



Passport

Womenswear in Chile

Euromonitor International

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This sample report is for illustration
purposes only.

Some content and data have been
changed.

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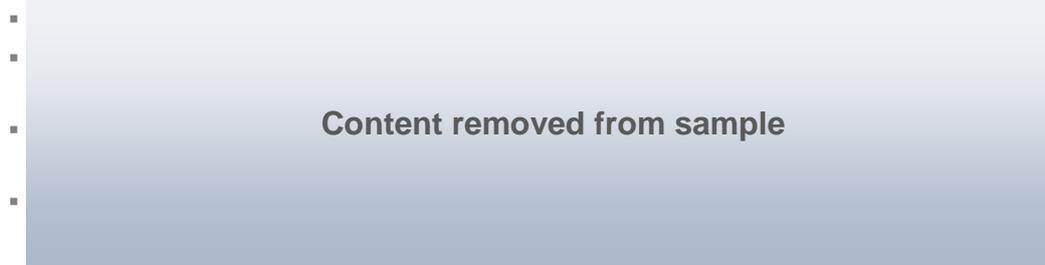
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WOMENSWEAR IN CHILE - CATEGORY ANALYSIS

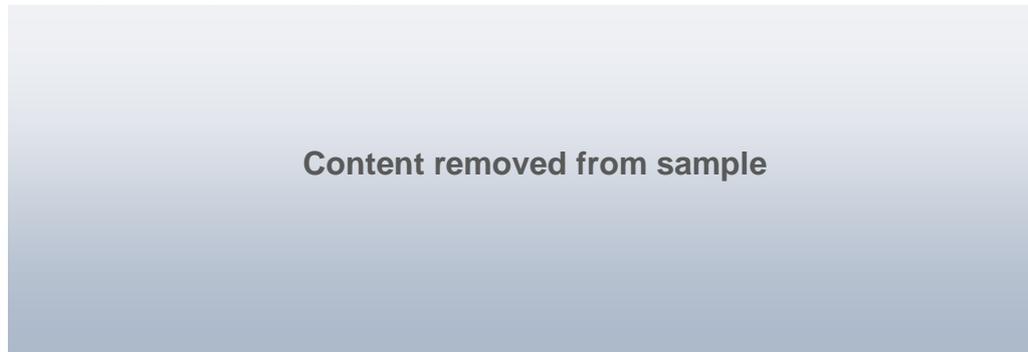
KEY DATA FINDINGS

- The pandemic has a very significant impact on womenswear category, especially outerwear items such as dresses, jackets and coats



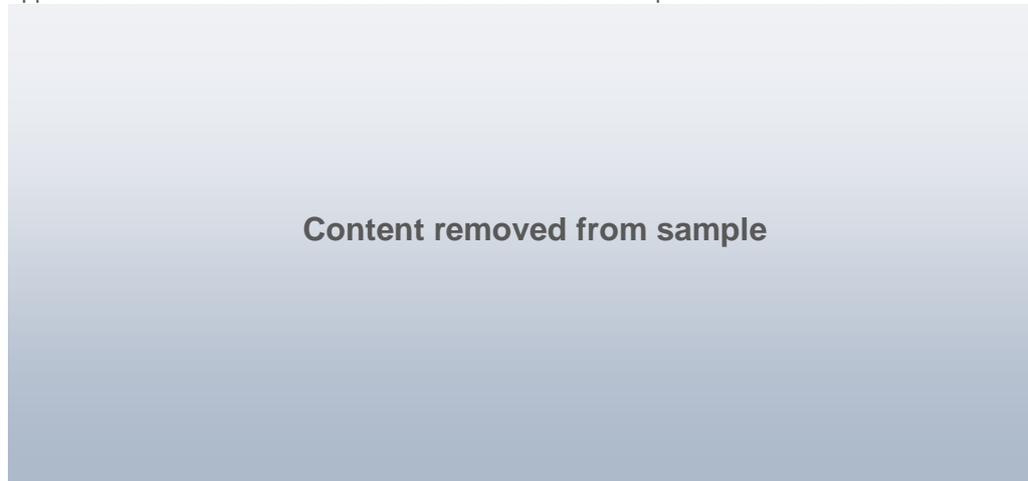
2020 IMPACT

In 2020, womenswear suffered a significant decrease. The decrease in average income in the country (GDP is expected to drop by...



