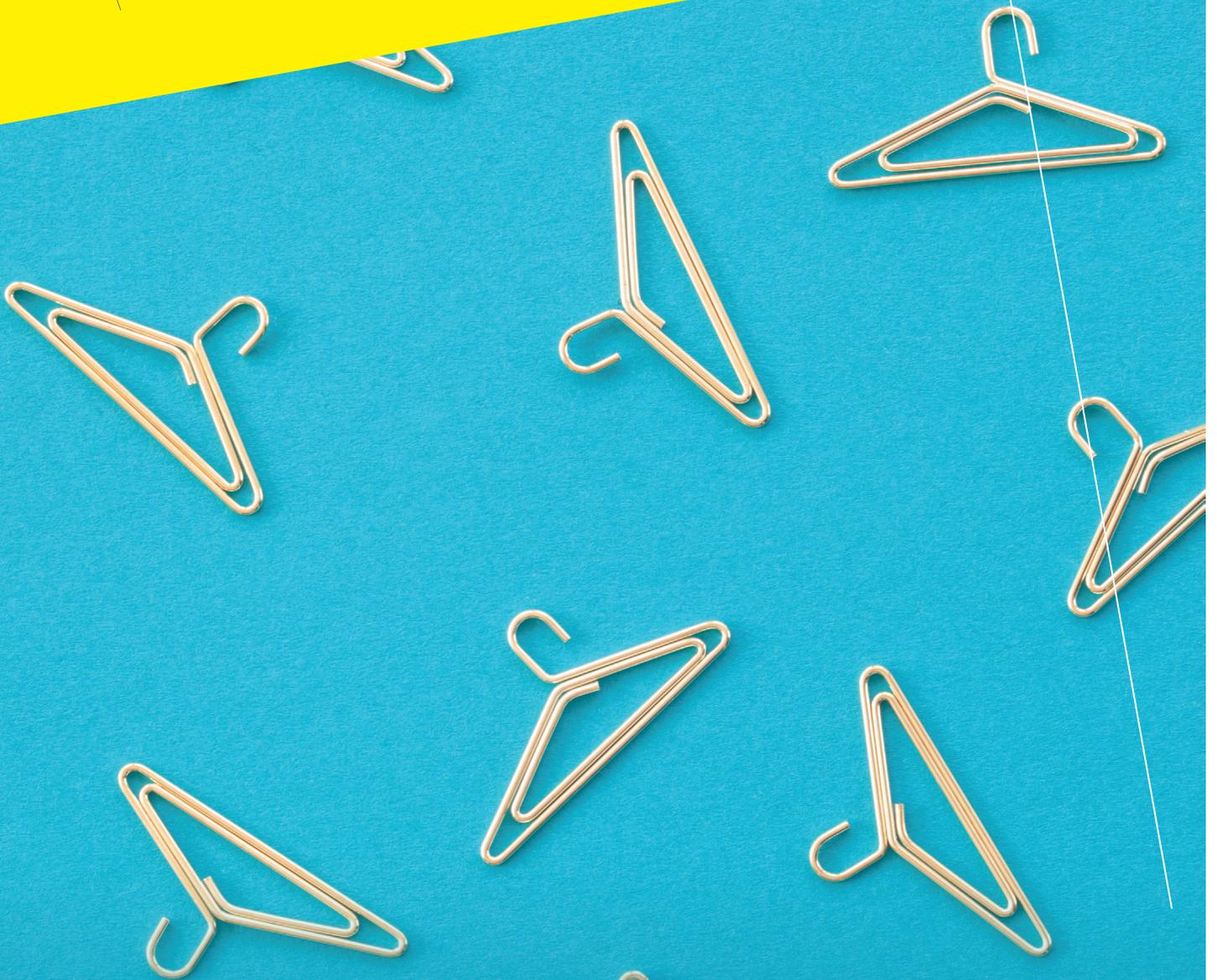




Flanders
State of the Art



FASHION TRENDS IN THE US

FLANDERS INVESTMENT & TRADE MARKET SURVEY

Unbleached Cotton	PANTONE: 11-0103 TCX
Beaver Fur	PANTONE: 17-1417 TCX
Digital Violet	PANTONE: 17-3920 TCX
Pink Clay	PANTONE: 14-1309 TCX
Jade	PANTONE: 17-0210 TCX

Source: WGSN, 2022

The key details of the work-leisure trend are block-like shapes, casual items designed like smart pieces, stretch waistbands, layering, and less structured, relaxed tailoring. There are no specific prints when it comes to this trend, as the designs are rather minimalistic with little to no prints. For these designs, fabrics are softer and comfortable using fibers like organic cotton recycled cotton, and recycled polyester, for example. It's all about comfortable, yet smart designs!

