



How workwear practices impact wellbeing and reflect employee values

LINDSTRÖM GROUP

Survey of manufacturing
industry employees
2025





Content

Key findings	3
Study overview	4
Workwear impacts employee wellbeing	6
What to consider when choosing workwear?	10
Sustainability matters to employees	16
How to improve workwear sustainability?	19





Key findings

Employee wellbeing and sustainability

58%



Employees rate their wellbeing high at work. The main factors impacting workplace happiness are salary and compensation, workload and stress levels and work-life balance.

86%



say that workwear cleanliness, functionality and comfort impact their satisfaction

80%



of employees say sustainability matters to them

30%



of damaged workwear is discarded rather than repaired. Over 40% of employees are unaware of what happens to discarded workwear, and 1 in 3 of those who do know report that it is sent to landfill.

19%



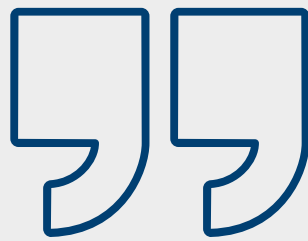
say that workwear fit to job impacts their productivity

58%

Would like to know more about the sustainability of their workwear

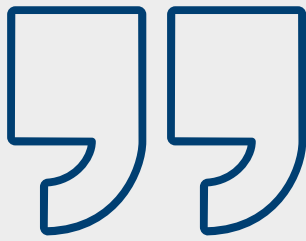


Irena Kostelanská
Product manager



Employers should look beyond compliance and consider how workwear contributes to employee comfort, safety, and a sense of pride. It must be functional and well-suited to the demands of the job, with the right fit and features for day-to-day tasks.

The key requirement is longevity—the longer workwear stays in use, the more sustainable it becomes. Reusability and repairability should be considered right from the design stage.



Ulla Luhtasalo
Sustainability Director



Study overview

This study was conducted by Nortstat, the leading independent European data collector for market research in February 2025.

It covered 11 European countries: Bulgaria, Croatia, Czech Republic, Estonia, Germany, Hungary, Latvia, Lithuania, Romania, Slovakia, and Türkiye.

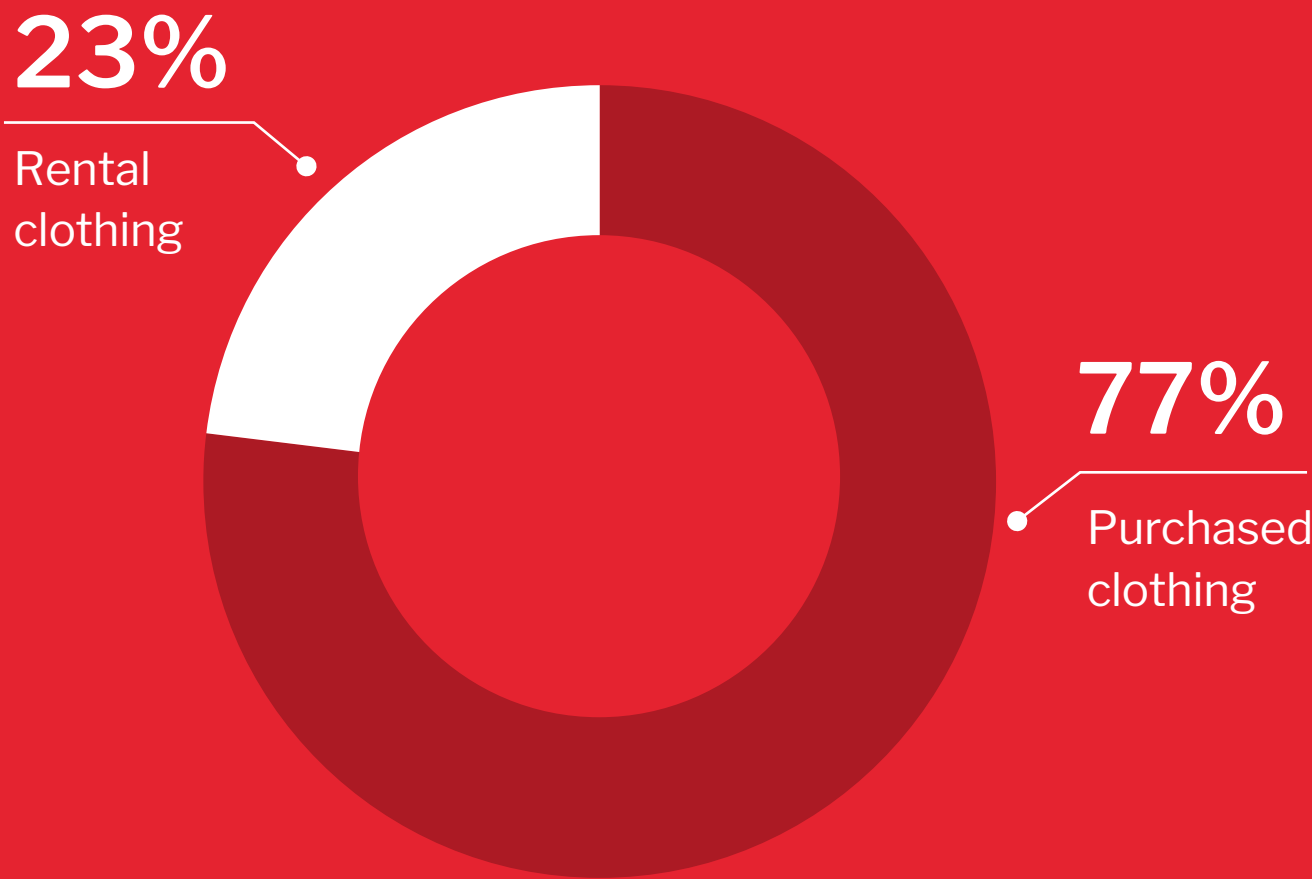
A total of 2,276 workwear users in manufacturing industry participated in the survey. The majority of respondents were permanent employees, (79% of participants), women and men equally presented (50%).

Workwear and washing practices:

