



Euromonitor
International

Apparel and Footwear in Spain

November 2024

Table of Contents

EXECUTIVE SUMMARY

Apparel and footwear in 2024: The big picture
2024 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

- Table 1 - Sales of Apparel and Footwear by Category: Volume 2019-2024
- Table 2 - Sales of Apparel and Footwear by Category: Value 2019-2024
- Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2020-2024
- Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2021-2024
- Table 7 - Distribution of Apparel and Footwear by Format: % Value 2019-2024
- Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2024-2029
- Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Smaller retailers suffer as price becomes an increasingly important consideration amid high cost of living
Social media shapes young fashion trends in Spain in 2024
Older children are a focus of growth for the category

PROSPECTS AND OPPORTUNITIES

Demographic and economic trends will hamper growth
Social media platforms will grow in importance over the forecast period
Players will likely revamp their bricks-and-mortar stores in order to boost traffic

CATEGORY DATA

- Table 13 - Sales of Childrenswear by Category: Volume 2019-2024
- Table 14 - Sales of Childrenswear by Category: Value 2019-2024
- Table 15 - Sales of Childrenswear by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Childrenswear by Category: % Value Growth 2019-2024
- Table 17 - NBO Company Shares of Childrenswear: % Value 2020-2024
- Table 18 - LBN Brand Shares of Childrenswear: % Value 2021-2024
- Table 19 - Forecast Sales of Childrenswear by Category: Volume 2024-2029
- Table 20 - Forecast Sales of Childrenswear by Category: Value 2024-2029
- Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029
- Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

Apparel Accessories in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

A relatively positive performance for apparel accessories in 2024, despite the challenging economic landscape

Relaxation of work dress codes and warmer temperatures impact demand

Fast fashion brands and private label gain ground in a fragmented landscape

PROSPECTS AND OPPORTUNITIES

Unfavourable economic conditions will curtail discretionary spending over the forecast period

Continued working-from-home trend will continue to hamper sales

Growing consumer preference for experiences over material gifts

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2019-2024

Table 24 - Sales of Apparel Accessories by Category: Value 2019-2024

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2019-2024

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2020-2024

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2021-2024

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2024-2029

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2024-2029

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

Menswear in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slowdown in growth for menswear, while changing working patterns facilitate shift from formal to informal styles

Brick-and-mortar outlets remain key sales channels for menswear

Zara leads a fragmented competitive landscape in 2024

PROSPECTS AND OPPORTUNITIES

Economic outlook and persistent inflation set to shape sales over the forecast period

Sustainable fashion will grow in prominence, but price will remain deciding factor in purchasing decisions

Dressing down and the casualwear trend will support sales in the years ahead

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2019-2024

Table 34 - Sales of Menswear by Category: Value 2019-2024

Table 35 - Sales of Menswear by Category: % Volume Growth 2019-2024

Table 36 - Sales of Menswear by Category: % Value Growth 2019-2024

Table 37 - NBO Company Shares of Menswear: % Value 2020-2024

Table 38 - LBN Brand Shares of Menswear: % Value 2021-2024

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2020-2024

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2021-2024

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2020-2024

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2021-2024

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2020-2024

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2021-2024

Table 45 - NBO Company Shares of Men's Underwear: % Value 2020-2024

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2021-2024

Table 47 - Forecast Sales of Menswear by Category: Volume 2024-2029

Table 48 - Forecast Sales of Menswear by Category: Value 2024-2029

Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2024-2029

Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2024-2029

Womenswear in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Weaker performance for womenswear in Spain in 2024, as women cut back on discretionary spending

Fast-fashion brands remain popular with younger consumers in particular, despite concerns about sustainability

Zara retains top category position amid fierce competition in 2024

PROSPECTS AND OPPORTUNITIES

Sluggish performance predicted for womenswear in the years ahead

New ways to promote sustainability are likely to emerge as players seek to differentiate and vie for share

Shift in focus could present opportunities for players in womenswear

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2019-2024

Table 52 - Sales of Womenswear by Category: Value 2019-2024

Table 53 - Sales of Womenswear by Category: % Volume Growth 2019-2024

Table 54 - Sales of Womenswear by Category: % Value Growth 2019-2024

Table 55 - NBO Company Shares of Womenswear: % Value 2020-2024

Table 56 - LBN Brand Shares of Womenswear: % Value 2021-2024

Table 57 - NBO Company Shares of Women's Nightwear: % Value 2020-2024

Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2021-2024

Table 59 - NBO Company Shares of Women's Outerwear: % Value 2020-2024

Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2021-2024

Table 61 - NBO Company Shares of Women's Swimwear: % Value 2020-2024

Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2021-2024

Table 63 - NBO Company Shares of Women's Underwear: % Value 2020-2024

Table 64 - LBN Brand Shares of Women's Underwear: % Value 2021-2024

Table 65 - Forecast Sales of Womenswear by Category: Volume 2024-2029

Table 66 - Forecast Sales of Womenswear by Category: Value 2024-2029

Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029

Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

Jeans in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Jeans benefits from status as a wardrobe staple, but trading down is visible in 2024

