The European market potential for socks

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According to Statista, total revenue in the European sock market is expected to achieve a compound annual growth rate (CAGR) of 2.62% between 2025 and 2029.

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1. Product description: socks

A sock is a knitted piece of clothing worn on the foot, often covering the ankle and some part of the leg. Unlike shoes and most slippers, socks do not have separately attached soles. They are generally sold in pairs.

Socks have several basic functions:

- Protecting feet from rubbing against footwear;
- Absorbing sweat to keep feet dry and reduce odour;
- Keeping feet warm during cold weather;
- Creating a barrier between feet and shoes for hygiene purposes;
- Serving as a fashion accessory to complement an outfit.

Figure 1: The European sock market is worth around €4.17 billion

Source: Jametlene Reskp via Unsplash

Under the HS code classification for socks, the following are not included in this category: babies' socks/hosiery, graduated compression hosiery, tights, and women's stockings measuring <67 Decitex per single yarn.

Table 1: HS code classification for the socks category

HS code	Fibre type
61159400	Wool or fine animal hair
61159699	Synthetic fibres

HS code	Fibre type
61159900	Other textile fibres
61159500	Cotton

Source: Eurostat, 2025

Note: For a product to be put in one of these fibre groups, that fibre must be the main one by weight.

Certain socks have features that give them additional functionality. These kinds of socks are often used for workwear, sports, hiking or other outdoor exercise. Other features may be applied for safety reasons. For example:

- Grip dots or patterns to prevent slipping when shoes are not worn;
- Elements to keep socks in place inside footwear;
- Cushioning or reinforcement in specific areas;
- Compression zones to enhance circulation, reduce muscle fatigue and provide support;
- Breathability through mesh ventilation or specific fibres;
- Moisture-wicking materials for sweat management;
- Wool or specialised synthetic insulating materials for warmth;
- Antimicrobial functionality for odour reduction;
- Blending with synthetic fibres (nylon, elastane, polyester) to increase durability or for shape retention;
- Flame resistance;
- High visibility.

2. What makes Europe an interesting market for socks?

Europe is one of the biggest importers of socks in the world, at an import value of €4.17 billion in 2024 (up from €3.05 billion in 2019). This is around 5.12 billion units of socks in 2024 (up from 4.77 billion in 2019). In 2019-2024, the average import price increased from €0.64 to €0.82, and the value of the European Union’s sock imports grew by an average of 6.4% annually.

The largest of the four fibre categories of socks is cotton, with a 73.2% share of the market due to its softness and breathability, followed by synthetics (19.8%). Wool/fine animal hair and other textile fibres both hold less than 5% of the market (3.1% and 4%, respectively). In 2019-2024, cotton and synthetic fibres saw market share losses (-0.6% and -0.2%, respectively), while wool/fine animal hair and other textile fibres increased their shares (by 0.1% and 0.7%, respectively).

What these statistics do not reveal is the increased use of cotton/synthetic blends seen in recent years (to add durability and functionality, including shape retention and stretch). If the cotton content is higher than the synthetic content, these products will still belong to the cotton fibre subsegment.

The ‘other textile fibres’ subsegment includes fibres like silk, bamboo, modal and tencel, all fibres that add silkiness/softness to the garment. This is the highest growth category, with an average annual growth rate of 10.8%, compared to 6.2%-6.8% for the other fibre subsegments.

Source: Eurostat, 2025

The European Union is also a large exporter and re-exporter of socks. In 2024, it exported €2.89 billion worth of socks (up from €2.05 billion in 2019). This is around 1.98 billion units of socks in 2024 (down from 2.21 billion in 2019). Between 2019 and 2024, the value of EU sock exports grew at an average yearly rate of 7%.

Source: Eurostat, 2025

The market share by fibre type closely follows that of imports. Cotton is the clear leader, followed by synthetics. The 'wool and fine animal hair' subsegment is the highest growth category, with an average annual growth rate of 8.1%, followed by 'other textile fibres' (7.7%).

The biggest EU exporters in 2024 were the Netherlands (€595 million), Germany (€519 million), Belgium (€403 million), Italy (€238 million), Poland (€196 million) and France (€175 million). Together, these six countries represent over 73.6% of the EU's sock exports. Belgium, Poland, the Netherlands and France have all seen export growth rates higher than the overall EU export growth rate.