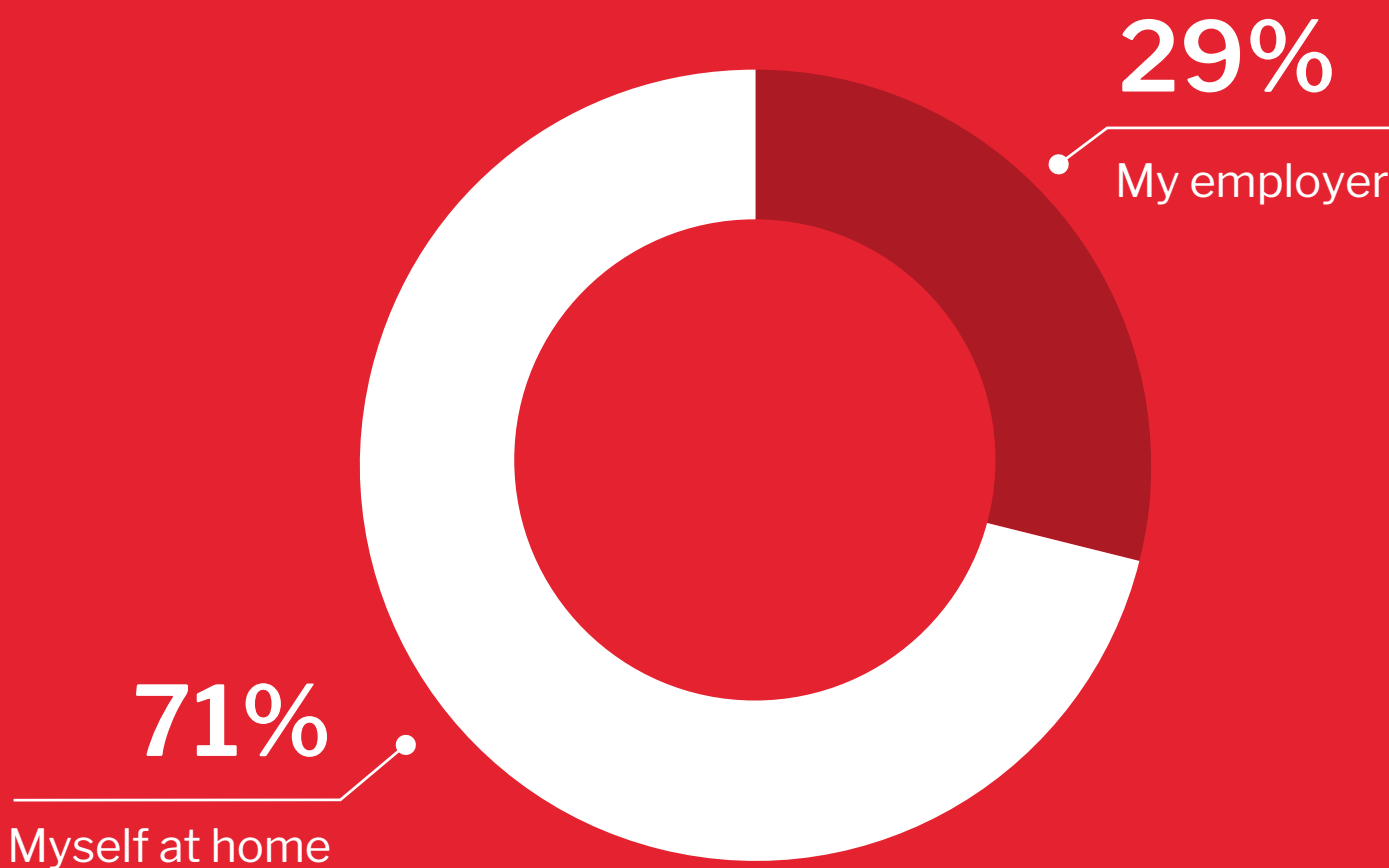
Most respondents use purchased workwear (77%) which is washed at home (71%) by the employees.

When employers offer a washing service, the most common solutions are to use an external laundry provider (43%) and workwear service provider (30%). In-house laundries were the least commonly used option (28 %).

Clothing provided by your employer



Who is primary responsible for your washing and maintaining workwear?





Workwear impacts employee wellbeing



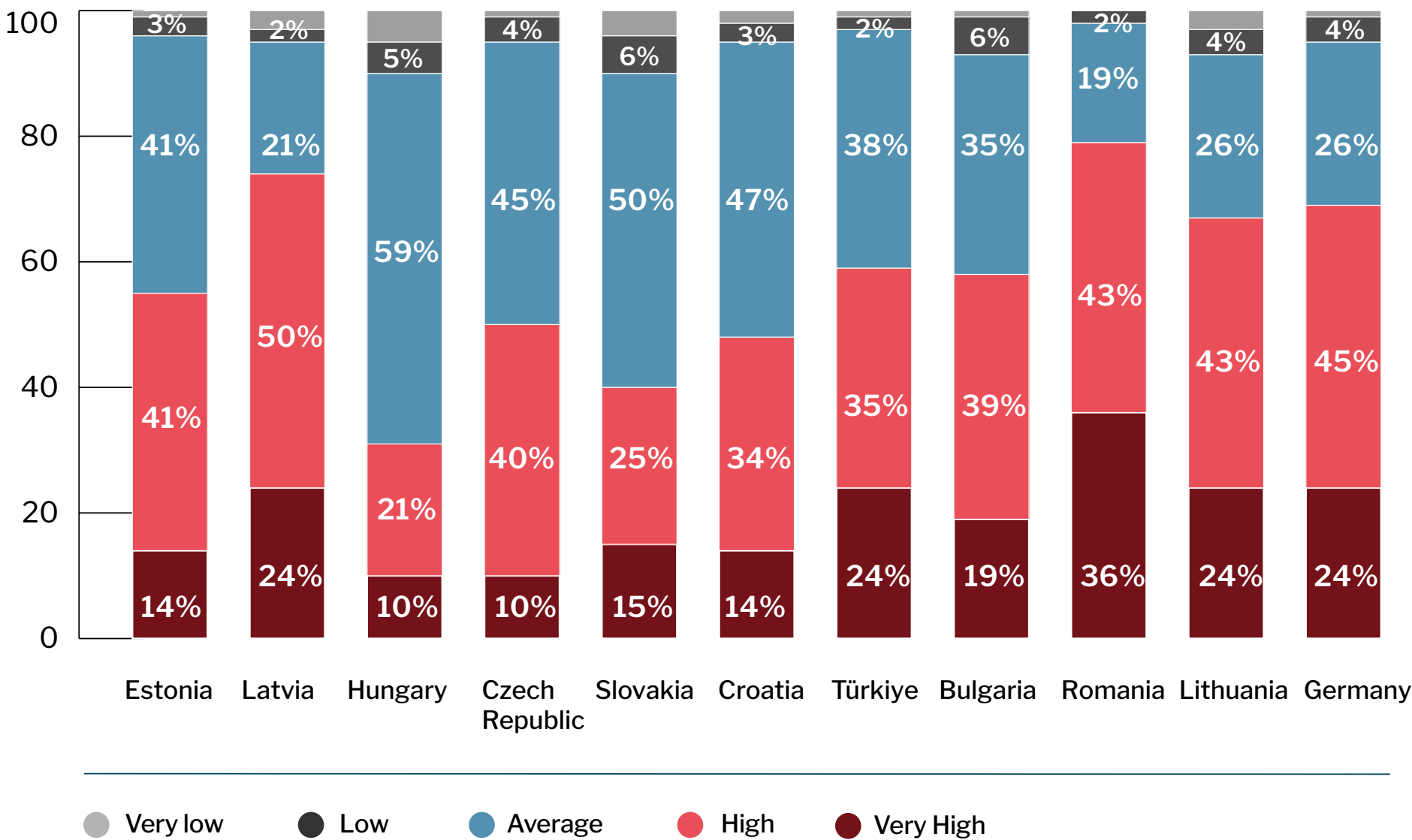


Employee wellbeing at a good level

Employees in the manufacturing industry generally report high levels of wellbeing at work. Only 6% expressed dissatisfaction, while a majority (58%) rated their wellbeing as high or very high. The highest levels of satisfaction were reported in Romania and Latvia, whereas employees in Hungary rated their wellbeing lower compared to other countries.

The key factors influencing employee wellbeing were salary and compensation (52%), followed by workload and stress levels (30%), work-life balance (27%), and job security (26%).

How would you rate your overall wellbeing at work?



