



Euromonitor
International

Apparel and Footwear in Poland

December 2024

Table of Contents

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Children take greater ownership of the purchasing decision
Fewer children leads to higher spend per child
Value brands thrive amidst economic challenges

PROSPECTS AND OPPORTUNITIES

Further expansion of second hand clothing
Polish government supports parents with state subsidies
Demographic dangers ahead for childrenswear

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Accessories provide affordable and personalised fashion

Sustainability becomes a mainstream issue

Ethical choices shape purchasing decisions

PROSPECTS AND OPPORTUNITIES

Second hand goods are possible threat to brands

E-commerce channels offers strong growth opportunities

Technological developments create opportunities for small brands

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Quality and price is stronger than brand in purchasing decisions

Nostalgia is a major pull in menswear

Discounters attract menswear shoppers with low prices

PROSPECTS AND OPPORTUNITIES

Squeeze on profit margins expected as unit price growth slows

Polarisation driven by search for quality and durability

Manufacturer's struggles will deepen as costs rise and consumer price sensitivity remains strong

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Well informed consumers make discerning choices
- AI aids personalisation and client engagement
- Affordable mass-market brands drive sales

PROSPECTS AND OPPORTUNITIES

- Sustainability and natural fabrics will drive demand
- Retail e-commerce is preferred channel for second-hand womenswear
- Unit price inflation to outpace wage growth

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Polarisation is evident with economy jeans taking the lead
- The fit is a crucial selling point in jeans
- Ethical and sustainable concerns influence consumer choice

PROSPECTS AND OPPORTUNITIES

- New formats and personalisation to drive growth in jeans
- Poles gravitate towards the durability and simplicity of jeans
- Comfortable jeans are an essential

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Colourful hosiery is in vogue
- Local manufacturers are under pressure
- Value is of huge importance to consumers

PROSPECTS AND OPPORTUNITIES

- Industry consolidation is anticipated in the short-term
- Consumers are keen to save money when buying hosiery
- Niche opportunities for hosiery that delivers health benefits

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Mid-priced footwear performs well despite polarisation
- Sports footwear performs well compared to other categories
- E-obuwie drives e-commerce growth

PROSPECTS AND OPPORTUNITIES

- 3D printed shoes offer personalisation and a sustainable choice
- Challenges for local manufacturers even as prices grow
- Cost of returns is growing issue for e-commerce retailers

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 Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

- adidas Poland sees strong recovery in value share
- Price sensitivity drives importance of discounts
- Sportswear offers dual benefits of comfort and casual fashion

PROSPECTS AND OPPORTUNITIES

- Blurred lines between performance and sports-inspired apparel
- Local brands likely to gain traction as domestic access to technology improves
- Design will matter more especially in the context of social media

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-poland/report.