Some examples of designers that incorporate this trend into their new collections are Dries Van Noten, Hermes, and Lemaire.

Off-Line Luxe

Another effect of the switch to working from home is that the gap between evening and daywear, and lounge and partywear has been closed – the off-line luxe trend. The need for these clothes to be worn only during “professional” occasions has been eliminated. We want off-duty looks to still look sophisticated. These are often pieces that give a minimalistic, sophisticated, and professional looks because of their looseness and comfort. This minimalistic look gives off very luxurious vibes, allowing men to express themselves when they are at rest, offline. Brands tapping into this off-line luxe trend has helped put premium, slouchy looks on the map. This trend is very similar to the work-leisure trend previously discussed, but here the silhouettes are much more relaxed and rather shapeless.

Cream	PANTONE: 11-0103 TCX
Beaver Fur	PANTONE: 17-1417 TCX
Pewter	PANTONE: 18-4214 TCX
Vintage Blue	PANTONE: 18-3918 TCX
Black	PANTONE: 10-4203 TCX

Source: WGSN, 2022



Source: Kirstin Sinclair, 2017

Key details of this trend include anti-fit and less structured shapes, layering, brushed textures, drawcords, and quilting. Pieces like hoodies, scarves, robe coats, and oversized double-breasted blazers are silhouettes that are often included in these collections. Again, there are no specific prints tied to this trend, as it has more of a minimalistic vibe. We see a lot of neutral colors and monochromatic palettes. As for materials and fibers, sustainably sourced soft cottons, wools, cashmere, etc. are key to use with this trend. It is all about comfort and sensory pleasure – make sure the fabrics used are aligned with this consumer need!

Some examples of designers that incorporate this trend into their new collections are Jil Sander, Loewe, Louis Vuitton, and Uniqlo.

Soul-Craft

Moonlit Ocean	PANTONE: 19-4122 TCX
Rhubarb	PANTONE: 19-1652 TCX
Golden Yellow	PANTONE: 15-0953 TCX
Radiant Yellow	PANTONE: 15-1058 TCX
Algae Green	PANTONE: 16-0435 TCX

Source: WGSN, 2022

Soul-Craft is all about bringing out people’s creativity after the surge of DIYing and crafting during the pandemic, while also adding a touch of nature. Adding this element of a ‘home-made’ look into these designs taps into a feeling of comfort for the consumer, while the element of nature adds a sense of appreciation for the simple things in life. This trend speaks to the craft enthusiast who communes with nature and values a simple life. There are not really harsh elements to these designs,



so they are not over the top. This can be handmade graphics, patchwork, sewn on patches, etc. For example, an army jacket with sewn on patches, jeans with a repaired rip, or a jacket with embroidery elements.

Embroidery, a vintage feel, patchwork, quilting, and repair details are some of the key details of this trend. Key prints include different color plaids, color and pattern blocking, and irregular, multicolored stripes. With this variety of designs and added elements, the patterns of these garments are more textured. Both soft and rugged fabrics can be used with this trend, or a mixture of several different fabrics – staying consistent with the home-made, DIY, and nature feel of this trend.



Source: Edward Berthelot, 2022; Edward Berthelot, 2020

Some examples of designers that incorporate this trend into their new collections are Children of the Discordance, Fendi, Paura di Danilo Paura.

The Urban Outdoors



The outdoors has influenced men's fashion continuously in the past but now there is an urban element that has been slowly adding itself to the trend and there are a lot of different ways to look at it. This surge in outdoor styles is driven by people's desire to go outside and explore nature as a direct response to the pandemic. Though, the trend and designs are not only typical outdoor wear anymore but have an added urban sense to them. This direction takes the key items and tech details from authentic hiking gear and reimagines it as festival-wear with wild prints, futuristic colors, and augmented silhouettes. This new element breaks down the wall between urban, festival, and outdoor clothing and brings them together.

Dark Citron	PANTONE: 16-0435 TCX
Deep Lake	PANTONE: 18-4834 TCX
Molten Lava	PANTONE: 18-1555 TCX
Arctic Blue	PANTONE: 16-4519 TCX
Mango Sorbet	PANTONE: 15-0558 TCX

Source: WGSN, 2022



Source: Matthew Sperzel, 2019; Melodie Jeng, 2022

The key details of this trend are lightweight, breathable, and durable designs while also including sustainable and recycled textiles, tech-focused details, and elements to help with the functionality of it such as odor-fighting and anti-microbial properties. When we look at prints, we are seeing a lot of 90's inspired prints, wild prints, and just general all-over outdoor prints. For the make of the garments, we need these to be durable and functional so the fabric and materials used must also be durable and functional. Designers are leaning towards natural, sustainably sourced fibers for this trend with quilting, leather, or wool lined patterns/designs.