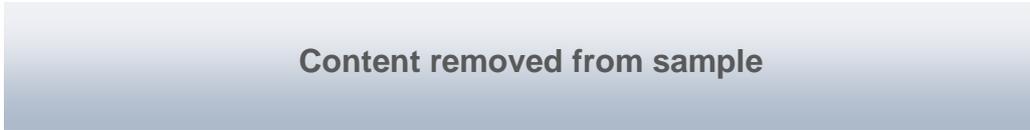
RECOVERY AND OPPORTUNITIES

E-commerce has witnessed particularly important expansion during 2020. The purchase of apparel often involves considerable research and brand comparison with internet retailers...



Outerwear accounts for majority of womenswear sales in Chile

Outerwear represents more than three quarters of what is sold in womenswear. Within outerwear (excluding jeans), women’s jackets and coats and women’s tops accounted for...



Chilean brand Flores maintains uninterrupted growth in women’s underwear

Underwear is the second largest subcategory within womenswear in terms of value sales...



CATEGORY DATA

Table 1 Sales of Womenswear by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						
- Women's Shorts and Trousers						
- Women's Skirts						
- Women's Suits						
- Women's Tops						
- Other Women's Outerwear						
Women's Swimwear						
Women's Underwear						
Womenswear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Womenswear by Category: Value 2015-2020

CLP bn	2015	2016	2017	2018	2019	2020
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						
- Women's Shorts and Trousers						
- Women's Skirts						
- Women's Suits						
- Women's Tops						
- Other Women's Outerwear						
Women's Swimwear						
Women's Underwear						
Womenswear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Womenswear by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Women's Nightwear	Data removed from sample		
Women's Outerwear			
Women's Jeans			
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			
Women's Outerwear (Excl Jeans)			
- Women's Dresses			
- Women's Jackets and Coats			
- Women's Jumpers			
- Women's Leggings			
- Women's Shirts and Blouses			
- Women's Shorts and Trousers			
- Women's Skirts			
- Women's Suits			
- Women's Tops			
- Other Women's Outerwear			
Women's Swimwear			
Women's Underwear			

Womenswear

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Womenswear by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Women's Nightwear	Data removed from sample		
Women's Outerwear			
Women's Jeans			
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			
Women's Outerwear (Excl Jeans)			
- Women's Dresses			
- Women's Jackets and Coats			
- Women's Jumpers			
- Women's Leggings			
- Women's Shirts and Blouses			
- Women's Shorts and Trousers			
- Women's Skirts			
- Women's Suits			
- Women's Tops			
- Other Women's Outerwear			
Women's Swimwear			
Women's Underwear			
Womenswear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Womenswear: % Value 2016-2020

