

# Exporting sleepwear to Europe

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The European market for sleepwear is growing. Most imports originate from developing countries. The middle to high-end segments offer you the most opportunities. Focus on design and quality to appeal to these consumers. Using sustainable fabrics and providing comfort can also give you a competitive advantage.

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## 1. Product description

Sleepwear includes:

- adult onesie – all-in-one sleep suits worn by adults, usually cotton, similar to an infant onesie or children's blanket sleeper
- baby-doll – short, sometimes sleeveless, loose-fitting nightgown or negligee for women, generally designed to resemble a young girl's nightgown
- bathrobe – serving both as a towel and an informal garment, usually made of towelling textile
- chemise – delicate, loose-fitting, sleeveless, shirt-like lingerie, similar to a baby-doll but tighter at the hips
- negligee – loose nightwear for women, usually of sheer or semi-translucent fabric and trimmed with bows and lace or other fine material
- nightgown – loose hanging nightwear for women, typically cotton, silk, satin, or nylon
- nightshirt – unisex loose-fitting garment, longer than a regular shirt
- nightcap – warm cloth cap sometimes worn by women or men with pyjamas or a nightgown
- pyjamas – loose fitting two-piece garments for women, men and children, made of cotton, silk, satin or synthetic materials
- pyjama pants – loose-fitting cotton pants for men that are sold separately, to wear with a t-shirt
- peignoir – long outer garment for women, usually of sheer chiffon and sold with a matching nightgown, negligee or panties

This study uses the following codes to indicate trade in sleepwear:

Table 1: Product codes

HS	Prodcom	Description
6107 21	14 14 12 30	Men's or boys' nightshirts and pyjamas made of cotton, knitted or crocheted (excluding vests and singlets)
6107 22	Men's or boys' nightshirts and pyjamas made of man-made fibres, knitted or crocheted (excluding vests and singlets)	
6107 29	Men's or boys' nightshirts and pyjamas made of other natural materials, knitted or crocheted (excluding vests and singlets)	
6207 21	14 14 22 30	Men's or boys' nightshirts and pyjamas made of cotton (excluding knitted or crocheted, vests, singlets and underpants)
6207 22	Men's or boys' nightshirts and pyjamas made of man-made fibres (excluding knitted or crocheted, vests, singlets and underpants)	
6207 29	Men's or boys' nightshirts and pyjamas made of other natural materials (excluding knitted or crocheted, vests, singlets and underpants)	
6107 91	14 14 12 40	Men's or boys' bathrobes, dressing gowns and similar articles made of cotton, knitted or crocheted
6107 92	Men's or boys' bathrobes, dressing gowns and similar articles made of man-made fibres, knitted or crocheted	

6107 99	Men's or boys' bathrobes, dressing gowns and similar articles made of other natural materials, knitted or crocheted	
6207 91	14 14 22 40	Men's or boys' singlets and other vests, bathrobes, dressing gowns and similar articles made of cotton (excluding knitted or crocheted, underpants, nightshirts and pyjamas)
6207 99	Men's or boys' singlets and other vests, bathrobes, dressing gowns and similar articles made of other textile materials (excluding knitted or crocheted, underpants, nightshirts and pyjamas)	
6108 31	14 14 14 30	Women's or girls' nightdresses and pyjamas made of cotton, knitted or crocheted (excluding T-shirts, vests and negligees)
6108 32	Women's or girls' nightdresses and pyjamas made of man-made fibres, knitted or crocheted (excluding T-shirts, vests and negligees)	
6108 39	Women's or girls' nightdresses and pyjamas made of other natural materials, knitted or crocheted (excluding T-shirts, vests and negligees)	
6208 21	14 14 24 30	Women's or girls' nightdresses and pyjamas made of cotton (excluding knitted or crocheted, vests and negligees)
6208 22	Women's or girls' nightdresses and pyjamas made of man-made fibres (excluding knitted or crocheted, vests and negligees)	

6208 29	Women's or girls' nightdresses and pyjamas made of other natural materials (excluding knitted or crocheted, vests and negligees)	
6108 91	14 14 14 40	Women's or girls' negligees, bathrobes, dressing gowns, housecoats and similar articles made of cotton, knitted or crocheted (excluding vests, slips, petticoats, briefs and panties, nightdresses, pyjamas, brassieres, girdles, corsets and similar articles)
6108 92	Women's or girls' negligees, bathrobes, dressing gowns, housecoats and similar articles made of man-made fibres, knitted or crocheted (excluding vests, slips, petticoats, briefs and panties, nightdresses, pyjamas, brassieres, girdles, corsets and similar articles)	
6108 99	Women's or girls' negligees, bathrobes, dressing gowns, housecoats and similar articles made of other natural materials, knitted or crocheted (excluding vests, slips, petticoats, briefs and panties, nightdresses, pyjamas, brassieres, girdles, corsets and similar articles)	
6208 91	14 14 24 60	Women's or girls' singlets and other vests, briefs, panties, negligees, bathrobes, dressing gowns, housecoats and similar articles made of cotton (excluding knitted or crocheted, slips, petticoats, nightdresses and pyjamas, brassieres, girdles, corsets and similar articles)

