



Euromonitor  
International

# Apparel and Footwear in Australia

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EXECUTIVE SUMMARY

Apparel and footwear impacted by challenging economic conditions in 2024  
Market polarisation, DEI and sustainability emerge as key trends in 2024  
Mergers and disruptive DTC models shape competitive landscape  
E-commerce continues to evolve in Australia, responding to consumer demand and shaping trends that echo across the industry  
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DISCLAIMER

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Households with young children and mortgages limit discretionary spending  
Shrinking consumer spending translates into challenging conditions in local market  
Fashionable collaborations boost brand loyalty and ensure they remain top of mind

PROSPECTS AND OPPORTUNITIES

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Extensive physical presence of leading brands facilitates omnichannel strategies

Australian brand collaboration to nurture youth emotional wellbeing

#### PROSPECTS AND OPPORTUNITIES

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Digital transformation within womenswear ensures seamless customer experience

PROSPECTS AND OPPORTUNITIES

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Polarisation evident within men's jeans, while premiumisation characterises the women's segment

Competitive landscape subject to volatility as cross-category headwinds hit

Evolution of e-commerce leads to emergence of grey market drop-shipping

PROSPECTS AND OPPORTUNITIES

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Australians replenish their collections of daily wardrobe essentials

Competitive landscape features mix of private label, specialists, global sports brands and fast fashion

Generation Z and millennials debate 2024's sock trends on social media

PROSPECTS AND OPPORTUNITIES

Private label poised to be cost-effective solution in the face of economic uncertainty

Natural and alternative fibres are cornerstones of sustainability, yet the journey towards a circular economy will continue over the forecast period

Hosiery to be challenged by frugality and practicality in purchasing decisions, leading to distribution channel shift

CATEGORY DATA

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Footwear in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Redirected discretionary spending and shifting distribution impact performance of footwear  
Sportswear brands and major events heavily influence footwear in Australia  
Local fashion footwear brands gain attention for sustainability and considered design

PROSPECTS AND OPPORTUNITIES

Sports-inspired footwear likely to help drive growth, as reimagined aesthetic of vintage styles proves popular  
Direct-to-consumer dialogue to be facilitated by physical and virtual retail touchpoints  
Handcrafted and durable high-quality footwear is sustainable antidote to fast fashion

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Sportswear in Australia

KEY DATA FINDINGS

2024 DEVELOPMENTS

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Competition for incumbents as challengers record strong performances  
“Fashion Olympics” turn heads in Paris, while local fans emulate their favourite sporting stars through replica sportswear capsule collections

PROSPECTS AND OPPORTUNITIES

Future demand likely to be driven by fashion, fandom and functionality  
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