



WOMENSWEAR
RETAIL RADAR
FW25 HOLIDAY
COLLECTIONS



LIVETREND

RETAIL RADAR HOLIDAYS INTRODUCTION



Imperial.webp

Stradivarius (5).jpg

reformation-310.jpg

Cider.png



UPDATE

Sassy & Classy. Women's holiday collections are moving toward a posh and classy aesthetic, blending grannycore influences with ladylike refinement. Rooted in the understated appeal of quiet luxury, these collections are beginning to incorporate polished preppy elements that hint at a future of elevated sophistication. Bold bourgeois fur coats, glitzy prim cardigans, and pencil midi skirts are key pieces shaping this emerging narrative, reflecting a wardrobe that emphasizes elegance and timeless allure. This shift signals a move away from exuberant or overtly seductive designs, favoring intricate details and restrained luxury. This analysis points to a growing demand for femininity that feels polished, thoughtful, and enduring. It suggests a continued focus on refined silhouettes, luxurious materials, and subtle preppy touches that celebrate sophistication with a modern twist.

This report is based on Livetrend data extracted from e-commerce from 1/11/2024 to 31/12/2024 analysing the visibility and growth of the trends compared to the same period last year. The percentages show the visibility evolution year on year.

**ACCESS ALL IMAGES
CLICKING HERE**

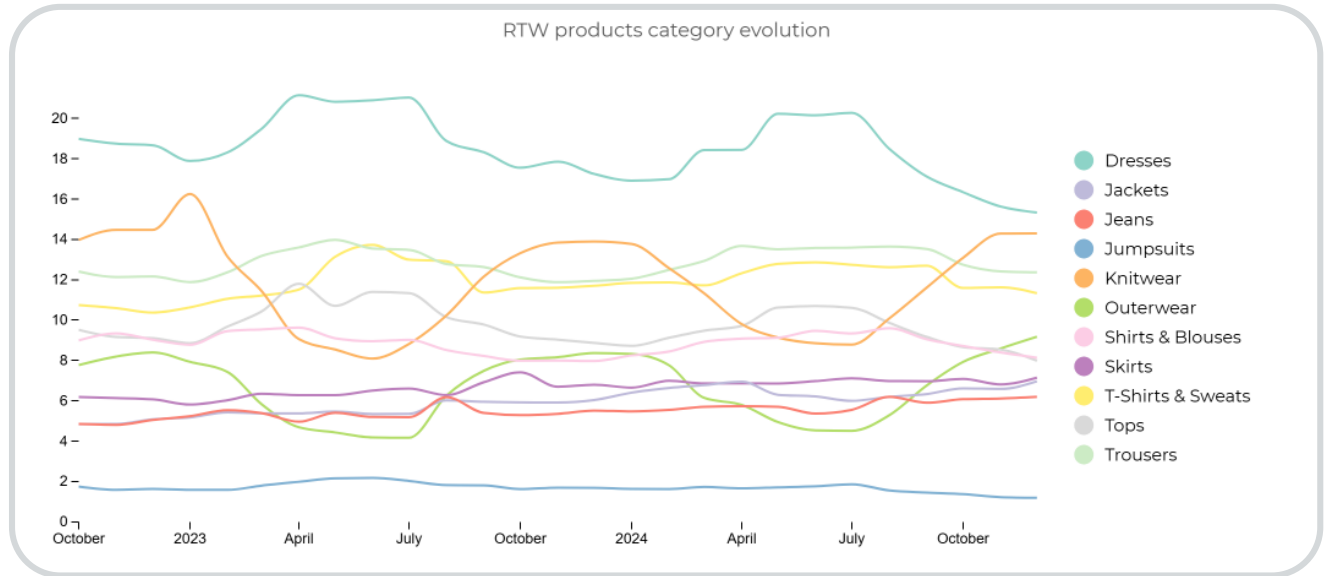
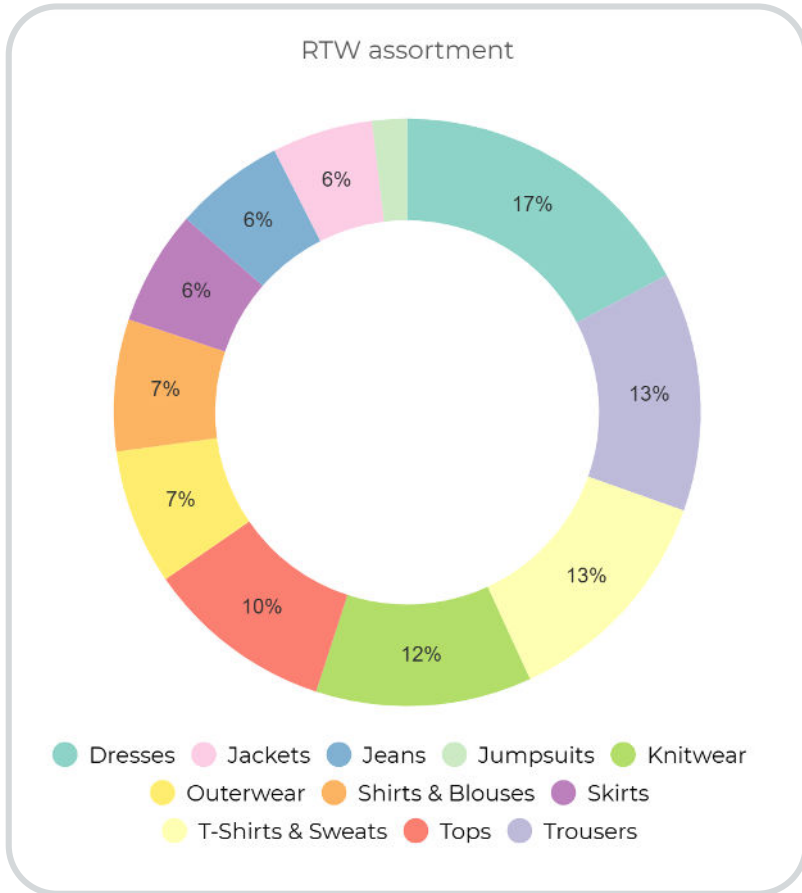


