



WOMENSWEAR
RETAIL RADAR
SUMMER
COLLECTIONS



LIVETREND

RETAIL RADAR WOMENSWEAR INTRODUCTION



zara (3).jpg



marni.jpg



chanel.jpg



@freepeople.jpg



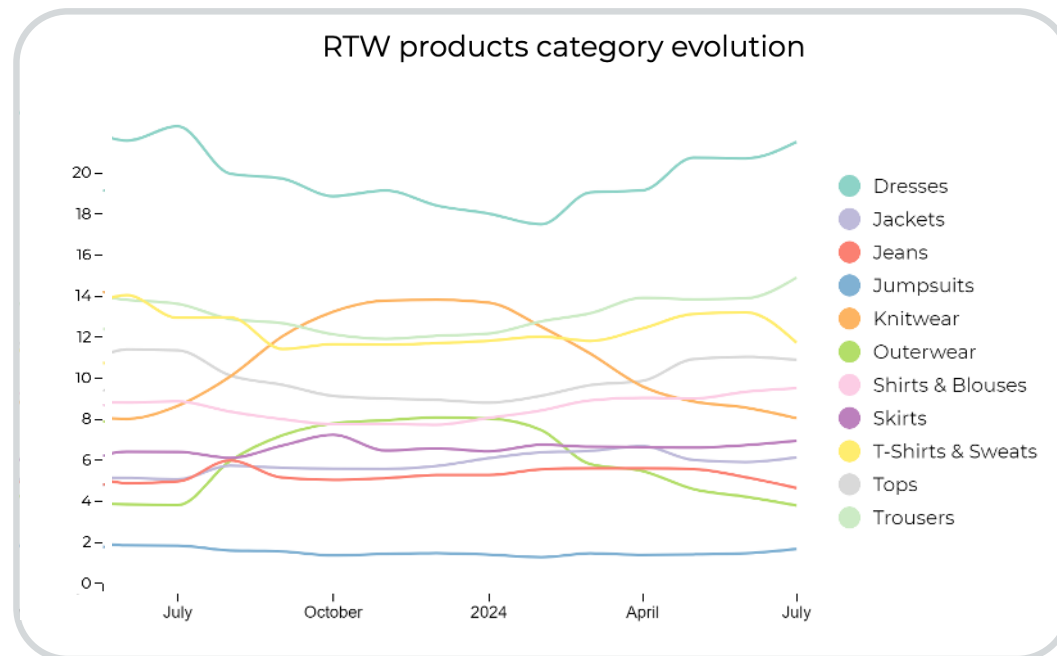
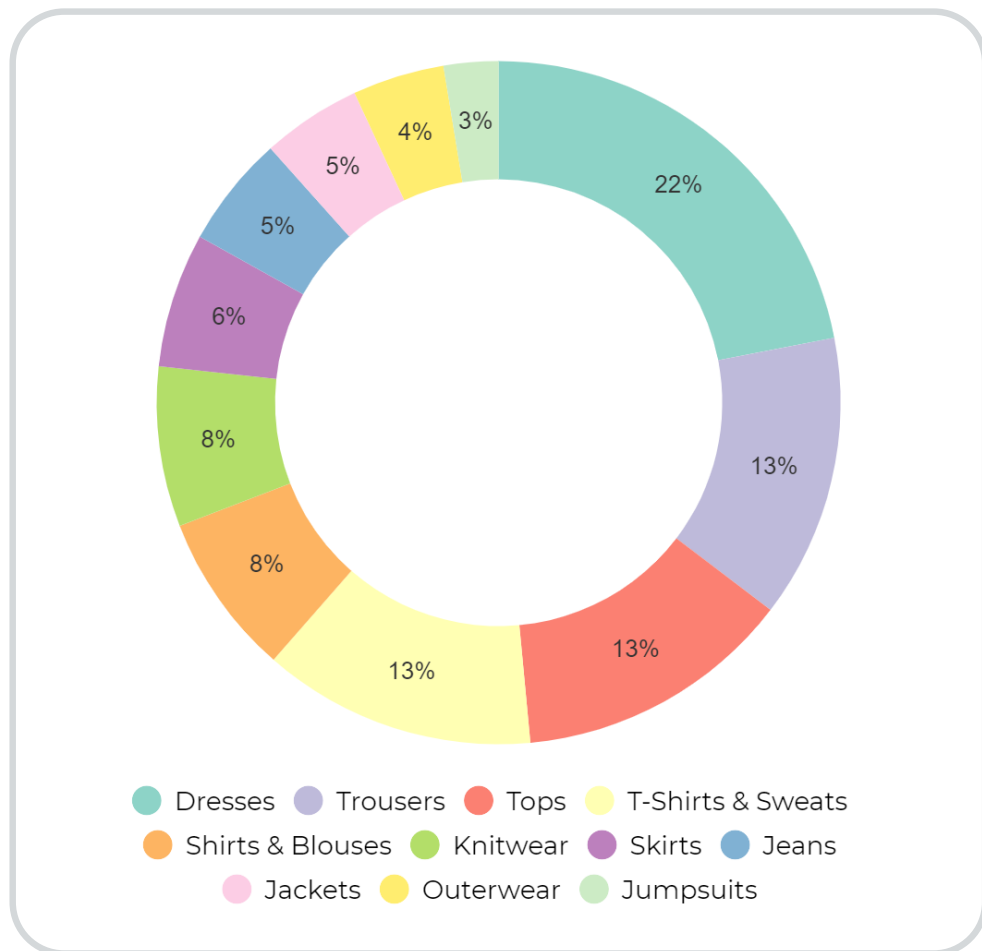
UPDATE

