Euromonitor International

Footwear in the US

January 2026

Table of Contents

Footwear in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tariff uncertainties and supply chain issues contribute to decline, but the forecast is brighter

Chart 1 - Key Trends 2025

INDUSTRY PERFORMANCE

Tariffs and supply chain uncertainty impact growth

Chart 2 - Footwear Giants Push Back on Tariffs as Nike and adidas Warn of Rising Prices

Women's footwear dominates, but men's footwear shows more resilience

Zellerfeld drives innovation with 3D-printed customisation

Chart 3 - Zellerfeld Sparks a Footwear Revolution with 3D-Printed Innovation

WHAT'S NEXT?

Footwear poised for recovery, driven by athleisure trend and rising disposable incomes

Athleisure trend will be crucial, while more players will focus on sustainability and inclusivity

Technological innovation will be important in a competitive landscape

Chart 4 - Analyst Insight

COMPETITIVE LANDSCAPE

Leading brands maintain strength by adapting to consumer preferences

Emerging brands disrupt the competitive landscape in footwear, challenging incumbents

Chart 5 - Salomon Expands US Retail Footprint with New Chicago Store in Bucktown

Skechers acquisition by 3G capital reshapes the competitive landscape

CHANNELS

Offline retail maintains its lead, with sports goods stores performing well

Retail e-commerce maintains a significant presence despite a slight share decline

COUNTRY REPORTS DISCLAIMER

Apparel and Footwear in the US - Industry Overview

EXECUTIVE SUMMARY

Apparel and footwear sees subdued growth in 2025, with stronger increase anticipated

KEY DATA FINDINGS

Chart 6 - Key Trends 2025

INDUSTRY PERFORMANCE

Growth continues, although this is minimal due to economic and tariff challenges

Resale and rental trend reshapes consumer behaviour

Chart 7 - ThredUp Launches First-Ever Digital Vintage Pop-Up to Expand Sustainable Fashion

Tariff volatility prompts response from manufacturers

Chart 8 - adidas and Puma Race Ahead in Running Shoes Amid Tariff Uncertainty

WHAT'S NEXT?

AI set to drive innovation and higher growth in apparel and footwear in the US

Resale and rental trend expected to reshape US consumer behaviour

Sustainability and social media will impact future growth

Chart 9 - Analyst Insight

COMPETITIVE LANDSCAPE

Top brands maintain their lead due to brand recognition, adaptation, and distribution
Market polarisation sees luxury resilience alongside the quest for value
Chart 10 - Uniqlo Accelerates US Expansion with Affordable, Functional Fashion
Mergers and acquisitions reshape the competitive landscape

CHANNELS

Offline retail remains dominant, with consumers valuing tactile experiences
E-commerce maintains a significant presence with AI-driven growth

ECONOMIC CONTEXT

Chart 11 - Real GDP Growth and Inflation 2020-2030
Chart 12 - PEST Analysis in the US 2025

CONSUMER CONTEXT

Chart 13 - Key Insights on Consumers in the US 2025
Chart 14 - Consumer Landscape in the US 2025

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/footwear-in-the-us/report.