WOMENSWEAR
HOLIDAY
COLLECTIONS
READY-TO-WEAR



LIVETREND

HOLIDAY COLLECTIONS **PRODUCT ASSORTMENT**

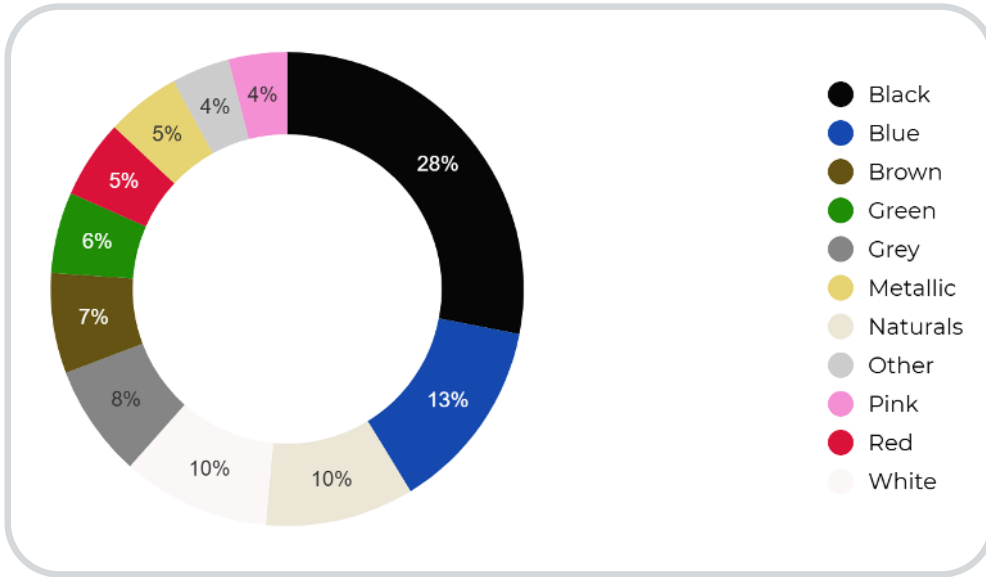


The product assortment for Holiday Collections indicates that, although categories have remained relatively stable overall, there are signs of gradual shifts in consumer preferences. Dresses continue to dominate the range, representing 17% of the assortment, yet the category has seen an 11% decline compared to the same period last year. On the other hand, skirts and trousers have gained traction, growing by 5% and 4%, respectively. This slow but noticeable change underscores a rising preference among consumers for two-piece outfits and tailored pieces, which offer greater versatility and adaptability than dresses. The shift away from dresses reflects a broader move towards essentials and timeless wardrobe staples, particularly in a moment when consumers are prioritizing practical and mixable pieces. Two-piece options like skirts and trousers provide more flexibility for creating varied looks, aligning with the current demand for functional yet stylish clothing that can adapt to different occasions.

