



**Euromonitor
International**

Apparel and Footwear in Italy

February 2026

Table of Contents

Apparel and Footwear in Italy

EXECUTIVE SUMMARY

Polarised spending and sustainable shifts shape apparel and footwear

KEY DATA FINDINGS

Chart 1 - Key Trends 2025

INDUSTRY PERFORMANCE

Households remain cautious despite easing economic pressures

Chart 2 - Itx Italia Srl Launches Lefties in Italy to Compete in Ultra-Value Segment

Diverging category dynamics define apparel and footwear

Circular business models gain traction with the introduction of specialist platforms

WHAT'S NEXT?

Ultra-value and premium players to drive further market polarisation

Tourism and lifestyle trends will drive experiential retail

Chart 3 - Falconeri Expands in Key Tourist Cities to Capture High-Spending Travel Flows

Sustainability to become a competitive strategy

Chart 4 - Analyst Insight

COMPETITIVE LANDSCAPE

Fragmented competitive landscape as leading brands face market polarisation

Consolidation shapes the competitive landscape

Emerging players gain momentum through distinct propositions

CHANNELS

Apparel and footwear specialists lead distribution in 2025

Retail e-commerce continues to grow in apparel and footwear

ECONOMIC CONTEXT

Chart 5 - Real GDP Growth and Inflation 2020-2030

Chart 6 - PEST Analysis in Italy 2025

CONSUMER CONTEXT

Chart 7 - Key Insights on Consumers in Italy 2025

Chart 8 - Consumer Landscape in Italy 2025

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Italy

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value resilience despite demographic challenges

Chart 9 - Key Trends 2025

INDUSTRY PERFORMANCE

Demographic headwinds dampen sales growth

Baby and toddler wear registers the sharpest decline within childrenswear

OVS reduces childrenswear offering as it focuses on key adult lines

Chart 10 - OVS Reduces Childrenswear Offering as it Focuses on Key Categories in 2025

WHAT'S NEXT?

Retail sales expected to show low value growth over the forecast period

Rise of value-driven retail

Chart 11 - Analyst Insight

Tightening sustainability enforcement will become a major regulatory challenge

COMPETITIVE LANDSCAPE

OVS SpA continues to lead the fragmented childrenswear category

Value specialists expand their footprint at the expense of incumbent players

Chart 12 - Pepco Opens 16 Stores in Italy in 2025, Boosting Low-Price Childrenswear

Challengers capitalise on incumbents' restructuring

Chart 13 - Dan John Brings Childrenswear In-House and Opens First Children-Only Stores in 2025

CHANNELS

Offline retail dominates childrenswear distribution with strong promotions

E-commerce sees growth, with established brands extending online partnerships

COUNTRY REPORTS DISCLAIMER

[Apparel Accessories in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Apparel accessories contracts as market polarisation intensifies

Chart 14 - Key Trends 2025

INDUSTRY PERFORMANCE

Consumers prioritise essentials amid economic uncertainty

Belts remain popular due to their essential nature

Growing retail engagement in circularity and social impact

Chart 15 - Intimissimi Rolls Out Nationwide Take-Back to Scale Circularity and Community Impact

WHAT'S NEXT?

Value giants and luxury houses to drive market polarisation

Sustainability will become non-negotiable for players in apparel accessories

Chart 16 - Analyst Insight

Gateway cities and resort hubs to drive sales of apparel accessories

COMPETITIVE LANDSCAPE

The squeeze on aspirational luxury: Shifting leadership in the Italian market

Chart 17 - HalfPrice Enters Italy, Accelerating Off-Price Accessories in 2025

CHANNELS

Apparel and footwear specialists lead the distribution of apparel accessories

Retail e-commerce drives growth with price transparency

COUNTRY REPORTS DISCLAIMER

[Menswear in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Menswear experiences decline, but tourism boosts premium sales

Chart 18 - Key Trends 2025

INDUSTRY PERFORMANCE

Menswear displays decline as consumers move towards value-focused offers

Essential and multi-season pieces continue to drive popularity within men's outerwear

Travel and tourism drives brands to invest in tourism-driven retail experiences

Chart 19 - Kiton Opens "Tender to Summer" Boutique in Porto Cervo With Client Tender Service

WHAT'S NEXT?

Expansion of accessible premium over the forecast period

Lifestyle-performance crossover will shape menswear boundaries

Chart 20 - Analyst Insight

Dedicated menswear formats will capture independent male shoppers

COMPETITIVE LANDSCAPE

Challenger brands gain ground due to male-specific messaging and store rollouts

Market polarisation results in brands releasing premium offerings

Chart 21 - Teddy SpA Debuts Premium Menswear Label QB24

CHANNELS

Apparel and footwear specialists lead menswear sales with destination retail

E-commerce serves as comparison tool rather than primary growth engine

Emerging brands turn to destination retail stores to gain share

Chart 22 - Dan John Enters Travel Retail With First Airport Store at Milan Malpensa

COUNTRY REPORTS DISCLAIMER

[Womenswear in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value and versatility drive modest growth in Italian womenswear

Chart 23 - Key Trends 2025

INDUSTRY PERFORMANCE

Consumers prioritise value and versatility in womenswear purchases

Women's outerwear drives overall category sales

Circular economy and fashion rentals gain traction, with risk to primary market

Chart 24 - Bivio Milano Expands Resale Chain in 2025

WHAT'S NEXT?

