The European market potential for bodywear

The value of European bodywear imports is estimated at €14.6 billion, making it a relatively large apparel subsegment. Women's Underwear accounts for over 43% of this market, followed by Hosiery at 33% and Men's Underwear at 15%. Homewear and Nightwear is the smallest category with almost 9% share. Bodywear imports have been growing on average by 4.5% each year, driven by the growth of the Men's Underwear and Homewear categories. The biggest markets include Germany, France, and the UK, while France and Spain have the highest average import prices.

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1. Product description

Bodywear is clothing which is worn as undergarments during the day or at nighttime. The Bodywear category can be broken down in the following subsegments: Men's Underwear, Women's Underwear; Men's and Women's Homewear and Nightwear; and Men's and Women's Hosiery.

The Men's Underwear segment includes men's underpants and briefs, knitted or crocheted, of cotton, man-made fibers and other textile materials (HS Codes: 61071100, 61071200, 61071900, 62071900); men's singlets, vests, underpants and briefs of cotton, man-made fibers and other textile materials (HS Codes: 62071100, 62079100, 62079200, 62079900).

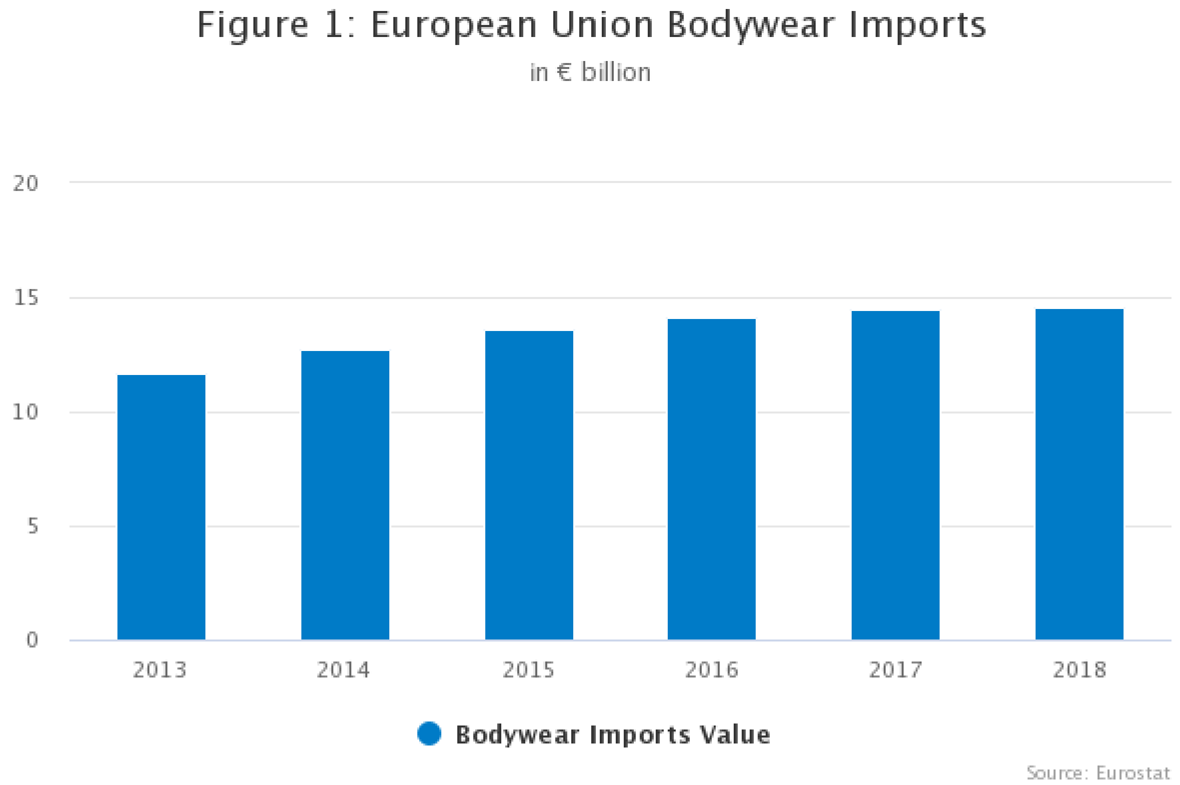
Women's Underwear includes brassieres and brassieres in a set, girdles and panty girdles, corselettes, corsets, braces, garters, suspenders & similar (HS Codes: 62121010, 62121090, 62122000, 62123000, 62129000); women's slips and petticoats of man-made fibres, other textile materials, cotton and other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

