



Apparel and Footwear in Western Europe

March 2025

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Key findings

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Western Europe among the less dynamic regions

Stagnation expected for Western European apparel and footwear in the coming years

Womenswear leads sales in Western Europe

Formalwear enjoys a strong performance in Italy in 2024

Sportswear the best performer in France over 2019-2024

Only sportswear manages to add new sales over the review period

Polarisation trend squeezing mid-priced brands in the UK

French government offers financial aid for clothes and shoe repairs

Apparel and footwear specialists the biggest distribution channel at a regional level

Variety stores taking share from grocery retailers in France

LEADING COMPANIES AND BRANDS

Relatively fragmented apparel and footwear country markets in Western Europe

Nike loses share in the UK market in 2024

The UK is the biggest market for half of the top 10 players in Western Europe

Shein moving up the brand rankings in Western Europe

FORECAST PROJECTIONS

Stagnating annual sales expected in real value terms over the forecast period

Continued market polarisation expected in the UK and German markets

Second-hand sales will continue impacting the French and Italian markets

COUNTRY SNAPSHOTS

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Austria: Competitive and Retail Landscape

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Denmark: Competitive and Retail Landscape

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