Some polarisation in a challenging economic climate

Zara leads a relatively fragmented competitive landscape in 2024

PROSPECTS AND OPPORTUNITIES

Economy jeans will continue to see strong demand as a result of ongoing economic uncertainty

Sustainable jeans will gain traction, particularly amongst younger Spaniards

Body-positive movement is expected to stall, as slimness is still seen as important for positive body image

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2019-2024

Table 70 - Sales of Jeans by Category: Value 2019-2024

Table 71 - Sales of Jeans by Category: % Volume Growth 2019-2024

Table 72 - Sales of Jeans by Category: % Value Growth 2019-2024

Table 73 - Sales of Men's Jeans by Category: Volume 2019-2024

Table 74 - Sales of Men's Jeans by Category: Value 2019-2024

Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2019-2024

Table 76 - Sales of Men's Jeans by Category: % Value Growth 2019-2024

Table 77 - Sales of Women's Jeans by Category: Volume 2019-2024

Table 78 - Sales of Women's Jeans by Category: Value 2019-2024

Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2019-2024

Table 80 - Sales of Women's Jeans by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Jeans: % Value 2020-2024

Table 82 - LBN Brand Shares of Jeans: % Value 2021-2024

Table 83 - Forecast Sales of Jeans by Category: Volume 2024-2029

Table 84 - Forecast Sales of Jeans by Category: Value 2024-2029

Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2024-2029

Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2024-2029

Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2024-2029

Table 88 - Forecast Sales of Men's Jeans by Category: Value 2024-2029

Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029

Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029

Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2024-2029

Table 92 - Forecast Sales of Women's Jeans by Category: Value 2024-2029

Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029

Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

Hosiery in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Challenging economic climate dampens demand for hosiery in 2024
- Sheer hosiery is increasingly viewed as an unfashionable item of clothing
- Calzedonia continues to lead sales of hosiery in Spain in a fragmented landscape

PROSPECTS AND OPPORTUNITIES

- Consumer price consciousness will limit growth over the forecast period
- New working habits will continue to influence sales
- Ageing population will help to boost demand for functional hosiery in the coming years

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2019-2024

Table 96 - Sales of Hosiery by Category: Value 2019-2024

Table 97 - Sales of Hosiery by Category: % Volume Growth 2019-2024

Table 98 - Sales of Hosiery by Category: % Value Growth 2019-2024

Table 99 - NBO Company Shares of Hosiery: % Value 2020-2024

Table 100 - LBN Brand Shares of Hosiery: % Value 2021-2024

Table 101 - Forecast Sales of Hosiery by Category: Volume 2024-2029

Table 102 - Forecast Sales of Hosiery by Category: Value 2024-2029

Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

Footwear in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cash-strapped Spaniards eschew discretionary footwear purchases in 2024
Sustainability remains important, but price is the deciding factor
Nike retains the lead in 2024 but loses share to second-ranking Zara

PROSPECTS AND OPPORTUNITIES

Economic factors and consumers priorities shaping sales
Lifestyle changes set to influence footwear, but consumers will remain price-conscious
Demographic trends and environmental awareness will drive innovation

CATEGORY DATA

- Table 105 - Sales of Footwear by Category: Volume 2019-2024
- Table 106 - Sales of Footwear by Category: Value 2019-2024
- Table 107 - Sales of Footwear by Category: % Volume Growth 2019-2024
- Table 108 - Sales of Footwear by Category: % Value Growth 2019-2024
- Table 109 - NBO Company Shares of Footwear: % Value 2020-2024
- Table 110 - LBN Brand Shares of Footwear: % Value 2021-2024
- Table 111 - Distribution of Footwear by Format: % Value 2019-2024
- Table 112 - Forecast Sales of Footwear by Category: Volume 2024-2029
- Table 113 - Forecast Sales of Footwear by Category: Value 2024-2029
- Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2024-2029
- Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2024-2029

Sportswear in Spain

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slower growth for sportswear in 2024, despite keen interest amongst Spaniards in sport and fitness
Mainstream players increasingly invest in sportswear ranges
Key player Decathlon invests in new store concepts to entice local consumers

PROSPECTS AND OPPORTUNITIES

An uncertain economic outlook will impede the recovery of sportswear to some extent
Continuation of athleisure trend provides an opportunity for sportswear manufacturers
Players will upgrade the physical store experience as they seek to differentiate themselves

CATEGORY DATA

- Table 116 - Sales of Sportswear by Category: Value 2019-2024
- Table 117 - Sales of Sportswear by Category: % Value Growth 2019-2024
- Table 118 - NBO Company Shares of Sportswear: % Value 2020-2024
- Table 119 - LBN Brand Shares of Sportswear: % Value 2021-2024
- Table 120 - Distribution of Sportswear by Format: % Value 2019-2024
- Table 121 - Forecast Sales of Sportswear by Category: Value 2024-2029
- Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

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-spain/report.