The Men's and Women's Homewear and Nightwear segment includes men's bathrobes, dressing gowns knitted, crocheted or woven, of terry toweling cotton, other cotton, man-made fibres, of other textile materials (HS Codes: 61079110, 61079190, 61079200, 61079900, 62079110, 62079190, 62079200, 62079900); men's nightshirts and pyjamas, knitted or crocheted and non-knitted and non-crocheted, of cotton, man-made fibers and other textile materials (HS Codes: 61072100, 61072200, 61072900, 62072100, 62072200, 62072900); women's nightdresses and pyjamas, knitted or crocheted and non-knitted and non-crocheted, of cotton, man-made fibers, artificial fibres, other textile materials (HS Codes: 61083110, 61083190, 61083219, 61083211, 61083290, 61083900, 62082100, 62082200, 62082900); women's negligees, bathrobes, dressing gowns, vests, briefs, pants and similar articles, knitted or crocheted and non-knitted and non-crocheted, of terry toweling cotton, other cotton, man-made fibers, wool or fine animal hair, other textile materials (HS Codes: 61089110, 61089190, 61089200, 61089910, 61089990, 62089111, 62089119, 62089190, 62089200).

The Men's and Women's Hosiery segment includes stockings for varicose veins of synthetic fibres, graduated compression hosiery of textile materials, pantyhose & tights, knee-length and full-length and other stockings, socks and hosiery of synthetic fibres, wool and other fine animal hair, cotton, and other textile materials (HS Codes: 61151010, 61151090, 61152100, 61152200, 61152900, 61153011, 61153019, 61153090, 61159400, 61159500, 61159610, 61159691, 61159699, 61159900).

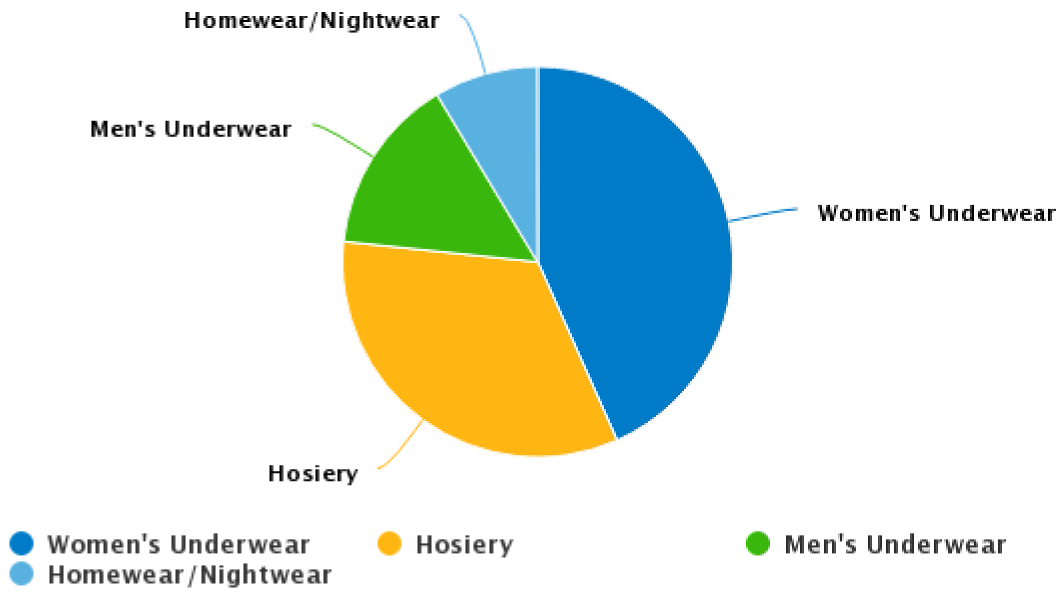
2. What makes Europe an interesting market for bodywear?

Europe is one of the more significant importers of bodywear in the world. In 2018, the value of bodywear imports to Europe, including intra-EU imports, accounted for €14.6 billion, up from €11.7 billion in 2013. This corresponded to roughly 10.9 billion units of clothing in 2018 (up from 9.8 billion in 2013). During the last five years, the value of EU bodywear imports has been growing on average by 4.5% annually, which is somewhat below the 5.8% average growth of all EU apparel imports (as reported in the CBI Market Statistics and Outlook Study), but generally in line with the growth of all product segments with the exclusion of the sportswear categories which are the market drivers. It is expected that the demand for bodywear will continue to grow at a similar rate in the years to come.



