

Clothing Retailing - Europe - October 2017

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“Clothing retailing is changing. Consumers are becoming more demanding and too many well established retailers have failed to respond adequately. New dynamic retailers are developing to take their place – some online only, but others combining online and stores.”

– **Richard Perks, Director of Retail Research**

This report looks at the following areas:

We cover the top five economies in detail in the individual country chapters of this report Clothing Retailing – Europe and in the Executive Summary – Europe – The Market chapter we also provide data on another 25 European economies. More details of retailing in these smaller markets plus Russia and Turkey can be found in Mintel’s European Retail Handbook, September 2017. Single country reports on Clothing Retailing are also available for the UK, France, Germany, Spain and Italy.

Clothing specialists are the focus of our report, because they are still the dominant channel in the market. That is changing. The specialists are losing share in the market, sometimes to non-specialists (such as the supermarkets in the UK) and sometimes to online retailers. It is our normal practice to follow the classifications used by the national statistics offices, but in clothing that needs to be widened. Online retailers, such as Zalando, are treated as “non-store retailers” in the national statistics, whereas we feel that they are actually clothing specialists and the distinction between them and store-based retailers is to a considerable extent artificial. We have also included Amazon, which although a “non-specialist”, is actually a major online player in clothing as well. In this report we have tried, where possible, to reflect the actual competitive situation.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Figure 306: Primark/Penneys: Group financial performance, 2012/13-2016/17

Figure 307: Primark/Penneys: Outlet data, 2012/13-2016/17

Retail offering

River Island

What we think

Avoiding seasonal fashion marketing

Integrating influencer-generated content

Seamless cross-channel shopping experience

Customer-facing digital enhancements streamline the in-store shopping experience

Improved stock availability boosting store sales

Pushing for a bigger slice of the children's clothing market

Cutting-edge canine fashion

Preparing to launch its own homewares

Company background

Company performance

Figure 308: River Island Clothing Co Ltd: Group financial performance, 2012-16

Figure 309: River Island Clothing Co Ltd: Outlet data, 2012-16

Retail offering

Tesco

What we think

Leading the pack with online innovations

Making stores work harder

Where next?

Company background

Company performance

Figure 310: Tesco Plc: Group financial performance, 2012/13-2016/17

Figure 311: Tesco Plc: Outlet data, 2012/13-2016/17

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Retail offering

TJX International (TK Maxx Europe)

What we think

Room for growth

Attracting a broad demographic

Launching new loyalty scheme in the UK and Ireland

Company background

Company performance

Figure 312: TJX International (TK Maxx Europe): Group financial performance, 2012/13-2016/17

Figure 313: TJX International (TK Maxx Europe): Outlet data, 2012/13-2016/17

Retail offering

Vivarte

What we think

Will the restructuring work?

Online

Company background

Company performance

Figure 314: Vivarte: Group sales performance, 2011/2-2015/16

Figure 315: Vivarte: Store numbers, 2011/12-2015/16

Retail offering

Figure 316: Vivarte: Clothing brands (unsold businesses only), October 2017

La Halle

YNAP Group

What we think

The future: more investment in technology

Company background

Company performance

Figure 317: YNAP group: Group financial performance, 2014-16

Retail offering

Zalando

What we think

Mobile is at the heart of the business

Prioritising delivery to drive customer loyalty

Geo-localised delivery being trialled

Moving from following to leading

Integrated commerce links up online and offline channels

Fulfilment service reaches out to brands

Company background

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Company performance

Figure 318: Zalando: Group financial performance, 2012-16

Figure 319: Zalando: Key metrics, 2015-H1 2017

Retail offering

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