Figure 4: Cotton is the most-used material for socks sold in Europe, often blended with synthetic fibres for comfort

Source: FT Journalistiek

Source: Eurostat, 2025

In 2024, sock imports from other EU countries accounted for 52.5% of the value of EU sock imports (up from 49.3% in 2019). Developing-country suppliers accounted for 45.4% of all EU sock imports in terms of value (down from 47.5% in 2019). The value of EU sock imports from developing countries was €1.89 billion in 2024. This has increased at an average yearly rate of 5.5% since 2019.

In the same period, EU sock imports from other EU countries increased by 7.8%. The data points to an increasing interest in intra-EU trade and premium, value-added products. But these statistics hide the fact that a portion of intra-EU trade was originally manufactured and exported to the EU by developing-country suppliers (and re-exported as branded products). Therefore, this portion is not in direct competition with imports from developing countries.

Five of the top 6 EU countries exporting within the EU are also the top 5 EU importers of socks, indicating that certain EU countries are becoming increasingly important as regional distribution hubs. Growth of direct and indirect trade with developing countries is expected to continue in the future, creating new opportunities for these countries.

Table 2: Top 10 non-EU sock exporters to the European Union in 2024

Country	Share of non-EU export	Share of total export to EU	5-year average annual growth	Value (€)
China	41.2%	19.6%	5.0%	€817 million

Country	Share of non-EU export	Share of total export to EU	5-year average annual growth	Value (€)
Türkiye	31.5%	15.0%	6.4%	€625 million
Pakistan	10.5%	5.0%	12.6%	€208 million
Vietnam	2.7%	1.3%	22.6%	€53.6 million
Indonesia	2.3%	1.1%	-11.9%	€45.9 million
Serbia	1.6%	0.7%	2.4%	€30.9 million
United Kingdom	0.8%	0.4%	-26.4%	€15.6 million
Sri Lanka	0.8%	0.4%	4.0%	€14.9 million
India	0.7%	0.4%	0.3%	€14.7 million
Myanmar	0.6%	0.3%	11.3%	€12.6 million

Source: Eurostat, 2025

The main non-European countries that dominate sock exports to Europe are China, Türkiye and Pakistan. Together, these three countries account for 39.6% of all sock exports to the European Union. China is the single largest sock exporter to the EU, holding a 19.6% share of all EU sock imports (by value). It also holds a 41.2% share of all EU sock imports from non-EU countries, followed by Türkiye with 15% and Pakistan with 5%.

Due to Brexit, the United Kingdom experienced a 26.4% decline in sock imports and lost the biggest market share (-3.9%) in 2019-2024. Indonesia lost 3.3% market share, while Pakistan, Türkiye and Vietnam all grew their market shares (by 3.1%, 1.9% and 1.5%, respectively).

Table 3: Top 10 EU sock exporters to the European Union in 2024

Country	Share of intra-EU export	Share of total export to EU	5-year average annual growth	Value (€)
The Netherlands	20.7%	10.9%	9.3%	€453 million
Germany	19.9%	10.4%	8.5%	€435 million

Country	Share of intra-EU export	Share of total export to EU	5-year average annual growth	Value (€)
Belgium	12.5%	6.5%	14.4%	€273 million
Italy	8.5%	4.5%	1.5%	€186 million
Poland	7.6%	4.0%	11.4%	€167 million
France	6.6%	3.5%	8.8%	€145 million
Croatia	3.6%	1.9%	7.5%	€78 million
Spain	3.4%	1.8%	5.3%	€75 million
Portugal	3.0%	1.6%	1.5%	€65 million
Czechia	2.9%	1.5%	11.3%	€62 million

Source: Eurostat, 2025

The intra-European Union sock trade is dominated by the Netherlands, Germany and Belgium. Together, these three countries account for 27.8% of all sock imports into the European Union. Intra-EU imports experienced an average growth rate of 7.8% between 2019 and 2024. However, imports from the Netherlands, Germany, Belgium, Poland, France and Czechia all grew at a higher rate, with Belgium, Poland and Czechia achieving double-digit growth.

Uncertainty around American trade policy will make Europe a safer bet

On 2 April 2025, President Trump announced higher import tariffs on goods from many countries. Many developing countries face even higher tariffs. The new measures include tariffs of over 19% on products from all six top exporters of apparel to the USA (China, Vietnam, Bangladesh, India, Indonesia and Cambodia). Most of these tariffs are in effect as of 7 August 2025.

