



WOMENSWEAR
RETAIL RADAR
FALL
COLLECTIONS



LIVETREND

RETAIL RADAR WW INTRODUCTION



Weekend Max Mara 07.jpg



@rouje.png



Mango_1.avif



@zara.png



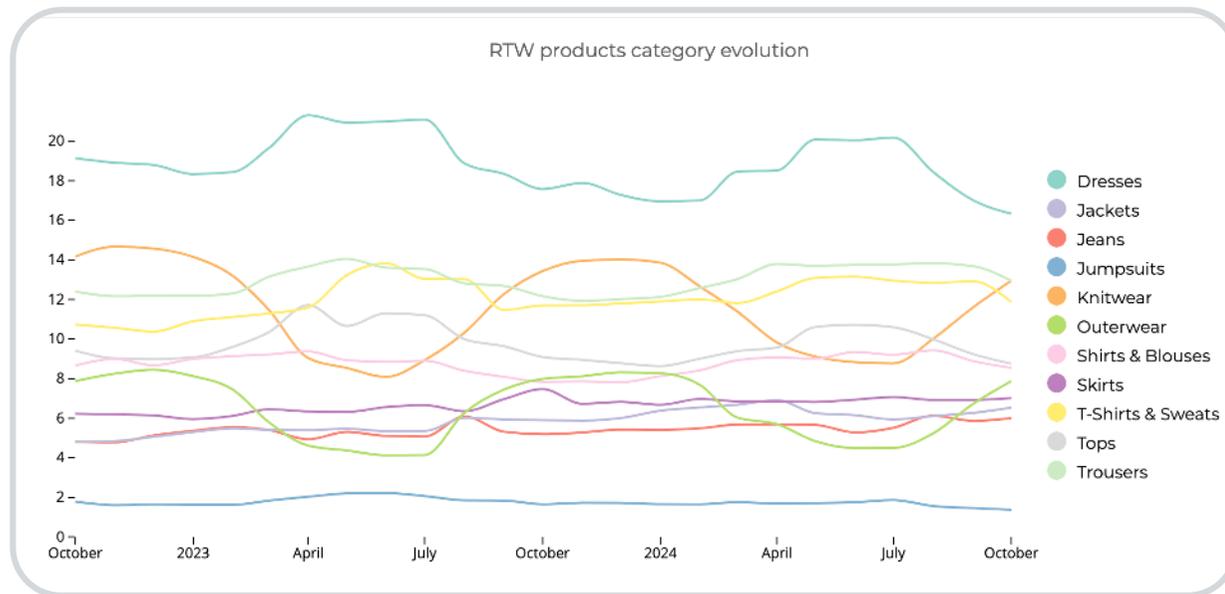
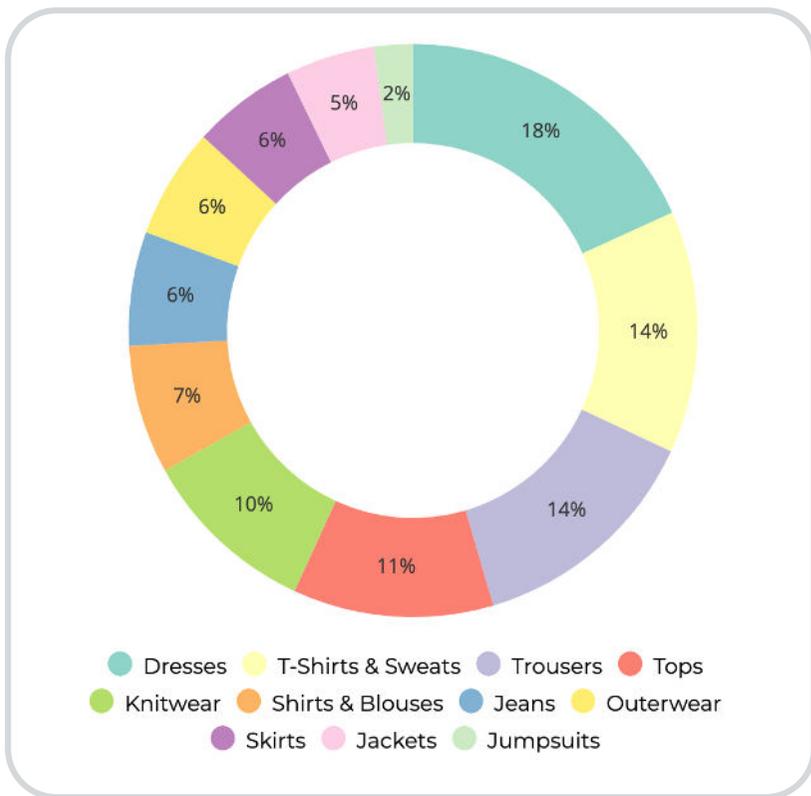
UPDATE

