



Euromonitor
International

Apparel and Footwear in Spain

February 2026

Table of Contents

Apparel and Footwear in Spain

EXECUTIVE SUMMARY

Growth potential despite challenges

KEY DATA FINDINGS

Chart 1 - Key Trends 2025

Chart 2 - Analyst Insight

INDUSTRY PERFORMANCE

Shein and other low-price players gain market share

Chart 3 - Cheaper Players Gaining Ground.

Apparel remains the largest category despite slow growth

Footwear drives dynamic growth with cautious optimism

WHAT'S NEXT?

Shein and dupe trends drive market polarisation

Dress-down looks to continue shaping sales

Sustainability and digital marketing to shape future

COMPETITIVE LANDSCAPE

Influencers and new players reshape competitive landscape

Emerging players and digital strategies to drive future growth

Chart 4 - Small Players Gaining Popularity

CHANNELS

TikTok Shop launch boosts retail e-commerce

Shein and local outdoor markets see growth

Rise of challengers influences development of distribution landscape

Chart 5 - Social Media Shaping Brand Performance

ECONOMIC CONTEXT

Chart 6 - Real GDP Growth and Inflation 2020-2030

Chart 7 - PEST Analysis in Spain 2025

CONSUMER CONTEXT

Chart 8 - Key Insights on Consumers in Spain 2025

Chart 9 - Consumer Landscape in Spain 2025

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Economic uncertainty dampens demand

Chart 10 - Key Trends 2025

Chart 11 - Analyst Insight

INDUSTRY PERFORMANCE

Consumer caution impacts sales

Largest category driven by demand

Resale and rental limit category growth

Chart 12 - Socio-economic Framework to Support Cheap Solutions

WHAT'S NEXT?

Parents prioritise value and sustainability for children

Chart 13 - Birth Rate to Limit Demand

Girls' apparel to remain the largest category

Influencers and resale shape future of childrenswear sales

COMPETITIVE LANDSCAPE

Low cost brands gain ground on traditional local brands

Resale and rental options limit sales of new childrenswear

Chart 14 - Second-Hand a Way to Save Money

CHANNELS

Apparel and footwear specialists leads

E-commerce gains traction as consumers seek affordable options

COUNTRY REPORTS DISCLAIMER

[Apparel Accessories in Spain](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Apparel accessories demonstrates resilience

Chart 15 - Key Trends 2025

Chart 16 - Analyst Insight

INDUSTRY PERFORMANCE

Low prices result in shift to affordable options

Chart 17 - Cheap Options Gaining Ground

Belts remains the largest category

Weather conditions impact sales of certain accessories

WHAT'S NEXT?

Influencers and e-commerce drive sales of fashion items

Belts to maintain largest share despite modest growth

Social media and sustainability to shape future trends

COMPETITIVE LANDSCAPE

Zara España SA and other key players maintain strength through strategic collaborations

No significant mergers or acquisitions expected to impact market

CHANNELS

Shein and TikTok Shop drive e-commerce growth

Retail e-commerce plays significant role

COUNTRY REPORTS DISCLAIMER

[Menswear in Spain](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cautious spending environment

Chart 18 - Key Trends 2025

Chart 19 - Analyst Insight

INDUSTRY PERFORMANCE

Conservative spending habits limit menswear growth

Men's outerwear is the largest category

Market polarisation drives value sales growth

Chart 20 - Socio-Economic Framework Limiting Sales

WHAT'S NEXT?

Fast fashion and sustainability drive market growth

Men's outerwear to remain largest category

Influencer marketing and sustainability to shape future sales

COMPETITIVE LANDSCAPE

Zara and Primark lead menswear with strong brand presence

Emerging brands and social media drive competition

CHANNELS

Brick-and-mortar stores dominate menswear sales

Stagnant e-commerce growth in menswear

Market polarisation drives sales in physical stores

COUNTRY REPORTS DISCLAIMER

[Womenswear in Spain](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strategic brand collaborations support resilience

Chart 21 - Key Trends 2025

Chart 22 - Analyst Insight

INDUSTRY PERFORMANCE

Influencers drive sales with strategic brand collaborations

Market polarisation reshapes consumer purchasing decisions

Social media dictates fashion trends and sales

WHAT'S NEXT?

