

The European market potential for women's underwear

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The value of European women's underwear imports is estimated at €6.5 billion, making it a relatively large apparel subsegment. Women's brassieres accounts for nearly 63% of this market, followed by women's briefs and pants at 36% and women's slips and petticoats at 1%. Women's underwear imports have been growing on average by 3.4% each year, driven by the growth of the women's brassieres category. The biggest markets include Germany, France, and the UK.

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1. Product description

Women's underwear is clothing which is worn as undergarments during the day or at nighttime. The women's underwear category can be broken down in the following subsegments: women's brassieres; women's slips and petticoats; and women's briefs.

Women's brassieres includes brassieres and brassieres in a set, girdles and panty girdles, corselettes, corsets, braces, garters, suspenders & similar (HS Codes: 62121010, 62121090, 62122000, 62123000, 62129000); women's slips and petticoats includes slips and petticoats of man-made fibres, other textile materials, cotton and other materials (HS Codes: 61081100, 61081900, 62081910, 62081990); women's briefs and pants includes briefs and pants of cotton, man-made fibers, and other textile materials (HS Codes: 61082100, 61082200, 61082900).

2. What makes Europe an interesting market for women's underwear?

Europe is one of the more significant importers of women's underwear in the world. In 2019, the value of women's underwear imports to Europe, including intra-EU imports, accounted for €6.5 billion, up from €5.5 billion in 2014. This corresponded to roughly 2.8 billion units of clothing in 2019. During the last five years, the value of EU women's underwear imports has been growing by an average 3.4% annually, which is below the 5.0% average growth of all EU apparel imports (as reported in [the CBI study "What is the demand?"](#)). It is expected that the demand for women's underwear will continue to grow at a similar rate in the years to come.

Women's brassieres is the largest product segment in women's underwear, representing €3.7 billion in imports or almost 63% of the segment value. It is followed by women's briefs and pants with €2.2 billion and women's slips and petticoats with €64 million. With a 3.8% average yearly growth, women's brassieres is the fastest

growing subsegment, followed by women’s briefs and pants, which has been growing on average by 3.1% per year in the last five years. Women’s slips and petticoats segment has been declining by an average 5.5% each year.

Table 1: Women’s underwear imports to EU by segment, 2019 EUR value; % share of women’s underwear; average 5-year compound growth

Segment	Value	% Share of Bodywear	5-yr growth
Women’s brassieres	€3.658 m	62.9%	↑ 3.8%
Women’s briefs and pants	€2.206 m	36.4%	↑ 3.1%
Women’s slips and petticoats	€64 m	0.7%	↓ 5.5%
Women’s underwear	€5.928 m	100%	↑ 3.4%

Source: Eurostat

The EU is also a large re-exporter of women’s underwear apparel. In 2019, it exported €3.8 billion worth of women’s underwear (up from €3.4 billion in 2014). The EU women’s underwear apparel exports have been growing at an average yearly rate of 2.6% between 2014 and 2019. The biggest EU exporters in 2019 were Germany (€632 million), France (€534 million), the Netherlands (€520 million), Italy (€382 million), Belgium (€304 million) and Austria (€290 million). Together, these six countries represent nearly 70% of the EU’s women’s underwear apparel exports. The Netherlands and Germany have seen the strongest export growth within this group, with an average yearly increase of 12.9% for the Netherlands and 6.8% for Germany. During the same time, France, Italy and Belgium had been growing in the single digits and Austria has been declining by 5.3% per year.

Currently, the value of EU women’s underwear imports originating from outside the EU accounts for 54% of the total imports, while the value of imports originating from inside the EU account for 46% of the total. In 2019, suppliers from the developing countries contributed 17.4% to all women’s underwear imports into the EU in terms of value (up from 11.1% in 2014) and suppliers from the rest of the world accounted for 36.8% of the import value (down from 43.1% in 2014). The share of women’s underwear imports from developing countries is lower than the overall share developing countries have in the EU’s apparel imports, which indicates that there is still unfulfilled potential in the women’s underwear segment. The value of the EU women’s underwear imports originating from developing countries corresponded to €1.1 billion in 2019 and has grown at an average yearly rate of 13.2% since 2014, almost quadruple of the overall women’s underwear import growth rate. This demonstrates that there is a strong demand for women’s underwear from developing countries.

