EXECUTIVE SUMMARY

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

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DISCLAIMER

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Childrenswear in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Childrenswear sees slower retail value growth as average unit price rises slow
Childrenswear is increasingly influenced by adult fashion trends
OVS remains the leader in childrenswear in Italy, but low-cost rivals continue to circle

PROSPECTS AND OPPORTUNITIES

Growth potential to be curbed by continuous slow birth rates
Mini-me trend and licensed products to sustain growth opportunities in childrenswear
E-commerce is set to continue to win over consumers with convenience retailing

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Apparel Accessories in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

“Other” apparel accessories suffers from the falling demand for fashion face masks but belts benefits from the return to formal situations. The return to out-of-home lifestyles and recovering demand for fashion products boost apparel accessories. Tie demand profits from the comeback of formal wear in the post-pandemic period.

PROSPECTS AND OPPORTUNITIES

Apparel accessories to stabilise after fast growth, while the warmer climate trend hinders the demand for some products. Use of smartphones and milder winters to curb use of gloves. Ties and belts to continue to gain attention.

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Menswear in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Menswear comes from behind to register the fastest retail current value growth in apparel and footwear. Formal and elegant outerwear on the rise as men return to the office and social occasions increase. OVS remains the leading brand in menswear in Italy.

PROSPECTS AND OPPORTUNITIES

Retail value growth trajectory to be undermined by slow demand dynamics and unit price stabilisation. Private label is well placed to continue to expand in retail value sales and share terms. Brand owners are set to continue to invest in menswear.

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Womenswear enjoys a return to 2019 pre-pandemic retail current value sales but retail volume sales are still in recovery

Outerwear outperforms other categories in 2023 as consumers resume work and social norms more fully

Growing polarisation resulting from the expansion of low-cost brands in Italy

PROSPECTS AND OPPORTUNITIES

Retail value sales set to slow down amid unit price stabilisation

E-commerce to continue to develop and grow as its presence consolidates

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Jeans in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Jeans returns to the pre-pandemic retail current value level with the resumption of socially active lifestyles

Growing polarisation trend impacts jeans

Levi's continues to lead while celebrating its 501 jeans anniversary

PROSPECTS AND OPPORTUNITIES

Jeans' performance to be limited by high maturity

Comfort, price, sustainability and personalisation to provide key criteria when purchasing jeans

Super premium jeans to continue to expand

CATEGORY DATA
Hosiery in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS
Hosiery continues on the road to recovery as society reopens fully
Sheer hosiery outpaces non-sheer hosiery but struggles to return to pre-pandemic levels
Calzedonia continues to benefit from its widespread presence and fashionable offerings

PROSPECTS AND OPPORTUNITIES
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Footwear in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Footwear to see a return to 2019 retail current value sales level as consumers resume out-of-home lifestyles
Adult male consumers show more interest in footwear for different occasions to boost men’s footwear
Sports footwear brands Nike and adidas continue to lead the field

PROSPECTS AND OPPORTUNITIES

Performance, casual and formal/elegant footwear to retain interest
Children’s footwear development to be curbed by low birth rate
Women’s footwear to benefit from the growing female participation in sports

CATEGORY DATA

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Sportswear in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Performance sportswear sees the highest retail value growth in 2023 due to the focus on regular sport and fitness activities
Outdoor apparel and outdoor footwear stabilise after the post-pandemic boom
Nike continues to invest in Italy to make retail value share gains in 2023

PROSPECTS AND OPPORTUNITIES

Shift to sportswear to stabilise amid recovery of formal wear
Focus on sports and fitness to support sales development
Brand owners to increasingly target sportswomen

CATEGORY DATA

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