



Apparel and Footwear in Brazil

January 2025

Table of Contents

Apparel and Footwear in Brazil

EXECUTIVE SUMMARY

Apparel and footwear in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2019-2024

Table 2 - Sales of Apparel and Footwear by Category: Value 2019-2024

Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024

Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2020-2024

Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2021-2024

Table 7 - Distribution of Apparel and Footwear by Format: % Value 2019-2024

Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2024

Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029

Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2024-2029

Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029

Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Childrenswear has to adapt to ongoing challenges

Pre-owned clothes gain traction in childrenswear

Physical presence remains important in distribution, even as retail e-commerce rises

PROSPECTS AND OPPORTUNITIES

Growth with purpose, combining sustainability with premium trends

Addressing social responsibility and sustainability will be important

Parents long for real connections in their shopping experiences

CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2019-2024

Table 14 - Sales of Childrenswear by Category: Value 2019-2024

Table 15 - Sales of Childrenswear by Category: % Volume Growth 2019-2024

Table 16 - Sales of Childrenswear by Category: % Value Growth 2019-2024

Table 17 - NBO Company Shares of Childrenswear: % Value 2020-2024

Table 18 - LBN Brand Shares of Childrenswear: % Value 2021-2024

Table 19 - Forecast Sales of Childrenswear by Category: Volume 2024-2029

Table 20 - Forecast Sales of Childrenswear by Category: Value 2024-2029

Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029

Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

Apparel Accessories in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Recent fast fashion trend even encompasses apparel accessories

Apparel accessories struggles with climate adversities

Retail e-commerce presents opportunities for growth

PROSPECTS AND OPPORTUNITIES

New options available to improve sales in the forecast period

Wellness and changing habits may shift demand away from certain accessories

Seasonal changes to impact growth for most apparel accessories in the future

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2019-2024

Table 24 - Sales of Apparel Accessories by Category: Value 2019-2024

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2019-2024

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2020-2024

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2021-2024

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2024-2029

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2024-2029

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

Menswear in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth for menswear in Brazil, in a complex landscape

Winds of change redefine masculinity and sustainability

The digital revolution in the national arena

PROSPECTS AND OPPORTUNITIES

Women continue to be a force within men's fashion

Combining sustainability with diversity in the forecast period

Innovation and connections to drive sales of menswear in the future

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2019-2024

Table 34 - Sales of Menswear by Category: Value 2019-2024

Table 35 - Sales of Menswear by Category: % Volume Growth 2019-2024

Table 36 - Sales of Menswear by Category: % Value Growth 2019-2024

Table 37 - NBO Company Shares of Menswear: % Value 2020-2024

Table 38 - LBN Brand Shares of Menswear: % Value 2021-2024

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2020-2024

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2021-2024

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2020-2024

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2021-2024

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2020-2024

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2021-2024

Table 45 - NBO Company Shares of Men's Underwear: % Value 2020-2024

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2021-2024

Table 47 - Forecast Sales of Menswear by Category: Volume 2024-2029

Table 48 - Forecast Sales of Menswear by Category: Value 2024-2029

Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2024-2029

Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2024-2029

Womenswear in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Economic shifts shape womenswear in Brazil
- Local brands are empowered by sustainability initiatives
- The fight for share between foreign fast fashion brands and local players

PROSPECTS AND OPPORTUNITIES

- A levelling of the playing field for womenswear in Brazil
- Sustainable initiatives will continue catering to consumers in the forecast period
- Technology at the forefront of a competitive edge in the future

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2019-2024

Table 52 - Sales of Womenswear by Category: Value 2019-2024

Table 53 - Sales of Womenswear by Category: % Volume Growth 2019-2024

Table 54 - Sales of Womenswear by Category: % Value Growth 2019-2024

Table 55 - NBO Company Shares of Womenswear: % Value 2020-2024

Table 56 - LBN Brand Shares of Womenswear: % Value 2021-2024

Table 57 - NBO Company Shares of Women's Nightwear: % Value 2020-2024

Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2021-2024

Table 59 - NBO Company Shares of Women's Outerwear: % Value 2020-2024

Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2021-2024

Table 61 - NBO Company Shares of Women's Swimwear: % Value 2020-2024

Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2021-2024

Table 63 - NBO Company Shares of Women's Underwear: % Value 2020-2024

Table 64 - LBN Brand Shares of Women's Underwear: % Value 2021-2024

Table 65 - Forecast Sales of Womenswear by Category: Volume 2024-2029

Table 66 - Forecast Sales of Womenswear by Category: Value 2024-2029

Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029

Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

Jeans in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Resilience meets comfort in jeans in Brazil
- Players are investing in sustainable features to get ahead of the competition
- Impact of denim on Brazil's textiles industry is significant