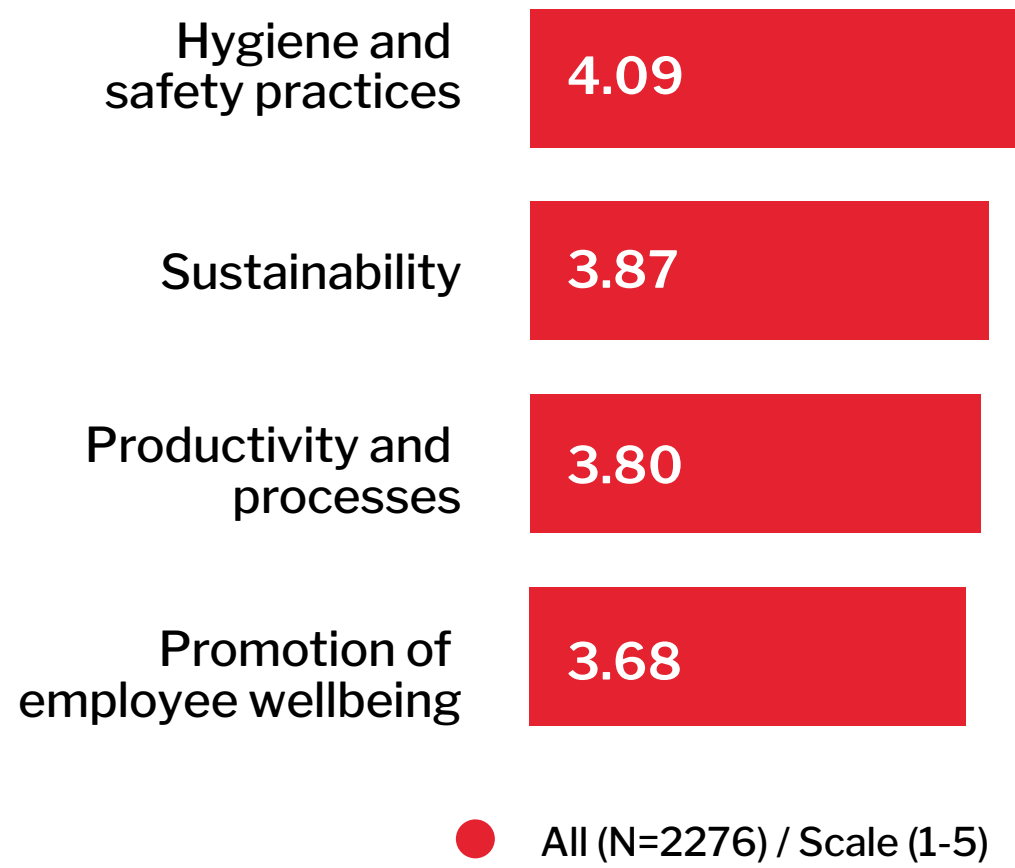


Performance of employers

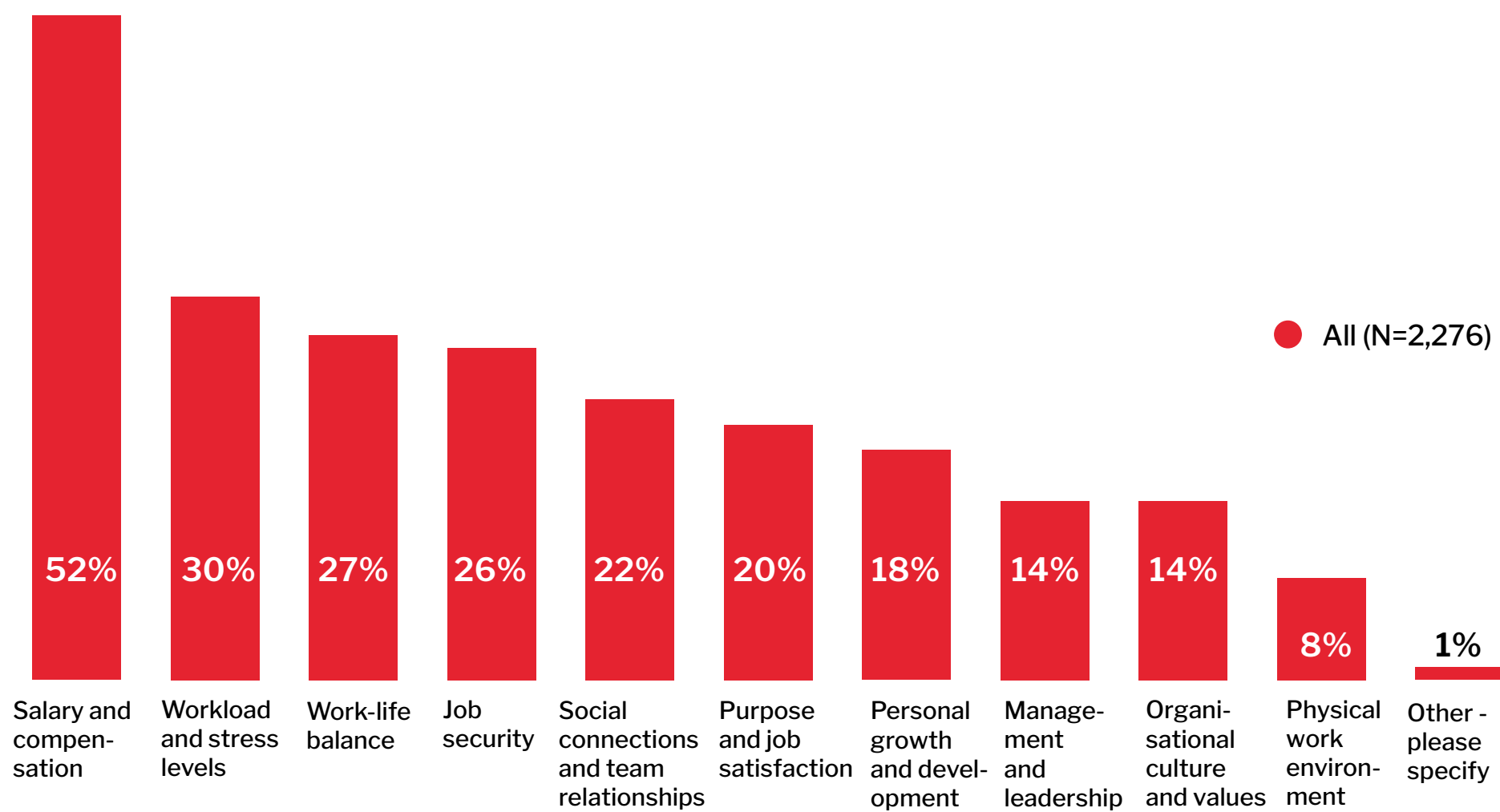
Despite generally positive experiences, employee wellbeing emerged as the lowest-rated area when respondents were asked to assess their employer across various dimensions. While hygiene and safety practices were ranked highest with overall score of 4.09, and promotion of employee wellbeing reached lower score 3.68.

One actionable area for improvement is workwear practices, which have a clear impact on both wellbeing and productivity. This is often underestimated —many employers still expect staff to maintain their own garments. In fact, 71% of employees reported washing their workwear themselves, and 22% said they repair damaged items on their own.

How would you grade your employer in the following topics?