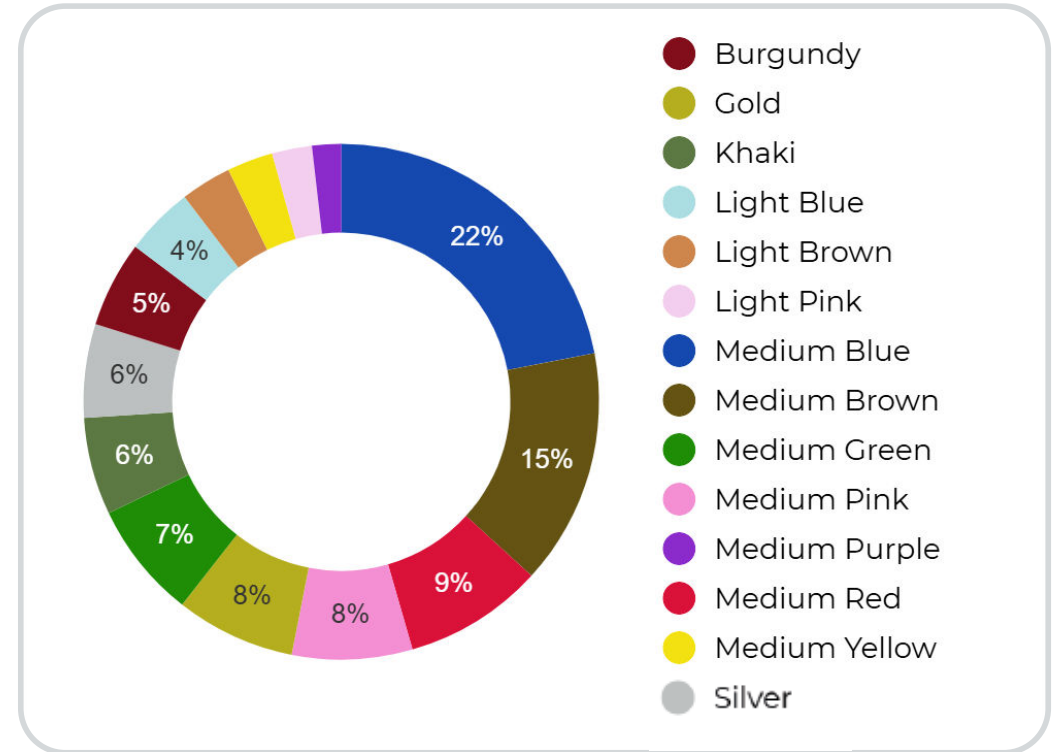


HOLIDAY COLLECTIONS **COLOR ASSORTMENT**

GLOBAL COLOR RANGE



FASHION COLOR RANGE



The Holiday color palette reveals a clear preference for dark colors and neutrals, which dominate more than half of the assortment. This ongoing trend reflects the appeal of low-key luxury, even during the typically vibrant festive season. Classic colors continue to resonate with consumers seeking timeless, versatile options that exude understated elegance. On the other hand, Red dominates the fashion colors that oscillate between reds, pinks, and greens, with a 8% of gold that is coming back as usual for this capsule collection. However, there has been a noticeable decline in vivid and bright hues, signaling a shift toward a more subdued and refined approach to holiday dressing. Investing in long lasting pieces, consumers prefer versatility and casual elegance over bold, attention-grabbing color choices.