Some examples of designers that incorporate this trend into their new collections are Keen, Sunnei, and Woolrich.



The Space Race

Oyster Mushroom	PANTONE: 13-4201 TCX
Iced Aqua	PANTONE: 13-5410 TCX
Sodalite Blue	PANTONE: 19-3953 TCX
Ashley Blue	PANTONE: 16-4013 TCX
Peach Whip	PANTONE: 14-1309 TCX

Source: WGSN, 2022

Back in the 1960s, the space race led to a generation of designs marked by futuristic yet minimalistic sensibilities. These types of clothes are slick and minimal and are catered to more of a mature market. Though, there is a great **opportunity** in finding ways to bring this into younger generations and for a more mass-market crowd! Here, soft layers, faded dyes, and minimalistic graphics add a gentle and organic touch to menswear, offering an almost spa-like serenity (WSGN, 2022). They do not necessarily need to be plain patterns, but they must be sophisticated and clean (which can also be seen in the color palette of this trend).

Fluid, soft, yet unexpected colors are the key details of this trend. There is a big significance on it staying sophisticated! The key prints include a fading of a color, an ombre effect, or tonal blocking. Clean and soft materials are also key! The space race trend can be portrayed in pieces like a tailored top coat, a turtleneck, a wide leg trouser, and a mini-cross body bag, for example.

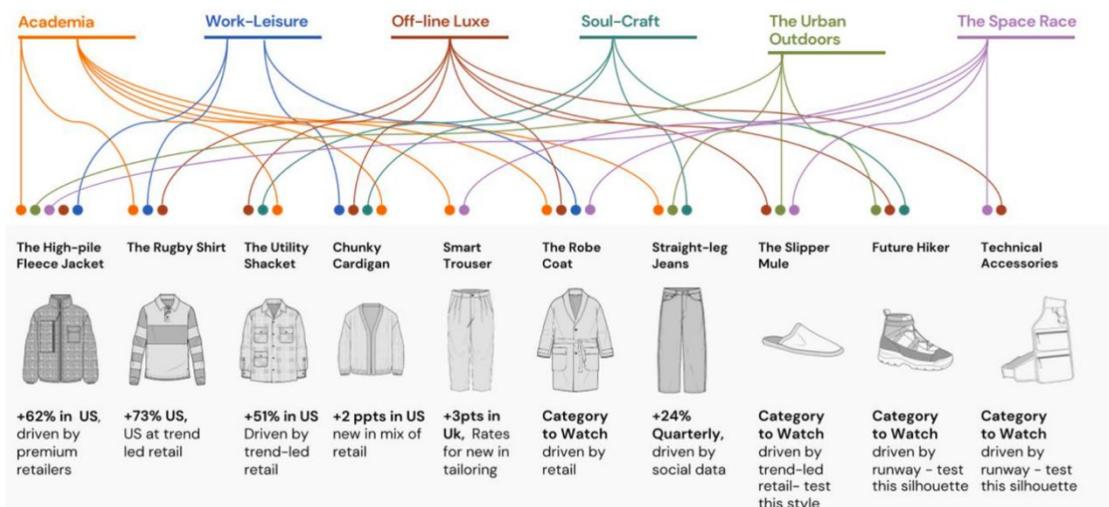
Some examples of designers that incorporate this trend into their new collections are Jil Sander, OAMC, and Prada.



Source: Edward Berthelot, 2021

2.3 SEASONAL MUST-HAVES

The following diagram, created by WGSN (2022) shows the seasonal must-haves from each trend in your new collection. These are all staple pieces and they fit into a lot of the different trends, but they do not all need to be included, just see how it fits into your brand name or brand story. For example, a cardigan does not need to be *only* in academia, it can also be in other trends or groups – it all depends on how it works for you.



