

Exporting shapewear to Europe

Europe's shapewear market continues to grow thanks to technical innovation and sociocultural factors such as the growing participation in sports and the increased attention consumers pay to their physical appearance. Relevant non-European suppliers include Colombia, China and some North African countries. The leading consumers of shapewear in Europe are aged between 25 and 54, followed by those aged 65-plus.

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1. Product description

Shapewear, also known as foundation garment, is a form of undergarment designed to help mould, hold or push the body into a preferred shape and make it appear smoother and slimmer. Shapewear products may have enhancing or corrective functions and are typically worn with a specific outfit.

Shapewear can be included in different product categories, so this study uses the following codes to indicate trade in shapewear:

Table 1: Product codes

HS	Prodcom	Description
HS610711/12/19	14141220 14142220	Men's or boys' underpants and briefs
HS610811/19	141414 14142450	Women's or girls' slips, petticoats
HS610821/22/29	14141420	Women's or girls' briefs, panties
HS620711/19	14141230 14142230	Men's or boys' underpants, briefs, nightshirts
HS620891/91/99	14141440 14142480	Women's or girls' singlets and other vests, briefs, panties, négligés, bathrobes, dressing gowns, housecoats and similar articles
HS621210	14142530	Brassieres of all types of textile materials, whether or not elasticated, including knitted or crocheted

HS621220	14142550	Girdles and panty girdles of all types of textile materials, whether or not elasticated, including knitted or crocheted
HS621230	14142550	Corselettes of all types of textile materials, whether or not elasticated, including knitted or crocheted
HS621290	14142570	Corsets, braces, garters, suspenders and similar articles and parts thereof, incl. parts of brassieres, girdles, panty girdles and corselettes, of all types of textile materials, whether or not elasticated, including knitted or crocheted

Quality

Functionality

The main contributor to the quality of a shapewear garment is its functionality. A good garment hides flaws and streamlines the silhouette to give the illusion of a slimmer shape. Shapewear must also be breathable, comfortable and cool, as well as safe to wear all day long.

Good-quality shapewear is strong, invisible and elastic. It grips to the body and does not create lumps or bumps underneath the outerwear. Durability is also important. The shaping function has to last throughout the day and the garment must have a reasonably long lifecycle. Finally, seams must be smooth or invisible and hems must stay in place without rolling up or riding up. The demand for moulded shapewear, especially bras, means that mouldability also matters.

With shapewear increasingly crossing over into sportswear, medical wear and outerwear, expectations are changing and may also include factors such as fashionability and soft fabrics. To make shapewear more fashionable, add lace, use fabrics with a soft touch and fashion colours.

Material

Functionality and comfort are the traditional key factors to consider when choosing fabric for shapewear garments. Nylon, Lycra and cotton are commonly used. Lycra can provide a smoothing effect, but it must be used in combination with a knit fabric that stretches, such as cotton or nylon.

The fabric content used for shapewear must be appropriate for the part of the body that the garment is designed to correct or enhance. For example, a Nylon-Lycra blend with a Lycra content of 10% or more is appropriate for control bottoms, but for a control camisole, a cotton-Lycra knit blend of 90-95% cotton and 5% Lycra may be more comfortable. Different European markets and segments require different compressions and fabrics. Products should match your target market.

Size

The European apparel industry is pushing for standard sizing legislation, but so far sizing systems vary across Europe. [The European clothing standard](#) EN 13402 can provide you with direction. This is a European sizing designation for clothes based on body dimensions and intervals.

The following table shows an example of differences in sizing within Europe. Each column represents the same size in a different system.

Table 2: Sizing across Europe

United Kingdom	Belgium and France	Norway, Sweden, Finland, Denmark, Netherlands and Germany	Portugal and Spain
Size 12	Size 40	Size 38	Size 42/44

Numbering in European sizes can be misleading. For instance, Italian and French body sizes are generally smaller than German body sizes, but the numbering systems in those countries have evolved differently nonetheless. For shapewear it is also common to look at bust, waist and hip sizes. A growing trend in sizing is consumer demand for more personalised sizing.

Colour and design

The ranges of colour and styles for shapewear are expanding. Shapewear garments can accommodate various types of outerwear, for example by being backless, strapless, scooped back, one-shoulder, long or short. They should look attractive with or without outer clothes and can be designed like lingerie with colour, lace or soft touch fabrics. Comfortable, functional features such as silicone hems or supportive bands with elastic can help the shapewear piece stay in place.

Black and nude are the most popular shapewear colours. Nude tends to be worn in summer months under light-coloured outerwear and should come in a colour range that supports a variety of skin tones. Black shapewear is worn more in the winter under dark-coloured outerwear. Other popular colours include navy, brown and grey.