Women’s Underwear is the largest product segment in Bodywear, representing €6.3 billion in imports or more than 43% of the segment value. It is followed by Hosiery with €4.9 billion, Men’s Underwear with €2.1 billion and Homewear and Nightwear with €1.3 billion. With 6.5% average yearly growth, Men’s Underwear is the fastest growing subsegment, followed by Homewear and Nightwear which has been growing on average by 5.0% per year in the last five years.

Figure 2: 2018 EU Imports of Bodywear by Segment share



Source: Eurostat

The EU is also a large re-exporter of bodywear apparel. In 2018, it exported €9.1 billion worth of bodywear apparel (up from €7.5 billion in 2013). The EU bodywear apparel exports have been growing at an average yearly rate of 4.1% between 2013 and 2018. The biggest EU exporters in 2018 were Germany (€1.4 billion), the Netherlands (€1.3 billion), Italy (€1.26 billion), France (€787 million), Belgium (€691 million) and Poland (€517 million). Together, these six countries represent over 66% of EU's bodywear apparel exports. The Netherlands and Poland have seen the strongest export growth within this group, with an average yearly increase at 15.4% for the Netherlands and 12.1% for Poland. During the same time, Germany, France and Belgium sported growth percentages in the single digits and Italy has been declining by 1.5% per year.

Figure 3: European Union Bodywear Exports

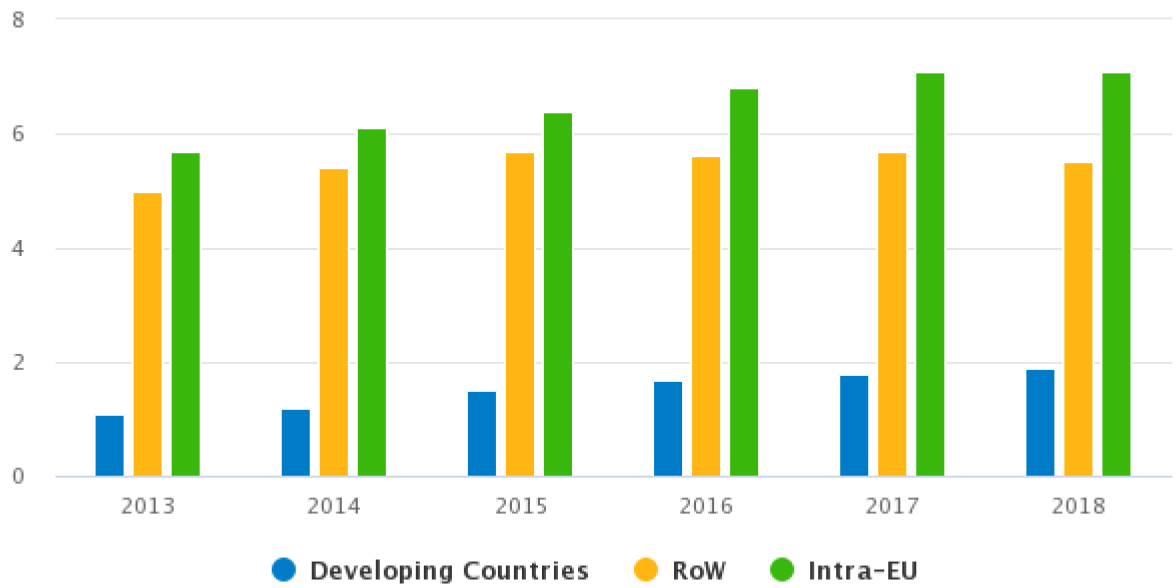
in € billion

Source: Eurostat

Currently, the value of EU bodywear imports is largely evenly split between bodywear originating from inside the EU and bodywear originating from outside the EU, respectively at 48.8% and 51.2%. In 2018, suppliers from developing countries contributed 13.3% to all bodywear imports into the EU in terms of value (up from 9.1% in 2013) and suppliers from the rest of the world accounted for 38% of the import value (down from 42.6% in 2013). The share of bodywear 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 bodywear segment. The value of EU bodywear imports originating from developing countries corresponded to €1.9 billion in 2018 and has grown at an average yearly rate of 12.7% since 2013, almost triple of the overall bodywear import growth rate. This demonstrates that there is a strong demand for bodywear from developing countries.

