

## Brandmonitor UK Men's Casualwear Brand Ranking: AW '09 (AW '08 in Brackets) – Top 200 Brands

### Top 50

AW '09 Rank	Brand
1	Adidas (1)
2	Nike (2)
3	Levi Strauss & Co (3)
4	Fred Perry (10)
5	G-Star Raw (5)
6	Bench (8)
7	All Saints (9)
8	Lacoste (13)
9	French Connection (4)
10	Diesel (6)
11	Boss Hugo Boss (12)
12	Polo Ralph Lauren (17)
13	Ted Baker (7)
14	Berghaus (20)
15	The North Face (15)
16	Superdry (19)
17	Puma (27)
18	Ben Sherman (14)
19	Firetrap (11)
20	Armani (21)
21	Henleys (26)
22	Fat Face (22)
23	Jack & Jones (32)
24	Gant (29)
25	Timberland (16)
26	Tommy Hilfiger (34)
27	Paul Smith (24)
28	Reebok (31)
29	Henri Lloyd (30)
30	Animal (18)
31	Barbour (41)
32	Lyle & Scott (42)
33	Gio Goi (23)
34	Umbro (28)
35	Wrangler (35)
36	Dolce & Gabbana (51)
37	Everlast (39)
38	Duck and Cover (25)
39	Jaeger (56)
40	Jack Wills (46)
41	Craghoppers (55)
42	Fila (44)
43	Quiksilver (36)
44	Penguin (48)
45	The Duffer Of St George (144)
46	White Stuff (64)
47	Voi Jeans (134)
48	Hackett (54)
49	Esprit (59)
50	Peter Werth (33)

### Ranked 51-100

AW '09 Rank	Brand
51	Crew Clothing (62)
52	Trespass (60)
53	Austin Reed (52)
54	Regatta (104)
55	DKNY (58)
56	United Kingdom of Luke (74)
57	Stone Island (49)
58	Replay (37)
59	Lee (47)
60	Pierre Cardin (89)
61	Fullcircle (43)
62	Ringspun (67)
63	Vivienne Westwood (79)
64	Prada (66)
64	Carhartt (76)
66	Gucci (86)
67	Rohan (88)
67	Slazenger (139)
69	Nickelson (95)
70	Lee Cooper (107)
71	Rockport (63)
72	Fenchurch (73)
73	Billabong (50)
74	Helly Hansen (67)
75	Tom Wolfe (40)
76	Nudie Jeans (75)
77	Teddy Smith (53)
77	Burberry (97)
79	Sergio Tacchini (128)
80	Franklin & Marshall (99)
81	Lambretta (45)
82	O'Neill (38)
83	Fly 53 (85)
84	Nicole Farhi (153)
85	Criminal (67)
86	Ed Hardy (157)
86	Uniqlo (96)
88	J Lindeberg (71)
89	Money (100)
90	Mountain Equipment (111)
90	Karrimor (194)
92	Evisu (70)
93	John Smedley (83)
93	Pepe Jeans (84)
95	Vans (101)
95	Head (229)
97	Sprayway (103)
97	Belstaff (130)
99	Farah (89)
100	Weird Fish (116)

### Ranked 101-150

AW '09 Rank	Brand
101	Breed (115)
102	Guide London (65)
102	Crosshatch (148)
104	Joules (233)
105	Alexander McQueen (133)
106	Paul & Shark (72)
107	Columbia (78)
108	Pringle (94)
109	Calvin Klein (119)
110	United Colours Of Benetton (91)
111	Ellesse (93)
112	Oakley (79)
113	True Religion (138)
114	Brave Soul (185)
115	Junk De Luxe (113)
116	Campri (294)
117	Geox (118)
118	Nigel Hall (107)
118	Rivington (319)
120	Rab (237)
121	Viyella (102)
122	Mountain Hardwear (183)
123	Wolsey (205)
124	Burton (308)
125	K-Swiss (218)
126	Scotch & Soda (126)
126	Guess (165)
128	Kathmandu (264)
129	Stussy (171)
129	Aquascutum (227)
131	Marc O'Polo (130)
132	Diadora (77)
133	Kappa (192)
133	Police (296)
135	UCLA (281)
136	Schott (81)
136	DC Shoes (159)
138	Mulberry (114)
138	Two Stoned (119)
140	Salomon (181)
141	Versace (87)
142	Mish Mash (143)
142	Mango (122)
144	Elvis & Jesus (148)
144	Criminal Damage (317)
144	Hardcastle (123)
147	Religion (216)
148	Supremebeing (98)
148	Penfield (237)
150	Element (139)