6208 92	14 14 24 80	Women's or girls' singlets and other vests, briefs, panties, negligees, bathrobes, dressing gowns, housecoats and similar articles made of man-made fibres (excluding knitted or crocheted, slips, petticoats, nightdresses and pyjamas, brassieres, girdles, corsets and similar articles)
6208 99	14 14 24 89	Women's or girls' singlets and other vests, briefs, panties, negligees, bathrobes, dressing gowns, housecoats and similar articles made of other natural materials (excluding knitted or crocheted, slips, petticoats, nightdresses and pyjamas, brassieres, girdles, corsets and similar articles)

### Tip:

- For more information on bathrobes, see our study about [cotton bathrobes and dressing gowns](#).

## Quality

### Functionality

A variety of styles can be attributed to sleepwear according to their functionality. Sleepwear can be worn in bed, around the house, and even outdoors, according to the latest trends. The different styles are selected to make sleepwear visually appealing, in addition to their functional purposes.

### Material

Sleepwear can be made of a wide variety of fabrics. The materials are usually soft, such as cotton, flannel, silk, wool and cashmere. Synthetic materials such as polyester and Lycra are also used.

### Design

Men's pyjamas tend to come in basic styles, with plain colours or simple patterns (traditionally stripes or checks). Women's sleepwear is more fashionable and comes in all sorts of colours, prints, fabrics and styles.

### Labelling

External packaging labels for sleepwear should include: producer, consignee, composition, size, number of pieces, box identification, total number of boxes, and net and gross weight.

The most important information on the product or packing labels of sleepwear is: composition, size, origin and

care labelling. For more information, refer to the chapter on buyer requirements.

## **Packaging**

You should pack sleepwear according to the importer's instructions. Packaging usually consists of plastic wrapping to protect the fabric from water, solar radiation and staining. It should be easily manageable in terms of size and weight and ideally fit together on European pallets. If in doubt, check the dimensions with your buyer.

Sleepwear is usually displayed unpacked. However, it is common to gift-wrap sleepwear in a box, especially in the high-end segment. The buyer usually provides the design of such special packaging.

## **2. Which European markets offer opportunities for exporters of sleepwear?**

European imports of sleepwear are growing. Developing countries are Europe's leading sleepwear suppliers. Europe's main importers of sleepwear are Germany, the United Kingdom and France. Especially the United Kingdom is an interesting focus country, with a strong market for products from developing countries. With its growing imports from developing countries, the Netherlands is a promising market as well.

## **3. Where is consumer demand located?**

- European demand for sleepwear increased between 2012 and 2016. With an average annual growth rate of 2.8%, it reached €1.7 billion in 2016.
- Demand is highest in the United Kingdom at €352 million, followed by France (€241 million) and Italy (€238 million).

## **4. What is the role of European production in supplying European demand?**

- Europe's demand for sleepwear is considerably larger than its production. This drives the need for imports, making Europe an interesting market.
- European sleepwear production declined between 2012 and 2016. With an average annual decline of -8.7%, it reached €296 million in 2016.
- Italy is responsible for 21% of European sleepwear production, followed by Poland and Spain with 13% each.

## **5. Which countries are most interesting in terms of imports from developing countries?**

- European sleepwear imports increased from €3.8 billion in 2012 to €4.7 billion in 2016. This corresponds to an average annual growth rate of 5.7%.
- In the coming years, European imports are expected to keep growing moderately.
- Developing countries are Europe's main source of sleepwear imports, supplying around 60%. This amounted to €2.8 billion in 2016. This share is predicted to stay stable in the coming years.
- In reality, many of the sleepwear exports from Western European countries are re-exports of products manufactured in developing countries.
- Germany is Europe's leading importer of sleepwear, with €767 million in 2016. The United Kingdom (€732 million) and France (€680 million) follow.
- The United Kingdom is leading by far when it comes to imports from developing countries, at €652 million. This is around 89% of its total sleepwear imports!
- The strong performance of developing country suppliers in the United Kingdom is evidenced further by a strong increase of €126 million between 2012 and 2016. The Netherlands also considerably upped its

imports from developing countries, by €131 million.