Figure 4: European Union Bodywear Imports by Origin

in € billion



Source: Eurostat

Europe's extra-EU bodywear imports are dominated by Asian countries with China, Turkey, and Bangladesh being the top three exporters. Together, these three countries account for 31.8% of all bodywear imports into the EU. China is the single largest bodywear exporter to the EU with 20.3% of the EU import value in 2018 (down from 24.2% in 2013). It is followed by Turkey with 5.9% and Bangladesh with 5.6%. Other Extra-EU Bodywear exporters have market shares between 1.1% and 3.1% of the overall bodywear import value. Bangladesh, India, Vietnam, Cambodia, Indonesia and Pakistan increased their share of the bodywear imports in the last five years due to above average growth. Bangladesh, Vietnam and Cambodia were the strongest growers. Vietnam and Cambodia grew at 28%-30% per year for the last five years while Bangladesh grew at 17.3%. During the same period, China, Turkey, Sri Lanka and Tunisia have grown at much lower rates that the overall bodywear import growth, resulting in a decline in market share.

Intra-EU bodywear imports are dominated by Germany with a market value of €1.35 billion (equivalent to 9.3% of market share). It is followed by the Netherlands with 7.6%, Italy with 6.6% and France with 3.8%. Germany, the Netherlands, Poland, Croatia, Spain, Serbia 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, France, Belgium and Austria lost market share during the same time period.

Table 2: Top 10 extra-EU and intra-EU bodywear exporters to EU, 2018 EUR value; average yearly growth

Country	Value	5-yr growth
Top Extra-EU Bodywear Exporters		
China	€3.0 b	↑0.8%
Turkey	€859 m	↑1.2%
Bangladesh	€818 m	↑17.3%
Sri Lanka	€453 m	↑2.2%
India	€328 m	↑5.5%
Vietnam	€269 m	↑28.0%
Cambodia	€259 m	↑29.8%
Indonesia	€219 m	↑6.5%
Pakistan	€203 m	↑10.7%
Tunisia	€157 m	↓0.7%
Top Intra-EU Bodywear Exporters		
Germany	€1.35 b	↑9.4%
The Netherlands	€1.11 b	↑14.9%
Italy	€954 m	↓1.4%
France	€549 m	↑3.4%
Poland	€455 m	↑13.2%
Belgium	€421 m	↑1.5%
Austria	€376 m	↑0.2%
United Kingdom	€256 m	↑4.4%
Croatia	€223 m	↑13.2%
Spain	€221 m	↑9.9%

3. Which European countries offer most opportunities for Bodywear?

Western European markets are much larger and better developed than the Central and Eastern European markets. The top bodywear import markets in the EU are Germany, France, the United Kingdom, the Netherlands, Italy and Spain. These top six countries, together account for 68.3% of bodywear imports in the EU and have been growing at an average rate of 3.9% per year in the last five years. Other important markets include Austria with €723 million and Belgium with €642 million. While the Eastern European imports are growing at higher rates than those in the west, they are all still relatively small. Poland, due to its high growth, 17.9% annually for the past 5 years is also an interesting market to watch. If its growth continues at the same level, within next two years, it will become the seventh largest EU market for bodywear.

Table 3: Top 10 EU importers of bodywear, 2018 EUR value; average yearly growth

Country	Value	5-yr growth
Germany	€2.7 b	↑5.0%
France	€1.9 b	↑2.5%
United Kingdom	€1.7 b	↑0.1%
Netherlands	€1.5 b	↑9.2%
Italy	€1.2 b	↑3.3%
Spain	€919 m	↑5.6%
Austria	€723 m	↑4.0%
Belgium	€642 m	↑0.2%
Poland	€577 m	↑17.9%
Sweden	€336 m	↑1.2%

Source: Eurostat

Table 4: Top 10 EU importers of bodywear from developing countries, 2018 EUR value; average yearly growth

Country	Value of Developing country imports	5-yr growth	Developing country share of imports
The Netherlands	€390 m	↑16.3%	26.3%
United Kingdom	€372 m	↑17.7%	21.7%

Germany	€332 m	↑9.9%	12.3%
France	€298 m	↑6.0%	15.4%
Spain	€133 m	↑16.4%	14.5%
Austria	€104 m	↑14.3%	14.4%
Belgium	€86 m	↑8.2%	13.4%
Italy	€83 m	↑8.9%	7.0%
Sweden	€48 m	↑17.3%	14.3%
Poland	€22 m	↑43.1%	3.8%

Source: Eurostat

The Women's Underwear 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 €1.2 billion opportunity and is growing at 7.6%. Homewear and Nightwear is the lowest valued category for each of these markets but it has a much higher average import unit price than all other categories, with a comparatively high growth and a very positive price development.