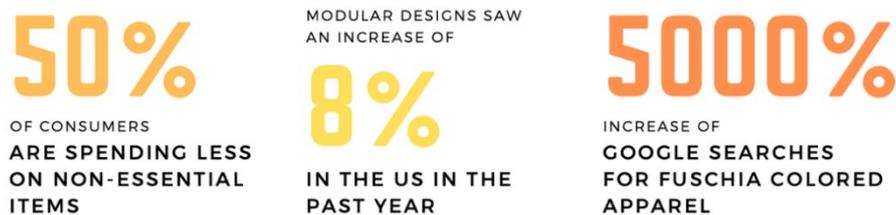
Source: WGSN, 2022

3. WOMEN'S CONTEMPORARY FASHION TRENDS AW 22/23

We see many similarities between AW 22/23 women's contemporary trends and menswear, discussed in the previous chapter. A big trend here is also adaptability and versatility of clothing pieces, with touches of optimism added through color and playful, yet decadent designs. Consumers **don't want a lot of different pieces** that can be used for 100 specific things – they **want fewer pieces** that can be used in 1000 different, versatile ways.

3.1 THE NEW NORMAL CONSUMER DRIVER

In 2023, we will still be feeling the effects of 2020 – time uncertainty, emotional overload, and a yearning for brighter days. We are in for an 'uneven' recovery – consumer spending will not be the same as it was before as people are and have been re-prioritizing their spending. According to Carmen Reinicke (2021), almost 50% of respondents are spending less on non-essential items, also stating that 35% can live off less than they previously thought (Reinicke, 2021). However, fashion is still forecasted to bounce back this year in the US and China.



Source: Reinicke, 2021; WGSN Insights, 2022

Dual function is very important in designs; versatility remains crucial, as we see that modular designs increased with 8% in the US (WGSN Insights, 2022). Consumers want to spend their money on pieces that can be worn for several occasions and for longer periods of time but remains in trend. This ties back with the fact that people want to feel good when making purchases and are looking for **optimism**, another big factor of 2023. This trend is here to stay. For example, people searching for fuchsia has seen a 5,000% growth on Google (WGSN Insights, 2022). People are looking for colors that make them feel good. Comfort and style mixed in with optimism for the future introduces the idea of dopamine dressing through **mood-boosting colors, tactile fabrics, and bold/graphic patterns**.

3.2 THE BIG TRENDS OF AW 22/23

The following contemporary womenswear trends come from research done by WGSN (2022) for the upcoming AW 22/23 season.



Color Play

Trends and silhouettes have been slowing down the past years, whereas colors have become the key differentiator to energize core shapes. Color blocking and layering different colors together is a mood-booster for many consumers as a backlash effect to reality and the uncertain time we are all living in. The key here, though, is to create looks with longevity. Colors can be timeless, it does not necessarily need to be black, but they need to be used in sophisticated and grounded designs. Knitwear, outerwear, and accessories are key pieces for this trend.



Source: Edward Berthelot, 2022

Artisanal Red	PANTONE: 18-1555 TCX
Arctic Blue	PANTONE: 16-4519 TCX
Sweet Coral	PANTONE: 16-1620 TCX
Mineral Yellow	PANTONE: 13-0746 TCX
Atlantic Blue	PANTONE: 19-3953 TCX

Source: WGSN, 2022

Key details of this trend would be minimalistic designs with tried-and-tested silhouettes. These designs can work for all generations with its playful yet sophisticated look. When it comes to prints, mixing colors by color blocking is trendy; while you can also add craft embroideries, patchwork, or use a tie-dye effect. For this trend, as it can be used with any sort of design or piece, there are no specific key fibers or fabrics used. Though, when adding this trend to outerwear or knitwear, it is crucial to use high quality materials, like wool or cashmere, that is sourced responsibly and is comfortable.

Some examples of designers that incorporate this trend into their new collections are Pangaea, 3.1 Phillip Lim, and Mara Hoffman.

Flex-Leisure

Flex-leisure is a key trend that established from the new lifestyles of people working from home and will be certainly present in future seasons as well. As the gap continues to blur between work, home, and leisure time, a more flexible approach to dressing is becoming the new way of life. This is the right balance between comfort and style but without looking too much like athleisure: smart casual, sweatshirts with a tailored pants or blazer, like the 1990s off-duty look for example. As with all the mentioned trends, it is also key here to make sure the pieces under this trend can perform in versatile and different functions.

Jade	PANTONE: 17-0210 TCX
Butter	PANTONE: 12-0824 TCX
Copper	PANTONE: 16-1422TCX
Sea Ice	PANTONE: 19-4122 TCX
Unbleached Cotton	PANTONE: 11-0103 TCX

Source: WGSN, 2022



It is clear to say that trends are shifting much more with lifestyle shifts and current events right now than ever before.