While the implementation and the full impact of these policy changes remain unclear at the time of writing this report, it is clear that a lot of uncertainty will surround the American market in the short-to-medium term. The apparel industry expects to see a shift towards products being 'made in the USA' and/or in other nearby apparel-producing countries with lower tariffs, such as Honduras. At the same time, China is likely to shift its focus away from the USA to the EU.

Tips:

- For most European apparel brands, socks are a niche category in their collections. Position yourself as a reliable, compliant and design-conscious partner by investing in design and development, certifications and small-scale orders.
- Stay updated on trends in the European apparel market by reading online industry outlets like Just-

Style, Business of Fashion and Sourcing Journal.

Germany is home to the sportswear sector's most important trade show, ISPO (for trends as well as technical and sustainable innovation). Search the ISPO website for information on technical innovation relevant to the sock category.

3. Which European countries offer the most opportunities for socks?

Western European markets are larger and more developed than those in Central and Eastern Europe. Brands and retailers in Western Europe have more advanced systems for sourcing products and managing compliance. They also tend to have better innovation capabilities and stronger branding.

The largest sock import markets in the EU are Germany, France, the Netherlands, Italy, Poland and Spain. These top 6 countries together accounted for 67.3% of all EU sock imports in 2024.

Table 4: Top 10 EU importers of socks in 2024

Country	Value 2024	Average annual growth	Dev. country share 2024	Dev. country imports average annual growth	Dev. country imports change in EU market share, 2019-2024	Dev. country imports average price 2024
Germany	€875 million	5.80%	53.50%	5.40%	-0.90%	€ 0.54
France	€528 million	5.20%	46.30%	5.50%	0.70%	€ 0.92
The Netherlands	€503 million	5.10%	73.90%	5.10%	0%	€ 0.50
Italy	€353 million	6.30%	31.80%	2.20%	-6.90%	€ 0.54
Poland	€281 million	12.70%	40.40%	13.10%	0.70%	€ 0.31
Spain	€266 million	5.00%	46.00%	3.00%	-4.70%	€ 0.56

Country	Value 2024	Average annual growth	Dev. country share 2024	Dev. country imports average annual growth	Dev. country imports change in EU market share, 2019-2024	Dev. country imports average price 2024
Belgium	€248 million	6.50%	59.10%	8.40%	5.00%	€ 1.21
Austria	€157 million	4.70%	18.60%	-0.50%	-5.40%	€ 0.43
Croatia	€120 million	15.90%	7.20%	1.70%	-6.60%	€ 0.57
Sweden	€113 million	6.60%	58.50%	5.40%	-3.20%	€ 0.57
EU total	€4.17 billion	6.40%	45.40%	5.50%	-2.00%	€ 0.54

Source: Eurostat, 2025

Of the top 10 importers, the Netherlands, Belgium and Sweden stand out in terms of developing-country sourcing of socks, with 73.9%, 59.1% and 58.5% shares, respectively. Poland grew its imports from developing countries by an average of over 13% between 2019 and 2024. This rate is higher than that of the country's overall import growth, indicating that Poland is stepping up its sourcing from developing countries.

Belgium and France also had higher average annual growth in imports from developing countries compared to their overall import growth rates. The share of Belgium's imports coming from developing countries increased by 5% between 2019 and 2024.

Figure 6: Of the six largest sock importers in Europe, the Netherlands has the largest developing-country import share

Source: Hassan Anayi via Unsplash

Germany: the most populous country in Europe

Germany is the largest import market for socks in Europe, with an import value of €875 million in 2024 (up from €660 million in 2019). This is around 1.2 billion units of socks. Between 2019 and 2024, the value of Germany's sock imports grew at an average rate of 5.8% per year, while the import volume grew by 1.2% per year.

Germany sources 53.5% of its sock imports from developing countries in terms of value, which is higher than the EU average. Developing-country imports grew at an annual rate of 5.4% per year between 2019 and 2024.

The average unit price of imported socks in 2024 was €0.72, which is €0.14 higher than in 2019 and slightly lower than the European average (€0.82). The average price of German sock imports from developing countries increased by €0.10 between 2019 and 2024. Socks made from wool or fine animal hair make up 4.6% of Germany's total sock imports, higher than any other top 6 importing country. The subsegment is also growing at a higher rate than other fibre subsegments.

