

Apparel and Footwear in Spain

November 2023

Table of Contents

Apparel and Footwear in Spain

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: % Volume Growth 2023-2028
Table 11 - Forecast Sales of Apparel and Footwear by Category: % Value Crowth 2023-2028
Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Smaller retailers suffer as price becomes an increasingly important consideration Falling birth rate continues to erode sales Social media shapes young fashion trends

PROSPECTS AND OPPORTUNITIES

Demographic and economic trends will hamper growth Social media platforms will grow in importance Players will revamp their bricks-and-mortar stores in order to boost traffic

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 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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lifting of remaining face mask restrictions hinders growth in apparel accessories Relaxation of work dress codes and warmer temperatures impact demand Private label gains ground

PROSPECTS AND OPPORTUNITIES

Unfavourable economic conditions will curtail discretionary spending Continued working from home trend will continue to hamper sales Growing consumer preference for experiences over material gifts

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 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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slowdown in growth for menswear, while changing working patterns facilitate shift from formal to informal styles Clothing preferences are linked to climate change Zara leads competitive landscape

PROSPECTS AND OPPORTUNITIES

Muted growth expected, as interest rate hikes take their toll Sustainable fashion will grow in prominence, but price will remain key deciding factor in purchasing decisions Players will focus on needs of different generations

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023Table 34 - Sales of Menswear by Category: Value 2018-2023Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023Table 37 - NBO Company Shares of Menswear: % Value 2019-2023Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2019-2023Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2019-2023Table 43 - NBO Company Shares of Men's Outerwear: % Value 2019-2023Table 43 - NBO Company Shares of Men's Nightwear: % Value 2019-2023Table 43 - NBO Company Shares of Men's Outerwear: % Value 2019-2023Table 43 - NBO Company Shares of Men's Nightwear: % Value 2019-2023Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2019-2023Table 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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weaker performance in 2023, as women cut back on discretionary spending Return to pre-pandemic lifestyles presents supports demand for womenswear, but home-working trend has negative impact on formal clothing Fast-fashion brands remain popular with younger customers

PROSPECTS AND OPPORTUNITIES

Sluggish performance for womenswear Sustainability will continue as a key focus Focus on larger sizes could present opportunity for mainstream womenswear retailers

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Jeans benefits from its status as wardrobe staple, but trading down is unavoidable in 2023 Some evidence of polarisation of demand, in light of tough economic situation Levi's leads fragmented market

PROSPECTS AND OPPORTUNITIES

Economy jeans will see strong demand, in light of ongoing economic uncertainty Sustainable jeans will gain traction Body positive movement expected to stall, as thinness is seen as integral to body image

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Unsettled economy has negative impact on sales Sheer hosiery increasingly viewed as unfashionable option Calzedonia continues to lead sales

PROSPECTS AND OPPORTUNITIES

Consumer price consciousness will limit growth New working habits will shape sales Ageing population will help to boost demand for functional hosiery

CATEGORY DATA

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

Footwear in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cash-strapped Spaniards eschew discretionary purchases Sustainability comes at a price Nike lose ground to local players

PROSPECTS AND OPPORTUNITIES

Lifestyle changes to shape footwear, but consumers will remain cost conscious Increased segmentation by footwear players Climate change will have greater impact on footwear industry

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 Format: % Value 2018-2023Table 112 - Forecast Sales of Footwear by Category: Volume 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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slow growth for sportwear, despite keen interest amongst Spaniards in sport and fitness Mainstream players invest in sportswear ranges Decathlon invests in new store concepts to entice customers

PROSPECTS AND OPPORTUNITIES

Recovery of sportswear will be impeded by uncertain economic outlook Continuation of athleisure trend provides opportunity for sportswear manufacturers Players to upgrade the physical store experience

CATEGORY DATA

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