- China is Europe's main source of sleepwear imports, with 23% in 2016. Bangladesh and India follow with 10% and 8.0% respectively. Other leading developing country suppliers are Sri Lanka (3.7%), Cambodia and Turkey (3.1% each).

### Tips:

- Study your options in Germany, the United Kingdom and France. Their large imports from developing countries make the United Kingdom an especially interesting market. The Netherlands' growing imports from developing countries makes this country promising as well.
- The upcoming [Brexit](#) (the United Kingdom leaving the European Union) has decreased the value of the British Pound. As a result, more British buyers have started importing directly from developing countries, rather than buying from European importers. However as the situation is still fluid and insecure, you should keep a close watch on the developments.
- Compare your products and company to the strong competition from China and India. You can use [ITC Trademap](#) to find exporters per country. You can compare on market segment, price, quality and target countries.

## 6. What role do exports play in supplying European demand?

- European sleepwear exports consist mainly of trade within Europe and with developed countries.
- Germany is Europe's leading sleepwear exporter with €312 million, followed by the Netherlands with €261 million. This illustrates these countries' role within Europe as important trade hubs.

## 7. What is the effect of real private consumption expenditure on European demand?

- Private consumption expenditure is an important indicator for the European home decoration market. The sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.
- Between 2017 and 2019, European private consumption expenditure is expected to increase. This means that consumption of home textile products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on decorating the home. Consumers in mature markets already spend a fair amount of money on decoration, so growth in their consumption will be moderate.

## 8. What trends offer opportunities on the European market for sleepwear?

### Eco-friendly garments

There is an increased focus on sustainable and eco-friendly textiles, especially for fabrics that come into close contact with the skin. Sustainable materials like organic cotton and bamboo have become more and more popular. In the higher segment, high-quality and very soft fibres such as cashmere are in fashion.

### Tips:

- Consider sustainable raw materials, like organic cotton and bamboo, especially if you are supplying the high and middle-high segments of the sleepwear market.
- For more information, see our special study on [sustainability](#).

## Cocooning

European consumers consider their home a personal space where they can shut themselves off from the outside for some quality me-time. Clothes worn inside the house must be intimate, answer to individual needs and be very comfortable. Sleepwear taps into this trend: onesies, pyjamas or nightshirts – you decide what to wear in your cocoon!

### Tips:

- Offer comfortable fabrics and styles.
- Avoid offering 'one-size-fits-all' products, especially if you are supplying the mid-high to high-end segments. 'One-size-fits-all' is typical for lower segments and is often less comfortable because of the reduced fit.

For more information, see our study about [trends for Home Decoration & Home Textiles](#).

## 9. What requirements should sleepwear comply with to be allowed on the European market?

### What legal and non-legal requirements must your product comply with?

#### General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including sleepwear. It states that all products marketed in Europe must be safe to use.

### Tips:

- Read more about the [General Product Safety Directive](#).
- Also use your common sense to ensure normal use of your product does not cause any danger.
- The [RAPEX database](#) lists products that the European Union has rejected at the border, or withdrawn from the market. Check the database for similar products for an idea of what issues may arise.

## Flammability

The [Netherlands](#) and the [United Kingdom](#) have national legislation regarding the flammability of sleepwear. In Ireland, the British legislation applies.

### Tip:

- The UK Fashion and Textile Association provides information about the [Dutch legislation in English](#).

## Children's clothing

There is a specific standard regarding the [safety of children's clothing](#) intended for children up to the age of 14. It specifically regulates the use of cords and drawstrings. Customs authorities often reject clothes due to risk of suffocation, strangulation and injuries. This applies especially to clothes for children up to 7 years old.



### Tip:

- For children's sleepwear, do not use cords in the neck areas or with long free ends that can become traps, nor parts (such as buttons) that children can easily remove and swallow.

## Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azodyes and certain flame retardants in textile products.

### Tips:

- The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals. Also check out the [information on REACH for companies established outside Europe](#) and the [Questions & Answers on REACH](#).
- Follow new developments in the field of flame retardants, as new alternatives are being developed. You can do, so for instance, through the [European Flame Retardants Association](#) (EFRA).

## Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition. These labels should be durable and tear-resistant, securely attached, easily legible, visible and accessible.

### Tip:

- For more information, see the [Frequently Asked Questions about the Textile Regulation](#).

## Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). Among other things, it restricts the use of certain heavy metals. Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as packing cases, boxes, crates, drums, (box) pallets and dunnage.

### Tip:

- Read more in the [overview of EU rules on wood packaging material](#).