PROSPECTS AND OPPORTUNITIES

- Celebrities will continue to attract consumers to jeans in the forecast period
- Sustainability will become a necessity, not a trend
- Celebrity power and Olympic inspiration in jeans in the future

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2019-2024

Table 70 - Sales of Jeans by Category: Value 2019-2024

Table 71 - Sales of Jeans by Category: % Volume Growth 2019-2024

Table 72 - Sales of Jeans by Category: % Value Growth 2019-2024

Table 73 - Sales of Men's Jeans by Category: Volume 2019-2024

Table 74 - Sales of Men's Jeans by Category: Value 2019-2024

Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2019-2024

Table 76 - Sales of Men's Jeans by Category: % Value Growth 2019-2024

Table 77 - Sales of Women's Jeans by Category: Volume 2019-2024

Table 78 - Sales of Women's Jeans by Category: Value 2019-2024

Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2019-2024

Table 80 - Sales of Women's Jeans by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Jeans: % Value 2020-2024

Table 82 - LBN Brand Shares of Jeans: % Value 2021-2024

Table 83 - Forecast Sales of Jeans by Category: Volume 2024-2029

Table 84 - Forecast Sales of Jeans by Category: Value 2024-2029

Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2024-2029

Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2024-2029

Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2024-2029

Table 88 - Forecast Sales of Men's Jeans by Category: Value 2024-2029

Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029

Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029

Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2024-2029

Table 92 - Forecast Sales of Women's Jeans by Category: Value 2024-2029

Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029

Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

Hosiery in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Influence of fast fashion platforms on hosiery in Brazil
- Sports and health continue to drive growth for hosiery in Brazil
- Despite growth for retail e-commerce, it faces resilience from physical retail

PROSPECTS AND OPPORTUNITIES

- Expansion by players into and outside of hosiery likely to continue
- Offering sustainable features likely to be a key driver of growth for hosiery
- Growth and transformation for hosiery in the forecast period

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2019-2024

Table 96 - Sales of Hosiery by Category: Value 2019-2024

Table 97 - Sales of Hosiery by Category: % Volume Growth 2019-2024

Table 98 - Sales of Hosiery by Category: % Value Growth 2019-2024

Table 99 - NBO Company Shares of Hosiery: % Value 2020-2024

Table 100 - LBN Brand Shares of Hosiery: % Value 2021-2024

Table 101 - Forecast Sales of Hosiery by Category: Volume 2024-2029

Table 102 - Forecast Sales of Hosiery by Category: Value 2024-2029

Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

Footwear in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Footwear overcomes the challenges of 2024 in Brazil
Running and wellness trends drive growth for footwear
Bridging physical and digital stores in footwear

PROSPECTS AND OPPORTUNITIES

Getting the most out of the hotter weather
Brazil as a reference for sustainable initiatives in footwear
Mergers and tech innovations to drive future growth

CATEGORY DATA

- Table 105 - Sales of Footwear by Category: Volume 2019-2024
- Table 106 - Sales of Footwear by Category: Value 2019-2024
- Table 107 - Sales of Footwear by Category: % Volume Growth 2019-2024
- Table 108 - Sales of Footwear by Category: % Value Growth 2019-2024
- Table 109 - NBO Company Shares of Footwear: % Value 2020-2024
- Table 110 - LBN Brand Shares of Footwear: % Value 2021-2024
- Table 111 - Distribution of Footwear by Format: % Value 2019-2024
- Table 112 - Forecast Sales of Footwear by Category: Volume 2024-2029
- Table 113 - Forecast Sales of Footwear by Category: Value 2024-2029
- Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2024-2029
- Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2024-2029

Sportswear in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sportswear in Brazil driven by athletic innovation and wellness
Sportswear wins thanks to the rise of athleisure
Keeping pace through omnichannel solutions

PROSPECTS AND OPPORTUNITIES

The fusion of fashion, function, and fame within sports wardrobes
Next-gen sustainable sportswear
Running likely to be the pivotal sport driving growth in the forecast period

CATEGORY DATA

- Table 116 - Sales of Sportswear by Category: Value 2019-2024
- Table 117 - Sales of Sportswear by Category: % Value Growth 2019-2024
- Table 118 - NBO Company Shares of Sportswear: % Value 2020-2024
- Table 119 - LBN Brand Shares of Sportswear: % Value 2021-2024
- Table 120 - Distribution of Sportswear by Format: % Value 2019-2024
- Table 121 - Forecast Sales of Sportswear by Category: Value 2024-2029
- Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/apparel-and-footwear-in-brazil/report.