

Womenswear Retailing - China - April 2014

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“Consumers are becoming more sophisticated and individualistic, which is forcing retailers to adapt to an increasingly diverse consumer market. This is creating opportunities for the development of more sub-brands aimed at different consumer lifestyles, life stage and price points.”

– Matthew Crabbe, Director of Research, Asia-Pacific

This report looks at the following areas:

The total womenswear retail market has risen steadily since 2008 thanks to continued growth in average consumer incomes and per capita spending power, the rapid spread of organised retail chains and very strong growth in online retail. Online retailing has been particularly significant in adding impetus to growth in the market, but has also added to price pressures on retailers because of deep discounting online, while costs of operating stores have risen, putting more pressure on company margins.

The market remains highly fragmented and segmented, with few of the leading chains having a truly national reach, making it difficult for most retailers to establish a truly significant national market share. The middle, fast fashion segment of the market has been one of the fastest growing over recent years, bridging the gap between the mass market and high-end luxury market, with there now being more opportunity for further segmentation by price point.

This market comprises women's clothes through all retail outlets including direct to consumer in the People's Republic of China. It excludes footwear and clothing accessories (such as belts, hats and jewellery) but includes sportswear. Market value is at retailers prices including sales tax.

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