

PRESS RELEASE

“Market REPORT Work and protective clothing 2020 in Germany“ – A new age has dawned

Cologne/Hamburg. The economic crisis of a decade ago hit the industry for workwear and personal protective equipment (PPE) hard with a market slump of 10 percent. However, the low point did not last long. Sales in Germany recovered and are currently 20 percent (workwear) and a good 5 percent (PPE) higher than in 2010. However, the conditions for the industry are becoming more difficult. A weakening industrial economy, trade conflicts, the Brexit and now the corona pandemic result in an uncertain future. Though, how will workwear and PPE be affected by these parameters? In three scenarios the industry insiders of Marketmedia24, Cologne, assessed the development of the next decade and see light at the end of the tunnel. The low point could be overcome as early as 2022. There are good reasons for the positive outlook: More than half of the industry's sales are generated in the sectors of healthcare, trade and services, among others, which have been little affected by the Corona crisis. Online retailers and the textile rental service will be the main beneficiaries of future expectations: Their market shares are expected to increase to 13.3 and 35.8 percent respectively by 2028, as the recently published study "Market REPORT Work and protective clothing 2020 in Germany" shows.

The market for workwear and PPE has developed positively since the end of the financial crisis, with sales increasing from year to year. "Various factors have contributed to this. In particular, the increasing shortage of skilled workers has led to a greater significance of workwear and PPE. They are being used more and more consciously as a means of employee retention and for better health protection. An upgrade in design and functionality of workwear and PPE ranges plus an increasing gender-related supply for men and women are backing up this trend. At the same time, the rejuvenation cure of collections resulted in a higher price level, leading to an increasing turnover for the entire branch," says textile engineer and author of the study, Sabine Anton-Katzenbach (Textilberatung Hamburg), summarizing the latest developments. The data of the market report reveals a particular high demand of workwear and PPE in industrial sectors: Approximately 45 percent of the expenditures are made in this sector, while 55 percent are divided among branches such as health care business, hospitality, hand-craft and service industry.

A new impetus also comes from a more sustainable approach and more transparency in supply chains being called for by the Federal Ministry for Economic Cooperation and Development (BMZ). To this end, the authority has launched the governmental seal "Green Button" which shall become a preferred criterion for public tenders regarding workwear and protective clothing. "Because sustainability does not come for free and fairly produced textiles and clothing are usually somewhat more expensive, the "Green Button" could also contribute to a steady market growth because of requested quantities in tenders," adds Sabine Anton-Katzenbach.

In view of the corona pandemic, however, predictions about the markets future development of became difficult. Usual prediction models no longer work, planning is done with great caution, because an anticipation of longer-term market developments begins with a look back at the past. Though, does the past still play a role for the future of this industry? The new " Market REPORT Work and protective clothing 2020 in Germany" cannot give a clear answer to this question due to the many unknown factors. However, the study provides three viable scenarios based on possible developments in economic growth up to the year 2028. In an optimistic scenario Marketmedia24 market research team expects a rapid recovery: According to the study, sales of workwear and personal protective equipment could already have reached the 2019-level in 2022. However, if the stagnation of the market continues for a longer period of time, a rapid "catch-up" is not to be expected.

The current situation is also affecting distribution channels: in times of social distancing online retailing is booming more than ever before taking customers away from traditional retailers. Even agencies that are specialized in corporate clothing are left behind because of Corona as there are no trade shows, congresses or special event where employees are meant to wear branded clothing. On the other hand, prospects for the textile rental service industry are optimistic due to new-comers in the business of textile sharing providing the industry with further growth in the coming decade.

The new edition of the "Market REPORT Work and protective clothing 2020 in Germany" provides reliable facts and figures for all product groups (women's and men's workwear, safety and working shoes, safety helmets, protective gloves), for the economic sectors of industry, retail, crafts, healthcare and care, hospitality, services and "others", as well as for all relevant distribution channels. The study provides a well-founded outlook on the development of the industry until 2028 and is therefore an important orientation guide for all market players.

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Marketmedia24 is a market research and consulting institute in Cologne. Founded in 2010, Marketmedia24 combines the knowledge of about twenty specialists.

The consultants who work for Marketmedia24 are real insiders. They know their markets up close and knee-deep: They visit industry hotspots and events, talk to market players and influencers and go to the boardroom, to employees, manufacturers and retailers. They advise and accompany, lecture, coach and hold seminars. Their solutions include market studies and target group analyses, insights into brand awareness and recognition as well as forecasts and futurology. The market researchers of Marketmedia24 provide the scientific foundation. Accuracy is a matter of honour for them. They use all methods that make up first-class market knowledge – primary research, frequency counting, mystery shopping and secondary market research with all its possibilities. The result: high-quality figures that are incorporated into studies, statistics and consultations.

Textilberatung Hamburg provides textile know-how. The service portfolio includes the presentation and analysis of markets and industries, the investigation of processes and the development of products. It includes lectures, training courses and editorial contributions that provide a sound view of and into the world of textiles. Its clients include companies in the chemical, fiber, textile and clothing industries as well as textile service providers, trading companies and publishing houses.