Labelling

The most important information on the product label of apparel is:

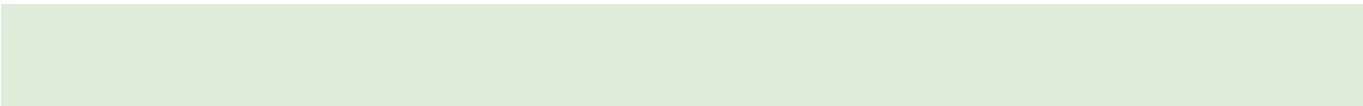
- size
- origin
- wash and care instructions

The care labelling system developed by [GINETEX](#), the International Association for Textile Care Labelling, is widely used in European countries. The [GINETEX symbols](#) are also very common, but you can only use them under contract with the association.

According to GINETEX, labels should cover the following topics:

- general care and warnings
- washing
- drying
- ironing
- professional textile care or dry-cleaning

Ecolabelling is largely unregulated in the clothing industry. There are several voluntary labels that have their own defined set of standards for producers to follow.



Tips:

Study common care labelling practices in Europe on the [GINETEX](#) website.

If you produce eco-apparel, clearly indicate this with at least one of the available label schemes, such as the [EU Ecolabel](#), to attest the sustainability claims of your product.

For more information on labelling, refer to the [section on buyer requirements](#).

Packaging Documentation

External packaging documents for apparel should include: producer, consignee, composition, size, number of pieces, box identification, total number of boxes, and net and gross weight.

Importer specification

Each order should be packed according to the importer's instructions. They have their own specific requirements for the use of packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer's order specifications, which make part of the purchase order.

Damage prevention

Properly packaging apparel minimises the risk of damage. Packaging usually consists of each article being packed in a polybag to protect the fabric from humidity, water, solar radiation and staining.

Dimensions and weight

Packaging must be easy to handle in terms of size and weight and ideally fit together on Euro pallets. Standards are often related to labour regulations at the point of destination, specified by the buyer. When in doubt, check the dimensions and weight of boxes with your buyer.

Cost reduction

European buyers are constantly trying to reduce packaging materials. Less packaging means improved sustainability, but it also reduces costs and increases margins. While packing has to provide maximum protection, you must also avoid using excess materials and 'shipping air'. Waste removal of packaging materials generates additional costs to buyers.

Material

Importers have been steadily banning certain packaging materials for sustainability reasons, as well as to reduce costs with purchasing and disposing of packaging. Economical and sustainable packaging materials are growing more popular. Using biodegradable packing materials can be a market opportunity and, for some buyers, it can even be a requirement.

2. Which European markets offer opportunities for exporters of shapewear?

Europe is one of the world's leading markets for bodywear and imports are growing. Leading shapewear suppliers come from Colombia, China and some North African countries.

No specific trade data is available specifically for shapewear, so these statistics cover bodywear in general.

Where is consumer demand?

- European demand for bodywear increased between 2013 and 2017 at an average annual growth rate of 3.9%, reaching €5.2 billion in 2017.
- Demand is highest in Germany at €1.0 billion, followed by the United Kingdom at €892 million and France at €773 million.

What is the role of European production in supplying European demand?

- Europe's demand for bodywear is considerably larger than its production. This drives up the need for imports, making Europe an interesting market.
- European bodywear production declined between 2013 and 2017 at an average annual growth rate of -4.6%, reaching €1.1 billion in 2017.
- Italy is responsible for 25% of European bodywear production, followed by Spain and Romania with 14% and 10% respectively.

Which countries are most interesting in terms of imports from developing countries?

- European bodywear imports increased from €6.9 billion in 2013 to €8.6 billion in 2017, an average annual growth rate of 5.5%.
- In the coming years, European bodywear imports are expected to keep growing moderately.
- According to industry experts, further details on bodywear imports and supplying countries are not representative for shapewear specifically. However, for example, Colombia, China and some North African countries are known suppliers of shapewear.

Tip:

Compare your products and company to the strong competition from Colombia and China. You can use the [ITC Trade Map](#) to find exporters per country. You can compare by market segment, price, quality and target countries.

What role does export play in supplying European demand?

- European bodywear exports consist mainly of trade within Europe and with developed countries.

For more information on general apparel trade statistics, see our study on [which European markets offer opportunities for exporters of apparel](#).

3. What trends offer opportunities in the European shapewear market?

Sustainability is increasingly important

There is an increased focus in Europe on sustainable and eco-friendly textiles, especially for fabrics that come into close contact with the skin. Social and environmental responsibility is an increasingly important aspect of the mid-high to high-end market segment. Sustainable materials such as organic cotton and sustainable types of viscose have become more and more popular.

