

North America and Europe Workwear Market Forecast to 2030 - COVID-19 Impact and Regional Analysis by Product Type (Top Wear, Bottom Wear, and Coveralls), Category (Men, Women, and Unisex), End Use (Construction, Oil & Gas, Chemicals, Healthcare, and Others), and Distribution Channel (Wholesalers, Supermarkets and Hypermarkets, Specialty Stores, and Online Platforms)

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Abstracts

The North America and Europe workwear market is expected to grow from US\$ 21.85 billion in 2023 and is projected to reach US\$ 33.08 billion by 2030; it is expected to register a CAGR of 6.1% from 2023 to 2030.

The organized retail sector has undergone a massive transformation recently. The emergence of e-commerce has resulted in considerable changes in how people shop and spend their money. A rise in penetration of smartphones and the internet, easy access to emerging technologies, a surge in purchasing power, and convenience provided by online retail shopping platforms from anywhere at any time are a few of the major factors bolstering the growth of e-commerce. Key manufacturing enterprises in North America and Europe have partnered with online retailers such as Amazon and Alibaba to sell industrial products such as personal protective equipment in bulk for industrial and individual consumers. According to the US Department of Commerce Retail Indicator Division, e-commerce sales in the US reached US\$ 870 billion in 2021, up by 14.2% from 2020. Furthermore, online sales of healthcare and personal care products grew by 67.9% in 2021 than 2019.

Further, with the increasing penetration of online shopping, manufacturers indulge in direct-to-customer (D2C) distribution channels by launching their own online retail sites, which eliminates the need to invest in expensive marketing and distribution infrastructure. Through these websites, manufacturers take bulk orders from end-use industries and sell products to customers. Thus, the increasing dependency of consumers on e-commerce services and the adoption of the D2C strategy by manufacturers are expected to offer lucrative opportunities for the North America and Europe workwear market growth in the coming years.

The North America and Europe workwear market is segmented into product type, category, end use, and distribution channel. Based on category, the market is segmented into men, women, and unisex. The men segment held the largest share of the market in 2022, whereas the women segment is expected to register the highest CAGR from 2022 to 2030. According to the World Bank Group June 2022 report, the participation of males in the global workforce was 72% in 2021. As most men work in sectors such as healthcare, industrial, and corporate, the demand for workwear is increasing. Moreover, according to the World Health Organization's (WHO) September 2021 report, almost 2 million men died from work-related causes in 2020. Hence, to protect their workforces against occupational injuries and deaths, manufacturers are focusing on new technologies such as flame-resistant workwear and insulated workwear.

Based on region, the North America and Europe workwear market is segmented into the North America and Europe. In 2022, North America accounted for a larger share of the North America and Europe workwear market. The increasing cases of occupational injuries; an upsurge in the number of surgeries and occupational deaths; high demand for safety apparel; growing expenditure on work safety by industries such as oil & gas, food, chemicals, construction, healthcare, and automotive; and the presence of major market players are a few of the prominent factors propelling the workwear market growth in North America. In addition, stringent government regulations in the region regarding the safety of working professionals in factories and on-site workers—coupled with penalties for non-compliance with the standards—augments the adoption of workwear. Workers across these industries are exposed to various risks owing to the nature of the job or task. Therefore, these industries require functional and high-performance workwear.

Carhartt, Inc.; Aramark; Alisco Group; Alexandra; 3M; A. LAFONT SAS; Fristads Kansas Group; Honeywell International Inc.; Hultafors Group; and Lakeland Industries, Inc. are among the major players operating in the North America and Europe workwear

market. These companies have presence in both developed and developing countries, which provides lucrative opportunities for their growth.

The North America and Europe workwear market has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the market. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights into the topic. The participants of this process include industry experts such as VPs; business development managers; market intelligence managers; national sales managers; and external consultants such as valuation experts, research analysts, and key opinion leaders specializing in the North America and Europe workwear market.

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