



**Global and China Luxury Apparel Industry  
Report, 2014-2017**

**July 2014**

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

With the improvement of people's income as well as the prosperity of agent purchasing and gifting, the luxury market in China (especially Mainland China) has achieved steady growth over the recent years. During 2004-2011, China's total consumption of luxury goods showed a CAGR of 20.9%. However, since 2012, influenced by the policies of anti-corruption, suppression of gifting and consumption with public funds, the growth rate of luxury consumption in China has been slowing down rapidly. In 2013, total luxury consumption in China was RMB 116 billion, up by only 2.1% YoY, falling 5.1 points compared to the growth rate in 2012.

At present, most luxuries in China are concerned about dressing, of which apparel account for over 60%. In 2013, China's total consumption of luxury apparel was RMB 76.13 billion, accounting for 65.6% of the total consumption of luxury goods, and it is expected to reach about RMB 89.04 billion in 2017.

Wristwatches, bags & suitcases and men's wear are major luxury apparel consumer products in China, which accounted for 72.9% of total consumption of luxury apparel in China in 2013. Among them, wristwatches made up the highest proportion 35.0%.

Being optimistic about the prospects of China's luxury market, the world's major apparel brands such as Louis Vuitton (LV), Hermes, Burberry, Gucci, Prada, Fendi and Thomas Pink all have begun their layout in China in recent years.

**LV:** a global luxury apparel brand with the highest value in 2014. As of the end of June, 2014, LV has a total of 50 specialty stores in 33 cities in Chinese Mainland, adding one city (Jinan) and 5 specialty stores compared with the numbers in 2013.

**Hermès:** the most popular luxury brand in China in 2014, with brand value reaching USD 21.84 billion. As for its strategy in China, Hermès draws close to the Chinese consumers through its "Shang Xia" brand and through building Chinese-style luxury. Currently, there are two "Shang Xia" brand stores each in Shanghai and Paris.

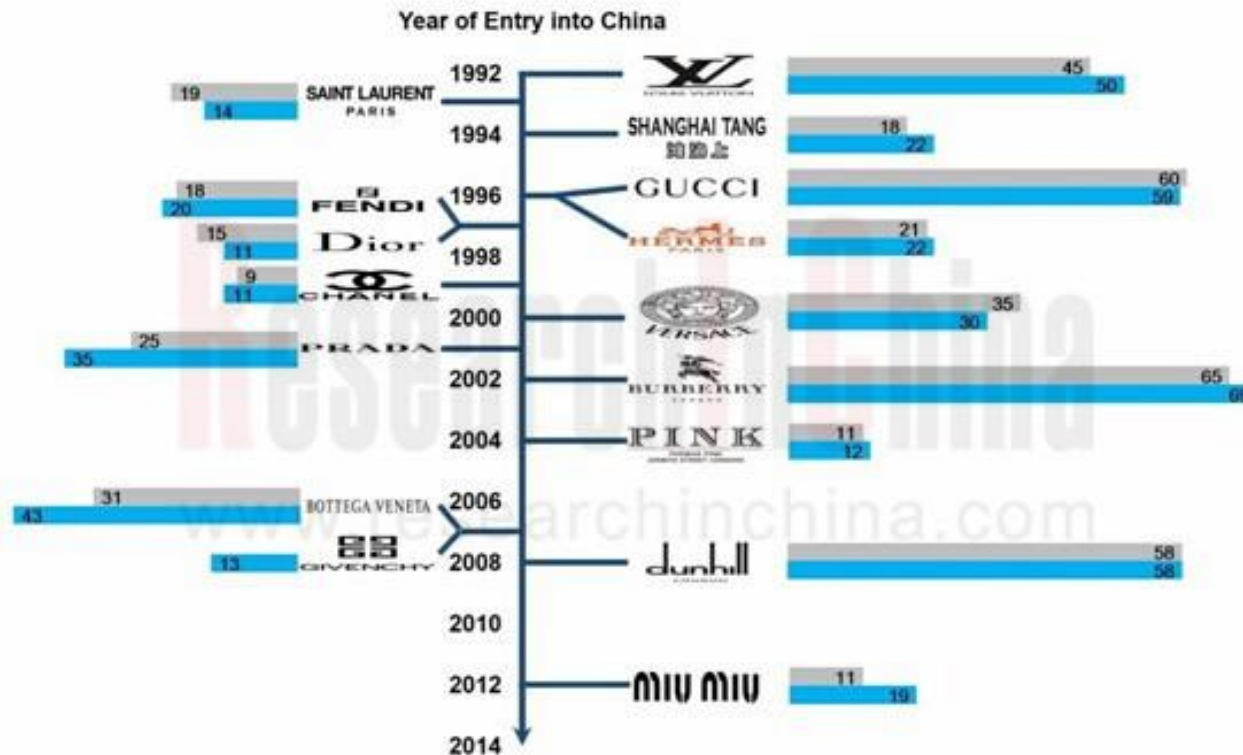
**Burberry:** the eighth largest luxury brand worldwide in 2014. In recent years, while actively strengthening partnership with Baidu, Youku and Alibaba, Burberry also opens the new online private customization service. In April 2014, Burberry online store successfully settled in [www.tmall.com](http://www.tmall.com) and became the first top luxury shop to open in China's B2C online stores.

Global and China Luxury Apparel Industry Report, 2014-2017 by ResearchInChina focuses on the following:

- ◆ Scale and regional structure of Global and China luxury markets, and overseas consumption of Chinese consumers, etc;
- ◆ Tax policies, size, product structure, regional structure and brand development status, etc of China luxury apparel market;
- ◆ Size of clothing, wristwatch, bag & suitcase, shoes and other apparel market segments and development and layout of various brands in China, etc.;
- ◆ Research of characteristics, information channel, purchase propensity of Chinese luxury apparel consumers;
- ◆ Online shopping market size and online shopping features of luxury apparel and patterns of enterprises in China;
- ◆ Operation and development in China of 8 key global luxury companies (including 17 brands);
- ◆ Forecast of Global and China luxury and China luxury apparel market size in 2014-2017.

## Number of the World's Major Luxury Apparel Brand Stores in China , 2013-2014

■ As of late June 2013 ■ As of late June 2014



Source: Global and China Luxury Apparel Industry Report, 2014-2017; ResearchInChina

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