

Clothing Retail Chains - Europe

Market Analysis – 2016-2025 Trends – Corporate Strategies

Publication date: July 2016

Exclusive extracts from this 227-page-long report:

- **What is the business?**

The clothing industry involves the design, manufacturing, marketing and, finally, distribution of apparel garments. However, most European retail groups outsource the production of textiles and apparel to third-party manufacturers located in low-cost regions. Nevertheless, the garments are generally designed by clothing retailers in-house. This report focuses on companies whose main activity is the retail and distribution of apparel. [...]

- **Who are the key players?**

The industry has two distinct leaders: Spain-based Inditex and the Swedish H&M. Both groups are highly present throughout the region and focus mainly on clothing offerings; while the third largest retailer, M&S, generates most of its revenues through its Food business. UK companies feature three times among the largest clothing retail chains in Europe, mainly driven by domestic sales, since the UK is the second largest European fashion market after Germany. Several global apparel retail groups are well-established in the European market, particularly those based in the US: PVH, A&F and Gap. [...]

Companies analysed in the report include: **H&M, Inditex, Primark, Next, M&S, Zalando, Esprit, Debenhams, Vente-Privée, Benetton, PVH, A&F, Gap and Fast Retailing**

- **How intense is competition?**

Competition in the European clothing retail market is fierce. Modern consumers seek brands which offer not only trendy designs, but also project a certain lifestyle and values. Therefore, a distinctive brand identity becomes highly important for apparel retailers. E-commerce is changing the structure of competition in the clothing retail market, providing a number of advantages in terms of time saving, convenience and variety of choice. As a result, conventional retailers are looking to tap into this growth, combining online and in-store distribution channels. [...]

- **What are the main markets?**

Germany and the UK, the two largest European economies in terms of GDP, lead the fashion market in the region, showing the highest sales figures of €64.5 billion and €62.3 billion respectively in 2014. They are followed by France and Southern Europe, represented by Italy and Spain, which are traditionally countries with developed fashion industries. At the same time, Northern European consumers from Norway, Denmark and Sweden have smaller markets in line with their smaller populations. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

Sun Kim
Analyst, Xerfi Global

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