

Collection Review: Men's Key Items – Cut & Sew S/S 25

The duality of S/S 25's smart yet relaxed aesthetic sees labels adopt a refined direction for cut-and-sew pieces

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Market analysis: category

Catwalk newness

- #NewPrep themes infuse collections with collegiate #Clubhouse aesthetics
- An emphasis on versatility and hybrid #WorkLeisure styling sees #CityDressing and #CityToBeach trends make their mark
- A youthful undercurrent emerges via #Kidult graphics and bright shades and in a darker grunge aesthetic with Rebellious Punk undertones

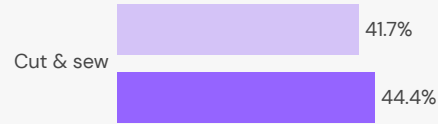
Retail reality

- An increase in new-in assortment figures in the UK indicates a desire for newness in the category. This aligns with the category tracking the shift to smarter dressed-up aesthetics through new style choices
- The decrease in the US new-in figures represents an opportunity to invest in newness to capitalise on shifting aesthetics

UK S/S men's retail mix tracker YoY

% cut-and-sew mix of new-in assortment

S/S 23 S/S 24



WGSN e-commerce. Data collected from retailers from February - May 2024 and 2023

WGSN.com



US S/S men's retail mix tracker YoY

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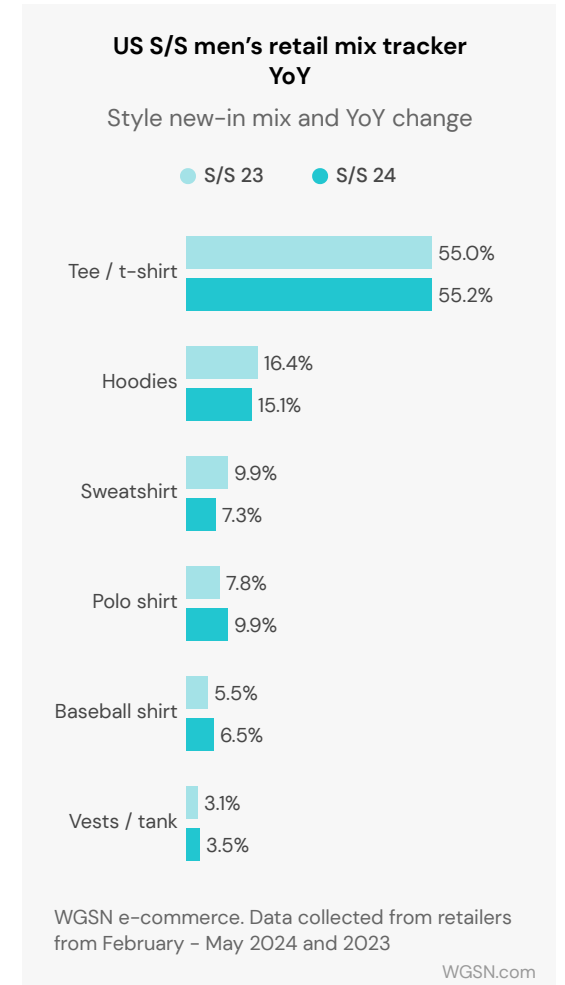
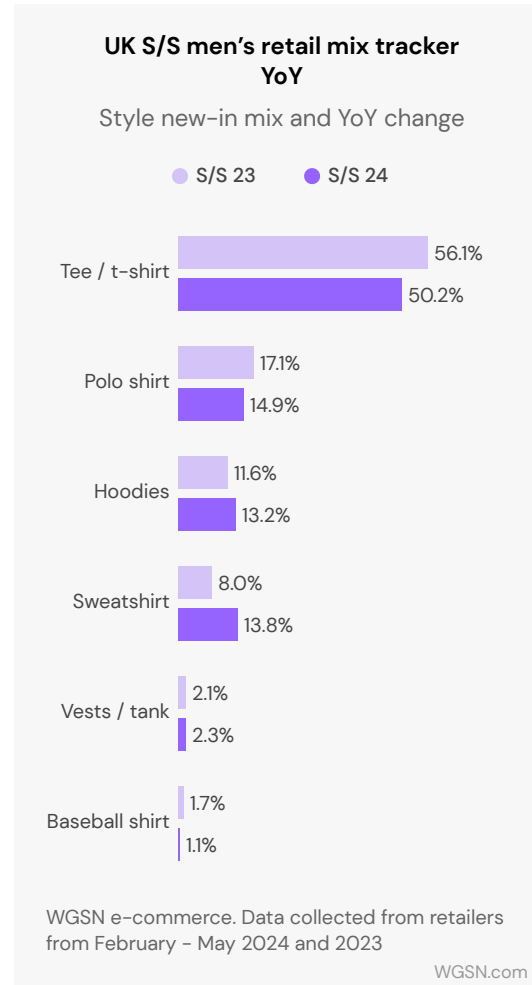
Market analysis: style

