

# Apparel and Footwear in China

November 2023

**Table of Contents** 

# Apparel and Footwear in China

# EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture 2023 key trends Competitive landscape Retailing developments What next for apparel and footwear?

# MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028Table 10 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

#### Childrenswear in China

# **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Childrenswear rebounds in 2023 thanks to the lifting of pandemic restrictions Growth of baby and toddler wear lags due to falling birth rate Sportwear brands continue to drive the growth of childrenswear

#### PROSPECTS AND OPPORTUNITIES

Functionality will continue to be a key selling point for childrenswear Increasing health consciousness amongst young parents raises concerns about childrenswear

#### CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023
Table 14 - Sales of Childrenswear by Category: Value 2018-2023
Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023
Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023
Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023
Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023
Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028
Table 20 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028
Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028
Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

Apparel Accessories in China

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Apparel accessories returns to growth in the post-pandemic era Super premium brands pay more attention to apparel accessories

#### PROSPECTS AND OPPORTUNITIES

Innovation is key to expanding sales of apparel accessories Growing awareness of sustainability and environmental consciousness

#### CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028Table 32 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028

#### Menswear in China

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

As the consumer environment normalises, menswear rebounds in 2023 Steady competitive landscape in menswear Accelerated shift to retail e-commerce reshaping menswear

#### PROSPECTS AND OPPORTUNITIES

The rise of unisex fashion in menswear Continuing emphasis on quality and practicality High-performance apparel and practical designs are the future of menswear

#### CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023 Table 34 - Sales of Menswear by Category: Value 2018-2023 Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023 Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023 Table 37 - NBO Company Shares of Menswear: % Value 2019-2023 Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023 Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023 Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023 Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023 Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023 Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023 Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023 Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023 Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023 Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028 Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028 Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028

# Womenswear in China

# **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

High single-digit growth for womenswear in 2023 due to rebound from the pandemic Decreased concentration and diminished brand value Simplicity and practicality are significant trends in womenswear

# PROSPECTS AND OPPORTUNITIES

Elevated texture preferences define the future of womenswear in China Nostalgia and vintage trends will continue to shape womenswear Increasing fragmentation ahead for womenswear

#### CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2018-2023 Table 52 - Sales of Womenswear by Category: Value 2018-2023 Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023 Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023 Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023 Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023 Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023 Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023 Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023 Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023 Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023 Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023 Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023 Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023 Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028 Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028 Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028 Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

#### Jeans in China

**KEY DATA FINDINGS** 

# 2023 DEVELOPMENTS

Jeans sees a resurgence in 2023 The rise of decorative attributes and higher-end brands

#### PROSPECTS AND OPPORTUNITIES

Embracing comfort and casual style in the post-pandemic era Accelerated growth of online channels in jeans

#### CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023Table 70 - Sales of Jeans by Category: Value 2018-2023Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023

Table 74 - Sales of Men's Jeans by Category: Value 2018-2023 Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023 Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023 Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023 Table 78 - Sales of Women's Jeans by Category: Value 2018-2023 Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023 Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023 Table 81 - NBO Company Shares of Jeans: % Value 2019-2023 Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023 Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028 Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028 Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028 Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028 Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028 Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028 Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028 Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028 Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028 Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028 Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028 Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

# Hosiery in China

## **KEY DATA FINDINGS**

# 2023 DEVELOPMENTS

Lifting of pandemic restrictions results in a rebound for hosiery Rising popularity of sports footwear and sliders boosts sales of ankle-high hosiery Hosiery remains highly fragmented in China

# PROSPECTS AND OPPORTUNITIES

Functionality will play an increasingly important role in sports socks Sheer hosiery will continue to underperform non-sheer hosiery

# CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2018-2023
Table 96 - Sales of Hosiery by Category: Value 2018-2023
Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023
Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023
Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023
Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023
Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028
Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028
Table 103 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028
Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

# Footwear in China

# **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Overall footwear rebounds in 2023, although sports footwear outperforms Footwear is still led by sportswear brands Casual footwear emphasising comfort favoured by Chinese consumers

# PROSPECTS AND OPPORTUNITIES

Niche footwear brands targeting different sports scenarios becoming more popular Growth of non-sports footwear likely to remain sluggish

# CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023Table 106 - Sales of Footwear by Category: Value 2018-2023Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023Table 109 - NBO Company Shares of Footwear: % Value 2019-2023Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023Table 111 - Distribution of Footwear by Category: Volume 2023-2028Table 112 - Forecast Sales of Footwear by Category: Value 2023-2028Table 113 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

# Sportswear in China

#### **KEY DATA FINDINGS**

# 2023 DEVELOPMENTS

Sportswear recovers strongly in 2023 after a dip in 2022 Outdoor fever is sustained beyond the pandemic due to gorpcore Lower-tier markets offer sportswear players opportunities to explore

#### PROSPECTS AND OPPORTUNITIES

Interest-based e-commerce becoming new battleground for online sales Sportswear steps into the age of women's empowerment

# CATEGORY DATA

- Table 116 Sales of Sportswear by Category: Value 2018-2023
- Table 117 Sales of Sportswear by Category: % Value Growth 2018-2023
- Table 118 NBO Company Shares of Sportswear: % Value 2019-2023
- Table 119 LBN Brand Shares of Sportswear: % Value 2020-2023
- Table 120 Distribution of Sportswear by Format: % Value 2018-2023
- Table 121 Forecast Sales of Sportswear by Category: Value 2023-2028
- Table 122 Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- · Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer

trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/apparel-and-footwear-in-china/report.