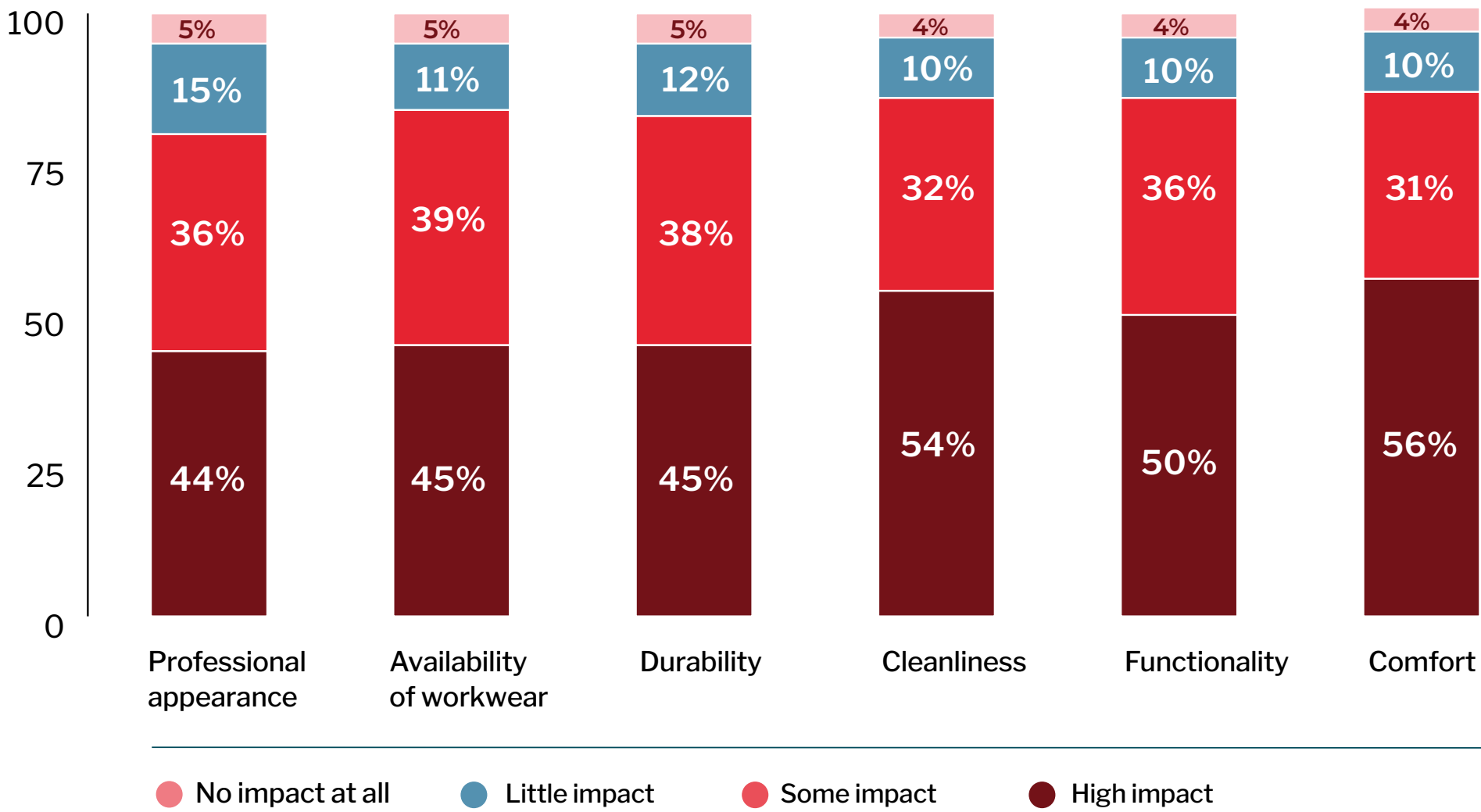


What are the main factors impacting your wellbeing at work?





How do these workwear features impact your satisfaction?



19%
say that
workwear
fit to job impacts
their productivity



**Workers link poor
workwear to lower
productivity and
satisfaction**

Workwear plays a crucial role in employee productivity and satisfaction. Nearly 1 in 5 employees reported that having workwear suited to their job impacts their productivity. Moreover, 86% stated that comfort, functionality, and cleanliness influence their overall satisfaction.

Despite this, 81% of employees have taken their workwear home to wash, citing hygiene, cleanliness, and a lack of available workwear as the main reasons. The most common complaint in workwear was poor durability, highlighted by 31% of respondents. At the same time, enhancing garment durability was the top recommendation for extending the lifespan of workwear—highlighting a strong link between quality workwear and sustainability.



Have you ever brought
workwear home to wash?

NO 19%



YES 81%

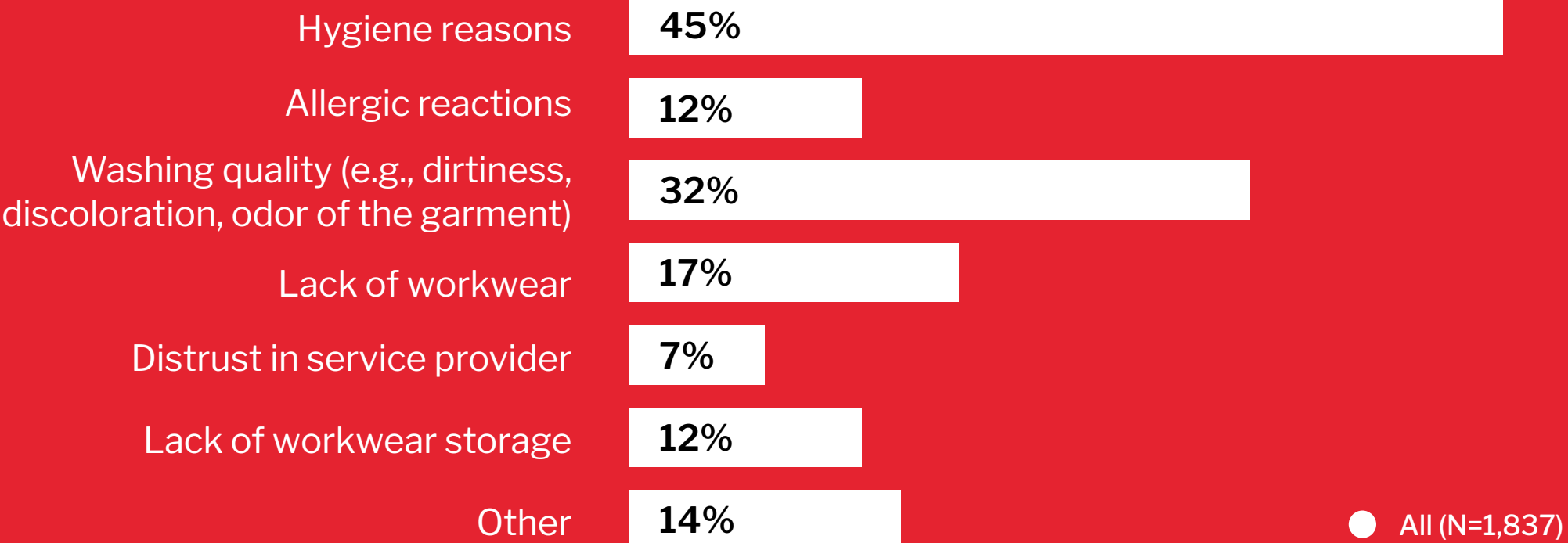
● All (N=2,276)

86%

say that workwear
cleanliness,
functionality and
comfort impact
their satisfaction



Main reasons for bringing workwear home to wash

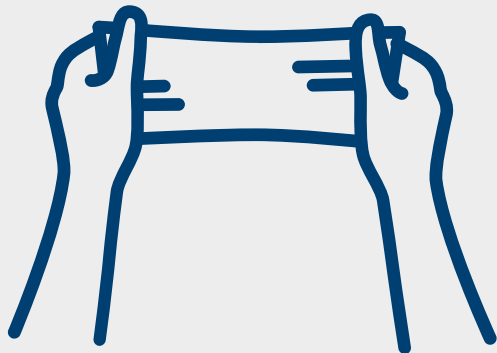


● All (N=1,837)