Table 5: 2024 imports of socks to Germany by segment

Segment	Value 2024	Share 2024	5-year growth	Average unit price 2024	5-year price change
Wool and fine animal hair	€36.7 million	4.2%	8.2%	€ 2.85	€ 0.32
Cotton	€654 million	74.7%	6.0%	€ 0.72	€ 0.18
Synthetic	€159 million	18.3%	4.5%	€ 0.58	-€ 0.04
Other textile fibres	€24.6 million	2.8%	6.1%	€ 0.81	€ 0.16

Source: Eurostat 2025

Germany is a country with strict and increasing sustainability requirements, driven by national legislation and policies. Some German legislation on harmful chemicals goes beyond EU legislation. Germany also has its own social and environmental standard, the Grüner Knopf label, which is displayed at the point of sale. Although supplying the German market requires investment in chemical management and certification, this will provide opportunities for higher-quality and sustainable products in the coming years, in line with overall segment trends.

Well-known German brands and retailers producing and/or retailing socks include Peek & Cloppenburg, Zalando, Hugo Boss, JOOP! and Tom Tailor. Germany is also home to Falke, one of Europe's most famous brands specialising in everyday and sports socks.

France: volume market with increasing sustainability requirements

France is the second-largest import market for socks in Europe, at an import value of €528 million in 2024 (up from €410 million in 2019). This is around 465 million units of socks. Between 2019 and 2024, the value of France's sock imports grew at an average rate of 5.2% per year, while the import volume grew by 0.6% per year.

France sources 46.3% of its sock imports from developing countries in terms of value, similar to the EU average. Developing-country imports grew at an average annual rate slightly higher than the country's total sock imports (5.5% per year compared to 5.2%) between 2019 and 2024, leading to a slight increase in developing country share of 0.7%.

The average unit price of imported socks in 2024 was €1.14, which is €0.22 higher than in 2019 and the highest among the top 6 importing countries. The average price of French sock imports from developing countries increased by €0.14 between 2019 and 2024. Socks made from synthetic fibres make up 29.2% of France's total sock imports, higher than any other top 6 importing country. The subsegment is also growing at a higher rate than other fibre subsegments.

Table 6: 2024 imports of socks to France by segment

Segment	Value 2024	Share 2024	5-year growth	Average unit price 2024	5-year price change
Wool and fine animal hair	€10.4 million	2.0%	3.1%	€ 3.79	€ 0.88
Cotton	€345 million	65.4%	4.4%	€ 1.06	€ 0.26
Synthetic	€154 million	29.2%	7.2%	€ 1.29	€ 0.08
Other textile fibres	€18 million	3.4%	5.7%	€ 1.11	-€ 0.26

Source: Eurostat, 2025

France is expanding its legislation on sustainability, particularly chemicals. It is now a legal requirement in France to inform customers about products that contain substances on the REACH Substances of Very High Concern (SVHC) list at the point of sale. France is also the first EU country to put into place specific regulation for MOSH/MOAH, mineral oils often used in printing inks of packaging materials and recycled paper.

It will become harder to comply with French buyer requirements, and there will also be increased demand for more sustainable products and packaging. Although France has seen the most positive price development among the top 6 importing markets, this could present a challenge for suppliers in the volume/budget segment.

Well-known French brands and retailers producing and/or retailing socks include La Redoute, Bluebuck, Royalties Paris, La Chaussette de France, Mes Chaussettes Rouges, Bonne Maison and Bleuforêt.

The Netherlands: important EU distribution hub

The Netherlands is the third-largest import market for socks in Europe, at an import value of €503 million in 2024 (up from €391 million in 2019). This is around 784 million units of socks. Between 2019 and 2024, the value of Dutch sock imports grew at an average rate of 5.1% per year, while the import volume grew by 2.8% per year.

The Netherlands sources 73.9% of its sock imports from developing countries in terms of value. This is 28.5% more than the EU average of 45.4% and more than any other EU market. Developing-country imports grew at the same average annual rate as the country's total sock imports between 2019 and 2024. This means that the developing-country market share has remained stable.

The average unit price of imported socks in 2024 was €0.64. This is just €0.07 higher than in 2019, and is only higher than that of Poland among the top 6 importing countries. The average price of Dutch sock imports from developing countries is also only higher than Poland's average price. Dutch sock import prices remained stable between 2019 and 2024 (an increase of just €0.02).

The fastest-growing subsegment was socks made from wool and fine animal hair (12% annual growth between 2019 and 2024), followed by synthetic fibres (10.9%) and other textile fibres (10.4%). The wool and fine animal hair subsegment was also the only subsegment to experience any significant positive price development.