Bare Minimal. The Summer 2024 womenswear collections continue to embrace minimalism, seamlessly integrating ease, softness, and comfort in both textiles and shapes. This full summer season sees a resurgence of color, with delicate pastels leading the way. Considering shapes, designers are favoring asymmetries and few but refined details, focusing on clean lines and understated elegance to showcase sophistication over frivolity. The collections balance simplicity with vibrant expressions, creating a refined yet lively aesthetic that embodies the essence of contemporary fashion. Commercially, this minimal wave proves advantageous as it caters to a wide audience seeking versatile, timeless pieces that can be effortlessly integrated into their everyday wardrobes, ensuring sustained market appeal and consumer loyalty. For 2025 we will see more divergent proposals. One staying in this quiet aesthetic and another pushing creativity and personality to the forefront.

This report is based on Livetrend data extracted from e-commerce from 1/06/24 to 31/07/24, analysing the visibility and growth of the trends compared to the same period last year. The percentages show the visibility evolution year on year.

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RETAIL RADAR RTW PRODUCTS ASSORTMENT

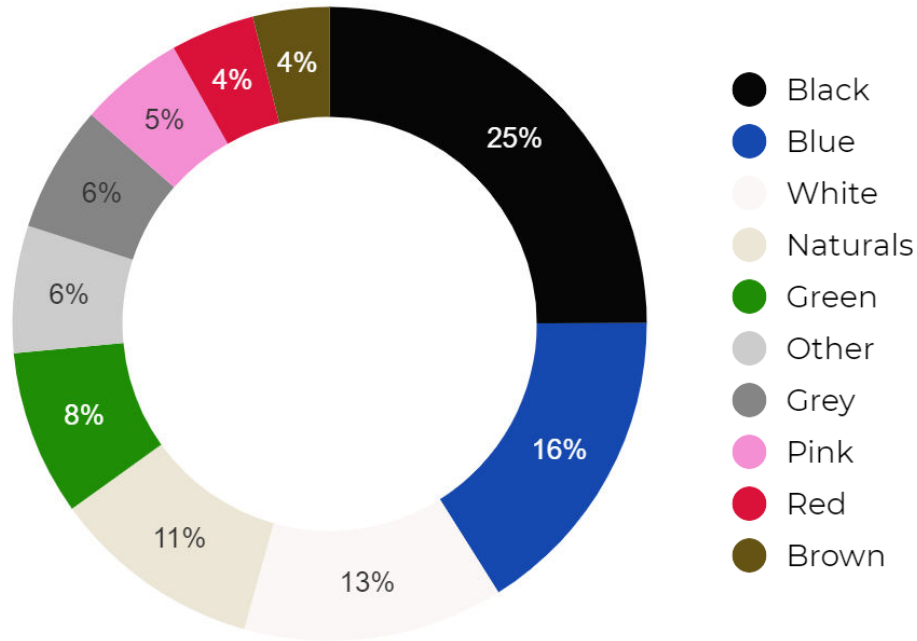


In this quantitative analysis, the women's dresses gain 1 point% in the assortment from Spring, while trousers and jeans stay stable with 18% of the range. Here, wide and straight legs are still dominating the e-commerce offer and shorts represents nearly 20% of pants. For full summer season Livetrend data shows that short dresses have leveled off the ratio with midi dresses. Topwear is taking 34% of the assortment and showing good commercial performances. Cropped tops are a big trend and after round and V-necks, data shows the importance of halter-neck, square and boat neck in the topwear range.

