

# Menswear in Western Europe

August 2020

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe grows slower in comparison to other key regions

Forecast for menswear sees slow-paced recovery post-COVID-19

Menswear grows in the UK, but revenues drop in main regional markets

Italy, Germany and France see the strongest declines in sales

Shorts and trousers account for 25% of absolute value sales decline

Product mix strongly varies according to countries' purchasing power

E-commerce sees the most important growth among channels

Online revolution is still more relevant in the region's developed markets

## LEADING COMPANIES AND BRANDS

Few global companies continue gaining share over smaller ones

Zara achieves leadership, followed by fast fashion and sports retailers

Germany and the UK are the main markets of five top players

Fast fashion brands dominate the market, but sports and jeans advance

## FORECAST PROJECTIONS

COVID-19 results in slowed pace of regional growth over coming years

COVID-19 deepens the crisis and leads to redesign of fashion industry

## COUNTRY SNAPSHOTS

Austria: market context

Austria: competitive and retail landscape

Denmark: market context

Denmark: competitive and retail landscape

France: market context

France: competitive and retail landscape

Germany: market context

Germany: competitive and retail landscape

Greece: competitive and retail landscape

Greece: market context

Italy: market context

Italy: competitive and retail landscape

Netherlands: market context

Netherlands: competitive and retail landscape

Norway: market context

Norway: competitive and retail landscape

Portugal: market context

Portugal: competitive and retail landscape

Spain: market context

Spain: competitive and retail landscape

Sweden: market context

Sweden: competitive and retail landscape

Turkey: market context

Turkey: competitive and retail landscape

UK: market context

UK: competitive and retail landscape

## APPENDIX: COMPETITOR ANALYTICS

Competitor Analytics tool

Overview

Competitors

Market overlap

Treemap

Overlap matrices

## APPENDIX: INDUSTRY FORECAST MODEL

About Euromonitor International's Industry Forecast Model

Soft drivers and the Industry Forecast Model

Growth decomposition explained

Significance and applications for growth decomposition

Key applications for Industry Forecast Models

## APPENDIX: VIA PRICING

About Via Pricing from Euromonitor International

### 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/menswear-in-western-europe/report](http://www.euromonitor.com/menswear-in-western-europe/report).