As shown in the table 2, Europe’s extra-EU women’s underwear imports are dominated by Asian countries, with China, Bangladesh and Sri Lanka forming the top three. Together, these three countries account for 34% of all women’s underwear imports into the EU. China is the single largest women’s underwear exporter to the EU with 20.8% of the EU import value in 2019 (down from 28.4% in 2014). It is followed by Bangladesh with 8.0% and Sri Lanka with 5.2%. Other extra-EU women’s underwear exporters have market shares between 1.1% and 3.1% of the overall women’s underwear import value. Bangladesh, Vietnam, Myanmar and Cambodia increased their share of the women’s underwear imports in the last five years due to above average growth. Myanmar was the strongest grower with an average growth of 58.9% per year, followed by Vietnam with 30.9% growth per year

and Cambodia with 23.8%. During the same period, China and Tunisia's growth has been negative and Sri Lanka has grown at much lower rates than the overall growth level for women's underwear imports, resulting in a decline in market share.

The top intra-EU women's underwear exporter is Germany with a market value of €625 million (equivalent to 9.7% of market share). It is followed by the Netherlands with 6.7%, France with 5.5%, Italy with 4.3% and Poland with 4.0%. Germany, the Netherlands, France, Poland, Belgium, Spain and the Czech Republic have each increased their market shares, although the only significant growers in this group were Germany, the Netherlands and Poland. Italy, Austria and the United Kingdom lost market share during the same time period.

Table 2: Top 10 extra-EU and intra-EU women's underwear exporters to EU, 2019 EUR value; average yearly growth

Country	Value	5-yr growth
Top extra-EU women's underwear exporters		
China	€1350 m	↓ 2.8%
Bangladesh	€516 m	↑ 17.2%
Sri Lanka	€338 m	↑ 2.7%
Vietnam	€251 m	↑ 30.9%
Myanmar	€143 m	↑ 58.9%
Cambodia	€133 m	↑ 23.8%
Indonesia	€117 m	↑ 4.0%
Tunisia	€108 m	↓ 2.5%
Morocco	€96 m	↑ 3.0%
India	€79 m	↑ 3.4%
Top intra-EU women's underwear exporters		
Germany	€625 m	↑ 7.1%
The Netherlands	€433 m	↑ 10.7%
France	€354 m	↑ 3.8%
Italy	€280 m	↑ 2.7%

Poland	€258 m	↑12.6%
Austria	€213 m	↓6.4%
Belgium	€160 m	↑4.9%
Spain	€110 m	↑10.1%
United Kingdom	€92 m	↓0.3%
Czech Republic	€70 m	↑16.7%

Source: Eurostat

3. Which European countries offer most opportunities for women's underwear?

Western European markets are much larger and better developed than the Central and Eastern European markets. The top women's underwear import markets in the EU are Germany, France, the United Kingdom, the Netherlands, Italy and Spain. These top six countries together account for 69% of women's underwear imports in the EU and have been growing at an average rate of 3.4% per year in the last five years. Other important markets include Austria with €357 million, Poland with €279 million and Belgium with €277 million. While the Eastern European imports are growing at higher rates than those in the west, they are all still relatively small. Poland is also an interesting market to watch due to its high growth rate of 12.3% annually over the past 5 years.

Table 3: Top 10 EU importers of women's underwear, 2019 EUR value; average yearly growth

Country	Value	5-yr growth
Germany	€1237 m	↑5.7%
France	€967 m	↑2.3%
United Kingdom	€712 m	↑1.9%
Netherlands	€674 m	↑6.2%
Italy	€505 m	↑1.6%
Spain	€405 m	↑3.5%
Austria	€357 m	↑0.9%
Belgium	€277 m	↓0.3%

Sweden	€144 m	↑ 1.7%
Czech Republic	€126 m	↑ 13.4%

Source: Eurostat

Table 4: Top 10 EU importers of women's underwear from the developing countries, 2019 EUR value; average yearly growth