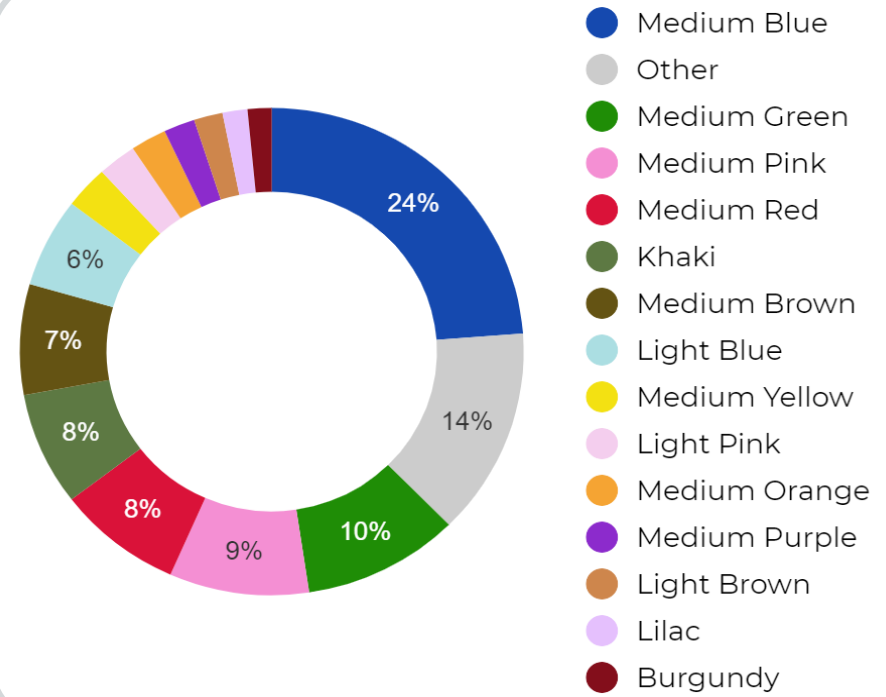


RETAIL RADAR RTW COLORS ASSORTMENT

SUMMER 24 RTW COLOR RANGE



SS24 RTW FASHION COLOR RANGE



Midsummer brings a new balance to the color assortment, which has been very safe during spring, with neutrals, pastels, and overall classic colors predominating over bold colors. Blues prevail by taking 16% of the assortment and growing 7% from last summer. Whites follow with 13% of the assortment and +5% to last year. As do naturals, showing the same annual growth but shrinking slightly to leave more room for full-summer hues. Speaking of colors, green remains stable, pink shows a noticeable decrease; while red, as expected, shows a decisive growth of +20%yoy. Brown is also definitely a color of summer, taking 4% of the assortment and the same weight as red and increasing by 11% yoy. Yellow and orange, on the other hand, show a marked decrease compared to last year

RETAIL RADAR RTW COLORS EVOLUTION



RED



Freepeople.webp



+21%

YEAR ON YEAR

CORAL



Rails.webp



+29%

YEAR ON YEAR

LIGHT PINK



Ba&Sh_1.avif



+28%

YEAR ON YEAR

KHAKI



Maje.webp



+15%

YEAR ON YEAR

AQUA



Reformation_1.webp



+30%

YEAR ON YEAR

SILVER



Topshop.png



+38%

YEAR ON YEAR



ORANGE



&Otherstories.jpg



-54%

YEAR ON YEAR

FUCHSIA



Zara.jpg



-45%

YEAR ON YEAR

For Full Summer 24 Womenswear, the color narrative undergoes a transformative journey. Bold colors like fuchsia (-45% yoy), and orange (-54% yoy), are consistently decreasing, reflecting a shift in consumer preferences. Red, however, is on the rise with an increase of +20%, indicating its announced growing popularity. Meanwhile, pastel and faded hues are taking center stage, offering a more delicate and sophisticated vibe for the summer season: coral, light pink and aqua are emerging as trendy shades for the warm season.