### Ranked 151-200

AW '09 Rank	Brand
150	Victorinox (214)
152	Amplified (300)
153	Energie (61)
154	Russell Athletic (283)
155	Sonneti (57)
155	Canterbury of New Zealand (92)
155	Icebreaker (189)
158	Desigual (136)
158	Osaka (159)
158	7 For All Mankind (229)
161	CP Company (105)
161	Dockers (117)
163	Trench (135)
164	Kickers (177)
165	Marmot (317)
165	Blazer (136)
167	Le Coq Sportif (194)
167	Remus Uomo (209)
167	Edwin (246)
170	Addict (125)
170	Chunk (129)
170	Yves Saint Laurent (274)
170	Abercrombie & Fitch (139)
170	Brooks Brothers (139)
175	Gabiccini (119)
175	Volcom (130)
175	Benzini (155)
178	Crombie (150)
179	Maharishi (112)
179	Lowe Alpine (229)
181	Ecko (162)
181	Boxfresh (205)
183	Billionaire Boys Club (162)
183	Smith & Jones (289)
183	Musto (265)
186	Cavalli (110)
186	Etnies (214)
188	Camel Active (154)
189	Blend (146)
189	WeSC (200)
191	Cotton Traders (234)
191	Hoi Polloi (150)
191	Muji (150)
194	Patagonia (205)
194	BC London (237)
194	Jil Sander (265)
197	Christian Audigier (281)
198	Marlboro Classics (183)
199	Zegna Sport (257)
199	Dsquared2 (155)

## brandmonitor

Brandmonitor surveys are carried out by teams of experienced fashion industry researchers who covertly visit every retailer in a shopping destination, log the presence of every fashion brand, and estimate the linear metres of space allocated to each brand.

The survey covers 51 key city centre shopping destinations. These shopping destinations cover all the major retail centres, often covering two in some cities (for example, the Metro Centre and Newcastle city centre are analysed separately). Retail parks are excluded. The geographical spread runs from Exeter to Aberdeen and there is a mix of major cities and smaller towns (eg. from Liverpool to Bath) and prominent shopping centres like Bluewater and Merryhill. Belfast and Dublin are also included.

Market data on men's brands, women's brands and footwear brands are collected separately. In all, more than 2,700 individual shops, from department stores to independent boutiques and from multibrand chains to monolabel stores, are surveyed. More than 1,000 fashion brands have been identified and their distribution partners recorded.

Brandmonitor research can be used strategically and tactically by defining:

- Individual brand position in the rankings (national and by location) vs. competitors
- Benchmarking channel mix (individual brands vs. national profile)
- Brand penetration by region and location grade
- Which markets appear to be over/under-represented by brands relative to retail spending?
- Where do specific brands rank now and where will they be in the future. Top 25? Top 10? Top 5?
- How much space do specific brands need to add (and in some cases subtract) to meet targets by location?

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# brandmonitor UK Men's Casualwear Brand Ranking AW '09 & AW '08

## Introduction

As Brandmonitor prepares to conduct its latest annual survey of UK men's casualwear brand distribution for AW '10 (results available from December '10), we thought it would be interesting to publish the Top 200 Menswear Brand Rankings based on our most recent survey, conducted in AW '09.

## Key Findings

Adidas and Nike retain their number one and number two ranking positions in AW '09, both well ahead of the next sportswear brands Puma, in 17<sup>th</sup> place and Reebok in 28<sup>th</sup> place.

Denim brands Levi Strauss (3<sup>rd</sup>) and G-Star raw (5<sup>th</sup>) retain their positions in AW '09, while French Connection drops from 4<sup>th</sup> ranking position in AW '08 to 9<sup>th</sup> in AW '09.

Other brands dropping down the distribution rankings include Diesel (down 4 places from 6<sup>th</sup> to 10<sup>th</sup>), Ted Baker (down 6 places from 7<sup>th</sup> to 13<sup>th</sup>), Firetrap (down from 11<sup>th</sup> to 19<sup>th</sup>), Timberland (down from 16<sup>th</sup> to 25<sup>th</sup>) and Gio Goi (from 23<sup>rd</sup> to 33<sup>rd</sup>).

