

## **Apparel and Footwear in Spain**

Market Direction | 2024-11-22 | 97 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

### **Report description:**

Retail sales of apparel and footwear in Spain registered a slowdown in growth in both volume and current value terms in 2024, with the high cost of living being the key factor behind this trend. With many households exposed to rising interest rates, given the high concentration of variable-rate mortgages, Spaniards saw a decline in their disposable incomes and exercised caution when it came to discretionary spending. At the same time, retailers were forced to raise their prices due to a general...

Euromonitor International's Apparel and Footwear in Spain report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023 and analysis by distribution format allowing you to identify the sectors driving growth. It identifies the leading companies, leading brands, and offers strategic analysis of key factors influencing the market. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Apparel, Footwear, Sportswear.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Apparel and Footwear market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Table of Contents:

Apparel and Footwear in Spain  
Euromonitor International  
November 2024

List Of Contents And Tables

### APPAREL AND FOOTWEAR IN SPAIN

#### 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

### 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 13 Sales of Womenswear by Category: Volume 2019-2024  
Table 14 Sales of Womenswear by Category: Value 2019-2024  
Table 15 Sales of Womenswear by Category: % Volume Growth 2019-2024  
Table 16 Sales of Womenswear by Category: % Value Growth 2019-2024  
Table 17 NBO Company Shares of Womenswear: % Value 2020-2024  
Table 18 LBN Brand Shares of Womenswear: % Value 2021-2024

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 19 NBO Company Shares of Women's Nightwear: % Value 2020-2024  
Table 20 LBN Brand Shares of Women's Nightwear: % Value 2021-2024  
Table 21 NBO Company Shares of Women's Outerwear: % Value 2020-2024  
Table 22 □LBN Brand Shares of Women's Outerwear: % Value 2021-2024  
Table 23 □NBO Company Shares of Women's Swimwear: % Value 2020-2024  
Table 24 □LBN Brand Shares of Women's Swimwear: % Value 2021-2024  
Table 25 □NBO Company Shares of Women's Underwear: % Value 2020-2024  
Table 26 □LBN Brand Shares of Women's Underwear: % Value 2021-2024  
Table 27 □Forecast Sales of Womenswear by Category: Volume 2024-2029  
Table 28 □Forecast Sales of Womenswear by Category: Value 2024-2029  
Table 29 □Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029  
Table 30 □Forecast Sales of Womenswear 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 31 Sales of Menswear by Category: Volume 2019-2024  
Table 32 Sales of Menswear by Category: Value 2019-2024  
Table 33 Sales of Menswear by Category: % Volume Growth 2019-2024  
Table 34 Sales of Menswear by Category: % Value Growth 2019-2024  
Table 35 NBO Company Shares of Menswear: % Value 2020-2024  
Table 36 LBN Brand Shares of Menswear: % Value 2021-2024  
Table 37 NBO Company Shares of Men's Nightwear: % Value 2020-2024  
Table 38 LBN Brand Shares of Men's Nightwear: % Value 2021-2024  
Table 39 NBO Company Shares of Men's Outerwear: % Value 2020-2024  
Table 40 □LBN Brand Shares of Men's Outerwear: % Value 2021-2024  
Table 41 □NBO Company Shares of Men's Swimwear: % Value 2020-2024  
Table 42 □LBN Brand Shares of Men's Swimwear: % Value 2021-2024  
Table 43 □NBO Company Shares of Men's Underwear: % Value 2020-2024  
Table 44 □LBN Brand Shares of Men's Underwear: % Value 2021-2024  
Table 45 □Forecast Sales of Menswear by Category: Volume 2024-2029  
Table 46 □Forecast Sales of Menswear by Category: Value 2024-2029  
Table 47 □Forecast Sales of Menswear by Category: % Volume Growth 2024-2029  
Table 48 □Forecast Sales of Menswear by Category: % Value Growth 2024-2029

## CHILDRENSWEAR IN SPAIN

### 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 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 49 Sales of Childrenswear by Category: Volume 2019-2024

Table 50 Sales of Childrenswear by Category: Value 2019-2024

Table 51 Sales of Childrenswear by Category: % Volume Growth 2019-2024

Table 52 Sales of Childrenswear by Category: % Value Growth 2019-2024

Table 53 NBO Company Shares of Childrenswear: % Value 2020-2024

Table 54 LBN Brand Shares of Childrenswear: % Value 2021-2024

Table 55 Forecast Sales of Childrenswear by Category: Volume 2024-2029

Table 56 Forecast Sales of Childrenswear by Category: Value 2024-2029

Table 57 Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029

Table 58 □Forecast Sales of Childrenswear 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 59 Sales of Sportswear by Category: Value 2019-2024

