

Fashion Brand Atlas 2026: 83 per cent of fashion brands sell online, but 70 per cent still rely on wholesale

An analysis of 2838 brand profiles from 58 countries shows that fashion brands combine online, wholesale and retail channels, while marketplaces remain marginal at 5 per cent.

Zurich, 14 October 2026

AI in Fashion Daily has published the Fashion Brand Atlas 2026, an analysis of 2838 researched fashion brand profiles from 58 countries of origin. E-commerce is documented for 83 per cent of the brands and wholesale for 70 per cent, while only 5 per cent document sales through marketplaces. The gap between online sales and wholesale is just 13 percentage points. Selling collections to retail partners therefore remains a core route to market alongside direct online sales.

HIGHLIGHTS

- 83 per cent of the 2838 brands document e-commerce, the most common sales channel.
- 70 per cent sell through wholesale; own stores follow at 53 per cent.
- Marketplaces are documented for only 5 per cent of brands, department stores for 11 per cent.
- Five countries account for 1674 brands, or 59 per cent: the United States, the United Kingdom, Germany, France and Italy.
- Denmark has the highest wholesale share among countries with at least 100 brands at 90 per cent, ahead of Italy at 85 per cent.
- Wholesale ranges from 90 per cent in sportswear and outdoor to 17 per cent in mass market and fast fashion.
- 686 of the 1801 brands with a known founding year were founded in the 2000s or 2010s.

How fashion brands sell today

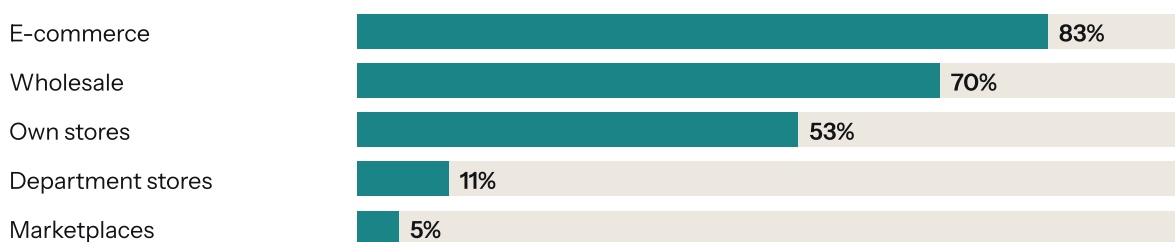
E-commerce is the most widely documented sales channel in the atlas: 83 per cent of the 2838 brands analysed sell online. Wholesale, the sale of collections to retail partners, follows at 70 per

cent, and own stores at 53 per cent. Since 83 and 70 per cent together exceed 100 per cent, at least 53 per cent of all brands must use both e-commerce and wholesale.

Two channels remain marginal. Department stores are documented as a named channel for 11 per cent of brands, marketplaces for only 5 per cent. Among the 18 countries listed in the study, Germany has the highest marketplace share at 9 per cent.

For the industry, the figures describe a multichannel reality rather than a switch from one channel to another. The five channel shares add up to 222 per cent, so a typical brand uses several routes to market at the same time. Because a channel only counts when a profile documents it, all shares are lower bounds.

Channels documented in the profiles (all brands)



Five countries account for 59 per cent of brands

The United States leads the country ranking with 408 brands, followed by the United Kingdom (347), Germany (331), France (300) and Italy (288). Together, these five countries account for 1674 of the 2838 brands. The Netherlands (210), Denmark (154) and Spain (104) complete the group of eight countries with at least 100 brands each.

Within that group, sales models differ markedly. Denmark has the highest wholesale share at 90 per cent and the lowest own store share of all 18 listed countries at 29 per cent. Italy follows at 85 per cent wholesale and combines it with own stores at 62 per cent. France has the lowest wholesale share of the eight at 57 per cent but the highest own store share at 71 per cent. Outside this group, Austria reaches 91 per cent wholesale on a base of only 23 brands, and Japan stands out with own stores at 87 per cent.

Price positioning follows national profiles. Italy has 76 per cent of its brands in luxury and premium, Japan 69 per cent and France 64 per cent, while Germany is at 39 per cent and the Netherlands at 34 per cent. Australia has the highest e-commerce share of the listed countries at 96 per cent.

Wholesale share by country (countries with at least 100 brands)



