



**Euromonitor
International**

Childrenswear in China

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

High-quality, functional products fuel value growth in childrenswear in China

Chart 1 - Key Trends 2025

INDUSTRY PERFORMANCE

Sales driven by demographic and socioeconomic factors

Balabala drives sales with targeted products and high-end strategy

Chart 2 - Balabala's High Average Transaction Value by Focusing on Functionality

Outdoor style drives innovation with functional designs

Chart 3 - Outdoor Style is a New Trend in Childrenswear

Further age segmentation drives growth in childrenswear

Chart 4 - Further Segmentation by Age Band Emerges Within Childrenswear

WHAT'S NEXT?

An increasing number of parents likely to prioritise sustainable childrenswear

Emotional value and high functionality to drive sales of childrenswear

Chart 5 - Analyst Insight

COMPETITIVE LANDSCAPE

Balabala maintains its lead in a fragmented competitive landscape

zosee's innovative edge propels rapid growth in childrenswear

Youngor's Bonpoint acquisition set to boost luxury childrenswear in China

CHANNELS

Retail e-commerce leads childrenswear with new business models

Omnichannel presence becomes key for childrenswear brands

COUNTRY REPORTS DISCLAIMER

Apparel and Footwear in China - Industry Overview

EXECUTIVE SUMMARY

Apparel and footwear navigates consumer comfort, sportswear boom, and digital retail

KEY DATA FINDINGS

Chart 6 - Key Trends 2025

INDUSTRY PERFORMANCE

Growth is driven by economic conditions, rational purchases, and technological innovation

Sportswear drives growth in apparel and footwear through innovation

Chart 7 - Descente Tap Into the More Professional Outdoor Segment

Market polarisation affects value growth

WHAT'S NEXT?

Rising incomes, DTC strategies, and sustainability expected to drive growth

Functional and athletic apparel set to gain further popularity among women

Niche brands to drive growth in footwear through innovation

COMPETITIVE LANDSCAPE

Anta's multi-category coverage, brand strategy, and distribution extend its leading position

Chart 8 - Anta's Store Uses High-Tech to Improve the Customer Shopping Experience

In a stable environment, opportunities for enhancing products and marketing

CHANNELS

Interest-based e-commerce platform Douyin takes share from Tmall

Chart 9 - Interest-Based E-Commerce is a Challenger to Tmall

Quick commerce gains traction with 30-minute delivery

Chart 10 - Analyst Insight

ECONOMIC CONTEXT

Chart 11 - Real GDP Growth and Inflation 2020-2030

Chart 12 - PEST Analysis in China 2025

CONSUMER CONTEXT

Chart 13 - Key Insights on Consumers in China 2025

Chart 14 - Consumer Landscape in China 2025

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/childrenswear-in-china/report.