Influencers and e-commerce drive sales despite economic uncertainty

Shifting demographics and sustainability concerns to reshape market

E-commerce and local markets to continue dominating sales channels

COMPETITIVE LANDSCAPE

Leading brands maintain lead through strategic collaborations

Emerging brands gain traction through social media influence

Chart 23 - Other Players Gaining Ground

CHANNELS

Influencers and e-commerce drive womenswear sales

Emerging trends and retail concepts to watch

COUNTRY REPORTS DISCLAIMER

Jeans in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Trend towards affordability

Chart 24 - Key Trends 2025

Chart 25 - Analyst Insight

INDUSTRY PERFORMANCE

Consumer caution limits jeans sales growth

Economy jeans drives sales with affordable pricing

Market polarisation shapes jeans sales strategies

WHAT'S NEXT?

Consumers prioritise affordability and sustainability

Economy jeans to remain largest category

Sustainability to drive innovation and growth in super premium jeans

COMPETITIVE LANDSCAPE

Influencers and smaller brands gain ground

Emerging brands challenge established players

Chart 26 - Smaller Brands Fighting for a Place

CHANNELS

Shein and TikTok Shop drive e-commerce growth

Local brands thrive in brick-and-mortar stores

Emerging trends and brands to watch

COUNTRY REPORTS DISCLAIMER

Hosiery in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth despite challenging environment

Chart 27 - Key Trends 2025

INDUSTRY PERFORMANCE

Consumers seek better value amidst economic uncertainty

Non-sheer hosiery leads sales with sporty collections

Fashion and social media drive sales of sporty hosiery

Chart 28 - Fashion dress down and Unisex

WHAT'S NEXT?

Consumers prioritise value and functionality

Non-sheer hosiery drives growth with sporty collections

Functionality and sustainability shape future

COMPETITIVE LANDSCAPE

Calzedonia maintains lead through influencer partnerships and sporty collections

No significant mergers or new product launches anticipated

CHANNELS

E-commerce gains traction as consumers seek better value
Smaller brands thrive online with unique offerings
No new retail brands or concepts emerge in 2026

COUNTRY REPORTS DISCLAIMER

Footwear in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth despite challenging economic environment
Chart 29 - Key Trends 2025
Chart 30 - Analyst Insight

INDUSTRY PERFORMANCE

Price sensitivity shapes demand
Chart 31 - Tough Times Dampening Sales
Women's footwear dominates sales, driven by fashion trends
Influencer collaborations boost sales in a price-sensitive market

WHAT'S NEXT?

Consumers prioritise affordability and sustainability in their purchasing decisions
Women's footwear to maintain as brands adapt to changing consumer needs
Sustainability and local production gain traction as consumer awareness increases

COMPETITIVE LANDSCAPE

Private label leads and local players gain ground
Shifting market dynamics and emerging opportunities

CHANNELS

Non-grocery retailers drive offline footwear sales in Spain
E-commerce gains traction with TikTok Shop launch
Rise of challengers affects retail channel mix

COUNTRY REPORTS DISCLAIMER

Sportswear in Spain

KEY DATA FINDINGS

2025 DEVELOPMENTS

Trend towards healthier lifestyles supports sales
Chart 32 - Key Trends 2025
Chart 33 - Analyst Insight

INDUSTRY PERFORMANCE

Consumers seek affordable trends and healthier lifestyles
Lululemon and Oysho capitalise on consumer health consciousness
Market polarisation and health trends drive sportswear sales
Chart 34 - Searching for Dupes

WHAT'S NEXT?

Decathlon benefits from niche sports and price sensitivity
Female and older demographics drive sportswear demand

Physical store experiences to be upgraded by key players

COMPETITIVE LANDSCAPE

Nike and Decathlon maintain lead as challengers emerge

Emerging brands capitalise on consumer demand for uniqueness

CHANNELS

Retail e-commerce drives sales with launch of TikTok Shop

Physical stores upgrade to enhance customer experience

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-spain/report.