Table 7: 2024 imports of socks to the Netherlands by segment

Segment	Value 2024	Share 2024	5-year growth	Average unit price 2024	5-year price change
Wool and fine animal hair	€12.8 million	2.6%	12.0%	€ 4.17	€ 2.06
Cotton	€376 million	74.8%	3.5%	€ 0.61	€ 0.09
Synthetic	€94.8 million	18.9%	10.9%	€ 0.72	-€ 0.16
Other textile fibres	€18.8 million	3.7%	10.4%	€ 0.57	-€ 0.50

Source: Eurostat, 2025

The Netherlands profits from a favourable business climate, which facilitates importing and exporting. This, combined with its proximity to the sea and availability of harbours, makes it an ideal route for product import into Europe. For this reason, many foreign apparel brands have their headquarters in the Dutch capital, Amsterdam.

Well-known Dutch brands and retailers producing and/or retailing socks include C&A, HEMA and WE Fashion. Brands specialising in socks include Forebel, Heroes on Socks and Angro.

Italy: Global leader in luxury

Italy is the fourth-largest import market for socks in Europe, at an import value of €353 million in 2024 (up from €260 million in 2019). This is around 349 million units of socks. Between 2019 and 2024, the value of Italy's sock imports grew at an annual average rate of 6.3% – in line with the EU average and higher than all top 6 importing countries except Poland – and import volume grew annually by 2.7%.

Italy sources just 31.8% of its sock imports from developing countries in terms of value, which is significantly lower than the EU average of 45.4% and the lowest among the top 6 importers. In 2019-2024, developing-country imports grew at just 2.2% between 2019 and 2024 – again, well below the EU average and the lowest among the top 6 importers – and lost 6.9% market share.

The average unit price of imported socks in 2024 was €1.01, which is €0.16 higher than in 2019 and lower only than France among the top 6 importing countries. The average price of Italian sock imports from developing countries is €0.54, in line with the EU average. This remained relatively stable between 2019 and 2024 (an increase of €0.03).

The fastest-growing subsegment was socks made from other textile fibres (18.2% annual growth between 2019 and 2024). All fibre subsegments saw positive price developments, but the average per-unit price for socks made from wool and fine animal hair increased the most (by €1.11).

Table 8: 2024 imports of socks to Italy by segment

Segment	Value 2024	Share 2024	5-year growth	Average unit price 2024	5-year price change
Wool and fine animal hair	€6.2 million	1.8%	3.5%	€ 4.16	€ 1.11
Cotton	€267 million	75.7%	5.7%	€ 0.92	€ 0.13
Synthetic	€59.2 million	16.8%	6.0%	€ 1.37	€ 0.22
Other textile fibres	€20.4 million	5.7%	18.2%	€ 1.38	€ 0.41

Source: Eurostat, 2025

Well-known Italian brands and retailers producing and/or retailing socks include Calzedonia, Intimissimi and OVS. Italy has a number of brands like Bresciani, Sozzi Milano, Nobile Italy and Gallo that specialise in high-quality, luxury socks (including many that are made in Italy), especially for men.

Poland: fastest-growing economy in Europe

Poland is the fifth-largest import market for socks in Europe, at an import value of €281 million in 2024 (up from €155 million in 2019). This is around 478 million units of socks. Between 2019 and 2024, the value of Poland's sock imports grew at an average rate of 12.7% per year, while import volume grew by 9.7% per year.

Poland sources 40.4% of its sock imports from developing countries in terms of value, the second-lowest among the top 6 importers. However, developing-country imports grew by 13.1% between 2019 and 2024, increasing Poland's developing country import share by 0.7%.

The average unit price of imported socks in 2024 was €0.59, which is €0.07 higher than in 2019 and the lowest among the top 6 importing countries. The average price of Polish sock imports from developing countries is just €0.31, the lowest among the top 10 countries. Average import prices remained stable between 2019 and 2024 (an increase of €0.01).

Table 9: 2024 imports of socks to Poland by segment

Segment	Value 2024	Share 2024	5-year growth	Average unit price 2024	5-year price change
Wool and fine animal hair	€5.9 million	2.1%	16.7%	N/A	N/A
Cotton	€218 million	77.6%	14.1%	€ 0.54	€ 0.04
Synthetic	€50.1 million	17.8%	7.6%	€ 0.79	€ 0.22
Other textile fibres	€7.1 million	2.5%	9.2%	€ 0.11	€ 0.04

Source: Eurostat, 2025

Because of lower GDP and wages, and owing to a lower level of awareness regarding sustainability issues among consumers, Poland is not currently a suitable market for value-added or sustainable products. As Poland's economy continues to expand and domestic brands establish themselves, the country's imports from developing countries are expected to increase.