Country	Value of Developing country imports	5-yr growth	Developing country share of imports
France	€247 m	↑ 11.6%	25.5%
United Kingdom	€239 m	↑ 16.8%	33.5%
The Netherlands	€208 m	↑ 13.4%	30.8%
Germany	€172 m	↑ 15.9%	13.9%
Spain	€62 m	↑ 17.3%	15.2%
Austria	€58 m	↑ 4.4%	16.3%
Belgium	€39 m	↑ 0.5%	14.0%
Sweden	€34 m	↑ 19.3%	23.7%
Italy	€29 m	↑ 8.8%	5.8%
Ireland	€13 m	↑ 22.8%	18.8%

Source: Eurostat

The brassieres segment is the largest segment for each of the main countries and presents the highest opportunity in terms of value, especially in Germany where it presents a €782 million opportunity and is growing at 6.4%. Slips and petticoats is the lowest valued category for each of these markets and is declining in value.

Germany

Germany is the largest women's underwear import market in Europe. In 2019, the value of its women's underwear imports amounted to €1.2 billion (up from €939 million in 2014). This corresponded to approx. 541 million units of clothing. In the last five years, the value of Germany's women's underwear imports has grown at an average rate of 5.7% per year, while the import volume has grown at 2.6% per year. Despite Germany being the largest import market in Europe, the value of developing country imports in Germany is way lower than it is in France, the United Kingdom and the Netherlands. This indicates that there is still an unfulfilled potential for producers from developing countries in Germany.

Brassieres constitute the largest women's underwear segment in Germany with 63% share of the import value (up from 61% in 2014), followed by briefs and pants with 36% (down from 38% in 2014). Slips and petticoats is a tiny segment, accounting for less than 1% of the women's underwear category. Brassieres have been the fastest growing segment in the last 5 years with an average annual growth of 6.4%, while briefs and pants have been growing at 4.5% per year. Slips and petticoats are a declining category, with an average 1.4% value decline per year in the last five years. The segment has the highest average unit price with €5.67 per unit, which is influenced by the small import quantities. Brassieres have the second highest average price with €5.01 per unit and the most positive price development in the last five years, as it went up €0.89 per unit. Briefs and pants is a volume segment with the import unit price at €1.17.

The brassieres segment is the largest and fastest growing in Germany. In the last 5 years, it has undergone the most positive price development and as such, it constitutes one of the most interesting segments for developing country suppliers.

Popular women's underwear brands from Germany include Triumph International GmbH, Mey GmbH, Anita, Speidel GmbH, Naturana GmbH and Felina GmbH.

Table 5: 2019 Imports of women's underwear to Germany by segment with 5-year growth, average import unit price and 5-year price evolution

GERMANY	2019 Value (€)	5-year growth	Average unit price	5-year price change
Brassieres	€782 m	6.4%	€5.01	+€0.89
Briefs and pants	€449 m	4.5%	€1.17	+€0.09
Slips and petticoats	€5 m	-1.4%	€5.67	+€0.20
TOTAL:	€1.237 m	5.7%	€2.29	+€0.31

France

France is the second largest women's underwear import market in Europe. In 2019, the value of its women's underwear imports amounted to €967 million (up from €862 million in 2014). This corresponded to approx. 343 million units of clothing. In the last five years, the value of French women's underwear imports has grown at an average rate of 2.3% per year, while the import volume has grown at 0.5% per year.

Brassieres constitute the largest women's underwear segment in France with 63% share of the import value (up 1% since 2014), followed by briefs and pants with 37% and slips and petticoats at less than 1%. Brassieres have been the fastest growing segment in the last 5 years with an average annual growth of 2.6% while slips and petticoats have declined during the same time by an average 2.8% each year. Slips and petticoats have the highest average unit price with €6.50 per unit, up from €3.69 per unit in 2014, which is most likely caused by the growing costs of import as the import volumes decline. Brassieres have an import unit price of €5.05 (up €0.66 over the last five years) and briefs and pants are a volume segment with a unit price of €1.59.