New Women. This season's womenswear Fall trends are crafting a new vision of the modern woman, one who embraces office-inspired fashion with an unwavering commitment to tailored elegance. She favors streamlined blazers, suit vests, and perfectly cut trousers, creating polished looks defined by clean lines and sophisticated layering, prioritizing timeless, structured pieces over bold, feminine statements. In contrast, another kind of consumer brings a chic yet ironic twist to the season, embracing maximalism with a sleek edge. She pairs animal prints, vintage textures, and fur coats to create statement looks, balancing extravagance with elegance. This dynamic blend of refined minimalism and understated maximalism is setting the stage for a future in fashion where creativity will center on reimagining classics and styling them with a fresh perspective. The result will evolve into a refined maximalism, perfect for the evolving taste of women who seek innovation within timeless sophistication, creating a perfect blend of low-key pieces with a wow-factor.

This report is based on Livetrend data extracted from e-commerce from July to October 2024 analysing the visibility and growth of the trends in percentage compared to the same period last year.

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CLICKING HERE**

RETAIL RADAR WW **PRODUCT ASSORTMENT**

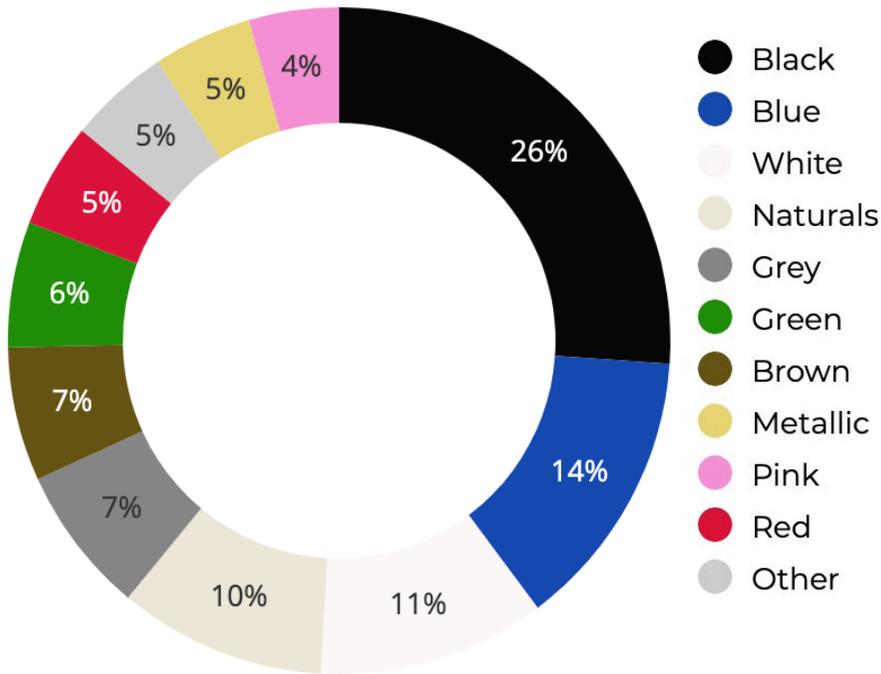


In this quantitative product analysis, women's dresses show a 3% decrease in assortment compared to last year, while pants and jeans are slightly increasing taking 20% of the range. Here, wide and straight-leg styles continue to dominate the e-commerce offer, representing nearly 30% of pants. Wide and flared pants are still an increasing trend showing 13% growth as baggy style, spotting one of the biggest trend for fall. On the other hand, classic tailored pants are rising by +14%. Dresses accounting for 18% of the assortment, are showing good commercial performance. For the fall season, Livetrend data indicates that long and midi skirts are showing 23% increase to last year, while mini-skirts are decreasing by 21%. Vests are a major microtrend in both the Topwear and Knitwear categories.

