

Apparel and Footwear in the United Kingdom

November 2023

Table of Contents

Apparel and Footwear in the United Kingdom

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture

2023 key trends

Sustainability and the introduction of return fees

Experiential retail proves valuable as consumers resume in-store shopping in force

Digital diversification will bolster future growth across the value chain

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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing unit prices contribute to value growth in 2023

Price protection on school uniforms remains a winning strategy

Resale, pre-owned and rental impacting primary market growth

PROSPECTS AND OPPORTUNITIES

Product mix diversification within childrenswear

Higher number of brands expected to introduce take-back schemes

Brands of menswear and womenswear set to further expand into 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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Diminished discretionary spending impacts category growth

Value and convenience motivate purchases

Ethical leather sourcing is a priority

PROSPECTS AND OPPORTUNITIES

Social media trends will continue to influence demand

Relaxation of dress codes to further impact growth opportunities for ties

The ongoing impact of resale and pre-owned sales being felt by the primary market

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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value is driving purchases where consumers face lower levels of disposable income Polarisation leads to positive performances for economy and super premium jeans Despite casualisation trend, demand for men's suits continues to recover

PROSPECTS AND OPPORTUNITIES

The second-hand market is shifting shopping habits

Uncertain economic outlook will likely impact future spending

E-commerce expected to further grow within menswear over the forecast period

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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cost-of-living crisis impacts discretionary spending and value growth opportunities in womenswear Polarisation in the local market

Dresses and skirts perform well despite casualisation trend, but overall outlook remains uncertain

PROSPECTS AND OPPORTUNITIES

Shapewear is expected to influence growth in women's underwear Resale and rental will continue to impact growth of the primary market Sustainability will remain a key product consideration ahead of EU legislation

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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price sensitivity and polarisation within jeans

Comfort and lifestyle casualisation are driving demand for jeans

Sustainability and changing consumption cycles

PROSPECTS AND OPPORTUNITIES

Focus on sustainable material development

Shifting style trends continue to impact purchasing habits

Bringing circularity to jeans consumption

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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Prioritisation of value and multipack offers

Non-sheer hosiery driven by a continual shift in consumers' lifestyles

Sheer hosiery driven by festive dressing

PROSPECTS AND OPPORTUNITIES

Greater focus on sustainability as part of hosiery production

DTC retail driving sales

Continual emphasis on durability within hosiery

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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers value longevity during a period of lower discretionary spending Casualisation trend continues to influence demand for specific styles of footwear Strong growth opportunities in children's footwear

PROSPECTS AND OPPORTUNITIES

Retail offline will continue to regain its importance

Further focus on material innovation and sustainability

Resale and second-hand market will continue to impact primary sales of 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 the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sportswear continues to see another year of strong growth

Sports footwear continues to outperform sports apparel

Casualisation trend continues to have a positive impact on demand

PROSPECTS AND OPPORTUNITIES

Technical outerwear to propel outdoor apparel in the UK

Sportswear will remain a viable category for product mix expansion

Child-focused sportswear will likely further penetrate the category

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-the-united-kingdom/report.