Table 60 Sales of Sportswear by Category: % Value Growth 2019-2024

Table 61 NBO Company Shares of Sportswear: % Value 2020-2024

Table 62 LBN Brand Shares of Sportswear: % Value 2021-2024

Table 63 Distribution of Sportswear by Format: % Value 2019-2024

Table 64 Forecast Sales of Sportswear by Category: Value 2024-2029

Table 65 Forecast Sales of Sportswear 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 66 Sales of Jeans by Category: Volume 2019-2024

Table 67 Sales of Jeans by Category: Value 2019-2024

Table 68 Sales of Jeans by Category: % Volume Growth 2019-2024

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 69 Sales of Jeans by Category: % Value Growth 2019-2024  
Table 70 Sales of Men's Jeans by Category: Volume 2019-2024  
Table 71 Sales of Men's Jeans by Category: Value 2019-2024  
Table 72 Sales of Men's Jeans by Category: % Volume Growth 2019-2024  
Table 73 Sales of Men's Jeans by Category: % Value Growth 2019-2024  
Table 74 Sales of Women's Jeans by Category: Volume 2019-2024  
Table 75 □Sales of Women's Jeans by Category: Value 2019-2024  
Table 76 □Sales of Women's Jeans by Category: % Volume Growth 2019-2024  
Table 77 □Sales of Women's Jeans by Category: % Value Growth 2019-2024  
Table 78 □NBO Company Shares of Jeans: % Value 2020-2024  
Table 79 □LBN Brand Shares of Jeans: % Value 2021-2024  
Table 80 □Forecast Sales of Jeans by Category: Volume 2024-2029  
Table 81 □Forecast Sales of Jeans by Category: Value 2024-2029  
Table 82 □Forecast Sales of Jeans by Category: % Volume Growth 2024-2029  
Table 83 □Forecast Sales of Jeans by Category: % Value Growth 2024-2029  
Table 84 □Forecast Sales of Men's Jeans by Category: Volume 2024-2029  
Table 85 □Forecast Sales of Men's Jeans by Category: Value 2024-2029  
Table 86 □Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029  
Table 87 □Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029  
Table 88 □Forecast Sales of Women's Jeans by Category: Volume 2024-2029  
Table 89 □Forecast Sales of Women's Jeans by Category: Value 2024-2029  
Table 90 □Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029  
Table 91 □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 92 Sales of Hosiery by Category: Volume 2019-2024  
Table 93 Sales of Hosiery by Category: Value 2019-2024  
Table 94 Sales of Hosiery by Category: % Volume Growth 2019-2024  
Table 95 Sales of Hosiery by Category: % Value Growth 2019-2024  
Table 96 NBO Company Shares of Hosiery: % Value 2020-2024  
Table 97 LBN Brand Shares of Hosiery: % Value 2021-2024  
Table 98 Forecast Sales of Hosiery by Category: Volume 2024-2029  
Table 99 Forecast Sales of Hosiery by Category: Value 2024-2029  
Table 100 Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029  
Table 101 □Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

#### APPAREL ACCESSORIES IN SPAIN

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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 102 Sales of Apparel Accessories by Category: Volume 2019-2024

Table 103 Sales of Apparel Accessories by Category: Value 2019-2024

Table 104 Sales of Apparel Accessories by Category: % Volume Growth 2019-2024

Table 105 Sales of Apparel Accessories by Category: % Value Growth 2019-2024

Table 106 NBO Company Shares of Apparel Accessories: % Value 2020-2024

Table 107 LBN Brand Shares of Apparel Accessories: % Value 2021-2024

Table 108 Forecast Sales of Apparel Accessories by Category: Volume 2024-2029

Table 109 Forecast Sales of Apparel Accessories by Category: Value 2024-2029

Table 110 Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029

Table 111 □Forecast Sales of Apparel Accessories 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 112 Sales of Footwear by Category: Volume 2019-2024

Table 113 Sales of Footwear by Category: Value 2019-2024

Table 114 Sales of Footwear by Category: % Volume Growth 2019-2024

Table 115 Sales of Footwear by Category: % Value Growth 2019-2024

Table 116 NBO Company Shares of Footwear: % Value 2020-2024

Table 117 LBN Brand Shares of Footwear: % Value 2021-2024

Table 118 Distribution of Footwear by Format: % Value 2019-2024

Table 119 Forecast Sales of Footwear by Category: Volume 2024-2029

Table 120 Forecast Sales of Footwear by Category: Value 2024-2029

Table 121 □Forecast Sales of Footwear by Category: % Volume Growth 2024-2029

Table 122 □Forecast Sales of Footwear by Category: % Value Growth 2024-2029

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## Apparel and Footwear in Spain

Market Direction | 2024-11-22 | 97 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-10"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com