Catwalk newness

- T-shirts had a premium look and feel with elevated details on the catwalks, echoing the #ContrastTrim and #RichEmbroidery we spotted at Pitti Uomo
- Labels explored #NotSoClassic fabrics and details for vests and tanks. Body-conscious silhouettes and semi-sheer materials spoke to #RedefiningMasculinity narratives
- #PoloPower featured strongly in knit and jersey varieties on the catwalks. #Preppy styling, print and details were prevalent

Retail reality

- A decrease in new-ins for T-shirts in the UK indicates a slowing growth for the style. This corresponds with its Slow Riser classification for S/S 25 in our Core Item Update report
- Retail analysis of T-shirt pricing in the US suggests an opportunity for higher-priced styles. Capitalise on premium details and aesthetics showcased on the S/S 25 catwalks
- Polo shirts surpass sweatshirts by 2.6% in the new-in mix in the US. This corresponds to the influence of #NewPrep and #Clubhouse trends and the demand for smarter aesthetics



Test or invest

●
Test



Florian Wowretzko

#NotSoClassic vest

●



Undercover

#CityToBeach sweatshirt

●



Saul Nash

Urban hoodie

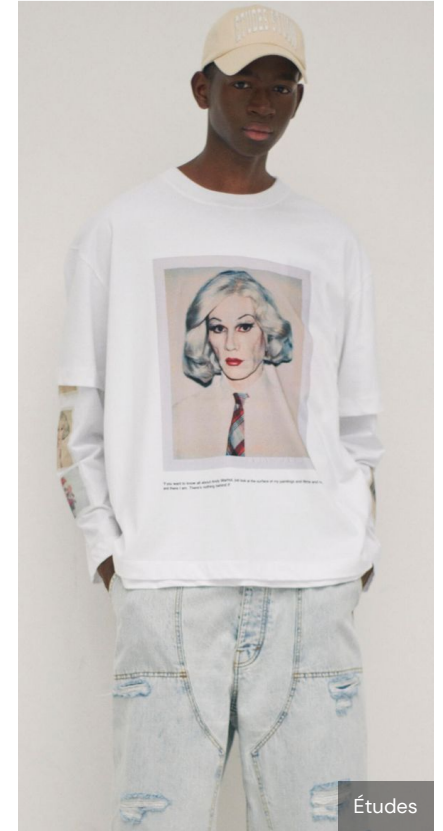
●



GmbH

#NewPrep polo

●
Invest



Études

Every-situation tee

The #NotSoClassic vest

Supplementing #CollectionEssential tanks, we spotted designs incorporating key seasonal trends on the catwalks. Fitted silhouettes have a #RelaxedFormal dressed-up appeal, while slouchy options exude youthful and laidback vibes.

Bold #ColourBlocking and #Asymmetric detailing



#NotSoClassic crafted construction



#RedefiningMasculinity semi-sheers



Slouchy fits for youth markets



Sunday_Best retro-inspired geo_prints and styling



The #CityToBeach sweatshirt

Nostalgic Coastal references update sweatshirt styles via haptic Retro Plush fabrications and preppy #Nautical details. The fits are slim but have room to layer.

Relaxed fit conducive to seasonal layering



Luxe Pastel tints and playful graphics



Tactile Fabrics elevate #CollectionEssentials



Summer Stencil graphics, sleeveless silhouette



#Clubhouse half-zip and collegiate-like Legacy Logos



The urban hoodie

The urban hoodie builds on the familiarity and commercial appeal of timeless shades and comfort-driven materials and fits. #Kidult and Grungy Punk themes offer design directions to test for youth assortments.

