

Clothing Retailing - China - December 2012

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"China's clothing retail industry continues to enjoy strong growth, in large part thanks to continued growth in average personal incomes, but also remains highly competitive, with leading retailers having to work hard to sustain interest from increasingly fickle and sophisticated Chinese consumers.

Just as the industry remains highly fragmented, so China's consumers are becoming increasingly individualistic, demanding products that better suit their personal needs. Those needs vary greatly among the population, be it due to their age, gender, income background or location, and retailers need to better understand the rapidly changing needs of their core target markets if they are to maintain relevance to their customers."

– **Matthew Crabbe** – Asia-Pacific Research Director

In this report we answer the key questions:

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How are continued strong per capita income growth rates helping to drive up sales of clothing among different segments of the consumer population in China?

What are the main consumer segments in the market, and how are their shopping habits shaping the development of different sectors in the market?

Which sectors of the market are growing fastest and what is driving that growth?

How are regional market differences manifesting themselves in terms of growth in the market for the key market sectors?

With continued average income growth, how are consumers of all income levels trading up to buying more expensive, better-quality clothing products?

Why has the sportswear sector in China been showing weakening sales, and which sectors are competing with sportswear for the attentions of Chinese shoppers?

How is the massive growth in the online retail clothing market shaping competition in the wider clothing retail industry, and what trends are emerging as competition heats up?

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