HOLIDAY COLLECTIONS **COLORS EVOLUTION**

MEDIUM GREY



Patrizia Pepe.webp



+41%

YEAR ON YEAR

MEDIUM BROWN



2Avis.webp



+53%

YEAR ON YEAR

RED



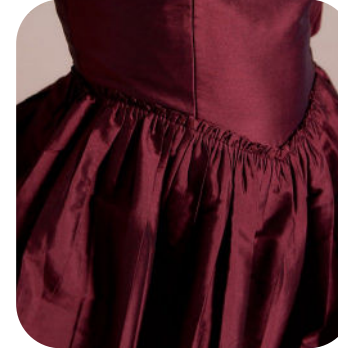
Mango.webp



+11%

YEAR ON YEAR

BURGUNDY



Freepeople.jpg



+101%

YEAR ON YEAR

DARK BROWN



&OtherStories.jpg



+62%

YEAR ON YEAR

PURPLE



Mango.avif



-28%

YEAR ON YEAR

GOLD



Anthropologie (5).webp



-100%

YEAR ON YEAR

Studying FW24 trend, Livetrend's data depict that medium grey (+41%), medium brown (+53%), burgundy (+101%) and dark brown (+62%) have shown significant growth year-over-year, reflecting as announced, a steady trend toward classic and versatile elegance. In contrast, brighter and more statement-making colors like purple (-28%) and gold (-100%) have dramatically declined, further underscoring a shift away from bold and flashy tones. This evolution highlights a consumer preference for sober, adaptable wardrobe choices that prioritize longevity and subtle sophistication, resonating with the broader trend of favoring essentials and timeless pieces.

HOLIDAY COLLECTIONS **PATTERNS & PRINTS**



ANIMALIER



CHECKS



MESSAGE



POLKA DOTS



HOUNDSTOOTH

BIG TREND



reformation-310.jpg

SAFE TREND



Bottega Veneta.avif

STABLE TREND



Pull&Bear.webp

STABLE TREND



Sandro.webp

STABLE TREND



Valentino-61.jpg



+26%
YEAR ON YEAR



+28%
YEAR ON YEAR



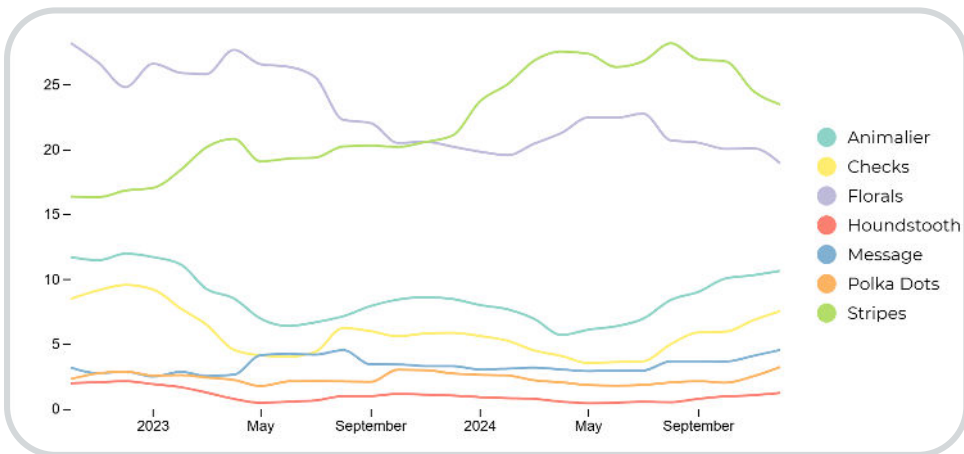
+38%
YEAR ON YEAR



+18%
YEAR ON YEAR



+19%
YEAR ON YEAR



Patterned and printed products for women's holiday collections continue to decline compared to the same period last year, with a significant drop over the past few seasons. This reflects consumers' growing preference for plain, timeless styles that emphasize versatility and longevity. However, as announced, the leopard print has been the strongest novelty of the season, emerging as a stable trend for the upcoming holiday collections. Animalier prints, checkered fabrics, polka dots, and houndstooth patterns are reappearing with a modern, ladylike twist that exudes class and status. As timeless elegance takes center stage, brands are adapting to balance bold patterns with classic motifs, creating a clear direction towards understated luxury, meeting the evolving demands of today's consumers.

