



Apparel and Footwear in Colombia

November 2023

Table of Contents

Apparel and Footwear in Colombia

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023
Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023
Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023
Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023
Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023
Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023
Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023
Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023
Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028
Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2023-2028
Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028
Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

As children grow quickly, parents focus less on quality and more on price
Comfort prioritised in childrenswear while trendy fashion in parental purchases becomes more influential
Hand-me-downs become more prevalent in times of economic downturn

PROSPECTS AND OPPORTUNITIES

More second-hand stores focus on childrenswear over the forecast period
Local brands remain important players in childrenswear
Gender-neutral and inclusive design in childrenswear increasingly characterise the category

CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023
Table 14 - Sales of Childrenswear by Category: Value 2018-2023
Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023
Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023
Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023
Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023
Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028
Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028
Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028
Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

Apparel Accessories in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Use of local materials is prominent in accessories
Fashionable caps become a growing trend to elevate style
Genderless accessories grow in popularity

PROSPECTS AND OPPORTUNITIES

Sustainability becomes common practice in the production of Colombian accessories over the forecast period
Consumers become more cognisant of necessity while price emerges as a vital consideration when purchasing accessories
Accessories play an enduring role as popular gift choices

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023
Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023
Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023
Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023
Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023
Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023
Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028
Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028
Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028
Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

Menswear in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men focus on purchasing items that are seen in public
Androgynous look gains popularity leading women to purchase from the men's section
Linen becomes a popular material in menswear

PROSPECTS AND OPPORTUNITIES

Sustainable fashion continues influencing menswear
Consumers continue seeking comfort in menswear
Price-sensitive consumers balance necessity and affordability as they shop

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023
Table 34 - Sales of Menswear by Category: Value 2018-2023
Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023
Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023
Table 37 - NBO Company Shares of Menswear: % Value 2019-2023
Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023
Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023
Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023
Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023
Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023
Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023
Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023
Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023

- Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023
- Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028
- Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028
- Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028
- Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

Womenswear in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Enhancing sustainability in Colombian women's fashion choices becomes a priority
 Remote working loses popularity pushing women to seek workwear for their return to office life
 Price continues to be a deciding factor for women

PROSPECTS AND OPPORTUNITIES

Tourism continues to support industry growth over the forecast period
 Women increasingly seek quality and classic wardrobe pieces over fast fashion
 Price competition and promotions remain popular due to ongoing economic constraints

CATEGORY DATA

- Table 51 - Sales of Womenswear by Category: Volume 2018-2023
- Table 52 - Sales of Womenswear by Category: Value 2018-2023
- Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023
- Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023
- Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023
- Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023
- Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023
- Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023
- Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023
- Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023
- Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023
- Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023
- Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023
- Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023
- Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028
- Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028
- Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028
- Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

Jeans in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Colombian jeans are world renowned and a favourite souvenir among tourists
 Colombia experiences a resurgence in vintage jeans trends
 Post-pandemic consumers seek comfort, posing a challenge for jeans manufacturers

PROSPECTS AND OPPORTUNITIES

Anticipated rise of eco-friendly jeans brands over the forecast period
 Promotions continue attracting price conscious consumers
 When fit is important, consumers splurge on super premium jeans

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023
 Table 70 - Sales of Jeans by Category: Value 2018-2023
 Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023
 Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023
 Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023
 Table 74 - Sales of Men's Jeans by Category: Value 2018-2023
 Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023
 Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023
 Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023
 Table 78 - Sales of Women's Jeans by Category: Value 2018-2023
 Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023
 Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023
 Table 81 - NBO Company Shares of Jeans: % Value 2019-2023
 Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023
 Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028
 Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028
 Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028
 Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028
 Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028
 Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028
 Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028
 Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028
 Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028
 Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028
 Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028
 Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

Hosiery in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand grows for patterned tights thanks to the latest fashion trend
 Imports and contraband prove a threat to the sales of national players
 Consumers wait for sales or shop in low-priced outlets when buying hosiery as it is not considered of primary importance

PROSPECTS AND OPPORTUNITIES

Local brand innovation continues to shape design
 Durability is an important aspect in consumer buying decisions in hosiery
 Athleisure trend continues to influence hosiery design

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2018-2023
 Table 96 - Sales of Hosiery by Category: Value 2018-2023
 Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023
 Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023
 Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023
 Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023
 Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028
 Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028
 Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028
 Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

Footwear in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sneakers remains a popular choice as consumers embrace global fashion trend
Quality matters to consumers when choosing footwear
Colombian consumers' increased health awareness promotes growth of sports shoes

PROSPECTS AND OPPORTUNITIES

Consumer loyalty remains steadfast seeking savings within their preferred footwear brands
Brand innovation continues to drive sales creating differentiation in a highly competitive marketplace
Personalised and customised footwear options gather momentum

CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023
Table 106 - Sales of Footwear by Category: Value 2018-2023
Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023
Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023
Table 109 - NBO Company Shares of Footwear: % Value 2019-2023
Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023
Table 111 - Distribution of Footwear by Format: % Value 2018-2023
Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028
Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028
Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028
Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

Sportswear in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sports enthusiasts seek deals on their preferred sportswear brands
Channel loyalty on the wane as consumers enjoy exploring a variety of channels
Social media plays a vital role in shaping sportswear choices

PROSPECTS AND OPPORTUNITIES

Sportswear continues to be used as everyday wear
Brand innovation remains a driving force for sales over the forecast period
Contraband continues to threaten sales of legitimate sportswear brands

CATEGORY DATA

Table 116 - Sales of Sportswear by Category: Value 2018-2023
Table 117 - Sales of Sportswear by Category: % Value Growth 2018-2023
Table 118 - NBO Company Shares of Sportswear: % Value 2019-2023
Table 119 - LBN Brand Shares of Sportswear: % Value 2020-2023
Table 120 - Distribution of Sportswear by Format: % Value 2018-2023
Table 121 - Forecast Sales of Sportswear by Category: Value 2023-2028
Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

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-colombia/report.