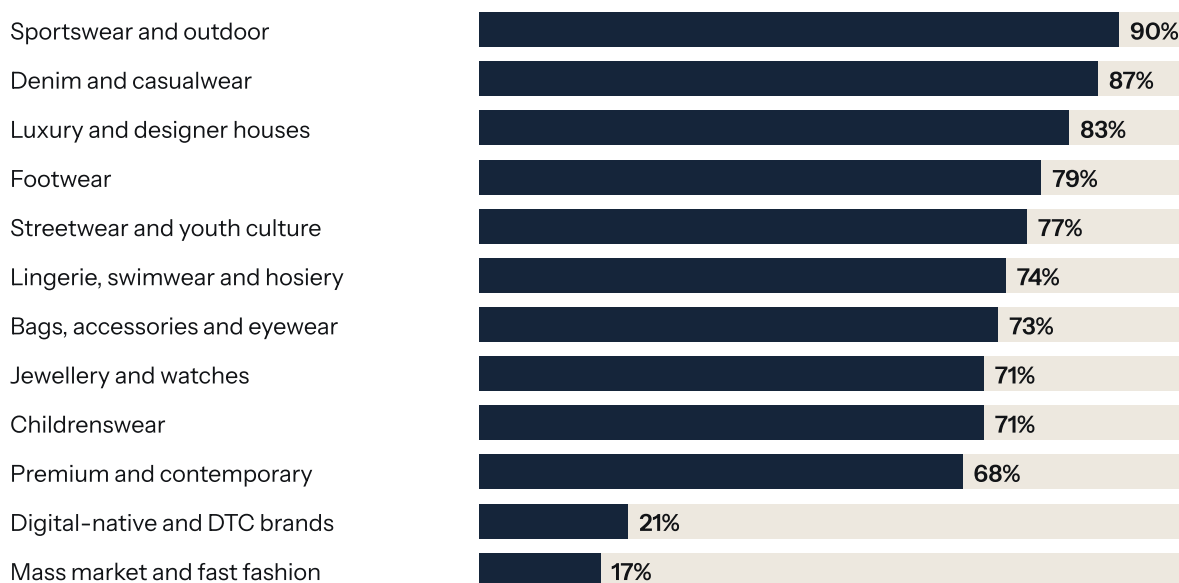
Segments: wholesale ranges from 90 to 17 per cent

Premium and contemporary is the largest segment with 854 brands, or 30 per cent of the atlas, followed by footwear with 358. The wholesale share spreads across 73 percentage points between segments, compared with 52 points across the 18 listed countries. Sportswear and outdoor brands document wholesale in 90 per cent of cases, denim and casualwear in 87 per cent, luxury and designer houses in 83 per cent and footwear in 79 per cent.

At the other end, only 17 per cent of mass market and fast fashion brands and 21 per cent of digital-native and DTC brands document wholesale. Mass market brands rely on their own stores (87 per cent) and online sales (89 per cent). All digital-native and DTC brands sell online, and 51 per cent of them also document own stores.

Luxury and designer houses are the most balanced segment, with wholesale at 83 per cent, own stores at 82 per cent and e-commerce at 81 per cent. Streetwear and youth culture brands reach an e-commerce share of 96 per cent.

Wholesale share by segment



70 per cent of dated brands were founded in 1970 or later

A founding year is documented for 1801 of the 2838 brands. The 2010s (344 brands) and the 2000s (342) are the most represented decades; together they account for 686 brands, or 38 per cent. Including the 1970s, 1980s and 1990s, 1267 brands were founded in 1970 or later.

The industry also has a long tradition: 139 brands were founded before 1900 and a further 231 between 1900 and 1949. The 2020s so far contribute 25 brands, which reflects both the short period covered and the time young labels need to become established.

Ownership: twelve groups hold 116 brands

Many brands belong to larger groups. Authentic Brands has the most brands in the directory with 19, ahead of LVMH with 18 and Richemont with 14. Kering follows with 11, VF Corp with 10, and Inditex and Bestseller with 8 each. The twelve largest groups together hold 116 brands, or 4 per cent of the atlas.

The ranking counts brand profiles, not turnover or market share. It shows that group ownership is concentrated among a small number of companies, while 96 per cent of the brands in the atlas sit outside these twelve groups.

Why this matters for wholesale and digital sales

The atlas shows that wholesale and e-commerce coexist across the industry rather than replacing each other. With 70 per cent of brands selling to retail partners, the processes behind wholesale, from presenting collections to taking orders and managing reorders, remain relevant for a large part of the industry.

The differences between countries and segments show that there is no single model. Danish and Italian brands rely heavily on wholesale, while mass market and digital-native brands sell mainly direct. For brands, agents and retailers, the more relevant question is how wholesale is digitised alongside direct online sales.

“Seven out of ten fashion brands sell through retail partners, yet most discussions about AI focus only on the end consumer. The biggest untapped lever lies in wholesale: in better data, faster orders and a closer connection to retailers.” Samuel Manz, Founder and CEO of FIREGROUP, publisher of AI in Fashion Daily

Method

The Fashion Brand Atlas 2026 analyses 2838 researched fashion brand profiles from 58 countries in the AI in Fashion Daily directory, as of October 2026. The profiles are compiled from publicly available information on each brand. Sales channels and price positioning reflect what a profile documents: a channel counts only when it is documented, so all shares are lower bounds and actual use may be higher. Country refers to the country of origin of the brand, not its sales markets. Founding years are available for 1801 brands. Group rankings count brand profiles, not turnover. The directory is not a complete census of the

fashion industry; larger and internationally visible brands are likely overrepresented, and percentages for countries or segments with few brands, such as Austria with 23, should be read with caution.

Full study with all tables: <https://ai-in-fashion.com/en/fashion-brand-atlas-2026/>

About AI in Fashion Daily: AI in Fashion Daily (ai-in-fashion.com) is an independent B2B trade publication on artificial intelligence and the fashion business. It is published in English, German, French and Italian by FIREGROUP GmbH, Zurich. The publication maintains a directory of fashion brands and trade journalists, which forms the basis of the Fashion Brand Atlas 2026.

Press contact: Samuel Manz, FIREGROUP GmbH, Hottingerstrasse 12, CH-8032 Zurich, s.manz@firegroup.com, +41 44 244 17 77