Tips:

Consider sustainable raw materials such as organic cotton and sustainable viscose, especially if you are supplying the high and middle-high segments of the market.

Promote your sustainable values to increase your credibility and to boost your marketing.

For more information, see our study on [sustainable apparel](#).

Underwear has become a fashion item

The growing underwear and shapewear market is increasingly affected by fashion trends and vice versa. As underwear items become more fashionable, many people today are wearing them more visibly.

Tip:

When designing shapewear products, think about appearance as well as functionality.

Shapewear influences outerwear

As more consumers enjoy the functionalities and benefits of shapewear, they want their outerwear to offer similar qualities. For this reason, producers are increasingly applying the figure-correcting techniques and other functionalities used in shapewear to, for example, trousers. Other examples include dresses and bathing suits with corrective lining. This trend is creating a new garment category that combines shapewear and outerwear.

Tip:

Look into the opportunities for applying shapewear features to outerwear and swimwear.

New techniques provide better moisture control and antibacterial properties

Technology trends are also creating opportunities for shapewear. New techniques providing, for example, moisture regulating solutions, anti-bacterial and anti-odour properties, bring added health and hygiene value to garments.

Tip:

Get inspired and keep up with trends by studying prominent shapewear brands and retailers. Look up shapewear garments by [Leonisa](#), [Spanx](#), [MAGIC Bodyfashion](#), [Anita](#) and [Triumph](#) to find examples.

Consumer attention to self-image drives up shapewear sales

In a media-driven culture that promotes images of thin people, consumers in Europe are increasingly self-aware of their physical appearance, seeking to look healthy and attractive. This trend is boosting sports participation along with sales of sportswear and compression garments, and shapewear sales as well. For instance, the increasing participation of women in sporting activities has propelled the sale of sports bras.

Women more specifically have been spending more on lingerie to improve their looks. European women increasingly buy different kinds of lingerie and shapewear for different uses and occasions, spending more on this garment category, focusing more on quality and design than they used to. Men have also been increasingly embracing shapewear and compression wear, especially in connection with sports activities but also on other occasions.

Shapewear is a quick fix for consumers who want to look slimmer and feel more confident, providing an easy alternative to dramatic lifestyle changes or painful and costly medical treatments.

Tip:

Do not claim health or other benefits that you cannot substantiate with research.

Gym, yoga, sports and related activities

There is an increase in health consciousness amongst all ages in Europe, where the number of gym memberships, athletic groups and boot camps has boomed in recent years. These changing lifestyles are creating interest in shapewear used as outer activewear for yoga, training, athletics and other sport activities. This trend is projected to increase further in the years to come.

Tip:

If you produce activewear, make sure you consider both functionality and design.

Growing 50-plus population

Europe's ageing population provides another growth driver for shapewear. As the share of consumers aged 50 years and older grows in the European population, pushing the average age up as well, so is the demand for shapewear expected to rise.

Tip:

Learn more about targeting older consumers in our study on [exporting apparel for 50-plus consumers in Germany](#).

Innovation adds yet another growth booster

Innovation in design, material and fit are also expected to boost growth in shapewear sales in the years ahead. The creation of better-fitting and more comfortable garments have already brought increasing attention to the shapewear category.

Technologies such as bonding, laser-cutting and moulding have transformed shapewear by eliminating seams, hems and bulky fastenings, all of which used interfered with a streamlined silhouette. Current fabrics are also softer and more breathable than before, while providing shaping properties at the same time. For instance, a

garment can have special shaping zones to target specific problem areas.

Tip:

Learn more about innovative fibres and fabrics in our studies on [natural fibres in European apparel](#) and [exporting man-made fibres to Germany](#).

For more information, see our study about [trends in apparel](#).

4. What are the requirements for shapewear garments to be allowed on the European market?

What are the legal and non-legal requirements for your product?

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including apparel. It mandates all products marketed in Europe must be safe to use.

Tips:

Read more about the [General Product Safety Directive](#).

Use common sense to ensure normal use of your product does not cause any danger.

The [Safety Gate database](#) lists products that the European Union has rejected at the border or withdrawn from the market. Check the database for similar products to yours to consider issues that may arise.

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). These requirements aim to prevent the production of packaging waste, promote the reuse of packaging and thereby reduce the final disposal of such waste.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azo dyes and certain flame retardants in textile products.

Tips:

The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals, check the [Information on REACH for companies established outside Europe](#) and the [Q&As on REACH](#).

Follow new developments in the field of flame retardants, as new alternatives are being developed. See for instance the [European Flame Retardants Association](#) (EFRA).

Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition in the language of the country where you are selling your products. These labels should be durable and tear resistant, securely attached, easily legible, visible and accessible.