Key details of this trend include functional performance (=versatility), relaxed silhouettes and fit, sport casual, and clean trims. For prints, we are seeing a lot of washed neutrals, textures based off nature, varsity red and blues, and very

Source: Christian Vierig, 2021; Christian Vierig, 2021



academia prints, like checkers. Fabrics are soft yet durable, and materials like sustainable cotton, cashmere, wool, and textured fabrics can be used when creating such pieces.

Some examples of designers that incorporate this trend into their new collections are Stella McCartney x Hunter, New Balance, Miu Miu, and J.W. Anderson x Uniqlo.

Beyond Outerwear

People are moving to rural areas and businesses have started to invest more into doing things outdoors. All these investments make us believe that we will spend more time outdoor and gives the opportunity for outdoor fashion, which is why beyond outerwear is an AW 22/23 trend for womenswear (and menswear). This is a more 'fashionable' approach to outdoor apparel, as opposed to actual outdoor type clothes. For example, quilted, patterns, etc. We want more options for outdoor clothing, especially in areas that do not get too cold.

Optic White	PANTONE: 11-0103 TCX
Olive Oil	PANTONE: 17-0636 TCX
Moonless Night	PANTONE: 19-4203 TCX
Dark Oak	PANTONE: 19-1016 TCX
Wavelife	PANTONE: 17-5912 TCX

Source: WGSN, 2022



Source: Jeremy Moeller, 2021

Shirring and ruching, decorative sleeves, dimensional texture, detachable components, all-weather dresses, and quilted patterns are key details when taking outerwear to this new level. Bold patterns, like florals, plaids, checkers, and stripes are key prints. The materials here are durable yet comfortable, using organic fibers like fleece, flannels and felts, lined and reversible wools, and nylon.

Some examples of designers that incorporate this trend into their new collections are Christian Wijnants, Deveaux, Loewe, Moncler 1952, and Burberry.

1970s Esque

Oat Milk	PANTONE: 14-1208 TCX
Orange Oxide	PANTONE: 16-1448 TCX
Copper	PANTONE: 17-1147 TCX
Dark Oak	PANTONE: 19-1016 TCX
Honeycomb	PANTONE: 13-0942 TCX

Source: WGSN, 2022

The drive towards nostalgic bohemian references through cultural pattern design and rich color choices alludes to old, worn, and uniquely beautiful pieces (WGSN Insights, 2022). Nostalgia is a familiar feeling, it is comfort, it is what makes us feel good. This trend, in a way, celebrates the thriftiness and creativity of the wearer. The secondhand market is currently booming, same as the vintage market/style, which can be the basis to this trend rising in AW 22/23.



Source: Edward Berthelot, 2021

This is a trend that should be explored CAUTIOUSLY! We want to look for retro prints, comfortable flowy dresses, textiles that feel luxurious but are wearable and accessible, but we do not want to go overboard. Eclectic folklore, exaggerated frills, flounciness, and retro-infused designs are the key details of the 1970's esque trend. The prints are very crucial for this trend. The key prints here are arts and craft florals, artisanal paisley, cultural patterns (done ethically and correctly), vintage tapestry patterns, and toile de joly patterns.

////////////////////////////////////

Some examples of designers that incorporate this trend into their new collections are Chloe, Marni, Missoni, and Elle Serbia.

Low-Key Drama

We want to go out again, we want to live again, we want to celebrate. This trend taps into the consumer who has gained a renewed appreciation for what symbolizes an 'occasion' and is seeking out ways to add an element of extravagance to their outfits and wardrobe. Here, we are exaggerating parts of the design, but not the whole piece – the sleeves, for example. Versatility is still important here, even for these more occasion-led silhouettes. Puffy sleeves, A-line shirts, wrap dresses, and ruched designs are all examples of how to add this element of extravagance to classic silhouettes.

Key details of this trend include flattering volume, relaxed silhouettes, sheer layering, rouged, and recycled metallics. There are not any specific prints here, it is all about the texture of the design and how the fabrics are put together. Soft textures and silky roughing are two examples of key 'prints' for this low-key drama trend. Key materials luxe satin, pleated chiffons, and recycled polyester, cotton, and wool.

Blanc	PANTONE: 11-4800 TCX
Optic White	PANTONE: 11-0103 TCX
Galactic Teal	PANTONE: 19-4919 TCX
Orchid Flower	PANTONE: 19-2434 TCX
Dark Cherry	PANTONE: 19-1528 TCX

Source: WGSN, 2022



Source: Raimonda Kulikauskiene, 2021; Edward Berthelot, 2021

Some examples of designers that incorporate this trend into their new collections are Hermes, Rag & Bone, GIA Studios, and Salvatore Ferragamo.