RETAIL RADAR PRINTS EVOLUTION



STRIPES



ANIMALIER



FLORALS



CHECKS



GRADIENT

BIG TREND



@steele.jpg

SAFE TREND



halpern.webp

STABLE TREND



dries van noten

STABLE TREND



Mango.webp

STABLE TREND



acne studio.avif



+56%

YEAR ON YEAR



+5%

YEAR ON YEAR



-14%

YEAR ON YEAR



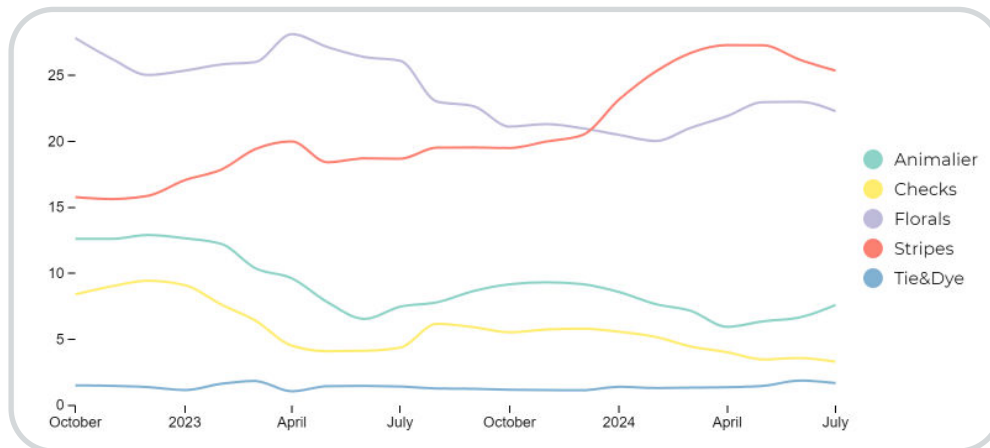
-12%

YEAR ON YEAR



-2%

YEAR ON YEAR



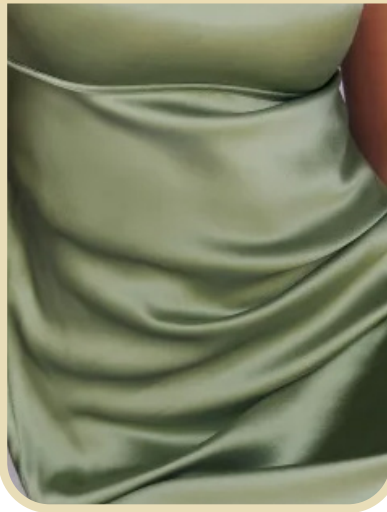
For full summer 24, prints are showing a decrease of 14% yoy. Brands this time played it safe, betting on stripes, that experienced a surge in visibility increasing by 56% compared to the same period last year. Animal prints remain stable, with a particular emphasis on leopard print, that is set to continue its growth, with an announced comeback for the fall winter season. The growing preference for these timeless patterns reflects a shift towards more classic and enduring styles in fashion.

RETAIL RADAR **RTW FABRICS EVOLUTIONS**



LUSH SATINS

STABLE TREND



thereformation.webp



+17%
YEAR ON YEAR



RUSTIC NATURALS

BIG TREND



Arket.png



+38%
YEAR ON YEAR



WRINKLED

SAFE TREND



Zara_1.jpg



+25%
YEAR ON YEAR



EMBROIDERED

STABLE TREND



farmrio.jpg



+17%
YEAR ON YEAR

For full summer 24, shiny fabrics are holding steady with a stable growth of 17% from the previous summer season, and as a hybridization from the lingerie world, it continues to influence the fabric trends. The natural appeal, however, is what captivates collections the most this season. Linen, wrinkled fabrics, and embroidered textiles are manifesting notable growth on e-commerce, reflecting a consumer shift towards more organic and tactile materials. These natural fabrics offer a blend of comfortable natural feel and sophisticated cool style, making them increasingly popular among the consumers. This trend highlights a broader movement towards sustainability and authenticity in fashion.

RETAIL RADAR DRESSES

MAXI SLIM

STABLE TREND



Reserved.avif


+23%
YEAR ON YEAR

90s SLIP DRESS

BIG TREND



Pepe.webp


+19%
YEAR ON YEAR

ASYMMETRIC

EARLY SIGN



COS_1.jpg


+64%
YEAR ON YEAR

CAFTAN

EARLY SIGN



poupette st barth.avif


+44%
YEAR ON YEAR

JUMPSUIT

STABLE TREND



Zara2.jpg


+17%
YEAR ON YEAR

For full-summer 2024, Livetrend's market data shows that long silhouettes are still a stable trend, showing an increase of 18%, while short dresses are slightly decreasing by 10% compared to last year. The mini trend has slowly faded, making room for more sophisticated, longer looks that suits everyone with elegance. This includes stretchy silhouettes and biais slip dresses that showcase a 90s revival. Additionally, summer styles like the caftan are gaining popularity, aligning with the desire for more inclusive, easy-going shapes. This shift reflects a broader preference for elegance and comfort in contemporary fashion.

