

Apparel and Footwear in Australia

November 2023

Table of Contents

Apparel and Footwear in Australia

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 2018-2023

Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023

Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023

Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023

Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023

Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023

Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023

Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028

Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2023-2028

Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Childrenswear is hit by inflationary pressure

Sustainability initiatives shape childrenswear

Affordable and durable childrenswear is gaining momentum

PROSPECTS AND OPPORTUNITIES

Childrenswear brands navigate Australia's changing demographic

Baby Bunting online marketplace likely to gain traction

Circular business models set to expand in 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: Value 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 Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Challenges plague apparel accessories

Hats/caps receives a stimulus from street style and sports events

Apparel accessories puts sustainability in the spotlight

PROSPECTS AND OPPORTUNITIES

Apparel accessories will continue to struggle, with local labels having a growing role in shaping the future

Emerging discount e-commerce set to fuel growth of personal accessories

Investment dressing set to replace dopamine dressing

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023

Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

Menswear in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales decline due to inflationary pressure, prompting consumers to prioritise investment in premium products

Smart casual dress code is on the rise

Sustainability trend takes root

PROSPECTS AND OPPORTUNITIES

Enhancing in-store experiences will become an area of focus

Inclusivity poised to gain momentum

Rising demand for made-to-measure suits expected to boost formalwear growth

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
Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

[Womenswear in Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressure takes a toll on consumer spending in womenswear
Inclusivity takes centre stage as plus-size fashion flourishes
The rise of private label, and a discount strategy in womenswear

PROSPECTS AND OPPORTUNITIES

Circular fashion is on the rise
Investment dressing set to grow, as mindful shopping is expected to stay
Material innovation will drive functionality in women's activewear

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 Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Australians continue to value jeans as a wardrobe staple
Adaptive clothing drives inclusivity in jeans
Eco-friendly denim is on the rise

PROSPECTS AND OPPORTUNITIES

Full recovery to pre-pandemic level of volume sales
Sustainability will continue to take centre stage
Strategic partnerships poised to bring growth opportunities

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023

Table 70 - Sales of Jeans by Category: Value 2018-2023

Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023

Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023

Table 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 Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hosiery struggles amidst headwinds

The significance of celebrity entrepreneurship and runway fashion in sheer hosiery

Sustainability reshapes product development in hosiery

PROSPECTS AND OPPORTUNITIES

Hosiery expected to return to steadfast demand

Prevalence of e-commerce set to expand, with Temu's entry in the Australian market poised to fuel growth

A rising trend toward individualism

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: % Volume Growth 2023-2028

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

Footwear in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Navigating economic challenges in footwear

Grassroots sports fuel growth

Innovative sustainability solutions reshape footwear

PROSPECTS AND OPPORTUNITIES

The seamless integration of online and in-store shopping will continue to shape the footwear retail landscape

Digital engagement strategy to remain a key area of focus

Fusion of sports and fashion expected to take centre stage

CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023

Table 106 - Sales of Footwear by Category: Value 2018-2023

Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023

Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Footwear: % Value 2019-2023

Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023

Table 111 - Distribution of Footwear by Format: % Value 2018-2023

Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028

Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028

Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028

Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

Sportswear in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Resilient growth in sportswear amidst economic challenges

Australian retailers capitalise on the FIFA Women's World Cup

Upcycled textile waste a strategic avenue to bolster sustainability endeavours

PROSPECTS AND OPPORTUNITIES

Demand above pre-pandemic level despite challenges

Performance fabrics poised to grow in popularity in sportswear, driven by climate changes

Sportswear expected to expand its focus on wellness

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-australia/report.