

# Apparel and Footwear in Austria

November 2023

Table of Contents

## Apparel and Footwear in Austria

### 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 Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation and quality focus spur retail current value growth despite retail volume decline

Fragmentation remains a factor in the competitive landscape

Specialist offline retailers reassert leadership as society reopens but e-commerce remains a threat

### PROSPECTS AND OPPORTUNITIES

Low birth rate to continue to impact childrenswear

The circular economy is set to develop apace

Ongoing shift to offline and omnichannel models

### 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 Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Post-pandemic rebound reduces the need to buy new apparel accessories in 2023

Renewed interest in belts as consumers resume pre-pandemic lifestyles

The competitive landscape reflects the polarisation trend in apparel accessories

#### PROSPECTS AND OPPORTUNITIES

Preference for classic and durable styles and experiences to slow sales development

Quality focus to boost value sales while thrifting feeds the circular economy

Austrian climate maintains use of apparel accessories

#### 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 Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflationary pressure on prices pushes retail current value sales

Polarisation gains traction as a trend

Men's suits and outerwear to the fore as consumers resume pre-pandemic out-of-home lifestyles

#### PROSPECTS AND OPPORTUNITIES

Quality over quantity trend to boost retail value performance while players look to develop through the omnichannel model

New work practices to favour the casualisation trend in the workplace

Sustainability to grow as a factor in production and purchasing

#### 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 Austria](#)

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Women's suits leads growth as consumers return to the office  
Polarisation of demand  
Reopening of society supports outerwear players

#### PROSPECTS AND OPPORTUNITIES

Mix-and-match workwear to boost sales across categories  
Sustainability to continue to grow as an influence on purchasing decisions  
Omnichannel approach to grow amid rising interest in e-commerce

#### 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 Austria](#)

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stabilisation and the reuse trend sees retail volume sales drop  
High brand recognition and wide availability help Fishbone, Levi's and Amisu to remain ahead of the field  
Higher-end jeans for workwear stimulate premium and super premium sales

#### PROSPECTS AND OPPORTUNITIES

Premiumisation and online shopping trends to spur customisation  
Moves to minimise waste in jeans  
Seasonality to become more of an issue for jeans

#### 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 Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Return to the office and social events maintain upward demand for sheer hosiery

H&M and Calzedonia continue to compete fiercely for the top spot

Repeat purchasers show confidence in e-commerce

#### PROSPECTS AND OPPORTUNITIES

Non-sheer to remain the leading type in hosiery but price rises are likely to dim demand

Players to work hard to differentiate brands

Polarisation of demand to impact branded and private label developments

#### 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 Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Shift from traditional leather shoes to versatile alternatives impacts footwear dynamics  
Deichmann leverages wide distribution and affordable prices to stay ahead of the field  
Omnichannel retailing gains in the slipstream of e-commerce development

#### PROSPECTS AND OPPORTUNITIES

Polarisation to grow as a trend in the forecast period  
Sustainability: A watchword in the forecast period  
Casual trend opens up the field to sports footwear

#### 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 Austria

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Signs of saturation for sportswear  
Messaging and collaboration play a key role in the competitive landscape  
Sports-inspired products benefit from sports and exercise and casual workwear trends

#### PROSPECTS AND OPPORTUNITIES

Trainers to leverage casual work and athleisure trends  
Companies to look to sustainability and brand activism to win over consumers  
Sportswear to continue to penetrate new environments

#### 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-austria/report](http://www.euromonitor.com/apparel-and-footwear-in-austria/report).