



**Euromonitor
International**

Jeans in the United Kingdom

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Polarised growth, premium appeal, and a sustainable future

Chart 1 - Key Trends 2025

INDUSTRY PERFORMANCE

Economy jeans drive sales with high-street brands offering affordable denim with inclusive sizing

Higher-end brands appeal with sustainable and stylish options

Sustainability shapes consumer behaviour and product development

Chart 2 - Analyst Insight

WHAT'S NEXT?

The circular economy's rise can influence future development of jeans in the UK

Navigating post-Brexit trade and leveraging global supply chain opportunities

Further exploration of sustainable and innovative materials as part of new development

COMPETITIVE LANDSCAPE

Niche players challenge established brands with affordable options

Brands look to offer affordable but stylish jeans for wider reach

Chart 3 - Affordable Jeans See Positive Sales Momentum

CHANNELS

Retail offline dominates jeans distribution with focus on in-store fit

E-commerce plays influential role despite offline dominance

PRODUCTS

Sustainability and Generation Z preferences drive design innovation

Chart 4 - Generation Z Continues to Impact Product Design Promoting Relaxed Denim Styles

Nudie Jeans revolutionises retail with sustainable concept

Chart 5 - Sustainable Brand Nudie Jeans Expands Store Footprint

COUNTRY REPORTS DISCLAIMER

[Apparel and Footwear in the United Kingdom - Industry Overview](#)

EXECUTIVE SUMMARY

Navigating polarised growth amidst economic challenges

KEY DATA FINDINGS

Chart 6 - Key Trends 2025

INDUSTRY PERFORMANCE

Macroeconomic pressure impacts consumer spending habits

Market polarisation drives diverging consumer values

Chart 7 - Analyst Insight

Resale platforms gain popularity among UK consumers

Chart 8 - Nobody's Child eBay Collaboration

WHAT'S NEXT?

Consumers set to drive sustainable and tech-enhanced shopping experience

Sportswear predicted to record further strong growth

Technological integration and sustainability to shape industry

COMPETITIVE LANDSCAPE

Asda Stores strengthens lead of fragmented landscape with private label line

Topshop relaunches with new strategy, fuelling growth

Emerging brands focus on niche strategies and community engagement

Chart 9 - Aligne x Elizabeth Day: Creative Collaborations Prove Successful for Challengers

CHANNELS

Retail offline remains crucial despite e-commerce growth

Retail e-commerce drives sales with convenience and competitive pricing

PRODUCTS

Amazon Haul responds to demand for affordable but fashionable pieces

Chart 10 - Amazon Haul Feature Launches in the UK

ECONOMIC CONTEXT

Chart 11 - Real GDP Growth and Inflation 2020-2030

Chart 12 - PEST Analysis in the United Kingdom 2025

CONSUMER CONTEXT

Chart 13 - Key Insights on Consumers in the United Kingdom 2025

Chart 14 - Consumer Landscape in the United Kingdom 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/jeans-in-the-united-kingdom/report.