Brassieres are the largest segment in France, with the largest 5-year growth, second largest price and positive price development, which creates a lot of potential. Slips and petticoats are the least attractive segment in that it seems that they are consistently declining in terms of value and volume.

Popular women's underwear brands from France include Chantelle, Simone Perele, Chantal Thomas, House of Marlow, Lise Charmel, Princesse Tam Tam, Aubade, Etam.

Table 6: 2019 Imports of women underwear to France by segment with 5-year growth, average import unit price and 5-year price evolution

FRANCE	2019 Value (€)	5-year growth	Average unit price	5-year price change
Brassieres	€608 m	2.6%	€5.05	+€0.66
Briefs and pants	€353 m	1.9%	€1.59	+€0.07
Slips and petticoats	€6 m	-2.8%	€6.50	+€2.81
TOTAL:	€967 m	2.3%	€2.82	+€0.24

The United Kingdom

The United Kingdom is the third largest women's underwear import market in Europe. In 2019, the value of its women's underwear imports amounted to €712 million (up from €647 million in 2014). This corresponded to approx. 329 million units of clothing. In the last five years, the value of the UK's women's underwear imports has grown at an average rate of 1.9% per year, while the import volume has declined at 4.0% per year, showing that the absolute import volumes have been declining and the prices increasing.

Brassieres constitute the largest women's underwear segment in the UK with 63% share of the import value (up 1% since 2014), followed by briefs and pants with 36% (down 1% since 2014). Slips and petticoats account for 1.3% of the segment. Brassieres have been the fastest growing segment in the last 5 years with an average annual growth of 2.3%, followed by briefs and pants with 1.6%. Slips and petticoats have on average declined by 3.4% each year. Slips and petticoats have the highest average unit price with €5.89 per unit and the most positive price development in the last five years - up €3.47 per unit, which is due to the rising import costs when faced with declining volumes. Brassieres have the second highest unit price with €4.83 per unit and a positive price development over the last five years - up €1.60. Briefs and pants are a volume segment with an average import unit price at €1.09.

Brassieres are the largest and fastest growing segment in the United Kingdom with a high unit price and positive price development, making it the most interesting category. Due to its negative growth, slips and petticoats are the least attractive segment.

Popular women's underwear brands from the UK include Pretty Polly Ltd., La Perla UK Ltd., Freya Lingerie, Panache Lingerie, Derek Rose, Agent Provocateur, Ann Summers, Bluebella, Bordelle, Boux Avenue, Bravissimo, Coco de Mer, Curvy Kate, Nichole de Carle, Selfridge's Myla and Dora Larsen.

Table 7: 2019 Imports of women's underwear to the United Kingdom by segment with 5-year growth, average import unit price and 5-year price evolution

UNITED KINGDOM	2019 Value (€)	5-year growth	Average unit price	5-year price change
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Brassieres	€447 m	2.3%	€4.83	+€1.60
Briefs and pants	€256 m	1.6%	€1.09	+€0.23
Slips and petticoats	€9 m	-3.4%	€5.89	+€3.47
TOTAL:	€712 m	1.9%	€2.17	+€0.56

The United Kingdom has left the EU on 31 January 2020 and is currently in a transition period during which the UK and the EU are negotiating their future relationship. During the transitional period, which is scheduled to end on 31 December 2020, the UK remains subject to EU law and remains part of the EU customs union and the single market. There is a lot of uncertainty with regards to the trade relationships and conditions beyond the transitional period. It is uncertain whether the UK will continue to provide preferential trade conditions for developing countries and how the United Kingdom's exit from the EU will impact the apparel sector and trade.

The Netherlands

The Netherlands is the fourth largest women's underwear import market in Europe. In 2019, the value of its women's underwear imports amounted to €674 million (up from 500 million in 2014). This corresponded to approx. 296 million units of clothing. In the last five years, the value of the Netherlands' women's underwear imports has grown at an average rate of 6.2% per year, while the import volume has grown at 0.3% per year, making the Netherlands the fastest growing import market by value for women's underwear in the top six markets.