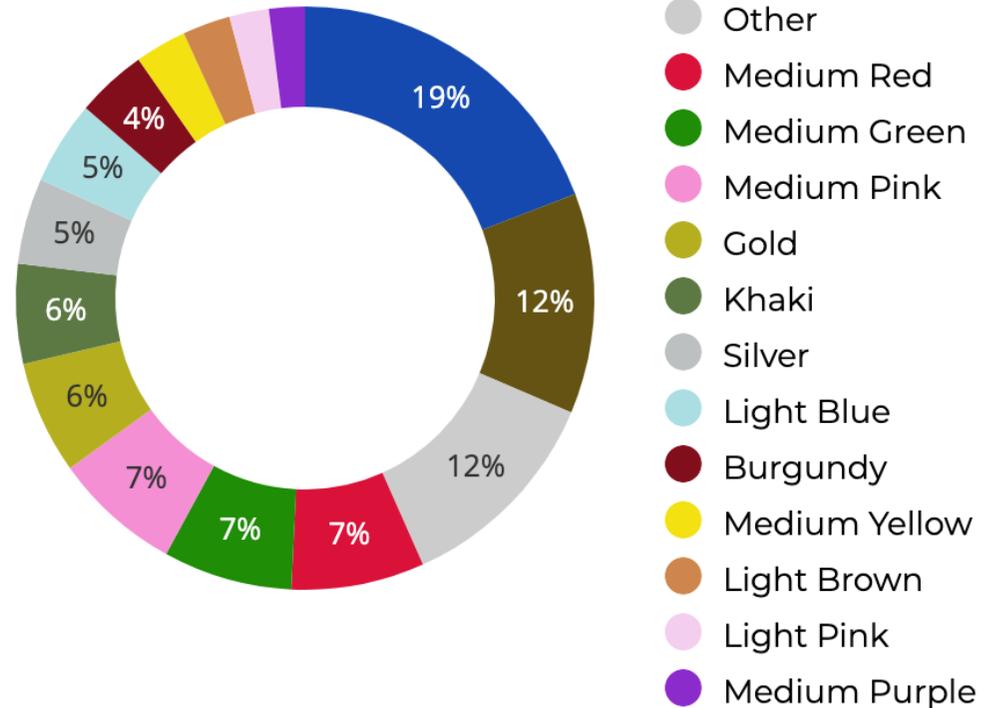
RETAIL RADAR WW **COLOR ASSORTMENT**

FALL 24 RTW GLOBAL COLOR RANGE

Global color assortment



FALL 24 RTW FASHION COLOR RANGE



Fall brings a new balance to the color assortment, with neutrals and classic colors predominating over bold hues representing 68% of the assortment. Black and blue prevail, accounting for 30% of the assortment and blue are growing by 6% from last fall. Whites follow with 11% of the range, remaining stable. Natural colors are also an increasing trend, increasing nearly by 20%, showing to be a big trend for fall collections. Speaking of colors, pink shows a noticeable decrease, while red, as expected, exhibits a growth of +11% yoy. Regarding greens, khaki are taking 6% of fashion colors, showing a growth of 26% yoy. Brown is certainly an increasing important color, taking 6% of the assortment and increasing by 18% yoy. Burgundy is starting to emerge in the fashion color palette, as a star trend color, representing 3% of the range with an astonishing growth of 66% yoy.

