

Clothing Retailing - Europe - October 2019

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"Clothing and footwear represent the largest and most important non-food sector in retailing, and ranks second after food in retailing overall. One could argue that this is why the sector remains the focus for development for a number of different non-specialists, from supermarkets to sports good retailers."

- **Armando Falcao, Research Analyst**

This report looks at the following areas:

Clothing and footwear has been a focus for development for online players as well, and not just the specialists like Zalando and ASOS, but also generalists, including online giant, Amazon. As we show in the Consumer section of this Executive Summary, Amazon remains the most used online retailer for clothing.

In this section we look at the market size and the major players. There are two sets of data relating to market size – all spending on clothing, or on clothing and footwear, and sales by specialist clothing retailers. The former covers all clothing spending and is the best overall guide. The latter is a useful insight into the specialists in the context of their peers.

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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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Retail offering

OVS group

What we think

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Figure 304: Tesco Plc: group financial performance, 2014/15-2018/19

Figure 305: Tesco Plc: outlet data, 2014/15-2018/19

Retail offering

TJX International (TK Maxx Europe)

What we think

A shift in focus?

A need to push the digital side of the business

Where now?

Company background

Company performance

Figure 306: TJX International (TK Maxx Europe): Group financial performance, 2014/15-2018/19

Figure 307: TJX International (TK Maxx Europe): Outlet data, 2014/15-2018/19

Retail offering

Vivarte

What we think

A troubled business

The slimming down

What is the outlook for Vivarte ?

Company background

Company performance

Figure 308: Vivarte: Group sales performance, 2013/14-2017/18

Figure 309: Vivarte: Outlet data, 2013/14-2017/18

Retail offering

YNAP group

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What we think

YNAP gives a much needed boost to Richemont's online presence

Increased co-operation with other brands in the Richemont family

Customer service enhancements focus on personalisation

Where now?

Company background

Company performance

Figure 310: YNAP group: Group financial performance, 2013/14-2018/19

Retail offering

Zalando

What we think

Selling more products, slower revenue growth

Zalando continues to succeed by combining online and offline

Zalando's circular fashion joins the physical world

Zalando expands beauty range to five new markets

Average basket size is still decreasing

Zalando Plus loyalty scheme expanded

Zalando trials robots for customer orders

Moving away from own brands

What next?

Company background

Company performance

Figure 311: Zalando: group financial performance, 2013-18

Figure 312: Zalando: key metrics, 2016-H1 2019

Retail offering

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