Brassieres constitute the largest women's underwear segment in the Netherlands with 60% share of the import value (up from 58% in 2014), followed by briefs and pants with 38% and slips and petticoats with 1.5%. Slips and petticoats have been the fastest growing segment in the last 5 years with an average annual growth of 10.9%. Brassieres followed with an average 6.8% growth and briefs and pants grew at 5%. Brassieres have the highest average unit price with €4.29 per unit and the most positive price development in the last five years - up €0.94 per unit. Slips and petticoats have the most negative price development in the last 5 years with a decline of €1.56 per unit, and briefs and pants are a volume segment with an average unit price of €1.31 per unit (up €0.32 over the last five years).

The brassieres segment is the largest segment in the Netherlands and has the highest prices per unit and best price development, making it the most attractive segment. Slips and petticoats are the fastest grower but the segment is very small at a total value of €10 million.

Popular women's underwear brands from the Netherlands include Sapph, Hunkemoller, ten Cate and Marlies Dekkers.

Table 8: 2019 Imports of women's underwear to the Netherlands by segment with 5-year growth, average import unit price and 5-year price evolution

NETHERLANDS	2019 Value (€)	5-year growth	Average unit price	5-year price change
Brassieres	€406 m	6.8%	€4.29	+€0.96

Briefs and pants	€258 m	5.0%	€1.31	+€0.32
Slips and petticoats	€10 m	10.6%	€2.35	-€1.56
TOTAL:	€674 m	6.2%	€2.28	+€0.57

Italy

Italy is the fifth largest women's underwear import market in Europe. In 2019, the value of its women's underwear imports amounted to €505 million (up from 466 million in 2014). This corresponded to approx. 236 million units of clothing. In the last five years, the value of Italy's women's underwear imports has grown at an average rate of 1.6% per year, while the import volume has grown at 1.4% per year.

Brassieres constitute the largest segment in Italy with 63% share of the import value (down 1% since 2014), followed by briefs and pants with 36% (up from 33% in 2014) and slips and petticoats with less than 1% (down from 2.6% in 2014). Briefs and pants have been the fastest growing segment in the last 5 years with an average annual growth of 3.2%. Slips and petticoats were by far the weakest performer with an average yearly decline of more than 20%. Brassieres have the highest average unit price with €4.08 per unit and the most positive price development in the last five years - up €0.28 per unit. Briefs and pants are a volume segment with an average import unit price of €1.17.

The brassieres segment is the largest and has the highest unit price but the briefs and pants segment has been the most dynamic grower in the last five years. Both segments are attractive for the developing country exporter. The slips and petticoats segment is unattractive due to its small size, negative growth and negative price development.

Popular women's underwear brands from Italy include Triumph International Rome, La Perla, Cottonella, Jadea, Lormar, Cosabella, Intimissimi.

Table 9: 2019 Imports of women's underwear to Italy by segment with 5-year growth, average import unit price and 5-year price evolution

ITALY	2019 Value (€)	5-year growth	Average unit price	5-year price change
Brassieres	€319 m	1.2%	€4.08	+€0.28
Briefs and pants	€183 m	3.2%	€1.17	+€0.04
Slips and petticoats	€4 m	-20.4%	€3.71	+€0.77
TOTAL:	€505 m	1.6%	€2.14	+€0.02

Spain

Spain is the sixth largest women's underwear import market in Europe. In 2019, the value of its women's underwear imports amounted to €405 million (up from 341 million in 2014). This corresponded to approx. 199 million units of clothing. In the last five years, the value of Spain's women's underwear imports has grown at an average rate of 3.5% per year, while the import volume grew at 1.5% per year.

Brassieres constitute the largest women's underwear segment in Spain with 62% share of the import value (down from 64% in 2014), followed by briefs and pants with 37% (up from 35% in 2014) and slips and petticoats at 0.4%. Briefs and pants have been the fastest growing segment in the last 5 years with an average annual growth of 5.1%. Slips and petticoats were the weakest performer with an average decline of 8.8% per year. Brassieres have the highest average unit price with €4.17 per unit, with a positive price development in the last five years - up €0.23 per unit.