HOLIDAY COLLECTIONS **FABRICS**



SHINY

STABLE TREND



@piabaroncini.png



-2%

YEAR ON YEAR



VEILED

STABLE TREND



Zara.jpg



+8%

YEAR ON YEAR



SPARKLING

STABLE TREND



@philosophyofficial2.png



+5%

YEAR ON YEAR



VELVET

EARLY SIGN



Mango (2).avif



+4%

YEAR ON YEAR



FURRY

BIG TREND



Anyie By (5).jpg



+48%

YEAR ON YEAR

The evolution of fabrics in holiday collections reflects a dynamic interplay between tradition and emerging trends. While shiny materials and veiled fabrics maintain stable traction, with slight year-on-year changes, the most notable growth is seen in fur-inspired textures, which have surged by +48%. This signals a shift toward a more maximalist approach, blending opulence with creativity. This furry trend is clearly visible in the market, in the social media and in the streets. Whether worn by a refined lady or a young girl in jeans, this trend relies on ladylike and posh attitude but introduces a bolder, more experimental edge. Velvet and sparkling fabrics also contribute to this narrative, offering even more glamour. Together, these elements hint at a future season where holiday collections balance refined sophistication with playful, statement-making textures, setting the stage for elevated and imaginative designs.

HOLIDAY COLLECTIONS **OUTERWEAR**

BIKER JACKET

SAFE TREND



Anyie By (2).webp

FUR COAT

BIG TREND



@gucci.png

CAPE

STABLE TREND



Zara_1.jpg

PEACOT

SAFE TREND



cos-56.jpg

TAILORED COAT

STABLE TREND



mango-744.jpg



+40%
YEAR ON YEAR



+55%
YEAR ON YEAR



+1%
YEAR ON YEAR



+93%
YEAR ON YEAR



+6%
YEAR ON YEAR



STAR PRODUCT: FUR COAT

HOLIDAY COLLECTIONS **TAILORING**

BLAZER

VEST

COLLARLESS

CROPPED

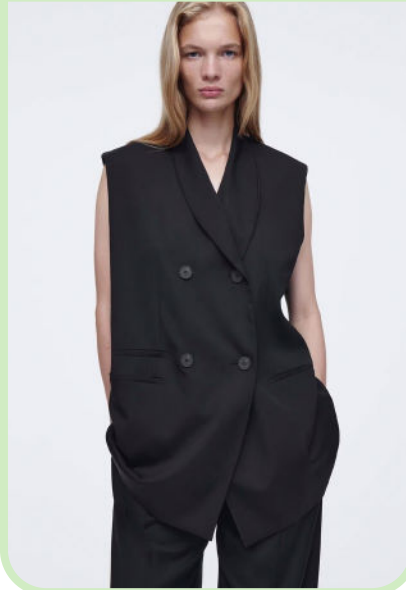
DOUBLE-BREASTED

SAFE TREND



Zara_2.jpg

EDGY TREND



cos-280.jpg

STABLE TREND



zara-25.jpg

STABLE TREND



anthropologie-217.jpg

STABLE TREND



ralph-lauren-309.jpg



-3%

YEAR ON YEAR



+29%

YEAR ON YEAR



+0%

YEAR ON YEAR



+9%

YEAR ON YEAR



-4%

YEAR ON YEAR



STAR PRODUCT: BLAZER

HOLIDAY COLLECTIONS **KNITWEAR**

CABLE SWEATER

STABLE TREND



The Reformation.webp

FAIR ISLE SWEATER

STABLE TREND



Pilcro.webp

GLITZY CARDI

EARLY SIGN



gucci-65.jpg

OFF-SHOULDER TOP

SAFE TREND



asura.png

SHAWL SWEATER

EARLY SIGN



Toteme.webp



-3%

YEAR ON YEAR



-9%

YEAR ON YEAR



+20%

YEAR ON YEAR



+22%

YEAR ON YEAR



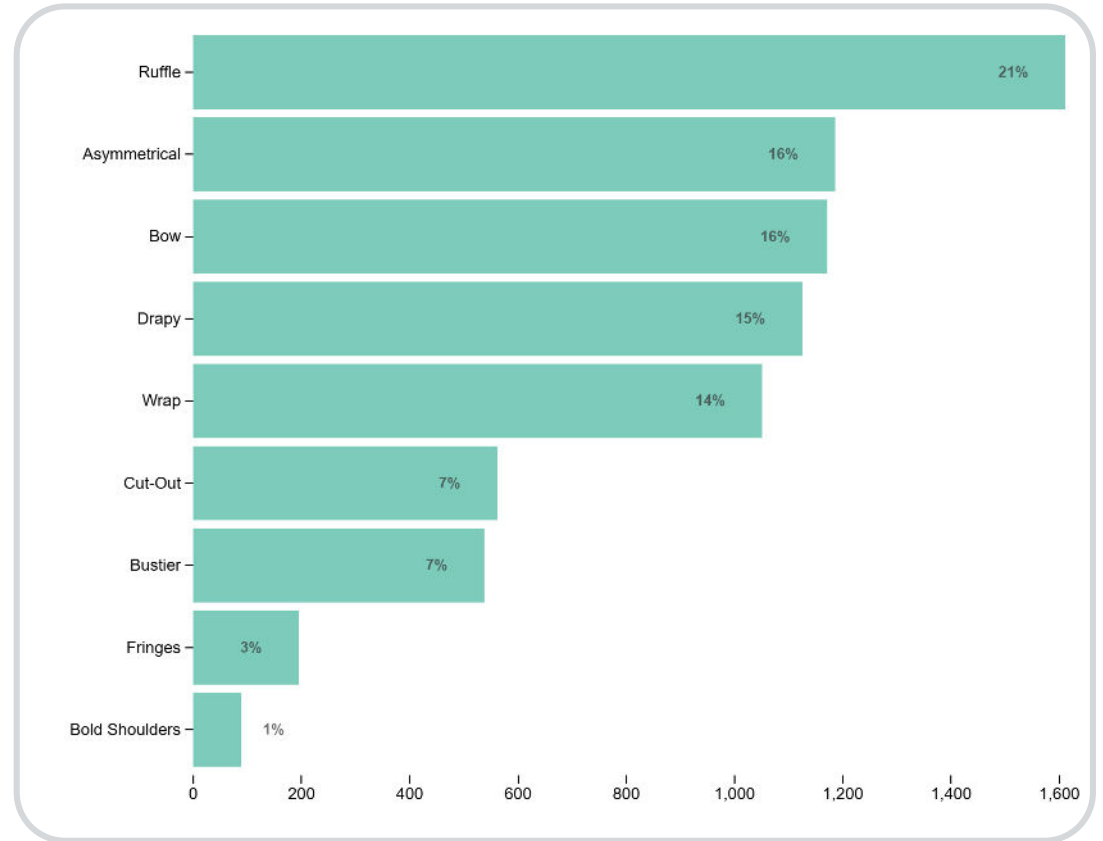
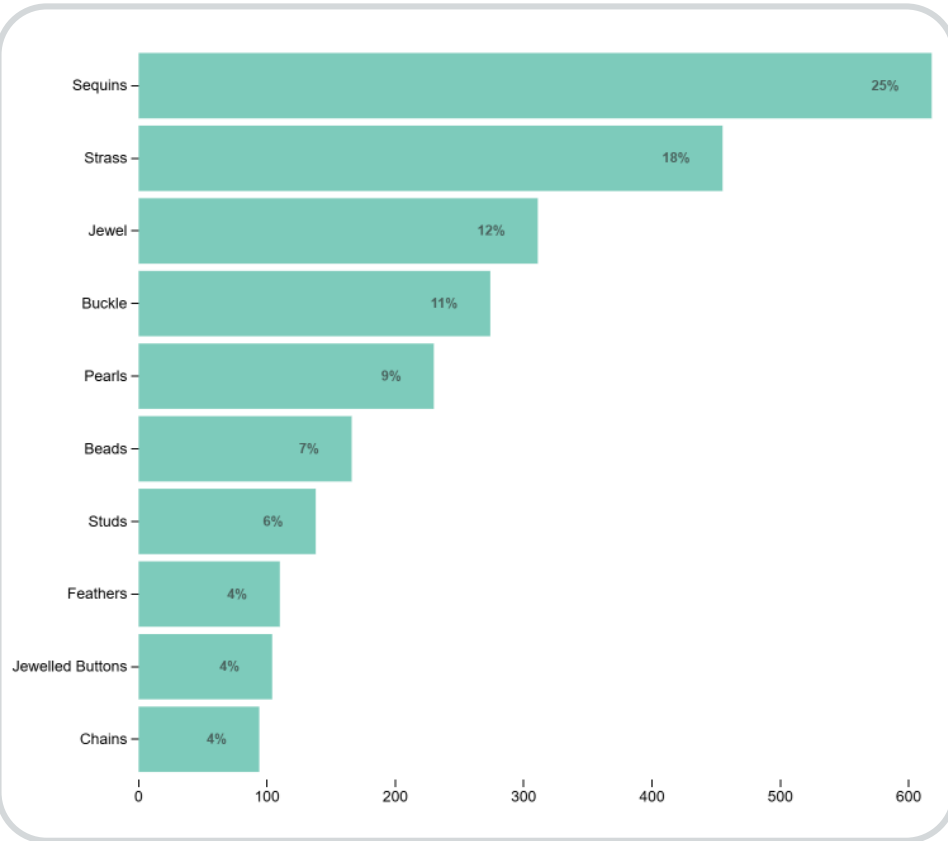
+70%

