



Focus on textiles

## A GOLDEN START TO THE FALL FOR FASHION

**The industry expected an upsurge. The last fall season was extremely weak. It should have been easy to beat, and it was, even if not by as much as many had hoped. After an almost tropical summer, the desire of consumers to spend money increased strongly at the start of the fall. Sales rose sharply but by November this uptrend was already over.**

In the high selling month of September, textile dealers were finally able to smile once again, as they achieved almost double-digit growth! This more or less offset the large decrease of the previous year. October was even better. While the weather was variable with highs and lows, the purchasing mood of customers was consistently high. The latest fall fashion was very popular. Women in particular invested highly in their wardrobe in this month. Despite slightly lower prices, this resulted in revenue in the textile trade shooting up significantly.

However, this period of prosperity was short-lived, as by November a downward turn into minus figures had occurred. It was a month of temperatures that are more typical of spring. For this reason, neither men nor women were inclined to buy warm winter items. As a result, customers placed significantly fewer items in their shopping baskets than in the same month of the previous year, which itself had been very weak.

All in all, moderate single-digit growth was achieved across all three fall months of

September, October and November despite a slightly lower price level. And as expected, online trade was again able to take away a small amount of the market share from the bricks-and-mortar trade.

The under 30s and over 50s in particular had the strongest desire for new tops, trousers and jackets, and sharply increased their clothes spending. In contrast, the amount spent by 30 to 49 year olds was only just above the previous year's level. This was, however, only due to men, who generally gave fashion the cold shoulder in October.

### The latest fall fashion was very popular among women in October.

In terms of the different income groups, it is again apparent that, as in the summer season, the highest income groups in particular sharply increased their expenditure on clothes to above average levels in the fall as well. Customers from lower-income households were more restrained in their fashion purchases.

In the fall, retailers were able to enjoy an increase in sales in almost all product areas. Customers especially favored hosiery, sportswear, children's clothes and accessories with each of these categories seeing double-digit sales growth. The most poorly performing category was shoes, which only witnessed a small growth in sales. Womenswear, menswear, and underwear all achieved average single-digit growth.

### This season, classic specialist retailers beat the chain stores.

In comparison with the previous year, almost all sales channels were able to report figures in the black for the past fall season. However, the growth recorded by non-specialist retailers was approximately double that of specialist retailers. There was

a similar discrepancy between bricks-and-mortar stores and distance-selling retailers. Mail-order companies and online retailers were clearly ahead in terms of sales growth.

Among specialist retailers, the performance of the various sales channels demonstrated highly varying results. Small classic specialist retailers with a maximum of three branches performed somewhat better this season than the large chains. This, however, was due to the poor performance of multi-brand chain stores in the fall. Single-brand chains, on the other hand, were able to draw in customers with their range of products. Department stores and young fashion stores achieved only marginal growth.

To end the year positively, December would once again have had to be very successful. However, there was one less Saturday this December in comparison to previous year. As a result, the year-end rally remained thrilling until the end but it is unlikely that everyone will have closed the year on a high note.

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