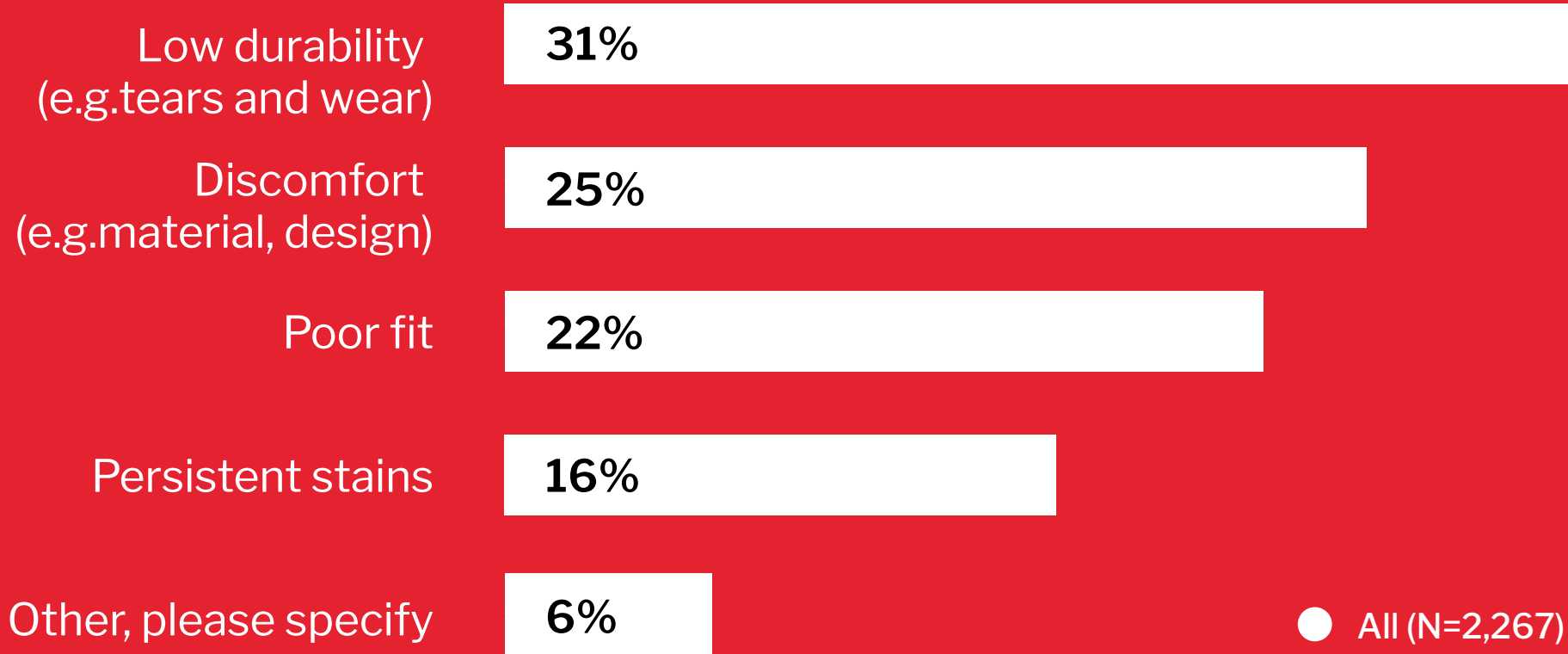


70%

say that **higher-quality materials** would be the key factor in **extending workwear lifespan**



What issues in workwear bother you most?



● All (N=2,267)



EXPERT INSIGHT – EMPLOYEE WELLBEING

What to consider when choosing workwear?



Irena Kostelanská
Product manager

What are the most important factors employers should consider when selecting workwear for their employees?

Employers should look beyond compliance and consider how workwear contributes to employee comfort, safety, and a sense of pride. It must be functional and well-suited to the demands of the job, with the right fit and features for day-to-day tasks. Poorly fitting or uncomfortable garments can negatively affect not only morale and performance but also workers’ safety - for example, too loose garments may pose a risk of entanglement in machinery.

Sustainability is also becoming increasingly important. Choosing durable, repairable and responsibly sourced workwear, not only supports environmental goals but also reflects values that matter to employees.

Another factor often overlooked is ease of use. Providing a professional laundry and maintenance service removes the burden from employees and ensures they always have clean, high-quality garments available when needed.

How do you assess whether workwear is comfortable and fit-for-purpose across different roles?

We combine real-world user testing with technical garment profiling to make sure workwear suits each role. Employees trial garments in their actual working conditions and provide feedback on comfort and functionality.

We also analyse the physical demands of the job to tailor features like breathability, flexibility, and protection. Regular surveys and service feedback help us stay responsive, and we use this input to continuously improve. We also work with textile experts to select high-quality materials, and we make sure our designs reflect real diversity by offering gender-specific cuts and modification options when needed.

What innovations or trends in workwear do you think will shape employee experience in the next few years?

We are seeing exciting progress in both digitalisation and sustainability. Digital platforms and smart workwear are transforming how garments are tracked, managed, and maintained, offering greater transparency and efficiency.

Circular design is becoming increasingly important, especially with upcoming EU regulations driving change. Workwear must be designed for durability, repairability, and reuse, with new requirements on recycled content reinforcing the shift towards more sustainable practices.

Sustainability matters to employees





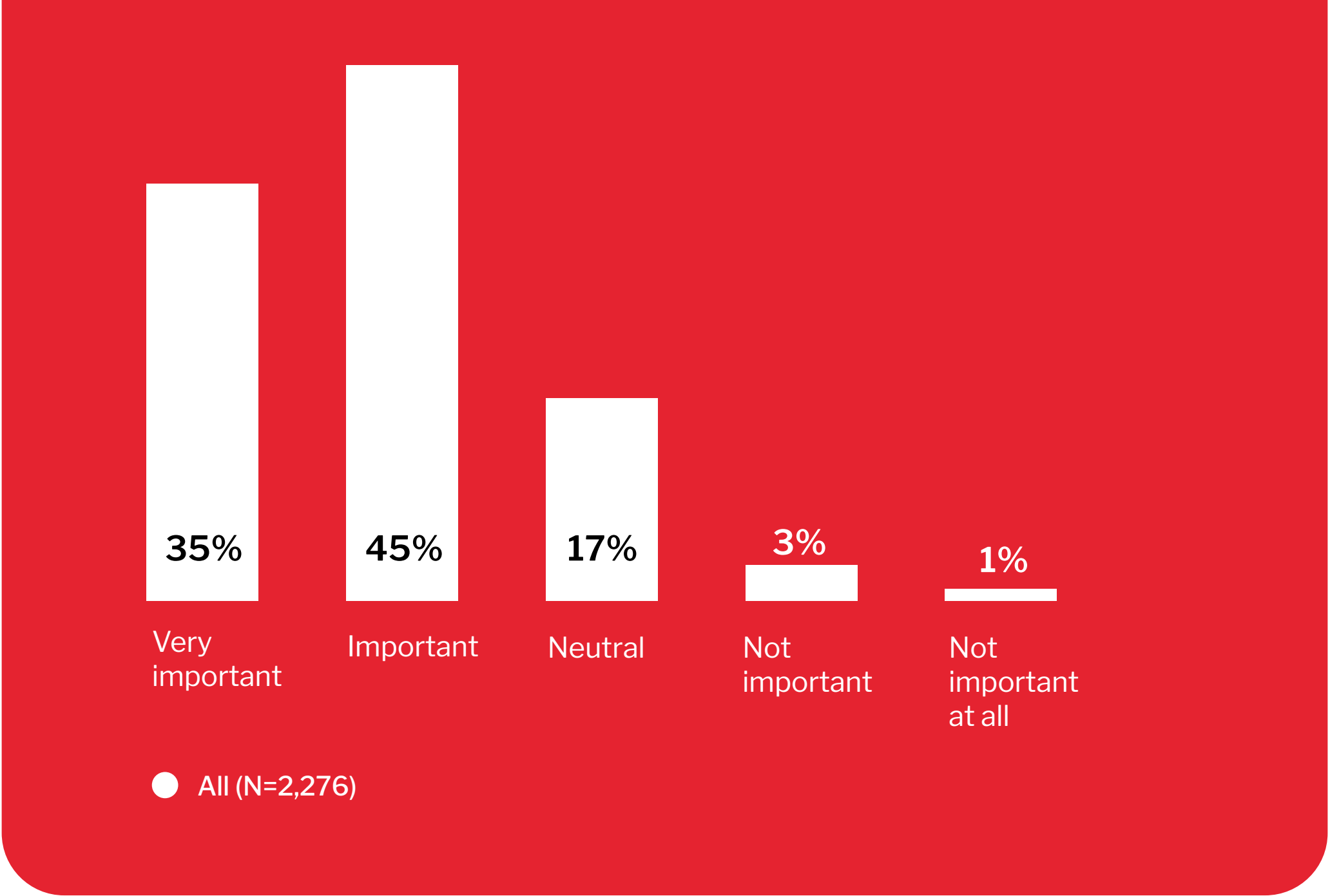
Sustainability matters to employees – but damaged workwear still ends up in landfill

Sustainability matters to employees in the manufacturing industry: 80% say it is important in their personal lives, and 58% would like to learn more about the sustainability of their workwear. The results were similar across all the surveyed countries.