Women's outerwear will remain largest category, with sustainability becoming necessity

Accessible luxury set to emerge as new battleground for womenswear

Chart 25 - Analyst Insight

Value retailers likely to place greater pressure on mid-market players

COMPETITIVE LANDSCAPE

Leading brands look to strategic expansion in fragmented landscape

Market polarisation intensifies with an increase in entry-level competition

Chart 26 - Itx Italia's Lefties Enters Italy and Fuels Ultra-Low Pricing Competition in Apparel

CHANNELS

Retail offline dominates womenswear sales with shopping centres and outlets gaining share

Retail e-commerce grows rapidly, driven by low-price apps and marketplaces

Tourism drives Italian womenswear retail towards destination locations

Chart 27 - Falconeri Expands Presence in Italy's Key Tourist Cities in Summer 2025

COUNTRY REPORTS DISCLAIMER

Jeans in Italy

KEY DATA FINDINGS

2025 DEVELOPMENTS

Jeans in Italy remains resilient to navigate polarisation and tourism shifts

Chart 28 - Key Trends 2025

INDUSTRY PERFORMANCE

Jeans displays modest growth amidst market polarisation

Sustainability moves from marketing to material choices in Italian denim

Chart 29 - Gabriela Hearst Launches 100% Recycled Cotton Denim Line

International tourism shifts retail mix towards destination shopping

Chart 30 - Guess Turns Denim into Destination Retail with First Italian "Guess Jeans Café"

WHAT'S NEXT?

Market polarisation set to deepen over the forecast period

Consolidation will accelerate as operating pressures mount

Sustainability and regulatory compliance drive product innovation

Chart 31 - Analyst Insight

COMPETITIVE LANDSCAPE

Premium and economy brands gain share at expense of mid-market labels

Chart 32 - Levi's Dylan Capsule Powers Denim's Cultural Reboot

Consolidation and emerging brands reshape competitive landscape

CHANNELS

Apparel and footwear specialists lead jeans sales with strong brand presence

Retail e-commerce grows modestly, driven by economy tier sales

COUNTRY REPORTS DISCLAIMER

Hosiery in Italy

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sustainability and brand consolidation shape hosiery in Italy

Chart 33 - Key Trends 2025

INDUSTRY PERFORMANCE

Consumers prioritise essential spending amid economic uncertainty

Non-sheer hosiery drives sales with everyday and performance use cases

Sustainability and durability shape product development and consumer choices

Chart 34 - Calzedonia and Golden Lady Launch "Life Re-Tights" Recycling Project in Italy

WHAT'S NEXT?

Performance and shapewear products will restructure the hosiery landscape

Chart 35 - Analyst Insight

Leading players set to standardise sustainability and traceability

Market consolidation set to intensify over the forecast period

COMPETITIVE LANDSCAPE

Scaled leaders gain ground with clear value propositions

Mergers and acquisitions reshape competitive dynamics

Chart 36 - OVS Completes 100% Acquisition of Goldenpoint, Accelerating Value Hosiery

CHANNELS

Scaled chains dominate retail offline with expanded presence

Global challenger brands expand physical footprint in Italy

Chart 37 - lululemon Opens First Italy Store in Milan, Boosting Performance Socks

E-commerce plays a supporting role in product discovery

PRODUCTS

Brands target shapewear demand with invisible comfort innovations

COUNTRY REPORTS DISCLAIMER

[Footwear in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sustainability and digital innovation drive market evolution amid modest decline

Chart 38 - Key Trends 2025

INDUSTRY PERFORMANCE

Footwear displays marginal decline, with women's footwear leading sales

Embracing circularity through innovation and collaboration

Chart 39 - Prada Establishes Ocean Literacy Centre in Venice

Social media platforms emerge as strategic channels for luxury engagement

Chart 40 - Snapchat Launches New Luxury Bitmoji Looks in Partnership with Miu Miu

WHAT'S NEXT?

Footwear set to remain stagnant, with increasing focus on sustainability

Product personalisation and customisation to become more prevalent

Chart 41 - Analyst Insight

Forecast period to be characterised by market polarisation

COMPETITIVE LANDSCAPE

Nike and adidas lead a fragmented footwear landscape

CHANNELS

Apparel and footwear specialists face competition from e-commerce

PRODUCTS

Tech-savvy consumers drive innovation with customised footwear

Chart 42 - Tod's Expands Digital Product Passport (DPP) Offering to My Gommino Line

COUNTRY REPORTS DISCLAIMER

[Sportswear in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sportswear growth strengthened by focus on fitness and wellbeing

Chart 43 - Key Trends 2025

INDUSTRY PERFORMANCE

Sportswear records positive growth amidst fitness and wellness boom

Diversifying product offerings to counter market polarisation

Chart 44 - Rossignol Diversifies Product Offering with Launch of New Sports Footwear

Inclusivity and local engagement become a strategic pillar

Chart 45 - Kappa and GO Fit Partner to Drive Inclusivity and Community Engagement

WHAT'S NEXT?

Eco-friendly practices will become increasingly important differentiators

Digital sector will transform how companies engage with consumers

Chart 46 - Analyst Insight

Technological integration expected to drive future growth

COMPETITIVE LANDSCAPE

Global giants lead with wide variety and strong investments

Smaller brands turn to sponsorships and collaborations to grow awareness

Chart 47 - Puma Enters into New Sponsorship Agreement with U.S. Salernitana 1919

CHANNELS

Apparel and footwear specialists leads sportswear distribution

Retail e-commerce gains traction with consumers seeking convenience

COUNTRY REPORTS DISCLAIMER

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-italy/report.