RETAIL RADAR WW **COLORS EVOLUTION**

NAVY BLUE



A.P.C. Wool Vest.jpeg



+39%

YEAR ON YEAR

GREY



Weekday 3.jpeg



+35%

YEAR ON YEAR

BROWN



freepeople.webp



+18%

YEAR ON YEAR

KHAKI



mango.avif



+26%

YEAR ON YEAR

BURGUNDY



zara.jpg



+66%

YEAR ON YEAR

PINK



Prada 2.avif



-25%

YEAR ON YEAR

YELLOW



Patrizia Pepe.webp



-27%

YEAR ON YEAR

For Womenswear, the color narrative provides some intriguing data that highlights evolving consumer preferences. Bold colors such as pink (-25% yoy) and yellow (-27% yoy) are consistently decreasing, indicating a significant shift in what consumers are looking for this season. In contrast, burgundy is experiencing a remarkable rise, with an increase of +66%, signaling its growing popularity and potential as a staple color for the fall. Meanwhile, dark blue and grey are, as expected, taking center stage, offering a more professional and back-to-office vibe that aligns with the return to traditional work settings. Additionally, brown and khaki are emerging as key earthy shades for this season, reflecting a broader trend towards natural and organic tones, making them versatile options for layering and styling.

RETAIL RADAR WW PRINTS & PATTERNS EVOLUTION



STRIPES



FLORALS



ANIMALIER



TARTAN



HERRINGBONE

BIG TREND



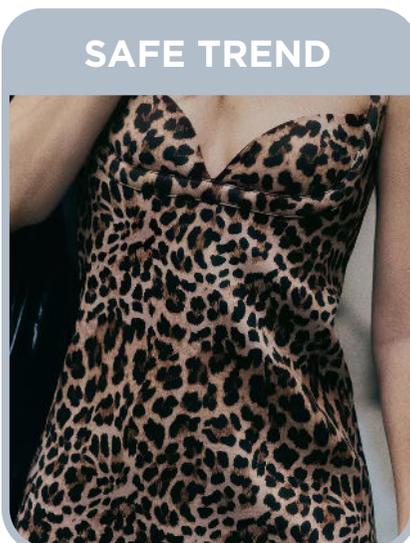
Miu Miu Striped Cardigan.jpeg

STABLE TREND



reformation.jpeg

SAFE TREND



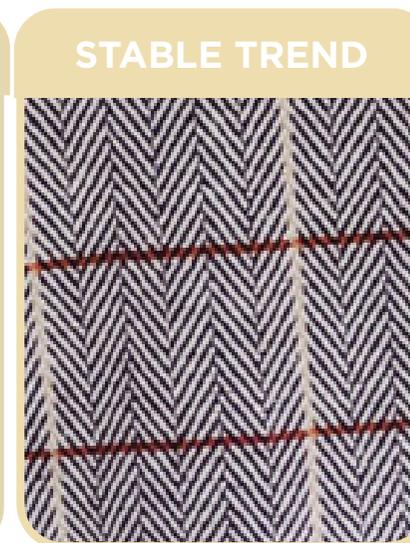
Anthropologie-Thelmpression.jpg

STABLE TREND



@shopdoen.png

STABLE TREND



SAAJ.jpg



+34%

YEAR ON YEAR



-6%

YEAR ON YEAR



+15%

YEAR ON YEAR



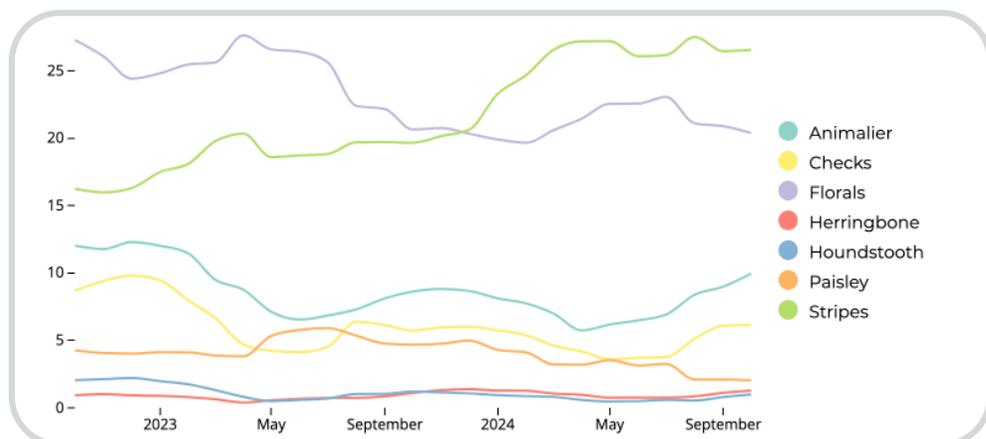
+7%

YEAR ON YEAR



+15%

YEAR ON YEAR



For Patterns, brands played it safe by betting on classic motifs: Stripes experienced a surge in visibility, increasing by 34% to last year. Other classic patterns as herringbone or checks are stable, while florals, slightly decreasing, are taking dark backgrounds and traditional designs. Animal print remains stable, with a particular emphasis on leopard print, which is set to continue its growth, signaling a notable comeback. This growing preference for timeless patterns reflects a shift towards more classic and enduring styles in fashion.



RETAIL RADAR WW **FABRICS EVOLUTION**



CABLE KNIT



LACE



SHEER



TEXTURED



FUZZY

BIG TREND



ralph-lauren.webp

STABLE TREND