RETAIL RADAR **TOPWEAR**

ASYMMETRIC TOP

EARLY SIGN



-mango-.avif


+87%
YEAR ON YEAR

GATHERED TOP

STABLE TREND

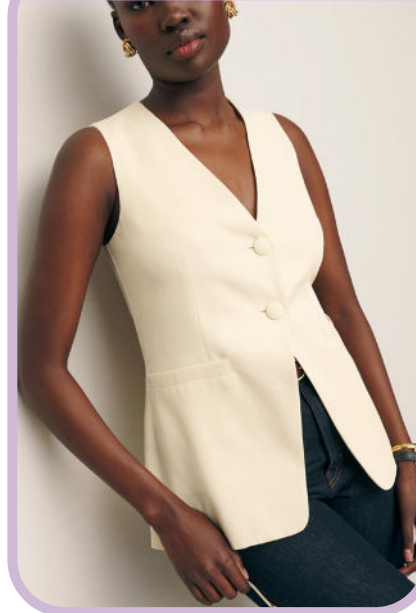


pull&bear.jpg


+23%
YEAR ON YEAR

VEST TOP

EARLY SIGN

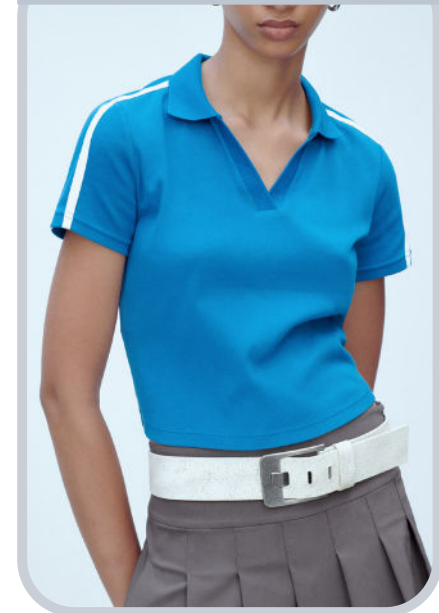


Reformation.webp


+92%
YEAR ON YEAR

JERSEY POLO

SAFE TREND



Mango_2.avif


+58%
YEAR ON YEAR

Considering full-summer topwear, the trend reflects a desire for simpler shapes, ranging from soft asymmetric looks to delicate camisoles, minimal vests, and sporty polos. The influence of sportswear and the Olympics games is noticeable in several drops in the e-commerce, where knitted polo continue to rage. The main focus is on streamlined, unfussy designs that prioritize practicality without sacrificing elegance. For the fashionable tops, these minimal shapes are adorned by gathers (+23%), draping and knots (+13%), bows (+9%), to bring these added-values that women are always looking for.

