

Brandmonitor UK Women's Clothing Brand Ranking: AW '09 (AW '08 in Brackets) – Top 200 Brands

Top 50		Ranked 51-100		Ranked 101-150		Ranked 151-200	
AW '09 Rank	Brand	AW '09 Rank	Brand	AW '09 Rank	Brand	AW '09 Rank	Brand
1	Adidas (2)	51	7 For All Mankind (51)	101	Breed (150)	148	Hoi Polloi (116)
2	Nike (1)	52	Regatta (156)	102	Aquascutum (200)	152	Modo (446)
3	All Saints (4)	53	Motel (74)	102	Sonia Rykiel (106)	152	Mela Loves London (290)
4	French Connection (3)	54	Brave Soul (311)	104	Geox (106)	152	Mountain Hardwear (242)
5	Ted Baker (5)	54	Gant (63)	105	Day Birger Et Mikkelsen (81)	152	Sandwich (186)
6	Fat Face (9)	56	Olympus (423)	106	Vans (166)	152	Icebreaker (169)
7	The North Face (12)	57	Gucci (75)	107	Pussycat (276)	157	Hudson (112)
8	Berghaus (11)	58	USA pro (67)	107	Weird Fish (104)	158	Chilli Pepper (102)
9	Bench (7)	59	Billabong (34)	109	Henri Lloyd (144)	159	Vila (129)
10	Armani (15)	60	Chesca (260)	110	Sub Couture (83)	159	Tigi-Wear (127)
11	Diesel (6)	61	Four Seasons (84)	111	Miu Miu (260)	159	Theory (93)
12	G-Star Raw (8)	62	Angel Eye (388)	112	Only (60)	162	Ringspun (186)
13	Levi Strauss & Co (13)	63	Ellesse (437)	113	Stella McCartney (145)	162	Malene Birger (173)
14	Superdry (16)	63	Pepe Jeans (48)	114	Quiz (88)	162	Diadora (73)
15	White Stuff (26)	65	AX Paris (179)	115	Kathmandu (284)	165	John Zack (398)
16	Puma (23)	66	Timberland (33)	115	Belstaff (153)	165	Umbro (191)
16	Animal (10)	67	Gerard Darel (99)	115	Columbia (62)	165	Gavi Di Gavi (125)
18	Esprit (20)	68	Quiksilver (72)	115	Lee (49)	165	Give (125)
19	Reebok (19)	69	Joules (191)	119	Pinko (105)	169	True Religion (153)
20	Firetrap (14)	70	Rare (56)	120	Karrimor (379)	169	Ben Sherman (97)
21	Polo Ralph Lauren (39)	71	Paul's Boutique (197)	120	Sahara (94)	171	Chanel (336)
22	Miss Sixty (17)	72	Sweaty Betty (53)	122	Roman Originals (119)	172	Abercrombie & Fitch (131)
23	Tommy Hilfiger (36)	73	Guess (127)	123	Tara Jarmon (149)	172	Brooks Brothers (131)
24	Jack Wills (30)	74	Olsen (79)	124	James Lakeland (356)	174	Marmot (473)
25	Lipsy (22)	75	Prada (71)	125	Cavalli (84)	174	Blend (251)
26	DKNY (29)	76	Alexander McQueen (145)	126	BCBG Max Azria (290)	176	Twenty8Twelve (99)
27	LA Gear (24)	77	Moschino (69)	127	Mulberry (96)	177	Stella (457)
28	Boss Hugo Boss (27)	78	Glamorous (204)	128	Sisley (325)	178	Cath Kidston (404)
29	Vero Moda (32)	78	Paul & Joe (66)	128	Rab (242)	178	Chloe (142)
30	Henleys (21)	80	Calvin Klein (102)	130	Noa Noa (94)	178	Cutie (136)
31	Everlast (38)	81	O'Neill (31)	131	Punkyfish (109)	181	Iron Fist (361)
32	Dolce & Gabbana (52)	82	Helly Hansen (77)	131	Red Or Dead (106)	181	Influence (290)
33	Paul Smith (35)	83	Sprayway (133)	133	Criminal Damage (437)	181	David & Goliath (159)
34	Vivienne Westwood (47)	83	Comptoir des Cotonniers (109)	134	Oska (91)	181	Freddy (140)
35	Joseph (36)	85	Diane Von Furstenberg (136)	135	T Sega (457)	185	Lee Cooper (393)
36	Trespass (45)	85	Applebottoms (65)	135	Crea Concept (145)	185	Salomon (240)
37	Desigual (57)	85	Tom Wolfe (43)	137	QED London (417)	185	Max C (124)
38	Viyella (69)	88	Replay (40)	137	Yves Saint Laurent (260)	188	Balenciaga (190)
39	Barbour (59)	89	Fullcircle (55)	137	Miss Fiori (119)	189	Siren (417)
40	Craghoppers (57)	90	Killah (133)	137	Traffic People (75)	189	Musto (183)
41	Nicole Farhi (123)	90	Great Plains (41)	141	J Brand (136)	189	Arrogant Cat (98)
42	Burberry (63)	92	Pineapple (78)	142	Playboy (90)	192	Evita (429)
43	Roxy (28)	93	Apricot (388)	143	Missoni (247)	192	Uttam London (238)
43	Lacoste (25)	93	Mountain Equipment (116)	143	Donna Karan (210)	192	Toast (145)
45	Yumi (54)	93	Marc Jacobs (61)	145	Religion (140)	192	Rock & Republic (86)
46	Gio Goi (18)	96	Ghost (457)	145	Wal G (114)	196	Ed Hardy (437)
47	Crew Clothing (50)	96	Ichi (119)	145	Zadig & Voltaire (114)	196	Title (150)
48	Fred Perry (46)	98	See By Chloe (92)	148	Dannimac (304)	198	Graffic (429)
49	Rohan (68)	98	Oakley (86)	148	Aftershock (284)	198	Marni (197)
50	Juicy Couture (44)	98	Pringle (79)	148	TFNC (129)	198	Greenstone (153)