Germany

Germany is the largest bodywear import market in Europe. In 2018, the value of its bodywear imports amounted to €2.7 billion (up from €2.1 billion in 2013). This corresponded to approx. 2.2 billion units of clothing. In the last five years, the value of Germany's bodywear imports has grown at an average rate of 5.1% per year, while the import volume has grown at 2.9% per year. Popular bodywear brands from Germany include Bruno Banani, Falke, Schiesser, Triumph International, Anita.

Women's Underwear constitutes the largest bodywear segment in Germany with 45% share of the import value (up from 40% in 2013), followed by Hosiery with 35% (down from 39% in 2013), Men's Underwear at 15% and Homewear and Nightwear at 5%. Women's Underwear has been the fastest growing segment in the last 5 years with an average annual growth of 7.6%, while Hosiery and Homewear have been growing below the segment growth. Homewear and Nightwear has the highest average unit price with €6.65 per unit and the most positive price development in the last five years – up €1.07 per unit. Women's and Men's underwear are volume segments with the import unit prices at €2.18 and €1.73.

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

Table 5: 2018 Imports of bodywear to Germany by segment with 5-year growth, average import unit price and 5-year price evolution

GERMANY	2018 Value (€)	5-year growth	Average unit price	5-year price change

Women's Underwear	€1.227 m	7.6%	€2.18	+€0.27
Hosiery	€934 m	2.3%	€0.66	-€0.01
Men's Underwear	€397 m	5.8%	€1.73	+€0.33
Homewear/Nightwear	€147 m	2.1%	€6.65	+€1.07
TOTAL:	€2.705 m	5.1%	€1.22	+€0.12

France

France is the second largest bodywear import market in Europe. In 2018, the value of its bodywear imports amounted to €1.9 billion (up from €1.7 billion in 2013). This corresponded to approx. 1.1 billion units of clothing. In the last five years, the value of French bodywear imports has grown at an average rate of 2.5% per year, while the import volume has grown at 1.3% per year. Popular bodywear brands from France include Chantelle, Simone Perele, Chantal Thomas, House of Marlow, Lise Charmel, Princesse Tam Tam, Aubade, Etam.

Women's Underwear constitutes the largest bodywear segment in France with 49% share of the import value (unchanged from 2013), followed by Hosiery with 29%, Men's Underwear at 13% and Homewear and Nightwear at 8%. Men's Underwear and Homewear have been the fastest growing segments in the last 5 years with an average annual growth of 3.2 and 3.5%, while Hosiery and Women's Underwear have been growing below the segment growth. Homewear and Nightwear has the highest average unit price with €5.48 per unit and the most positive price development in the last five years – up €0.16 per unit. Women's and Men's underwear are volume segments with the import unit prices at €2.71 and €1.61.

Women's Underwear is the largest segment in France, which creates a lot of potential. Homewear and Nightwear appears to be the most interesting emerging category due to the above average growth, very high average unit price and a very positive price development over the last five years.

Table 6: 2018 Imports of bodywear to France by segment with 5-year growth, average import unit price and 5-year price evolution

FRANCE	2018 Value (€)	5-year growth	Average unit price	5-year price change
Women's Underwear	€950 m	2.4%	€2.71	-€0.01
Hosiery	€573 m	2.1%	€1.02	+€0.11
Men's Underwear	€259 m	3.2%	€1.61	-€0.04
Homewear/Nightwear	€164 m	3.5%	€5.48	+€0.16
TOTAL:	€1.945 m	2.5%	€1.77	+€0.10

The United Kingdom

The United Kingdom is the third largest bodywear import market in Europe. In 2018, the value of its bodywear imports amounted to €1.7 billion (unchanged from 2013). This corresponded to approx. 1.1 billion units of clothing. In the last five years, the value of the UK's bodywear imports has grown at an average rate of 0.1% per year, while the import volume has declined at 2.9% per year, showing that the absolute import values have been declining and the prices increasing. Popular bodywear brands from the UK include Pretty Polly, Derek Rose, Agent Provocateur, Ann Summers, Bluebella, Bordelle, Boux Avenue, Bravissimo, Coco de Mer, Curvy Kate, Nichole de Charle, Selfridge's Myla and Dora Larsen.

