

Clothing Retailing - France - 2022

Report Price: £2195.0 | \$2963.9085 | €2470.253

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This report looks at the following areas:

- The impact of the cost-of-living crisis on the clothing retail sector
- The performance of the major clothing retailers in 2021
- The main channels used to purchase clothes and how this is evolving
- How clothing shopping behaviours have changed as a result of the cost of living crisis
- The role of online and the impact of online-only specialists.

After a significant slump in spending of over 17% in 2020, spending on clothing recovered a little in 2021 (+9.5%), but the underlying decline is continuing, with the market €4.4 billion smaller than it was in 2017. 2022 has seen the market impacted by the conflict in Ukraine and rising inflation, with profound implications for those retailers that were already struggling.

Rising prices and skyrocketing household bills mean that many consumers are having to re-evaluate their spending priorities. Mintel's Sustainability Barometer 2022 found that 37% of French respondents said that clothing was starting to become unaffordable and 16% of lower income respondents in this survey had not bought any clothing at all in the last year. Price is rising up the agenda and 42% in consumer research for this report had switched to lower cost retailers. However, value can mean many things, and for others this could mean a focus on buying fewer, but better clothes or more versatile items that can be worn for different occasions.

The rising importance of sustainability to consumers represents both a threat and an opportunity for clothing retailers. Mintel's Sustainability Barometer 2022 found that 53% of French adults had bought fewer clothes in the last year, while this report found that over half of clothing buyers had bought second-hand clothes or would be interested in doing so.

Retailers should be looking to CSR for growth opportunities, not just as another risk or cost. Innovations in product design and manufacture can develop



"The French fashion sector has been undergoing a structural crisis for over ten years and was dealt a huge blow by the COVID-19 pandemic, further compounded by the cost of living crisis. The economic outlook for 2023 remains uncertain and there are high risks for clothing retailers, but equally great opportunities for those that truly understand their customers."

– **Natalie Macmillan, Senior European Retail Analyst**

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products whose environmental footprint can be clearly demonstrated. Depending on positioning, there could also be opportunities to develop alternative retail models alongside selling new fashion, as well as exploring new avenues such as rentals.

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Table of Contents

OVERVIEW

- Key issues covered in this Report
- Market context
- Areas covered in this Report

EXECUTIVE SUMMARY

- **The five year outlook for clothing retailing**
Figure 1: France: outlook for clothing retailers, 2022-27
- **The market**
- **Clothing spend struggling to recover**
Figure 2: France: consumer spending on clothing (including VAT), 2017-22
- **And the specialists are losing ground**
Figure 3: France: specialist clothing retailers, sales (excluding VAT), 2017-23
- **Specialists face ongoing challenges from other channels**
- **Inflation and the Ukraine conflict are holding back the post-COVID recovery**
- **Pain for consumers despite government cap on energy price rises**
- **The consumer**
- **Store-shopping continues to decline**
- **Grocers are the most shopped for clothing**
- **Sports retailers appeal to men**
- **Amazon’s reach is less in France but Shein is growing**
Figure 4: France: retailers used to purchase clothing in the last 12 months (NET of retailers used to purchase in-store and/or online), 2022
- **Over 40% have switched to a lower-priced retailer**
- **Second-hand takes off**
- **Interest in sustainability has moved up the agenda**
Figure 5: France: clothing shopping behaviours, 2022
- **The retailers**
- **French fashion retailers continue to fail**
- **A consolidating sector**
Figure 6: France: leading specialist clothing retailers, sales as % all spending on clothing, 2021
- **Close to 20% of clothing spending passes online**

ISSUES AND INSIGHTS

- How will the cost of living crisis affect clothing retailers?
- Looking to the digital space for future growth

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MARKET SIZE AND PERFORMANCE

Figure 7: France: consumer spending on clothing (including VAT), 2017-22

RETAIL SECTOR SIZE AND FORECAST

Figure 8: France: specialist clothing retailers, sales (excluding VAT), 2017-23

CHANNELS TO MARKET

MARKET DRIVERS

- **Inflation and the Ukraine conflict will dampen the post-COVID recovery**

Figure 9: France: key economic projections, 2019-24

- **The conflict in Ukraine is hurting the French economy**
- **Inflation is causing hardship for both consumers and businesses**
- **But the government has set a price shield on energy prices**
- **...which will continue into 2023**
- **The price of fashion is going up, albeit slowly**

Figure 10: France: consumer prices * of clothing and footwear, annual % change, 2017-21

Figure 11: France: consumer prices * of clothing and footwear, annual % change, 2022

- **Consumer spending power will be curbed**

Figure 12: France: financial confidence trend data, 2022

Figure 13: France: spending intentions, 2022

- **Employment has held up well**

HOW THEY SHOP FOR CLOTHING

- **Online is winning, but stores remain dominant**

Figure 14: France: how consumers have bought clothes for themselves in the last 12 months, 2018-22

- **Younger women shop more likely to buy and like shopping online**

Figure 15: France: people who have bought clothes for themselves in-store and/or online or have not bought clothes in the last 12 months by gender and age, 2022

- **Apps are a necessity, especially for the young**

Figure 16: France: usage of a smartphone to shop for clothing, 2020-22

WHERE THEY SHOP FOR CLOTHING

- **Supermarkets hold their own**
- **Sports goods retailers are shopped by almost a third**

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- **Amazon is not building scale**
- **Other pureplayers**
- **Department stores trying to bounce back**

Figure 17: France: retailers used to purchase clothing in the last 12 months (NET of retailers used to purchase in-store and/or online), 2022

Figure 18: France: retailers used to purchase clothing in the last 12 months, by channel, 2022

- **Customer profiles**

Figure 19: France: retailer customer profiles, by gender, 2022

Figure 20: France: retailer customer profiles, by age (ranked by percentage of shoppers aged 16-24), 2022

SELECTED BEHAVIOURS WHEN SHOPPING FOR CLOTHING

Figure 21: France: clothing shopping behaviours, 2022

- **A shift towards lower priced retailers**
- **Second-hand takes off**

Figure 22: France: clothing shopping behaviours by retailer shopped, 2022

- **Interest in sustainability has moved up the agenda**

Figure 23: France: clothing shopping behaviours by retailer shopped, 2022

- **Pay-later schemes boost payment options**
- **Broadening the offer**
- **A niche opportunity in rental**

THE RETAILERS

- **French fashion retailers continue to fail**
- **Inditex consolidates its position**
- **Beaumanoir's expansion continues**
- **Etam and others embrace the metaverse**
- **The threat from Shein**

Figure 24: France: leading specialist clothing retailers, sales (excluding VAT), 2017-21

Figure 25: France: leading specialist clothing retailers, outlets, 2017-21

MARKET SHARES

Figure 26: France: leading specialist clothing retailers, sales as % all spending on clothing, 2017-21

ONLINE

- **Online retailing in France**
- **The clothing sector online**

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Full Report PDF

Infographic Overview

Powerpoint Presentation

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- **Leading online players**
- **Opportunities in the metaverse**

APPENDIX – RESEARCH METHODOLOGY, DATA SOURCES AND ABBREVIATIONS

- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

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