

## Clothing Retailing - UK - October 2013

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“While consumers have continued to increase their clothes purchases in real terms, driving up value sales, volume growth has slowed as inflation has returned and the market is vulnerable to cost rises especially in cotton. In the current climate, clothing retailers can’t get away with being average; they need to excel in both merchandise and innovation.”

– Tamara Sender, Senior Fashion Analyst

This report looks at the following areas:

- Are consumers prioritising spend on clothing?
- What impact will a fragmented clothing market have?
- How are pureplayers competing in a multichannel world?
- How are different age groups driving growth in the market?
- Where should mid- and top-end retailers shift their emphasis?

Consumers continued to grow spend on clothing in 2013 despite the income squeeze. Annual spending growth has remained well above inflation since 2008 as shoppers have spent liberally on buying new clothes in the last five years.

The winners in 2012 were value retailers with strong fashion credentials, with Primark and TK Maxx each gaining market share. At the same time, non-specialists including sports retailers Sports Direct and JD Sports, as well as department store John Lewis outperformed the market.

Clothing specialists, on the other hand, saw their total share of the market fall as M&S continued to see declining sales and Next only held its share broadly steady. Spending has fragmented away from the broad-focus, mid-market specialists as consumers search for individuality means they are favouring more targeted specialists.

Mintel's report includes extensive consumer research looking at where consumers are shopping, how much they spend, as well as their attitudes and behaviours when buying clothes.

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