YEAR ON YEAR



STAR PRODUCT: CARDIGAN

TOPWEAR & DRESSES TRIMS & DETAILS



In the Holiday Collections, trims and style details for topwear and dresses are taking a refined, understated direction. While jeweled accents and sparkling fabrics continue to provide a touch of luxury, they play a subtler role within the „quiet luxury“ aesthetic. The real focus has shifted toward construction-based design details that elevate sophistication without relying on overt embellishments. Draped features, deep waterfall necklines, intricate bow knots, wraps, and complex asymmetrical styles are shaping distinctive pieces with an understated charm. These elements create visually intriguing silhouettes that feel both modern and elegant. This approach delivers products that are meticulously elaborated on the body, emphasizing craftsmanship and uniqueness while embracing a minimalist flair.

HOLIDAY COLLECTIONS TRIMS & DETAILS

DRAPED FEATURES

PLUNGING HALTER

ASYMMETRIC NECK

BOWS

JEWELLED HEMS

SAFE TREND

BIG TREND

SAFE TREND

STABLE TREND

SAFE TREND



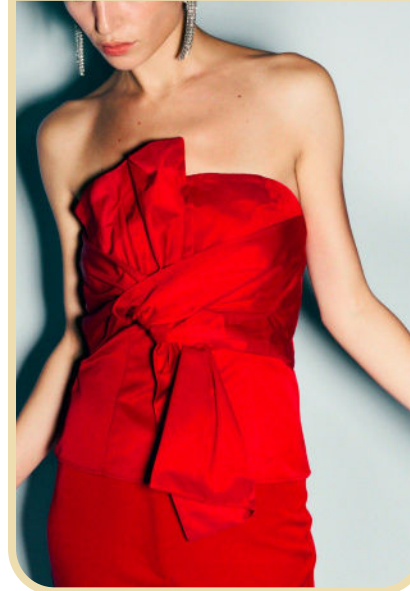
River Island.avif



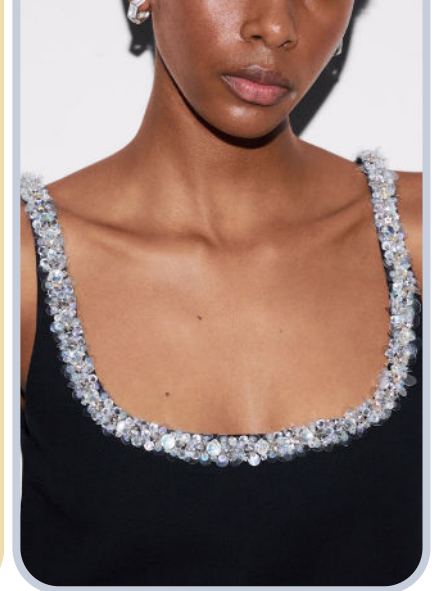
Zara (2)_1.jpg



h&m-271.jpg



h&m-289.jpg



gucci-4.jpg



+40%
YEAR ON YEAR



+128%
YEAR ON YEAR



+50%
YEAR ON YEAR



+14%
YEAR ON YEAR



+47%
YEAR ON YEAR



STAR DETAIL: JEWELLED TRIMS

HOLIDAY COLLECTIONS **SHIRTS & BLOUSES**

WRAP BLOUSE

SAFE TREND



Erika Cavallini.webp

EASY BOATNECK

EDGY TREND



Massimo Dutti.jpg

TIE NECK SHIRT

EARLY SIGN



h&m-110.jpg

BOHO BLOUSE

STABLE TREND



&Other Stories.jpg

PREPPY BLOUSE

SAFE TREND



Sezane.avif



+50%
YEAR ON YEAR



+59%
YEAR ON YEAR



+250%
YEAR ON YEAR



+3%
YEAR ON YEAR



+43%
YEAR ON YEAR



STAR PRODUCT: BLOUSE

HOLIDAY COLLECTIONS **TOPWEAR**

TUBE TOP

SAFE TREND



H&M.avif

CHIC TANK

EARLY SIGN



gucci-135.jpg

SOFT SQUARE

EARLY SIGN



cos-131.jpg

GLITZY TEE

STABLE TREND



mango-109.jpg

SLIP CAMI

STABLE TREND



Na-kd (3).jpg