However, there is still room for improvement when it comes to sustainable practices regarding workwear. Currently, 30% of damaged workwear is not repaired and 43% of employees are unaware of what happens to discarded garments. Among those who are informed, almost third reported that they still end up in landfill.

Encouragingly, over half of the respondents who knew how their garments are handled said that the items are now being recycled.

How important is sustainability to you in your personal life?



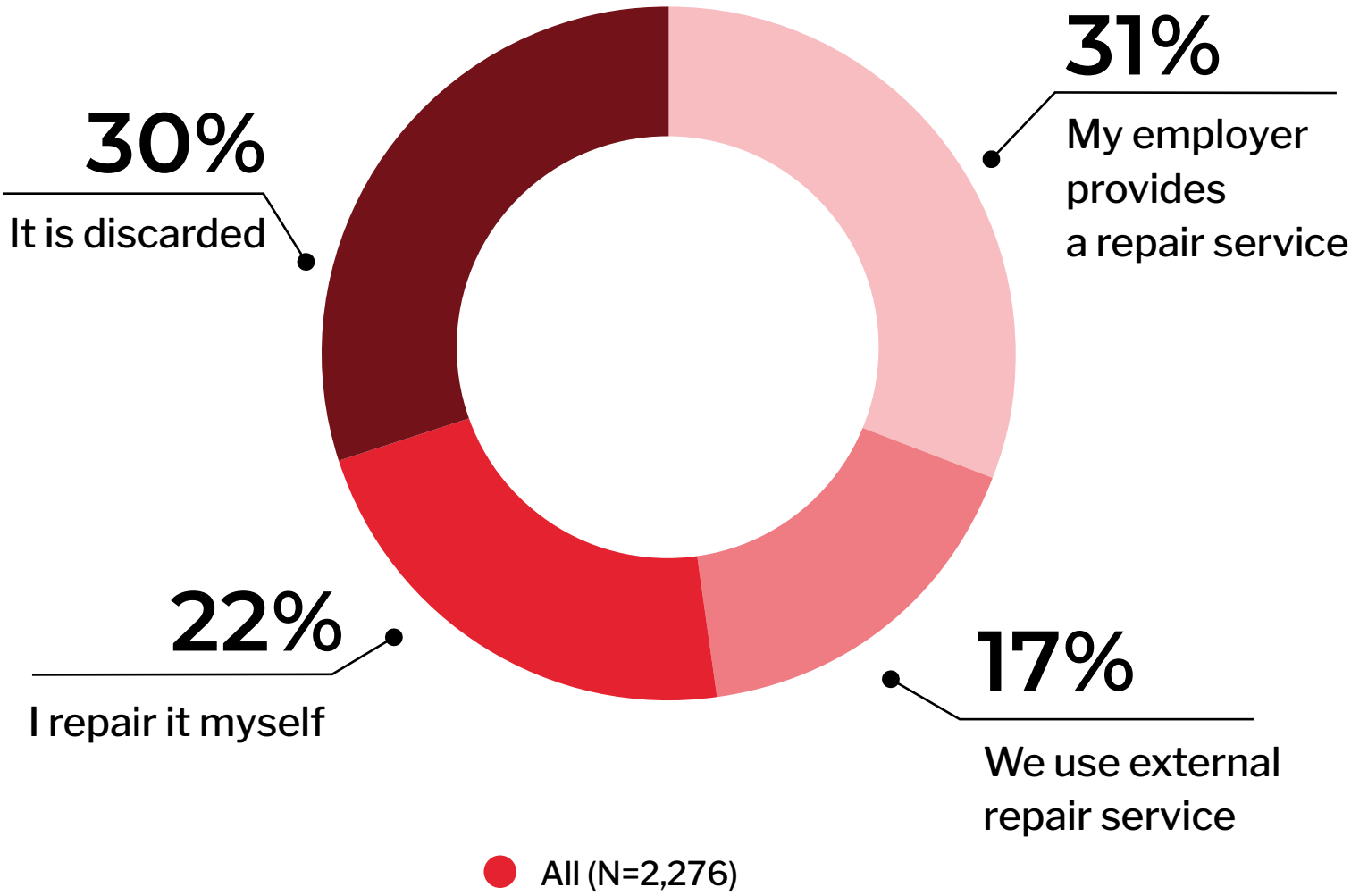
58%

would like to know more about the sustainability of their workwear





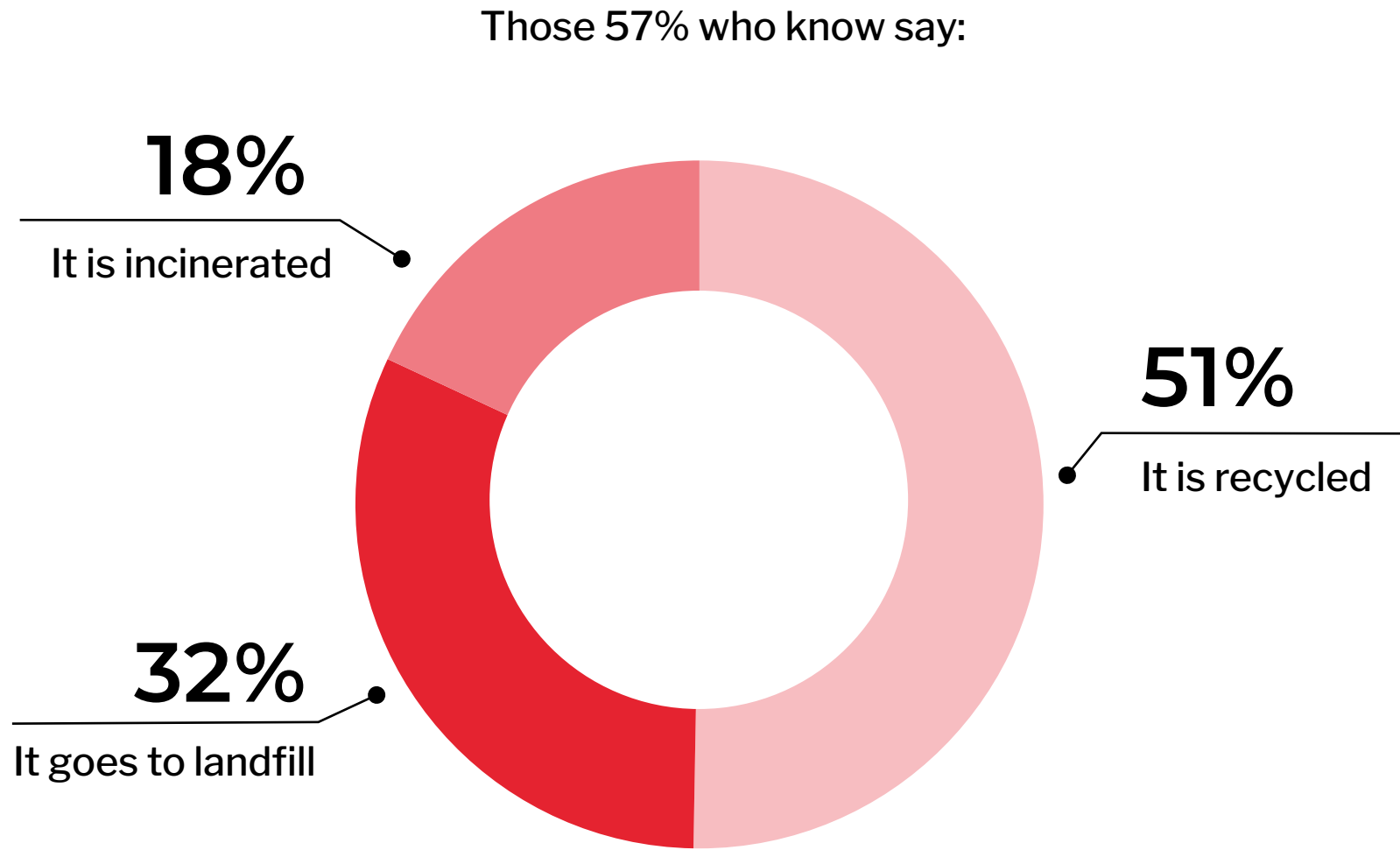
If your workwear is damaged, what happens to it?