Women's Underwear constitutes the largest bodywear segment in the UK with 38% share of the import value (unchanged from 2013), followed by Hosiery with 33%, Homewear and Nightwear at 15% and Men's Underwear at 14%. Homewear and Nightwear has been the fastest growing segment in the last 5 years with an average annual growth of 4.8%, followed by Men's Underwear with 4.1%. Hosiery has declined at 3.4% each year and Women's Underwear has stagnated. Homewear and Nightwear has the highest average unit price with €5.27 per unit and the most positive price development in the last five years – up €1.32 per unit. Women's and Men's underwear are volume segments with the import unit prices at €2.17 and €1.81.

The Women's Underwear segment is the largest segment in the United Kingdom. Homewear and Nightwear is the most interesting emerging category due to its very high growth, high average unit price and a very positive price development over the last five years.

Table 7: 2018 Imports of bodywear to the United Kingdom by segment with 5-year growth, average import unit price and 5-year price evolution

UNITED KINGDOM	2018 Value (€)	5-year growth	Average unit price	5-year price change
Women's Underwear	€648 m	0.4%	€2.17	+€0.47
Hosiery	€560 m	-3.4%	€0.87	-€0.04
Homewear/Nightwear	€263 m	4.8%	€5.27	+€1.32
Men's Underwear	€240 m	4.1%	€1.81	+€0.45
TOTAL:	€1.711 m	0.1%	€1.53	+€0.21

The United Kingdom is scheduled to leave the EU this year. Brexit has been postponed till 31 January 2020 and it is currently generating a lot of uncertainty. 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 bodywear import market in Europe. In 2018, the value of its bodywear imports amounted to €1.5 billion (up from 953 million in 2013). This corresponded to approx. 1.2 billion units of clothing. In the last five years, the value of the Netherlands' bodywear imports has grown at an average rate of 9.9% per year, while the import volume has grown at 6.7% per year, making the Netherlands the fastest growing import market for bodywear in the top ten markets. Popular bodywear brands from the Netherlands include Hunkemoller and Marlies Dekkers.

Women's Underwear constitutes the largest bodywear segment in the Netherlands with 42% share of the import value (down from 45% in 2013), followed by Hosiery with 32%, Men's Underwear at 20% and Homewear and

Nightwear at 7%. Men's Underwear and Homewear and Nightwear have been the fastest growing segments in the last 5 years with an average annual growth of 15.1% and 11.6% respectively. Hosiery followed with an 8.8% growth and Women's Underwear was the weakest performer at 8.4% annual growth. Homewear and Nightwear has the highest average unit price with €4.47 per unit and the most positive price development in the last five years – up €1.15 per unit. Women's and Men's underwear are volume segments with the import unit prices at €1.96 and €1.89.

The Women's Underwear segment is the largest segment in the Netherlands, but Men's Underwear is the fastest grower with a yearly segment increase of 15.1%, average unit prices above the Women's segment and a very positive price development over the last five years, making it one of the most attractive segments for suppliers from developing countries.

Table 8: 2018 Imports of bodywear to the Netherlands by segment with 5-year growth, average import unit price and 5-year price evolution

NETHERLANDS	2018 Value (€)	5-year growth	Average unit price	5-year price change
Women's Underwear	€641 m	8.4%	€1.96	+€0.25
Hosiery	€483 m	8.8%	€0.59	€0.00
Men's Underwear	€302 m	15.1%	€1.89	+€0.36
Homewear/Nightwear	€103 m	11.6%	€4.47	+€1.15
TOTAL:	€1.528 m	9.9%	€1.15	+€0.09

Italy

Italy is the fifth largest bodywear import market in Europe. In 2018, the value of its bodywear imports amounted to €1.2 billion (up from 1.0 billion in 2013). This corresponded to approx. 839 million units of clothing. In the last five years, the value of Italy's bodywear imports has grown at an average rate of 3.4% per year, while the import volume has grown at 1.3% per year. Popular bodywear brands from Italy include La Perla, Cosabella, Intimissimi, Golden Point.