RETAIL RADAR **TOPS & DRESSES DETAILS**

HALTER NECK

STABLE TREND



The Reformation_1.webp


+23%
YEAR ON YEAR

ASYMMETRIC NECK

STABLE TREND



Mango.avif


+18%
YEAR ON YEAR

COLD SHOULDER

STABLE TREND



riverisland.jpeg


+17%
YEAR ON YEAR

BOWS

SAFE TREND

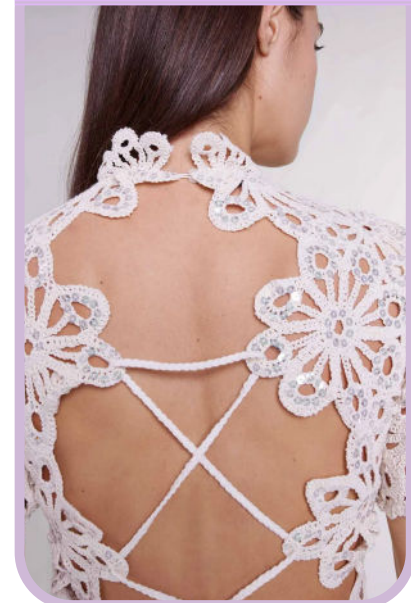


Gina Tricot.avif


+33%
YEAR ON YEAR

LACING

EARLY SIGN



Maje (2).webp


+89%
YEAR ON YEAR

For the women's collections, tops and dresses are embracing simpler and more minimal shapes, where sophisticated details become essential to elevate the wardrobe. Key elements such as halter necks, sharp asymmetries, and fluid draped collars are set to infuse these categories with a touch of luxury. These refined details add a subtle yet impactful elegance, ensuring that even the most understated designs exude a sense of refinement. Other important necklines are cold shoulder rising 17%, polo collar +26%, tunisian and mao collar, Additionally, dainty bows and gentle lacing further enhance these garments, providing delicate and intricate accents that contribute to their overall sophisticated appeal.

RETAIL RADAR **PANTS**

WIDE-LEG PANT

SAFE TREND



<Sans lien d'intersection>



+27%
YEAR ON YEAR

BERMUDA

SAFE TREND



Sandro.jpg



+31%
YEAR ON YEAR

CAPRI

EDGY TREND



Mango_1.avif



+64%
YEAR ON YEAR

DENIM SHORTS

SAFE TREND



Ba&Sh.avif



+43%
YEAR ON YEAR

In the full summer women's collection, pants are taking on a genderless approach, with wide-leg pants continue to rise in popularity, offering a relaxed and versatile silhouette. Bermudas are adding a boyish touch, from baggy casual denim style for the fashionistas to tailored linen version, its length reaches close to the knee. As predicted, Capri pants are making a notable comeback, bringing a retro vibe to modern wardrobes. Still remaining a microtrend, this style is increasingly visible on Instagram and the market follow with +64% yoy. Meanwhile, denim shorts remain a trending staple, ensuring a timeless and casual option for the warmer months.

RETAIL RADAR **SKIRTS**

SLIT SKIRT

SAFE TREND



Mango (2).avif


+133%
YEAR ON YEAR

FEATHERY SKIRT

SAFE TREND



massimo dutti.jpg


+52%
YEAR ON YEAR

DRAWSTRING SKIRT

EARLY SIGN



Miu Miu.avif


+43%
YEAR ON YEAR

LOW WAIST

EARLY SIGN



motelrocks.webp


+33%
YEAR ON YEAR

For women's full summer collections, skirts emphasize simplicity and sophistication over frivolity. Elegant long slit skirts showcase a refined aesthetic, while the elevated maxi skirt continues to trend, offering versatile and chic options. Subtle details such as pleating and minimalist patterns further enhance the sophistication, allowing these skirts to effortlessly transition from day to night, making them essential additions to any fashion-forward closet. From simple elasticated waist to sporty drawstrings, high waist prevails in quantity over the market but low rise has bigger growth compared to last year.

DATA SOURCES & ICONS

TREND GROWTH



MARKET

YEAR ON YEAR TREND GROWTH ON E-COMMERCE



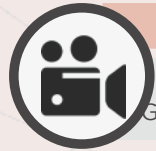
SOCIAL MEDIA

YEAR ON YEAR TREND GROWTH ON INSTAGRAM



CONSUMER INTEREST

YEAR ON YEAR GROWTH OF ONLINE SEARCH VOLUMES



FASHION SHOWS

YEAR ON YEAR TREND GROWTH ON FASHION SHOWS

TREND BEHAVIOR

EDGY TREND

weak signal of a potential micro trend with very high risk

EARLY SIGN

emerging trend with growing perspective but higher risk

SAFE TREND

announced trend with growing perspective and safe risk

BIG TREND

trend with a big magnitude due to high commercial potential and quick adaption

STABLE TREND

trend that is already present in the market with flat growth

LAST CALL

trend with decreasing perspective but still having business potential

TREND MAGNITUDE



MANIFEST

AN ICONIC PRODUCT THAT IS A STABLE TREND OF LARGE MAGNITUDE WITH CONFIRMED COMMERCIAL SUCCESS



INVEST

A CORE PRODUCT REPRESENTING A STEADILY GROWING TREND OF MODERATE MAGNITUDE WITH COMMERCIAL POTENTIAL



TEST

A STATEMENT PRODUCT WITH GROWING PERSPECTIVE BUT SMALLER MAGNITUDE AND HIGHER RISK



DATA TO DRIVE

01 CREATIVITY

02 STRATEGY

03 SUSTAINABILITY



LIVETREND

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