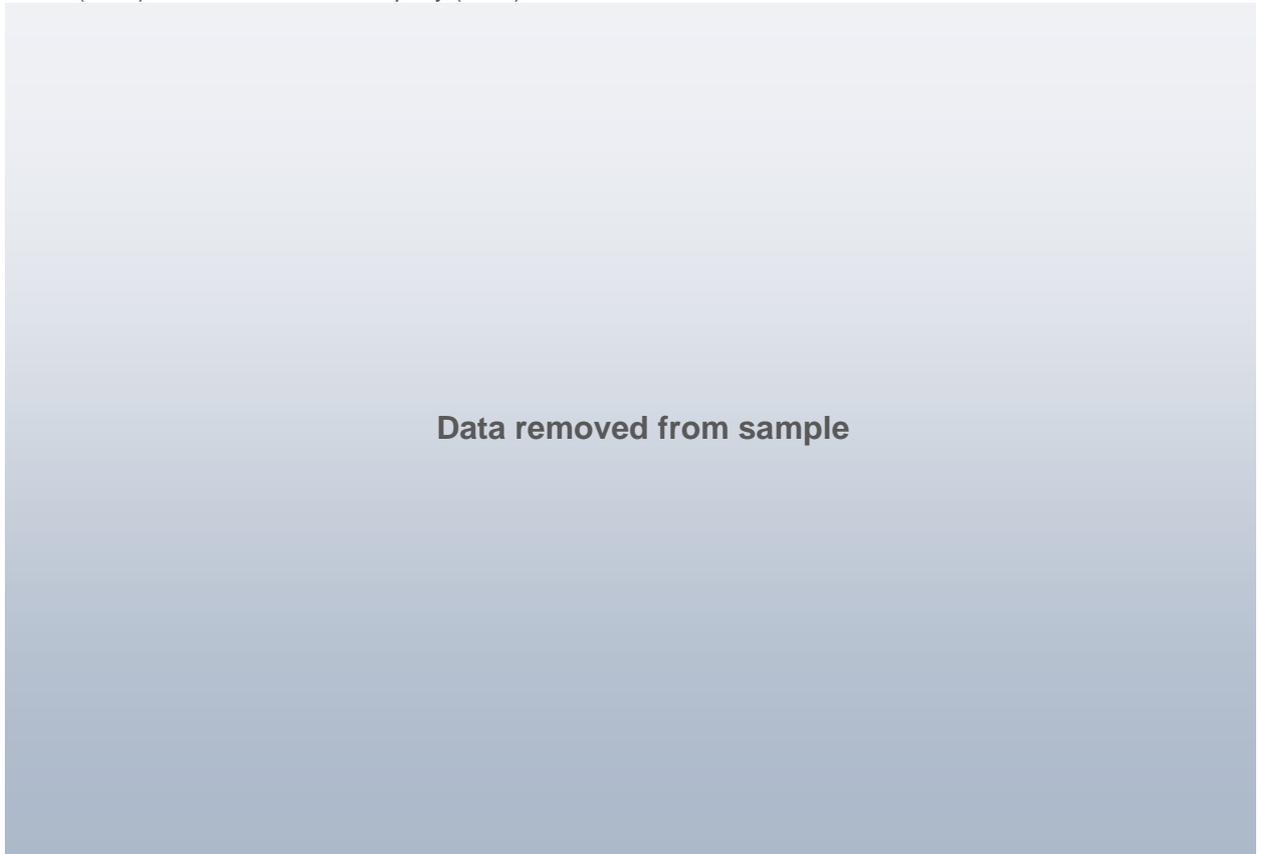
% retail value rsp Company	2016	2017	2018	2019	2020
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Womenswear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 NBO Company Shares of Women's Nightwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Women's Nightwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 NBO Company Shares of Women's Outerwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 LBN Brand Shares of Women's Outerwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Women's Swimwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Women's Swimwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 NBO Company Shares of Women's Underwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 LBN Brand Shares of Women's Underwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Forecast Sales of Womenswear by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						
- Women's Shorts and Trousers						
- Women's Skirts						
- Women's Suits						
- Women's Tops						
- Other Women's Outerwear						
Women's Swimwear						
Women's Underwear						
Womenswear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Womenswear by Category: Value 2020-2025

CLP bn	2020	2021	2022	2023	2024	2025
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						
- Women's Shorts and Trousers						
- Women's Skirts						

- Women's Suits
- Women's Tops
- Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Womenswear by Category: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Women's Nightwear			
Women's Outerwear			
Women's Jeans			
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			
Women's Outerwear (Excl Jeans)			
- Women's Dresses			
- Women's Jackets and Coats			
- Women's Jumpers			
- Women's Leggings			
- Women's Shirts and Blouses			
- Women's Shorts and Trousers			
- Women's Skirts			
- Women's Suits			
- Women's Tops			
- Other Women's Outerwear			
Women's Swimwear			
Women's Underwear			
Womenswear			

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

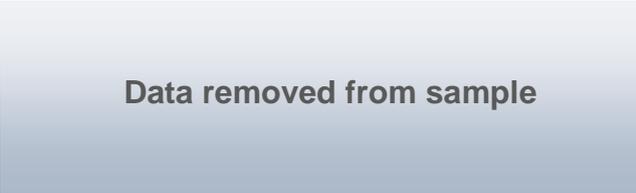
Table 18 Forecast Sales of Womenswear by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Women's Nightwear			
Women's Outerwear			
Women's Jeans			
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			
Women's Outerwear (Excl Jeans)			
- Women's Dresses			
- Women's Jackets and Coats			
- Women's Jumpers			
- Women's Leggings			
- Women's Shirts and Blouses			
- Women's Shorts and Trousers			

Data removed from sample

- Women's Skirts
 - Women's Suits
 - Women's Tops
 - Other Women's Outerwear
- Women's Swimwear
Women's Underwear
Womenswear



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

APPAREL AND FOOTWEAR IN CHILE - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on apparel and footwear

In 2020, apparel and footwear witnessed a decrease of...