Women's Underwear constitutes the largest bodywear segment in Italy with 43% share of the import value (up from 41% in 2013), followed by Hosiery with 31%, Men's Underwear at 15% and Homewear and Nightwear at 11%. Women's Underwear and Homewear and Nightwear have been the fastest growing segments in the last 5 years with an average annual growth between 4.6% and 4.7%. Hosiery was the weakest performer at 1.3% annual growth. Homewear and Nightwear has the highest average unit price with €4.56 per unit, even after the most negative price development in the last five years – down €0.34 per unit. Women's and Men's underwear are volume segments with the import unit prices at €2.16 and €1.62.

The Women's Underwear segment is the largest and fastest growing in Italy. It's average price and positive price development over the last 5 years makes it the most interesting segment in Italy.

Table 9: 2018 Imports of bodywear to Italy by segment with 5-year growth, average import unit price and 5-year price evolution

ITALY	2018 Value (€)	5-year growth	Average unit price	5-year price change
Women's Underwear	€518 m	4.6%	€2.16	+€0.13
Hosiery	€372 m	1.3%	€0.81	+€0.05
Men's Underwear	€174 m	3.6%	€1.62	+€0.14
Homewear/Nightwear	€131 m	4.7%	€4.56	-€0.34
TOTAL:	€1.195 m	3.4%	€1.43	+€0.14

Spain

Spain is the sixth largest bodywear import market in Europe. In 2018, the value of its bodywear imports amounted to €923 million (up from 701 million in 2013). This corresponded to approx. 575 million units of clothing. In the last five years, the value of Spain's Bodywear imports has grown at an average rate of 5.7% per year, while the import volume has declined at 2.9% per year. Popular Underwear brands from Spain include Oysho and Andres Sarda.

Women's Underwear constitutes the largest bodywear segment in Spain with 43% share of the import value (down from 44% in 2013), followed by Hosiery with 29%, Men's Underwear at 15% and Homewear and Nightwear at 13%. Men's Underwear have been the fastest growing segment in the last 5 years with an average annual growth of 8.6%. Hosiery was the weakest performer at 4.7% annual growth. Homewear and Nightwear has the highest average unit price with €5.30 per unit, with a positive price development in the last five years – up €1.95 per unit.

Both the Women's and Men's Underwear segments seem to be quite attractive in Spain. They are both showing relatively strong growth and a positive price development over the last 5-year period. The Homewear and Nightwear segment is currently small but it is seeing solid growth and offers high average prices, making it a potentially very promising niche.

Table 10: 2018 Imports of bodywear to Spain by segment with 5-year growth, average import unit price and 5-year price evolution

SPAIN	2018 Value (€)	5-year growth	Average unit price	5-year price change
Women's Underwear	€398 m	5.4%	€2.07	+€0.57
Hosiery	€270 m	4.7%	€0.92	+€0.32
Men's Underwear	€138 m	8.6%	€2.08	+€0.90
Homewear/Nightwear	€117 m	5.7%	€5.30	+€1.95
TOTAL:	€923 m	5.7%	€1.61	+€0.56

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 bodywear 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 Spain may be particularly interesting due to the highest average import prices of bodywear and a positive price evolution over the last five years.
- Consider entering the Women's Underwear segment as it the largest segment for each of these markets offering a lot of variety and entry options. Another interesting segment is the Nightwear and Homewear segment, although it is relatively small for most of the countries, it shows promise through very high average prices and strong growth.
- Visit the websites of the most popular bodywear brands in Europe such as Hunkemöller, Triumph, Falke and Chantelle to understand the aesthetic of European bodywear. 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.
- Consider exporting to Poland, as it is currently Europe's fastest growing importer of apparel and apparel from developing countries, including the bodywear segment.

4. What trends offer opportunities or pose threats for the European bodywear market?

The European bodywear 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 bodywear 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 Selfridge'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.

Hosiery is driven by the athleisure market and fashion

Hosiery is increasingly driven by the athleisure market with compression hosiery used for the treatment of leg disorders and varicose veins gaining in popularity. The leaders in the compression hosiery market include

Sigvaris, Innothera and Thuasne. Aside from being functional, hosiery is also becoming increasingly fashionable with different styles such as floral, lace and color tights trending. The most popular hosiery brands in Europe include Falke, Calzedonia and Wolford.

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 bodywear players in your product segment. Consult Feedspot for the list of Top 100 European Fashion Bloggers.

This study has been carried out on behalf of CBI by M-Brain GmbH.

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