Mango (2).avif

STABLE TREND



The Frankie Shop.jpg

EARLY SIGN



free-people.webp

EARLY SIGN



-cos-.avif



+38%

YEAR ON YEAR



+5%

YEAR ON YEAR



+9%

YEAR ON YEAR



+32%

YEAR ON YEAR



+20%

YEAR ON YEAR

For womenswear fabrics, the collections showcase a fascinating evolution, highlighting a blend of texture and tactile appeal. Key materials like cable knit, lace, sheer fabrics, textured and fuzzy surfaces are gaining traction, each contributing to the season's aesthetic in unique ways. Cable knit stands out with a substantial 38% year-on-year increase, reaffirming its timeless appeal as a warm, versatile choice for colder months. Lace, with a moderate 5% increase, brings a delicate, feminine touch that aligns with the season's focus on ladylike details and subtle nostalgia. Sheer fabrics, up 9%, add an element of lightness and modern elegance, supporting the trend toward sophisticated femininity. Textured materials have seen a notable 32% rise, reflecting a growing interest in tactile surfaces bringing visual non-chalance. Finally, fuzzy fabrics are showing a 20% increase, tapping into a big furry trend of the season and the cozy „granny chic“ vibe, offering warm playful, nostalgic edge.

RETAIL RADAR WW **OUTERWEAR**

BLAZER

SAFE TREND



Sandro_.webp


+2%
YEAR ON YEAR

HARRINGTON

BIG TREND



The Frankie Shop (2).webp


+43%
YEAR ON YEAR

TRENCH COAT

STABLE TREND



Reiss.jpg


+16%
YEAR ON YEAR

QUILTED VEST

EARLY SIGN



Barbour.webp


+71%
YEAR ON YEAR

FUR COAT

EDGY TREND



Mango (3).avif


+43%
YEAR ON YEAR

Womenswear outerwear is combining a mix of timeless staples with some interesting novelties. Blazer jackets are experiencing a very high visibility but globally they remain a stable trend, with the businesscore wave still emerging on the market. The harrington jacket replaced the bomber with an emphasis on contrasted collars, elevating the varsity vibe with a retro preppy allure. These products enhance a genderless notion, inspired by masculine codes, and can be proposed in co-ord versions to capitalize on the uniform-like wave. With a „country & elegant“ makeover, the quilted vest represents a good product to experiment within lengths and volumes. An increasing product in the collections is the announced maxi fur coat, exuding mob-wife vibes intertwined also with a granny chic appeal for the trendiest cohorts.