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out in the European market. Think of sustainable raw materials, fair working conditions and production processes. European buyers increasingly demand the following certification schemes and programmes:

- [Amfori Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company is audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations, which aims to improve the working lives of people across the globe who make or grow consumer goods.

You can review standards such as [ISO 14001](#), [Sedex](#) and [SA 8000](#) to read up on sustainable options. Check with your potential buyers which certifications they require.

Tips:

Optimise your sustainability performance. Studying the issues addressed by these initiatives will help you focus on the requirements that apply specifically to your product and your business.

Buyers appreciate a well-grounded story. Showing that you value your company's environmental and social performance may provide you with a competitive advantage.

Use a self-assessment tool such as the [BSCI Self-Assessment for Producers](#) or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#) to evaluate your performance.

For more information, see our special study on sustainability in the apparel sector.

What are the requirements for niche markets?

Fair trade

The concept of fair trade involves fair pricing and improved social conditions for producers and their communities. Especially when the production of your apparel is labour intensive, fair trade certification can give you a competitive advantage.

Common fair-trade certification awarding organisations include:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair Wear](#)

Tips:

Ask buyers what they might be looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Sustainable textile certification

Sustainability is gaining ground across the apparel sector and so is interest from buyers for sustainable textile certification.

The [Global Organic Textile Standard](#) (GOTS) certifies environmental and social responsibility throughout the production chain. To qualify, textile products must have more than 70% organic fibres.

The [OEKO-TEX Standard 100](#) certification ensures responsible use of chemicals, while the [Sustainable Textile Production \(STeP\) by OEKO-TEX®](#) certification ensures that textile manufacturing and processing takes place in a sustainable manner. Textiles with the [MADE IN GREEN by OEKO-TEX®](#) label are:

- made from materials that have been tested for harmful substances;
- manufactured using environmentally friendly processes;
- produced under safe and socially responsible working conditions.

The [EU Ecolabel](#) for textiles focuses on minimising environmental impact at the manufacturing stage.

Tips:

Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.

Determine which certification programme would be the best fit for you and apply if possible.

For more information, see our study on [buyer requirements for apparel](#).

5. What is the competition like in the European shapewear market?

The competition in shapewear does not differ significantly from the sector in general. Refer to our [10 tips for doing business with European buyers](#).

6. Through what channels can you get shapewear on the European market?

Market channels

Shapewear is mainly sold via physical shops, but online sales are growing. In Europe, catalogue shopping is an important purchase channel.

In general, apparel retailers make up the most commonly used channel for apparel sales in Europe. This channel accounts for 40% to 60% of distribution in most European countries. Some retailers appeal more to young consumers while others target older demographics.

Trade associations and fairs

These trade fairs are useful sources for finding trading partners in Europe:

- [Fashion SVP](#), United Kingdom, January
- [Interfilière](#), France, January
- [Salon International de la Lingerie](#), France, January
- [Supreme Body and Beach](#), Germany, February
- [Unique](#), France, July

The European Apparel and Textile Confederation, [EURATEX](#), and the International Apparel Federation, [IAF](#), can also be helpful for finding trading partners in Europe.

Market segments

The largest segment for shapewear in Europe is the 25–54 age group followed by those aged 65 and older. Young consumers are more likely to buy cheap products, while older shoppers favour comfort and quality over price. Consumers are also becoming more conscious about environmental aspects, labour standards along the production chain and the origin of products.

In the low-end segment, simple and inexpensive shapewear is common. The middle segment emphasises design, material and finish, while keeping prices reasonable. In the high-end segment, designer quality is common and private labels are the standard. This is also the segment where more expensive raw materials are used. The middle and high-end markets offer you the most opportunities.

Tip:

To supply the middle and high-end segments you need to pay particular attention to design and quality.

7. What are the end-market prices for shapewear?

As types of shapewear vary considerably, so do consumer prices. The European consumer price for your apparel will be around four to six-and-a-half times your selling price or even more if you would cater to the high-end segment. Shipping, import and handling add 15–20%. Wholesalers account for a further 40–70% markup. Retailers may add at least another 100–150% to the price. Finally, European VAT rates range from 18% in Malta to 27% in Sweden.

Your original selling price depends heavily on the availability and cost of raw materials. For example, the average prices of cotton fluctuated considerably in recent years. Occasional increases in the price of raw materials are not directly passed on to the consumer, but do put pressure on exporters, importers and retailers' margins.

Tips:

The perceived value of your product in the chosen segment determines its price. The quality and price of your shapewear must match what is expected in your chosen target segment. To determine your

price, study consumer prices in your target segment and adjust your prices accordingly.

Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

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