Both the brassieres and briefs and pants segments seem to be quite attractive in Spain. They are both showing growth and a positive price development over the last 5-year period. The slips and petticoats segment is very small and declining, making it unattractive for developing country exporters.

Popular women's underwear brands from Spain include Oysho, Andres Sarda, Dama de Copas, The Nude Label, and Baelle.

Table 10: 2019 Imports of women's underwear to Spain by segment with 5-year growth, average import unit price and 5-year price evolution

SPAIN	2019 Value (€)	5-year growth	Average unit price	5-year price change
Brassieres	€252 m	2.8%	€4.17	+€0.23
Briefs and pants	€152 m	5.1%	€1.10	+€0.18
Slips and petticoats	€2 m	-8.8%	€2.02	-€2.27
TOTAL:	€405 m	3.5%	€2.03	+€0.19

Tips:

- Focus your export efforts on the top six markets: Germany, France, the United Kingdom, the Netherlands, Italy and Spain because they are both the biggest apparel and women's underwear consumers in Europe and the biggest importers of apparel from developing countries. All of these countries have a high acceptance of extra-EU suppliers. France and the Germany may be particularly interesting due to the highest average import prices of women's underwear and a positive price evolution over the last five years.
- Consider entering the brassieres segment as it the largest segment for each of these markets, offering a lot of variety and entry options.
- Visit the websites of the most popular women's underwear brands in Europe such as [Hunkemöller](#), [Triumph](#), [Falke](#) and [Chantelle](#) to understand the aesthetic of European women's underwear.
- Check the [Intima Lingerie Trends](#), which are published at the beginning of each year.
- Keep an eye on the development of Brexit especially if you are an exporter to the UK. Check how the free trade agreements are impacted and whether you will be subject to new tariffs or other procedural export difficulties. [Visit the website 'get ready for Brexit'](#) for more information on Brexit and its potential impact on your business.

4. What trends offer opportunities or pose threats for the European women's underwear market?

The European women's underwear market follows the general apparel trends related to sustainability, technological innovation and increased emphasis on corporate and social responsibility. For more information, see the [CBI study on Trends in the Apparel market](#). Aside from these general trends, the women's underwear market has its own, segment-specific trends:

Change in the types of women's lingerie

The women's lingerie segment is increasingly being desexualised and the body positivity message appears to be gaining force. The styles and fits have moved towards comfort, e.g. soft bras with triangle cuts and bralettes in stretch lace, as well as sportier silhouettes. Some brands that personify this trend include [Selfridges's Myla](#) and [Beija London](#). Based on the sample of retailers in the US; the UK and Europe, in 2017, the sales of push-up bras have fallen by 50% compared to a year ago, while sales of bralette or triangle bras have rocketed by 120%. Women want to feel like they can move around and be active in their underwear, just like they are in their clothes. Also, there is aging in the population, bodies are changing, and the cuts and shapes need to reflect that.

Rise of Digital Native Brands

Away from the traditional wholesale model, digital native brands have been driving change with a new kind of messaging, building strong online communities often centered around body positivity, inclusivity and diversity. Digital engagement allows customers to interact directly with brands and for them to respond accordingly.

Sustainability

Most brands will have a sustainability range but there are also brands emerging that put sustainability at the centre of their brand and product. Companies are increasingly using fabrics such as bamboo, organic cotton, deadstock (as seen in the collections of [Ayten Gasson](#), [Lara Intimates](#), [Wama](#)). Other sustainability efforts include trying to keep short and transparent supply chains to reduce carbon emissions, eliminating the use of chemicals in the production. Some organic underwear has antibacterial and anti-odour properties.

Tips:

Adjust your women's lingerie styles according to the trends, i.e. by introducing comfort and sportier silhouettes as well as a sizing range that is inclusive towards larger shapes.

Experiment with D2C sales alongside your B2B activities. You can sell through your own web shop, existing online platforms or through social media.

Familiarise yourself with the latest fashion trends on social media by following the fashion influencers and/or leading European women's underwear players in your product segment. Consult [Feedspot for the list of Top 100 European Fashion Bloggers](#).

This study was carried out on behalf of CBI by [M-Brain GmbH](#).

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