Artful Expression

Faded Citrus	PANTONE: 15-1334 TCX
Lazuli Blue	PANTONE: 19-3953 TCX
Mineral Yellow	PANTONE: 13-0746 TCX
Orchid Flower	PANTONE: 19-2434 TCX
Galactic Teal	PANTONE: 19-4919 TCX

Source: WGSN, 2022

This is another trend with a more celebratory mood. It is very much about color and applying decadence to everyday designs. The use of surface textures inspires touch and adding dramatic volume helps in expressing optimism. We have familiar silhouettes here but with different textiles, patterns, colors, etc. This mix of prints and pattern combinations also helps to express joy. But these are all still relaxed silhouettes! For example, sheer blouses, pleated skirts, graphic knits, and a day-to-night column dress.



The key prints for this trend are rainbow expressive prints, art inspired prints, patchwork, plush and plissé textures, and soothing abstracts. It is all about being playful and expressing yourself through the art that is fashion.

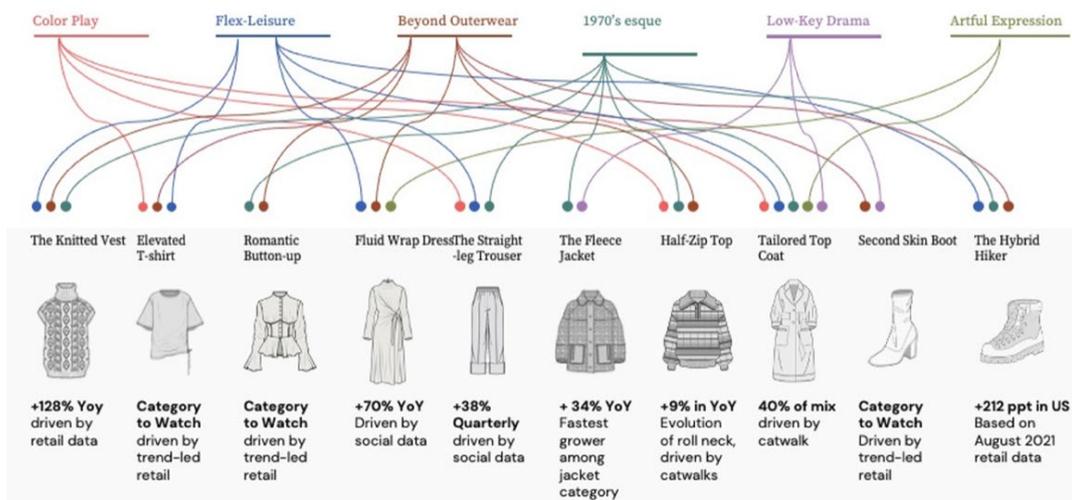
Some examples of designers that incorporate this trend into their new collections are Marine Serre, Proenza Schouler, Vivienne Westwood, and Elle Serbia.



Source: Raimonda Kulikauskiene, 2021; Edward Berthelot, 2021

3.3 SEASONAL MUST-HAVES

The following diagram, created by WGSN (2022) shows the seasonal must-haves from each trend in your new collection. These are all staple pieces and they fit into a lot of the different trends, but they do not all need to be included – it is important to keep your brand story into consideration when deciding which styles best fit into your collections.



Source: WGSN, 2022

When we look at the seasonal must-haves, the wrap dress is a big trend, and we can see this on social media like Instagram and TikTok. The knitted vest is also a good building block as it is versatile and can be layered → there are big numbers here! The fleece jacket is the fastest growing silhouette, which taps into the outdoors trend but is also for indoors, the flex-leisure trend, and the vintage trend as well.

These trends sit on a spectrum ranging from **commercial** to **conceptual**. When it comes to the most commercial, it is the color play trend, while artful expression is the most conceptual. As for the other trends, from most commercial to most conceptual, this is the order: Color Play, Flex-Leisure, Beyond Outerwear, 1970s esque, Low-Key Drama, and Artful Expression. As a brand, you can look at this list and see which trends are most easily commercialized and which trends will add a more conceptual twist within your collections – the mixture of these trends within one collection will vary from brand to brand as each designer has a different vision and each consumer group different needs.