+26%
YEAR ON YEAR



+66%
YEAR ON YEAR



+60%
YEAR ON YEAR



-7%
YEAR ON YEAR



+8%
YEAR ON YEAR



STAR PRODUCT: TUBE TOP

HOLIDAY COLLECTIONS **DRESSES**

LONG TUBE

STABLE TREND



The Reformation (2).webp



+20%
YEAR ON YEAR

MINI TUTU

EARLY SIGN



mango-51.jpg



+500%
YEAR ON YEAR

FULL-VOLUME

SAFE TREND



Corey Linn.webp



+130%
YEAR ON YEAR

60S MINI

BIG TREND



Atsu.webp



+48%
YEAR ON YEAR

JUMPSUIT

STABLE TREND



Tara Jarmon.webp



+2%
YEAR ON YEAR



STAR PRODUCT: MINI DRESS

HOLIDAY COLLECTIONS **PANTS EVOLUTION**

TAILORED WIDE

SPARKLING PALAZZO

JEWELLED JEANS

GLITZY PANTIE

LEGGINGS

BIG TREND

SAFE TREND

STABLE TREND

EDGY TREND

SAFE TREND



Zara (2).jpg



h&m-5.jpg



mango-681.jpg



Retrofete.webp



ZARA.jpg



+27%
YEAR ON YEAR



+39%
YEAR ON YEAR



+11%
YEAR ON YEAR



+50%
YEAR ON YEAR



+42%
YEAR ON YEAR



STAR PRODUCT: WIDE-LEG PANTS

HOLIDAY COLLECTIONS **SKIRTS EVOLUTION**

SHEER STYLE

BIG TREND



The Frankie Shop.webp

SPARKLING MIDI

SAFE TREND



anthropologie-206.jpg

FULL-VOLUME

SAFE TREND



Zara (4).jpg

MINI BUBBLE

EARLY SIGN



Reserved.avif

JEWELLED MINI

EARLY SIGN



liujo-87.jpg



+23%
YEAR ON YEAR



+35%
YEAR ON YEAR



+110%
YEAR ON YEAR



+130%
YEAR ON YEAR



+112%
YEAR ON YEAR



STAR PRODUCT: MIDI SKIRT

DATA SOURCES & ICONS

TREND GROWTH



MARKET

YEAR ON YEAR TREND GROWTH ON E-COMMERCE



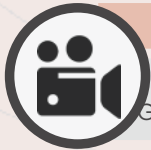
SOCIAL MEDIA

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

THANK YOU!

You may not copy, reproduce, distribute, publish, display, perform, modify, create derivative works, transmit, or in any way exploit any such content, nor may you distribute any part of this content over any network, sell or offer it for sale, or use such content to construct any kind of database. You may not alter or remove any copyright or other notice from copies of the content on any Livetrend report.

If you have further needs, please contact us via chat.