

**Black Friday: discounts started earlier and are aimed at Christmas shopping. But not everything is on sale.
The new study Retviews by Lectra**

- **Early discounts for Black Friday 2025, but premium brands also focus on new collections**
- **Wallets (+13%), handbags (+10%), jeans (+12%) and denim jackets (+14%): what not to expect from the promotions**

Paris, November 26, 2025 – With Black Friday just around the corner, consumers show a greater willingness to buy, while still keeping an eye on spending (recent Deloitte and PwC studies even predict an overall YoY decline in spending levels). For this reason, even during the discount period associated with Black Friday, shoppers will tend to favor brands that can strike the right balance between price, quality, and sustainability.

In this context, **Lectra – a key player in Industry 4.0 solutions for the fashion, automotive, and furniture sectors – has analyzed real-time data from Retviews**, its AI-powered solution specialized in competitive intelligence and automated benchmarking, to identify the trends that will shape the upcoming discount season.

“The evolution of dynamics linked to the Black Friday period requires fashion brands to strictly manage discount strategies. The ability to identify the right timing and type of offers is crucial to protect both margins and brand positioning. Having solid, up-to-date, and comparable data therefore becomes an essential requirement for making competitive choices and responding promptly to consumer expectations,” comments **Antonella Capelli, President EMEA at Lectra**. *“Thanks to Retviews, we at Lectra can support brands with an advanced AI-powered competitive intelligence tool, designed to enable faster, more targeted, and sustainable decisions.”*

Longer discount periods and diversified commercial strategies for premium and mass-market brands

This year, **Black Friday once again falls just before the start of December**, reducing the window for holiday shopping. The result? Instead of concentrating promotions solely on Black Friday and Cyber Monday, brands are spreading discounts over a longer period.

The study shows that, in Europe, **pre-season discounts started earlier in 2025 compared to 2024**.

Moreover, Retviews data shows that while seasonal discount patterns generally remain consistent, the share of items on sale is decreasing and markdowns are being reduced more slowly. This suggests that, in a context where consumer confidence is weakening and prices are rising, **brands are choosing to keep promotions active for longer to clear inventory**.

For example, premium brands GANNI and Tommy Hilfiger launched their first major seasonal sales on October 24, whereas in 2024 they started discounts on November 14 and 6 respectively. Similarly, Banana Republic, GUESS, and J.Crew began offering discounts as early as late October and early November, meeting the needs of consumers who prefer to start their holiday shopping earlier.

However, alongside early promotions, these brands continue to focus on new collections, highlighting holiday lines and festive styles.

Conversely, mass-market brands such as GAP and Abercrombie & Fitch prioritize discounts, promoting them throughout the entire fall season.

Best sellers and slow movers: the trends driving discount strategies

While consumers take advantage of discounts to hunt for the best deals, brands must carefully monitor trends to decide which products should receive the most appropriate markdown rate, while potentially keeping top sellers at full price.

For this Fall/Winter season, **Retviews data has identified four best-selling categories that are less likely to feature high discount percentages.**

Assortments have seen year-on-year growth for accessories – particularly **wallets (+13%)** and **handbags (+10%)** – as well as **jeans (+12%)** and **denim jackets (+14%)**.

In particular, barrel-leg jeans have emerged as bestsellers in European collections (+50%), frequently selling out and being restocked at full price.

Conversely, cargo pants are losing momentum, with assortment share down 54% in the European market. These are 'slow movers,' which consumers can expect to find on promotion as brands aim to clear inventory.

Trending Categories FW25 – YoY Growth

Source: Retviews



Read the full study [here](#).

About Lectra:

At the forefront of innovation since its founding in 1973, Lectra provides industrial intelligence technology solutions—combining software in SaaS mode, cutting equipment, data, and associated services—to players in the fashion, automotive and furniture industries. With boldness and passion, Lectra accelerates the transformation and success of its customers in a world in perpetual motion thanks to the key technologies of Industry 4.0: AI, big data, cloud and the Internet of Things.

The Group is present in more than one hundred countries. It operates three production sites for its cutting equipment, located in France, China and the United States. Lectra's 3,000 employees are driven by three core values: being open-minded thinkers, trusted partners and passionate innovators. They all share the same commitment to social responsibility, which is one of the pillars of Lectra's strategy for ensuring sustainable growth for both the company and its customers.

In 2024, Lectra recorded revenues of €527 million, of which €77 million came from its SaaS offerings. The company is listed on Euronext, and is included in CAC All Shares, CAC Technology, EN Tech Leaders and ENT PEA-PME 150 indices. For more information, please visit [lectra.com](https://www.lectra.com).

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