Well-known Polish brands and retailers producing and/or retailing socks include House and Cropp. Brands specialising in socks are Kabak, Rainbow Socks, Banana Socks and Many Mornings.

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

Spain is the sixth-largest import market for socks in Europe, at an import value of €266 million in 2024 (up from €208 million in 2019). This is around 282 million units of socks. Between 2019 and 2024, the value of Spain's sock imports grew at an average rate of 5% per year, while import volume grew by 1.1% per year.

Spain sources 46% of its sock imports from developing countries in terms of value, in line with the EU average (45.4%). Developing-country imports grew by 3% between 2019 and 2024 and lost 4.7% market share.

The average unit price of imported socks in 2024 was €0.94, which is €0.16 higher than in 2019. The average price of Spanish sock imports from developing countries is €0.56, in line with the EU average. Average import prices remained stable between 2019 and 2024. In that same period, socks made from wool and fine animal hair were the fastest-growing segment (9.4% annual growth), despite experiencing a negative price development.

Table 10: 2024 imports of socks to Spain by segment

Segment	Value 2024	Share 2024	5-year growth	Average unit price 2024	5-year price change
Wool and fine animal hair	€2.8 million	1.1%	9.4%	€ 2.36	-€ 0.60
Cotton	€195 million	73.6%	5.2%	€ 0.94	€ 0.21
Synthetic	€60.2 million	22.6%	4.1%	€ 0.89	-€ 0.02
Other textile fibres	€7.2 million	2.7%	8.8%	€ 1.42	€ 0.25

Source: Eurostat, 2025

Well-known Spanish brands and retailers producing and/or retailing socks include El Corte Inglés, Zara, Massimo Dutti and Cortefiel. Brands specialising in socks include Mund Socks, Thunders Love and Socks & Co.

Tips:

- Focus on Northern Europe if you want to export wool socks. The market there is strong and growing. The region has a cold climate and consumers have a preference for durable, high-quality garments. There are many opportunities for suppliers that have (or can build) competitive and compliant supply chains to export woollen socks to this region. Certification (such as Responsible Wool Standard) is becoming an essential requirement.
- Research the British market for inspiration on doing business with Europe. Although no longer in the European Union, the UK maintains a great deal of influence when it comes to fashion, design and technological trends across the apparel industry. The country has the largest number of specialist sock brands in the European region.

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

European consumers are willing to pay more for socks that combine creative design, comfort, high quality, durability, performance features and/or more sustainable materials.

More active lifestyles and technological innovation are fuelling growth in sports socks

Rising health and wellness priorities mean that more Europeans are engaging in physical activity than ever before. The European Commission’s latest Eurobarometer survey (2022) found that 55% of EU respondents engaged in exercise or play sports, 38% of them at least once per week. Northern European countries have a higher rate of participation.

The European Union has produced some of the industry’s most influential sportswear brands and designers. Different sports have different demands for socks based on the specific movements, equipment/footwear and conditions involved. Technological advancements are leading to even more product differentiation, fuelling further growth. The global market is set to grow significantly from $8.6 billion in 2024 to $18.5 billion by 2031, at a compound annual growth rate (CAGR) of 13.6%.

In addition to popular year-round sports such as running and hiking, skiing is a prominent winter sport in Europe. The share of the population that skis exceeds 10% in as many as six of the top 10 EU sock-importing countries: Austria (34%), Sweden (18%), Germany (18%), France (13%), Italy (12%) and Belgium (11%).

While the wool/fine animal hair subsegment holds just 3.1% of the total European sock import market, its share is much higher in the hiking and skiing sock subsegments. This is because of natural moisture-wicking, temperature-regulating and odour-resistant properties. Merino wool is particularly favoured thanks to its softness compared to traditional wool.

Competing in the high-performance sports socks segment requires continuous investment in research and development. However, starting with basic performance features and gradually building technical capacity allows manufacturers to enter this growing market segment without excessive initial investments.