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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?

If you would like to know more about Brandmonitor research, please contact:

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brandmonitor UK Women's Clothing Brand Ranking AW '09 & AW '08

Introduction

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

Key Findings

Nike loses the top spot to Adidas, however both brands remain well ahead of the next sports brands Puma (16th) and Reebok (19th).

All Saints moves up to 3rd place in the Brandmonitor rankings, swapping places with French Connection, which drops to 4th place.

Reduced Distribution

Many established brands dropped down the Brandmonitor rankings in AW '09. Bench dropped 2 places from 7th to 9th, Diesel dropped 5 places from 6th to 11th, G-Star Raw dropped 4 places from 8th to 12th, Firetrap moved 6 places lower from 14th to 20th, Henleys moved from 21st to 30th, Miss Sixty from 17th to 23rd and Lacoste from 25th to 43rd.

Increased Distribution

A number of brands with distinctive handwriting have moved up the Brandmonitor rankings. Desigual moved up 20 places in AW '09 from 57th to 37th, while Vivienne Westwood moved from 47th to 34th place. Superdry continues to move up the rankings, from 16th place in AW '08 to 14th by AW '09.

US lifestyle brands also moved up the rankings, reflecting increased, wider distribution in AW '09. Polo Ralph Lauren moved up 18 places from 39th to 21st place, Tommy Hilfiger moved up 13 places from 36th to 23rd place, Gant moved from 63rd to 54th, while Guess jumped over 50 places from 127th to 73rd place.



French Connection dropped from 3rd to 4th place in the Brandmonitor Rankings in AW '09.



Brands with distinctive handwriting have moved up Brandmonitor's rankings list. Vivienne Westwood for example has moved from 47th to 34th place over the past 12 months.



The continuing popularity of outdoor brands is reflected in the top 10 ranking positions of The North Face (ranked 7th) and Berghaus (ranked 8th).

Outdoor Brands

The popularity of outdoor brands can be seen from the fact that The North Face and Berghaus both moved into the top 10 brand rankings in AW '09. The North Face moved up 5 places from 12th to 7th, while Berghaus moved up 3 places from 11th to 8th place.

Other outdoor brands also moved up the Brandmonitor rankings: Trespass from 45 to 36th, Barbour from 59th to 39th, Craghoppers from 57th to 40th, Rohan from 68th to 49th, and Sprayway from 133rd to 83rd.

UK Homegrown Lifestyle Brands

Many UK lifestyle brands have moved up the Brandmonitor rankings, reflecting their move into more mainstream distribution. Fat Face has moved up 3 places from 9th to 6th, White Stuff has moved from 26th to 15th, Jack Wills has moved from 30th to 24th and Joules has moved from 191st to 69th.

Surf Down

In contrast to homegrown brands, many international surf brands have suffered over the past 12 months. O'Neill has dropped 50 ranking places from 31st to 81st, Billabong has dropped 25 places from 59th to 34th place, Roxy has moved from 28th to 43rd. Even home grown UK surf brands aren't immune, as Animal has dropped 6 places from 10th to 16th place.

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