The Smart Academic



Source: Edward Berthelot, 2021; Edward Berthelot, 2021

The smart academic trend is taking preppy styles and updating them with smarter and more mature designs, with cardigans and vests for example. These retro-academic looks will become popular because of two main reasons: (1) the renewed interest in learning as a direct effect of the pandemic and lockdowns, and (2) the feeling of nostalgia for our younger/earlier years due to the uncertain times that we are currently living in. Education has become glamorized in the last few years and there is a new focus on educators and advocates as the new influencers. This is all resulting in a renewed interest in the classic academic look. This does not only mean smart fashion, but also off-beat styling.

Classic, grown-up, optimistic, and hard-working pieces are some of the key details of this trend. This also includes pieces with utility that are business casual, are essentials, and have color play. As for the key prints, paneling, color blocking, bright winter colors, and dabbled tweed are some of the most recognized in this smart academic trend.

Some examples of designers that incorporate this trend into their new collections are Moncler Genius, Jil Sander, Stine Goya, and Christian Wijnants.

Butterscotch	PANTONE: 17-1134 TCX
Unbleached	PANTONE: 11-0103 TCX
French Navy	PANTONE: 19-4122 TCX
Artisanal Red	PANTONE: 18-1555 TCX
Jade Green	PANTONE: 17-0210 TCX

Source: WGSN, 2022

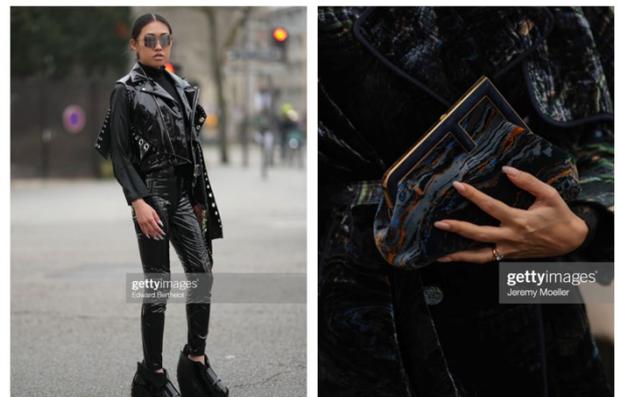
Phygital Emo

Verdigris	PANTONE: 18-4834 TCX
Beetroot	PANTONE: 19-1528 TCX
Mineral Yellow	PANTONE: 13-0746 TCX
Soap Suds	PANTONE: 13-5410 TCX
Black	PANTONE: 10-4203 TCX

Source: WGSN, 2022

This phygital emo trend is a modern take on the 90's emo trend. Filters and perfectionism have been getting a negative response the last few years, to which this trend is a direct response. Here, we praise casual styles and added a layer of luxury to add a more grown-up feel from our childhoods. There is also an element of DIY when it comes to the emo aesthetic. Pieces like dresses, trucker jackets, overshirts, wide leg trousers, and pleated skirts can all come into play in this phygital emo trend.

The key details of this trend are iridescent fabric, slinky jerseys, underwear outerwear, digitally appealing designs, and future forms → really seeing the mix between physical and digital emo that this trend brings. This mix can also be seen when we look at the key prints of this trend. The key prints include space metallics, iridescent surfaces and prints, e-sport branding, hypnotic designs, and multi-checker patterns. Key materials can include, but are not limited to, cottons, leathers, and tougher materials.



Source: Edward Berthelot, 2022; Jeremy Moeller, 2022

Some examples of designers that incorporate this trend into their new collections are Givenchy, Vetements Official, Emily Dawn Long, and R13.

The Meta Party Girl



Source: Edward Berthelot, 2021; Edward Berthelot, 2021

The digital and the real world are coming together. The metaverse enables simultaneous existence across connected realms and we will need a wardrobe that can exist in both of these physical and digital worlds (WGSN, 2022). This trend is a fusion of the self-indulgence of 90s rave culture with gamification styling which will drive the design trends and preference of the coming years and generations. This generation will demand extensive experiences without boundaries, an important element for brands to keep in mind! How do you do this? Partner with innovators in the digital world that can help you with this transformation into the digital/metaverse world. Focus on making products that are very expressive that can be made and marketed digitally, but also physically. This can be a bodycon dress, matching sets, tracksuits, and cut & sew dresses, for example.

The key details of this trend are that pieces are/can be made to order, and for that reason are more sustainable. This trend is also filled with digital details, like iridescent fabrics and prints and 3D effects. For prints, this trend has ombres that have a liquid-like effect, cyanotype florals, shiny prints, virtual textures, and body forms. Mesh and satin materials are key here.