RETAIL RADAR WW **TOPWEAR**

CORPORATE SHIRT

POLO SWEATER

SUIT VEST

PRIM CARDIGAN

KNIT VEST

STABLE TREND

BIG TREND

EDGY TREND

BIG TREND

BIG TREND



IOEWE (2).jpg



Ganni Stripe polo shirt.jpeg



Mango (5).avif



Tara Jarmon.jpg



Artknit.webp



+8%

YEAR ON YEAR



+33%

YEAR ON YEAR



+145%

YEAR ON YEAR



+31%

YEAR ON YEAR



+73%

YEAR ON YEAR

Fall trends for topwear reflect a desire for simpler shapes, ranging from mens shirts to soft cardigans, minimal vests, and sporty polos. The influence of low-core luxury and retro-sportswear is evident in various drops, where shirts and polos continue to dominate the assortment. The main focus is on streamlined, unfussy designs that prioritize practicality without sacrificing elegance. For fashionable tops, these minimal shapes are enhanced by details such as scalloped hems (+17%), pleats (+21%), and bows, which are still experiencing significant growth (+47%). These embellishments could add a touch of sophistication and charm, catering to women's desire for versatile pieces that effortlessly blend style and comfort.

RETAIL RADAR WW DRESSES

ASYMMETRIC

SAFE TREND



& other stories .jpeg


+39%
YEAR ON YEAR

DRAPED MIDI

SAFE TREND



Zara (2).jpg


+48%
YEAR ON YEAR

DENIM MINI

EARLY SIGN



Reformation.webp


+30%
YEAR ON YEAR

CHECKERED

EARLY SIGN



Mango.jpeg


+25%
YEAR ON YEAR

The common ground for Fall dresses offers minimal and timeless shapes, playing with draping and asymmetry, with no considerable shifts in lengths which remain predominantly long. To elevate these looks the focus is on details, textiles and prints or textures. The asymmetric elements continue growing, experimenting with uneven details in the hemline, in the neckline or in the sleeves. Draped midi dresses are increasing by +48%, aligning with the need of softness and femininity, remaining minimalistic and sharpened. Mini dresses are decreasing by 21% on the market, while the denim combo is increasing.

RETAIL RADAR WW PANTS

WIDE-LEG PANT

SAFE TREND



Loewe.jpg


+17%
YEAR ON YEAR

TAILORED PANT

SAFE TREND



Mango (4).avif


+14%
YEAR ON YEAR

BERMUDA

EARLY SIGN



The Frankie Shop.webp


+64%
YEAR ON YEAR

BAGGY JEAN

SAFE TREND



Gina Tricot.jpeg


+130%
YEAR ON YEAR

BOOTCUT JEAN

STABLE TREND



reserved 2.jpeg


+11%
YEAR ON YEAR

Considering the bottom scope, the interest for tailoring brought back on the menu tailored pants and office-coded bermuda. These silhouettes define the need for timeless strong pieces. Wide-leg pants remain an investment product for brands, with the shapes becoming XL, following a new-found appeal for mens wardrobe. Baggy jeans are still leading the trends with a remarkable growth of +130%, capturing the attention of young fashion enthusiasts. The big absent in this analysis is the cargo pant, exploited widely during the previous seasons, is now decreasing by -31%, after a prolonged period of growth, indicating a shift in consumer preferences, where outdoor and utility have been replaced by sleek minimalism.

RETAIL RADAR WW **SKIRTS**

CHECKERED

STABLE TREND



Miista.webp


+7%
YEAR ON YEAR

MIDI DENIM

SAFE TREND



Patrizia Pepe 3.jpeg


+76%
YEAR ON YEAR

LONG KNIT

SAFE TREND



cos.jpeg


+31%
YEAR ON YEAR

PLEATED

SAFE TREND



Frankie Shop.webp


+41%
YEAR ON YEAR

Mini length doesn't cease to decrease, for this season, declining by 27% compared to the same period last year. While midi and long lengths remain a safer options, exploiting sophistication over seduction. In this analysis, fabrics and details define the trend shifts on the market, where the knee-length is dominating the trend scene. Skirts are no longer related only to femininity, but with styles which speak classy heritage or ease and comfort with an influence of retro, preppy or sharp aesthetics.

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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