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Social unrest country impact in 2019

On 18 October 2019, Chile witnessed the start of a period of social unrest, as a series of peaceful and violent demonstrations took place...

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COVID-19 country impact

A strict lockdown persisted for all commercial activity, except for essential shops and outlets...

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Company response

The companies that compete in the apparel and footwear market in Chile have undoubtedly...

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Retailing shift

Historically, mixed retailers, such as department stores, have maintained a clear dominance...

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E-commerce has increasingly significant impact on domestic market

E-commerce has become a platform of great importance to underpin sales in apparel and...

Content removed from sample

What next for apparel and footwear?

It is expected that only in 2022 will a recovery begin to be seen in the industry...

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MARKET DATA

Table 19 Sales of Apparel and Footwear by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Apparel	Data removed from sample					
Footwear						
Apparel and Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Sportswear volume not researched

Table 20 Sales of Apparel and Footwear by Category: Value 2015-2020

CLP bn	2015	2016	2017	2018	2019	2020
Apparel	Data removed from sample					
Footwear						
Sportswear						
Apparel and Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Sales of Apparel and Footwear by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Apparel	Data removed from sample		
Footwear			
Apparel and Footwear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Sportswear volume not researched

Table 22 Sales of Apparel and Footwear by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Apparel	Data removed from sample		
Footwear			
Sportswear			
Apparel and Footwear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 NBO Company Shares of Apparel and Footwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 LBN Brand Shares of Apparel and Footwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample					
---------------------------------	--	--	--	--	--

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Distribution of Apparel and Footwear by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
--------------------	------	------	------	------	------	------

Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						

- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Other Leisure and Personal Goods Specialist Apparel Retailers
- Other Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Distribution of Apparel and Footwear by Format and Category: % Value 2020

% retail value rsp

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Other Leisure and Personal Goods Specialist Apparel Retailers
- Other Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores

	AP	FW	SW
Data removed from sample			

- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: AP = apparel; FW = footwear; SW = Sportswear

Table 27 Forecast Sales of Apparel and Footwear by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Apparel	Data removed from sample					
Footwear						
Apparel and Footwear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: Sportswear volume not researched

Table 28 Forecast Sales of Apparel and Footwear by Category: Value 2020-2025

CLP bn	2020	2021	2022	2023	2024	2025
Apparel	Data removed from sample					
Footwear						
Sportswear						
Apparel and Footwear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 29 Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Apparel	Data removed from sample		
Footwear			
Apparel and Footwear			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: Sportswear volume not researched

Table 30 Forecast Sales of Apparel and Footwear by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Apparel	Data removed from sample		
Footwear			
Sportswear			
Apparel and Footwear			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT

- The COVID-19 pandemic has forced governments to quarantine entire countries, disrupted...

Content removed from sample

GLOBAL INDUSTRY ENVIRONMENT

- The COVID-19 pandemic has put manufacturing supply chains and retail operations...

Content removed from sample

FACE MASKS

Following the pandemic, 2020 saw a massive surge in demand for fashion face masks across the world...

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Table 31 Fashion Face Masks Usage, Pricing and Market Sizes in the Americas 2020

Country	Share of population that purchased a reusable fashion face mask	Average number of masks purchased	Average price per mask (USD)	Market size 2020 (USD million)
Argentina	Data removed from sample			
Brazil				
Canada				
Chile				
Colombia				
Mexico				
US				

Source: Euromonitor International

DISCLAIMER

Forecast closing date: 14 December 2020

Report closing date: 11 February 2021

Analysis and data in this report give full consideration to the impact of COVID-19 on consumer behaviour and market performance in 2020 and beyond. However, the situation continues to develop rapidly, and the influence and severity of the pandemic are constantly evolving. For the very latest insight on COVID-19 and its impact on industries and consumers, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Summary 1 Research Sources

Official Sources	Content removed from sample
Trade Associations	
Trade Press	

Source: Euromonitor International