## What additional requirements do buyers often have?

### Sustainability

Social and environmental sustainability make your products stand out on the European market. Think of sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes:

- **Business Social Compliance Initiative (BSCI)**: European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company has been audited, it is included in a database for all BSCI participants.
- **Ethical Trading Initiative (ETI)**: This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe that make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

### Tips:

- Optimise your sustainability performance. Reading up on the issues included in the initiatives will give you an idea of what to focus on.
- Buyers appreciate a good story. If you can show that you value your company's environmental and/or social performance, this may be a competitive advantage. You can do this, for instance, with a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#).
- For more information, see our special study on [sustainability in the home sector](#).

## What are the requirements for niche markets?

### Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your sleepwear is labour-intensive, fair trade certification can give you a competitive advantage.

Common fair trade certifications are from:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair For Life](#)

### Tips:

- Ask buyers what they are looking for. Especially in the fair trade sector, you can use the story behind your product for marketing purposes.
- Check the [ITC Standards Map database](#) for more information on voluntary standards and their requirements, including fair production.

## Sustainable textile certification

Across the home sector, sustainability is gaining ground. Although the actual use of certification is still not widespread in home textiles, there is an increasing interest from buyers.

The [Global Organic Textile Standard \(GOTS\)](#) ensures environmental and social responsibility throughout the production chain. To qualify, textile products must contain >70% organic fibres.

[OEKO-TEX Standard 100](#) certification guarantees no hazardous chemicals were used during production.

The [EU Ecolabel](#) for textiles focuses on minimising environmental impact at the manufacturing stage.

### Tips:

- Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.
- Determine which certification programme would be the best fit for you and apply if possible.

For more information, see our study about [buyer requirements for Home Decoration & Home Textiles](#).

## 10. What competition do you face on the European sleepwear market?

The competition for sleepwear does not differ significantly from the sector in general. Refer to our [10 tips for doing business with European buyers](#).

## 11. Through what channels can you put sleepwear on the European market?

The segments for sleepwear do not differ significantly from the sector in general.

However, the market channels for sleepwear do deviate from those for home textiles.

### Market channels

Figure 6: Trade channels for sleepwear in Europe

Sleepwear is mainly sold through retailers.

### Tip:

- For more information about trading directly with smaller retailers, see our special study about [alternative distribution channels](#).

### E-commerce

E-commerce in home textiles is increasing and can help you reach a broader range of customers. Retailers often combine online and offline channels. Consumers research and purchase products online, shopping around and comparing prices on home textile items. To supply e-commerce you must be able to work with individual packing and labelling, as well as limited minimum orders.

### Tips:

- See our special study about [e-commerce in Home Decoration & Home Textiles](#) for more information.
- Target online business-to-consumer retailers if you can meet the additional requirements.

## Trade associations and fairs

These trade associations and fairs are useful sources for finding trading partners in Europe:

- [Ambiente](#), Frankfurt, February
- [EURATEX](#), European Apparel and Textile Confederation
- [Heimtextil](#), Frankfurt, January
- [Maison et Objet](#), Paris, January and September

## Market segments

In the low-end segment, simple and inexpensive sleepwear is common. The middle segment puts more emphasis on design, material and finish, while prices are still reasonable.

In the high-end segment, designer quality is common and private labels are the standard. This is also the segment where more expensive raw materials such as silk, cashmere or blends of high-end fibres are used.

Products from India, Bangladesh and China generally dominate the low-end market. Competing with this type of cheap mass-production is almost impossible.

The middle and high-end markets offer you the most opportunities. To supply these segments, you need to pay particular attention to design and quality.

## 12. What are the end-market prices for sleepwear?

As types of sleepwear vary considerably, so do consumer prices. Table 2 gives an overview of the indicative prices of shorts and nightdresses in the low, middle and high market segments.

Table 2: Indicative consumer prices of sleepwear

	Low	Middle-low	Middle-high	High
Shorts	€4-€13	€15-€25	€30-€50	€90 onwards
Nightdress	€8-€17	€20-€60	€80-€150	€170 onwards

The European consumer price of your sleepwear is around 4-6.5 times your selling price. Shipping, import and handling add 15-20%. Wholesalers account for a further 50-90% mark-up. Retailers may add another 90-150% to the price. Finally, European VAT percentages range from 18% in Malta to 27% in Sweden.


Your original selling price depends heavily on the availability and cost of raw materials. For example, the average prices of cotton have fluctuated considerably in recent years. Occasional increases in the price of raw materials are not directly passed on to the consumer, but do put pressure on exporters, importers and retailers' margins.

### Tips:


- The value perception of your product in the chosen segment determines its price. The quality and price of your sleepwear must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment and adjust your price accordingly.
- Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position on the market.

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