Sock brands are focusing on sustainability and circularity

According to a 2023 Impact Assessment Report by the European Commission, EU countries generate more than 5 million tonnes of textile waste per year, just over 11 kg per person. Socks are among the most discarded clothing items because they endure a high level of wear and tear, get lost easily, or lose their matching pairs. The European Union imports more than 11 units of socks per capita per year.

Brands are getting inventive in addressing the problem of sock-related waste. For example, Dutch brand Forebel established an NGO, Sock by Sock, to raise awareness about overconsumption. The brand designs and sells mismatched pairs as well as single socks to encourage consumers to wear odd socks. Another EU company that exclusively sells mismatched socks is the Polish brand Many Mornings.

Many European brands are also focusing on lengthening the lifespan of their socks by using more durable fibres (such as wool) or adding reinforced heels and toes (stress zones).

Across the entire wool fibre sector, the market share of wool produced according to sustainable standards, such as the Responsible Wool Standard (RWS), reached 4.8% of total wool production in 2023 – up 0.6% compared to the previous year. This growth is expected to continue. Recycled fibres are also being introduced in many sock collections, particularly recycled wool, polyester and nylon. Wool holds the second-highest recycled fibre share (6% of total wool produced globally), after polyester (12.5%).

Especially in Northern European countries, socks are worn for long periods of time and throughout the year

Certain substances (for example dyes) or synthetic fibres used in production can irritate the skin or cause an allergic reaction. As a result, organic cotton has become an important fibre for most brands’ sock collections. The number of Global Organic Textile Standard (GOTS) certifications increased by 41% between 2020 and 2023 (latest data). The use of organic cotton or in-conversion cotton (produced by farmers moving towards organic practices and whose cotton is not yet certified), will continue to rise in the coming years.

Packaging is a key differentiator for sock products

It is easy to think of socks as simply a necessity item. Brands must work hard to differentiate their products in the marketplace. Some (like Swedish brand Happy Socks) create unique, colourful and playful designs to make their product more fashionable and stand out. Others use more neutral colours and simpler designs to convey a natural feel that appeals to the health- and environmentally-conscious consumer, or focus on performance characteristics and functionality.

Across much of the sock segment however, brands are using packaging to increase the perceived value and quality of their products. Presenting pairs of socks in sock ‘boxes’ of different shapes and sizes is a popular approach. This is particularly relevant for more premium socks, which may be gifted, or for custom promotional socks (merchandise).

In 2022, the EU generated an estimated 186.5 kg of packaging waste per inhabitant. The EU’s Packaging and Packaging Waste Regulation (2025) aims to reduce the use of virgin materials in packaging and requires that, by 2030, all packaging must be recyclable. The regulation also includes measures to promote reuse and phase out harmful substances.

The European Commission is currently working on proposals to set maximum allowable limits for the presence and use of MOSH and MOAH. These are mineral oils that are often used in printing inks of packaging materials and can be found in higher concentrations in recycled paper or cardboard. France has already established such limits under the AGEC Law, Article 112 of 13 April 2022 (reduction of certain critical compounds in printing inks for packaging materials).

Packaging therefore presents an opportunity to showcase brands' and suppliers' commitment to sustainability through the development and use of eco-friendly or circular solutions, including:

- Reusable containers (for example sock tubes, which are similar in design to poster tubes);
- Recyclable materials;
- Bio-plastic materials;
- Compostable materials;
- Biodegradable materials;
- Recycled materials;
- Materials and inks free of toxic substances;
- Biodegradable adhesives.

Best practice: Interloop

Interloop in Pakistan produces fashion and athletic socks for brands like Nike, Adidas, H&M and Puma. The company holds BSCI and ISO9001 certifications and has several vertically integrated factory sites, demonstrating social and environmental compliance. Their website highlights corporate responsibility, certifications, global buyers and product diversity.

Tips:

Visit the websites of different sports and outdoor brands to understand the types of performance functionality they require, as well as certifications they use to market their products. Follow industry leader Smartwool (NZ) to keep up with new innovations.

Research whether your facility can obtain certification for GRS (Global Recycled Standard) or GOTS (Global Organic Textile Standard). Certification is important for EU buyers as proof of compliance and traceability.

If you source ‘in-conversion’ cotton, promote this unique selling point to your buyers.

Ensure that your products and packaging conform to industry standards in terms of chemical compliance. More information can be found on the ECHA, ZDHC and AFIRM websites.

FT Journalistiek carried out this study in partnership with Giovanni Beatrice on behalf of CBI.