While some established brands moved down the rankings, other brands significantly increased their distribution in the marketplace during 2009 and moved up the Brandmonitor rankings table. Fred Perry moved up 6 places from 10<sup>th</sup> to 4<sup>th</sup> during 2009. Bench moved up 2 ranking spots from 8<sup>th</sup> to 6<sup>th</sup>, while Lacoste moved from 13<sup>th</sup> to 8<sup>th</sup> place.

Two brands which continued to grow distribution predominantly from standalone 'monolabel' stores were All Saints (up from 9<sup>th</sup> to 7<sup>th</sup> place) and Superdry (up from 19<sup>th</sup> to 16<sup>th</sup> place).

Other key movers were Polo Ralph Lauren, up 5 places from 17<sup>th</sup> to 12<sup>th</sup>, Henleys went from 26<sup>th</sup> to 21<sup>st</sup>, Jack & Jones moved up from 32<sup>nd</sup> to 23<sup>rd</sup>, Tommy Hilfiger moved up 8 places from 34<sup>th</sup> to 26<sup>th</sup> and Lyle & Scott moved from 42<sup>nd</sup> to 32<sup>nd</sup>. Other brand growth included Gant (up from 29<sup>th</sup> to 24<sup>th</sup> place) and Hugo Boss edged up 1 place from 12<sup>th</sup> to 11<sup>th</sup>.

## Emerging Brands

A number of brands made very large leaps in distribution during 2009. Voi Jeans broke into the top 50 brand list for the first time, moving from 134<sup>th</sup> ranked place to 47<sup>th</sup>. United Kingdom of Luke moved from 74<sup>th</sup> to 56<sup>th</sup> place.

Other brands which grew fast in 2009 include Musto, up from 265<sup>th</sup> place to 183<sup>rd</sup> place and 7 for All Mankind, up from 229<sup>th</sup> place to 158<sup>th</sup> place. Belstaff was another noticeable mover, up from 130<sup>th</sup> to 97<sup>th</sup>.

## Homegrown Lifestyle Brands

UK brands such as Joules, Crew Clothing, Jack Wills and White Stuff have all moved up the Brandmonitor rankings in 2009, reflecting their continuing move into mainstream distribution. Joules was ranked in 233<sup>rd</sup> place in 2008 however by AW 2009 had moved up to 104<sup>th</sup> place. Crew Clothing moved up from 62<sup>nd</sup> to 51<sup>st</sup> place in AW '09. White Stuff moved 18 ranking places from 64<sup>th</sup> to 46<sup>th</sup>, while Jack Wills moved from 46<sup>th</sup> to 40<sup>th</sup>. Fat Face, which has the most mainstream profile of these brands remained static in 22<sup>nd</sup> place.

## Mixed Fortunes for Outdoor Sector

The Outdoor branded sector was a story of mixed fortunes in AW '09. Brands with an outdoor heritage but also with one foot in the fashion mainstream lost ground in the rankings. Timberland, Helly Hansen, Columbia and Henri Lloyd all moved down the Brandmonitor rankings. In contrast, more 'pureplay' outdoor brand such as Trespass, Rohan, Mountain Equipment, Mountain Hardwear and Craghoppers rose up the rankings. Craghoppers for example, broke into the top 50 rankings, moving to 41<sup>st</sup> place up from 55<sup>th</sup> place a year earlier; Trespass moved up to 52<sup>nd</sup> place from 60<sup>th</sup> and Rohan moved from 88<sup>th</sup> to 67<sup>th</sup> place.

## Declining Brands

Sonneti declined from 57<sup>th</sup> place in AW '08 to 155<sup>th</sup> in AW '09 (and has now subsequently been sold by WDT to JD Sports to become part of their stable of own labels). Peter Werth also reduced distribution in 2009, moving from 33<sup>rd</sup> to 50<sup>th</sup> place. Denim brand Replay lost considerable ground, dropping 21 places from 37<sup>th</sup> to 58<sup>th</sup> place.

Surf brands had a challenging year in 2009. O'Neill dropped 44 places from 38<sup>th</sup> to 82<sup>nd</sup>, Quiksilver edged back from 36<sup>th</sup> to 43<sup>rd</sup>, Animal declined to 30<sup>th</sup> place from 18<sup>th</sup> and Billabong dropped over 20 places from 50<sup>th</sup> to 73<sup>rd</sup>.

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