Digital Lavender	PANTONE: 17-3930 TCX
Shell Coral	PANTONE: 15-1334 TCX
Jade	PANTONE: 17-0210 TCX
Dark Cherry	PANTONE: 19-1528 TCX
Orchid Flower	PANTONE: 19-2434 TCX

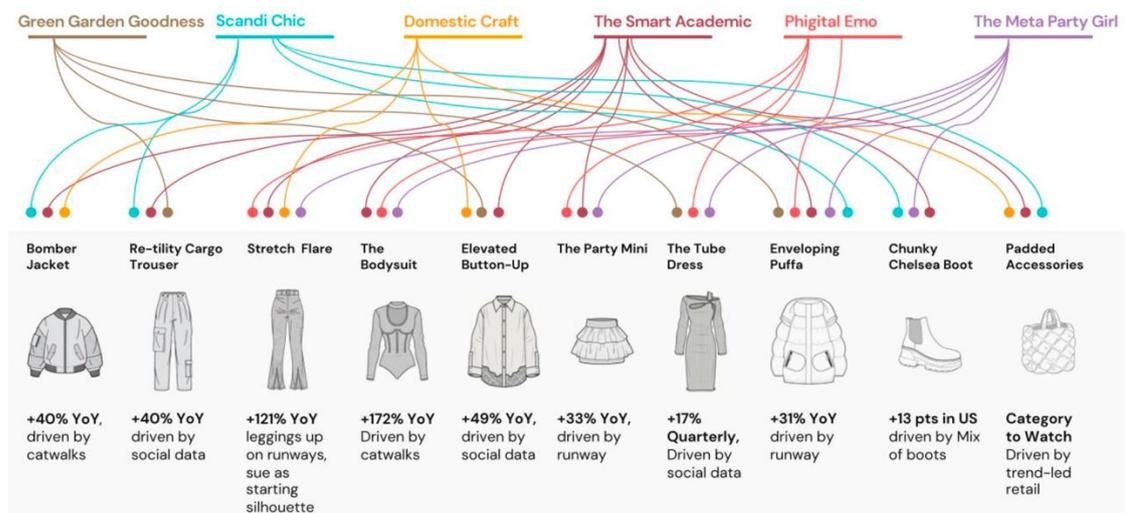
Source: WGSN, 2022

Some examples of designers that incorporate this trend into their new collections are Acne Studios, The Attic, and Maisie Wilen.

4.3 SEASONAL MUST-HAVES

The following diagram, created by WGSN (2022) shows the seasonal must-haves from each trend in your new collection. These are all staple pieces and they fit into a lot of the different trends, but they do not all need to be included – it is important to keep your brand story into consideration when deciding which styles best fit into your collections.





Source: WGSN, 2022

This diagram shows that pieces like a puffer coat and stretch flare pants are pieces that are found in several different of the AW 22/23 trends. Adding such pieces to your collections would lean into the different types of trends and appeal to a wider taste and consumer preference.

These trends sit on a spectrum ranging from **commercial** to **conceptual**. When it comes to the most commercial, it is the green garden goodness trend, while the meta party girl is the most conceptual. As for the other trends, from most commercial to most conceptual, this is the order: Green Garden Goodness, Scandi Chic, Domestic Craft, The Smart Academic, The Phigital Emo, and the Meta Party Girl. As a brand, you can look at this list and see which trends are most easily commercialized and which trends will add a more conceptual twist within your collections – the mixture of these trends within one collection will vary from brand to brand as each designer has a different vision and each consumer group different needs.

4.4 CONCLUSION

To conclude, there are 4 key takeaways from this short market study on womenswear AW 22/23 fashion trends. The first takeaway is that this season is all about re-energizing old silhouettes and styles by using optimistic prints and colors. This can be added in all different trends, from outdoor wear to party wear. With simple silhouettes, bright and pastel colors will work the best, or try a maximalist vibe with prints and patterns, like stripes. Then, the second takeaway is that fashion is pushing and needs to push more for body inclusivity. As a brand, it is very important to make designs that work with a broader size assortment – both for the plus-size market and genderless designs. A one-size-fits-all mentality is such an antiquated way of making clothing, so if you want to be relevant and in-trend make sure this is on your brand's to-do list! Another important thing that needs to be on a brand's to-do list is to use and support planet-friendly and low-impact processes when it comes to creating your collections. This third takeaway really taps into the need for a more sustainable fashion industry and will help each brand do their part in getting there. The fourth and last takeaway of this chapter on the womenswear trends of the AW 22/23 season is to pay attention to the digital world to be informed about unexpected aesthetics and subcultures coming out of the digital, metaverse world.