#Kidult feel-good colour and graphics



Legacy Logos and practical deep pockets



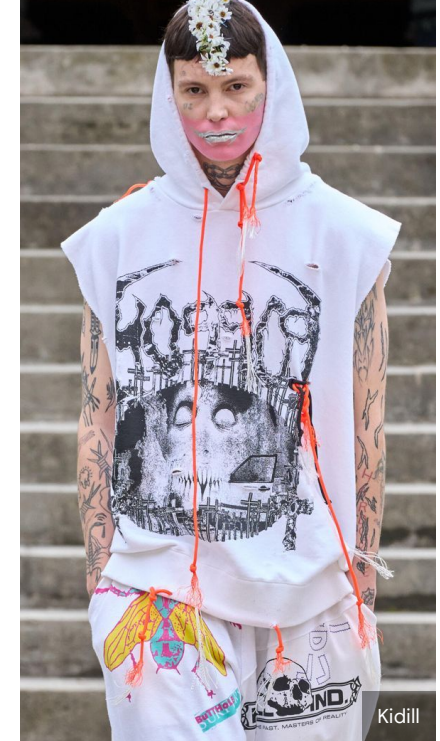
Comfort-driven sets



#Workwear layering and #EnhancedNeutrals



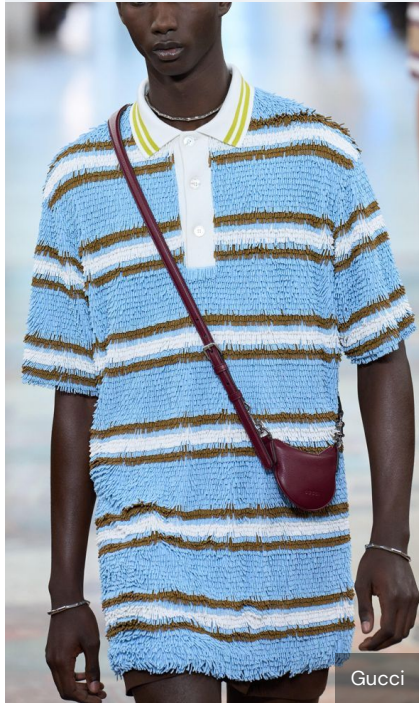
Youth-driven grungy punk



The #NewPrep polo

#NewPrep and #Clubhouse aesthetics give the style a smart yet casual look, playing into #CityDressing and #CityToBeach trends.

#PreppyStripes in upbeat and restorative shades



#ElevatedEveryday retro geos and #ContrastTrim



Tactile fabrics elevate #CollectionEssentials



#VariegatedStripes and half-zip closures



Classic #Clubhouse rugby shirt



The every-situation T-shirt

S/S 25 collections focused on a looser fit that stopped short of being slouchy. Print and detailing vary from premium-driven embroidery and appliqué to youthful, bold Self-Help Slogans and graphics.

Embroidery and appliqué



Contrast trims and borders



#SportSmart



Statement slogans



Cartoonification graphics



Action points

1

Prioritise comfort and versatility

Through fit and fabrication, ensure that designs are easy-wearing and adaptable to hybrid lifestyles. Keep silhouettes slim but relaxed to accommodate layered styling. Use textured and plush fabrications to elevate basic silhouettes and create styles suitable for work and leisure

2

Drive newness with key trends

Capitalise on the strong aesthetics of S/S 25's key trends to refresh best-sellers. Look to #CityDressing, #NewPrep and #ModernMariner trends for smarter T-shirts, polo shirts and hoodies. #RedefiningMasculinity offers a wealth of inspiration for trend-focused consumers

3

Adopt a holistic approach to range-building

As outerwear and tailoring become increasingly casual to adapt to hybrid lifestyles and match contemporary #WorkExperience and #RelaxedFormal aesthetics, the traditionally casual cut-and-sew category becomes smarter. Adopt a big-picture approach to building ranges and assortments to ensure that categories align

Methodology

WGSN e-commerce data

- Based on men's products across retailers in the UK and US from February to May 2023 and 2024
- Some retailers are excluded to ensure like-for-like calculations and to avoid inflated product counts due to the acquisition of new retailers on the platform
- Numbers may fluctuate as we recategorise to help clarify ambiguous/new products or if retailers refactor their websites

Definitions

- Assortment mix (%): products in each category divided by overall apparel products available during the specified period
- New-in: the products that are newly added to the retail website in the time frame selected
- Percentage point (ppt): a percentage is the proportion of a set of products over a larger set. An example is new-in trousers over new-in apparel mix. A percentage point computes the arithmetical difference between percentages; going from 40% to 44% is a 4ppt increase
- YoY: year-on-year