



Euromonitor
International

Menswear in China

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value, functionality, and e-commerce drive growth in menswear, although polarisation is seen

Chart 1 - Key Trends 2025

INDUSTRY PERFORMANCE

Amidst a cautious economic climate, a shift in consumer priorities is seen

Chart 2 - Market Polarisation Weighs on Value Growth in Menswear

Men's outerwear drives sales as consumers prioritise essentials

WHAT'S NEXT?

Value growth to persist amidst volume decline, driven by income rise and essentials

"New Chinese Style" to gain cultural confidence through modern silhouettes

Functional features will be demanded in menswear

Chart 3 - Analyst Insight

COMPETITIVE LANDSCAPE

Challengers erode incumbents' share through digital agility

Chart 4 - Challengers Gradually Capture Mind Share and Value Sales

Hermès and Basement FG illustrate market polarisation in China

CHANNELS

Competitive pricing contributes to the lead of retail e-commerce in menswear

Offline resilience meets low-cost disruption, demanding retailer adaptation

PRODUCTS

Biemlfdlkk merges practical features with a relaxed aesthetic

Chart 5 - Brands Merge Practical Features with Understated Style

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/menswear-in-china/report.