22%
**repairs
the damaged
workwear by
themselves**



How is your discarded workwear handled?





Türkish companies lead the way in sustainable workwear practices

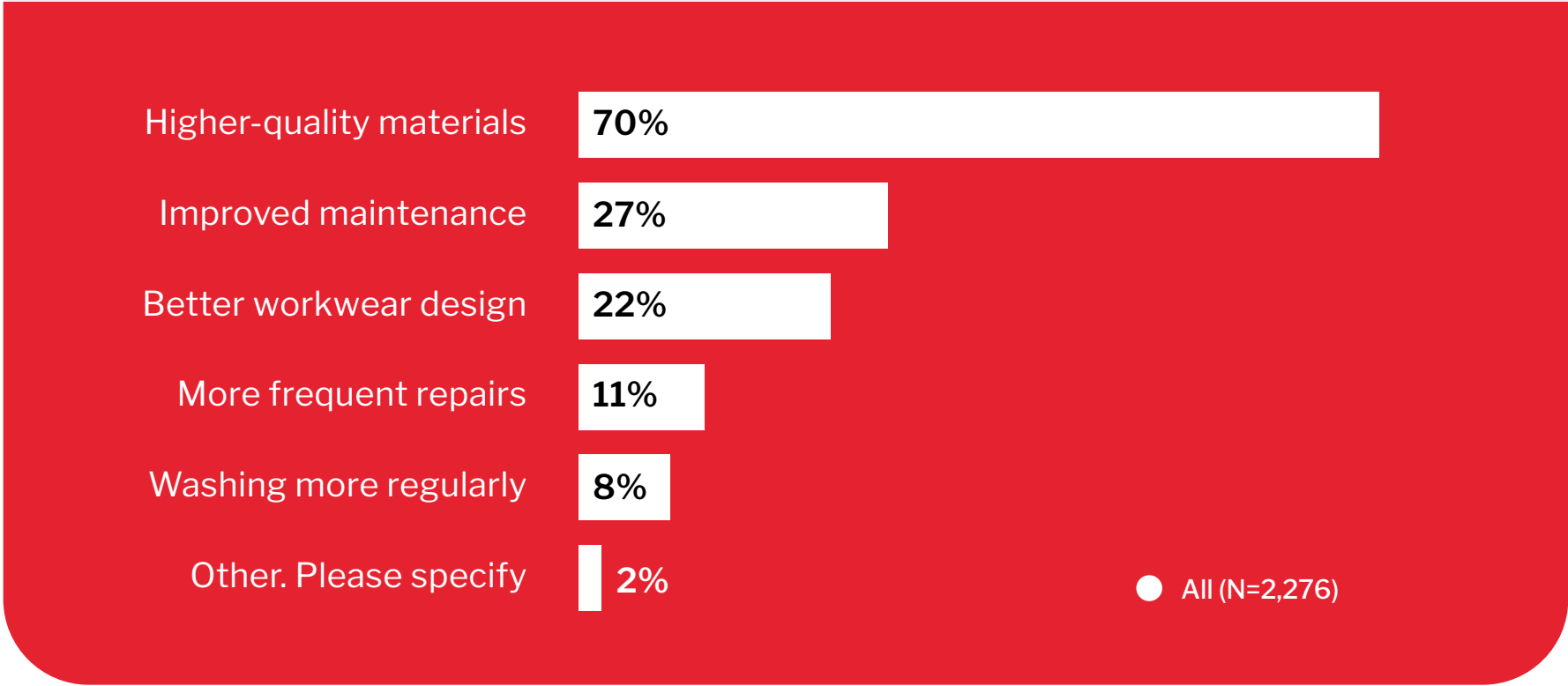
Türkish companies appear to stand out among their European counterparts when it comes to sustainable workwear practices. Repair services are significantly more common in Türkiye. Nearly 70% of employees reported that their employer provides garment repair support—well above the European average of 48%. Moreover, only 7% of Türkish respondents said that damaged workwear is discarded instead of repairing, compared to the European average of 30%.

Türkish employees are also notably better informed about the end-of-life handling of workwear. Just 16% were unaware of what happens to discarded garments, whereas the European average is 43%. In terms of

textile recycling, Türkiye again leads: 56% of respondents stated that their workwear is recycled (compared to a 29% average), and among those who know what happens to discarded items, the recycling rate climbs to 66%—well above the average of 51%. By contrast, textile recycling was reported as least common in the Baltic countries.

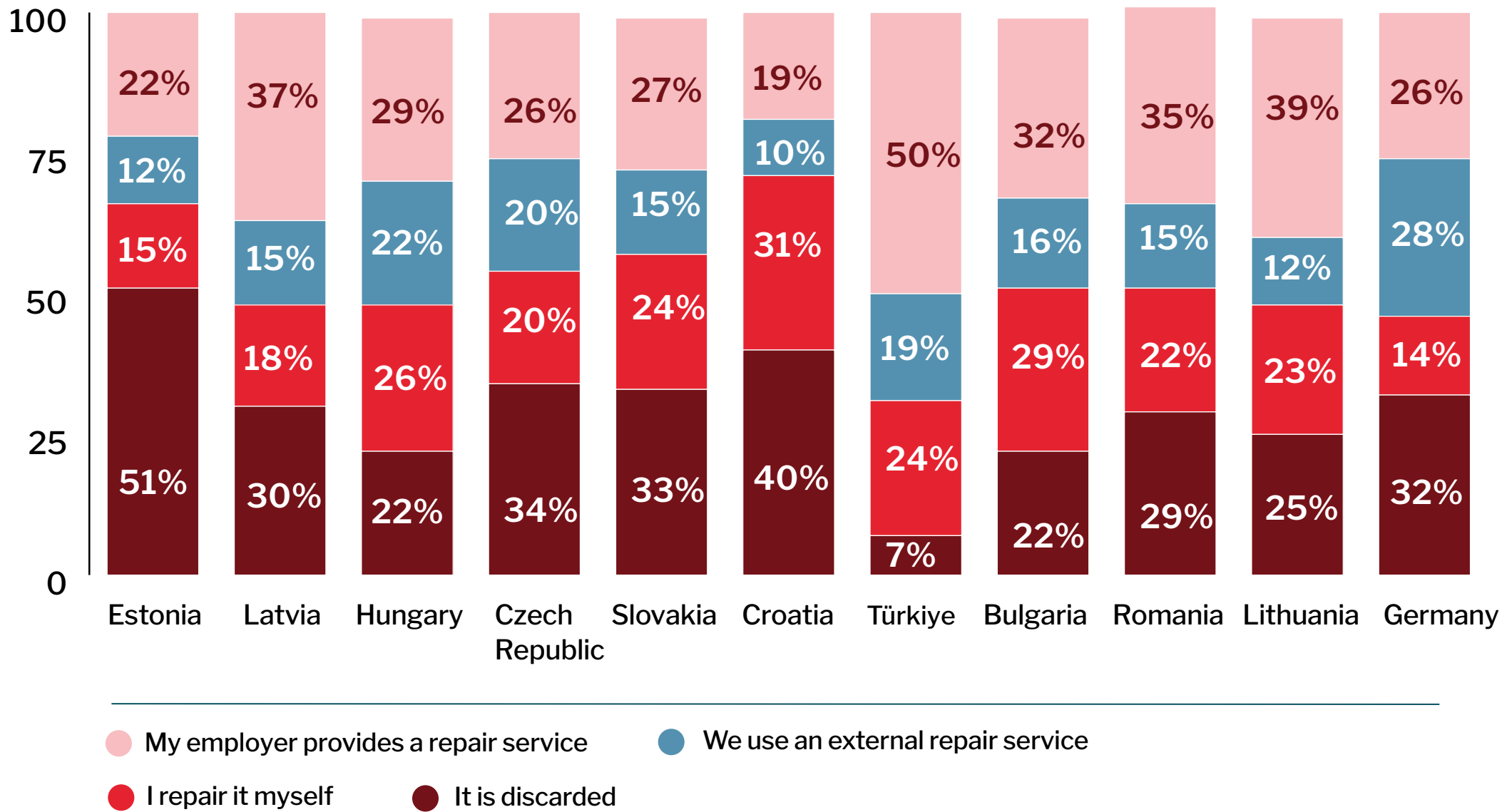
Across all surveyed countries, employees identified the most effective ways to extend the workwear lifespan as investing in higher-quality materials (70%) and improving maintenance practices (27%). Türkish respondents also placed high value on better workwear design, with 42% citing it as a key factor.

How could the lifespan of your workwear be extended?

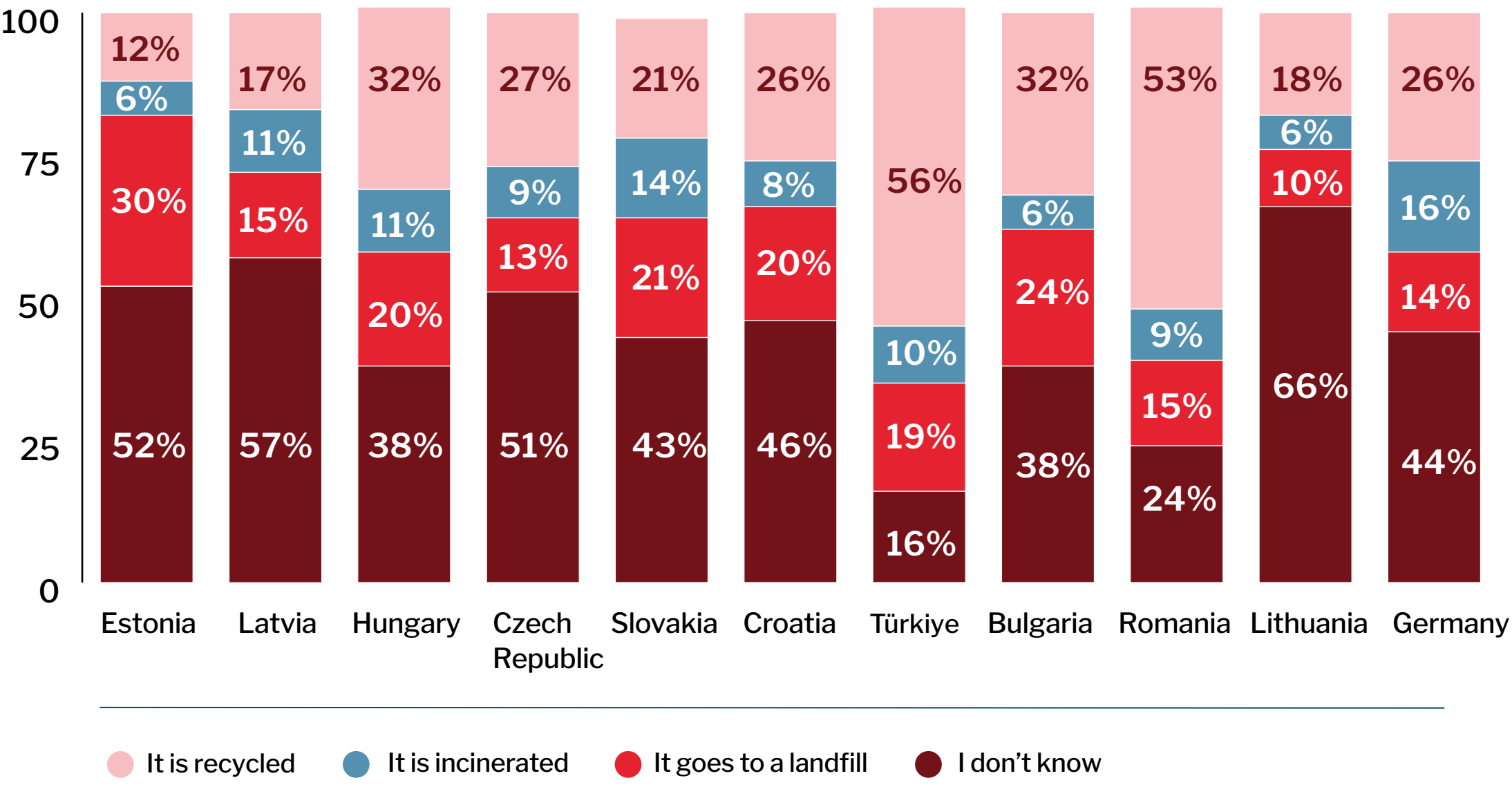




If your workwear is damaged, what happens to it?



How is your discarded workwear handled?



EXPERT INSIGHT – WORKWEAR SUSTAINABILITY

How to improve workwear sustainability?



Ulla Luhtasela
Sustainability Director

How to ensure that the raw materials used in your workwear are sustainably and ethically sourced?

The key requirement is longevity—the longer workwear stays in use, the more sustainable it becomes. Material selection should never compromise durability.

Fortunately, some recycled materials are proving to be strong alternatives. For instance, recycled polyester performs similarly to virgin polyester. It offers both durability and wearer comfort without reducing the garment's lifespan. According to some estimates*, producing recycled polyester generates 30% fewer CO² emissions, uses 45% less energy, and requires 20% less water compared to virgin polyester.

One way to ensure responsible sourcing is by working with suppliers who maintain long-term relationships across their supply chains. These suppliers should also have clear policies and audit mechanisms in place. Independent sustainability ratings—such as EcoVadis—can further help assess suppliers' ethical and sustainable procurement practices in addition to our risk-based audits conducted annually.

What design features can help extend the lifespan of garments in industrial settings?

Reusability and repairability should be considered right from the design stage. Reusability can be improved, for example, with adjustable features. Repairability benefits from simple, modular designs and minimal accessories. Reinforcement patches in high-stress areas can also help garments last longer.

At Lindström, the digitalisation of workwear has opened up new possibilities. Data on garment wear and repairs now informs future design decisions. This helps us create more durable and easier-to-maintain products.

It's also important to consider emotional durability. A garment needs to feel good, not just perform well. When real users are involved in the design process, it often leads to better functionality and higher satisfaction—key factors in long-term use.

What barriers prevent more companies from repairing or recycling workwear?

The main barriers are a lack of time, awareness, and practical solutions. It's often quicker to discard a damaged garment than to organise repair or recycling through external partners.

In some regions, recycling infrastructure is still limited. In certain cases, we have had to ship textile waste across borders for proper recycling—which is far from ideal. Finding, auditing, and working with reliable recycling partners takes time, expertise, and resources. For many companies, this leads to choosing the simpler path: sending textiles to landfill or incineration.

* REPREEVE® Unifi, Inc. manufacturing process,
<https://www.klopman.com/greenwear-old/fabrics-made-with-recycledpolyester#fabric/58293>

