

## **Lingerie - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-09-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Lingerie Market Analysis

The lingerie market size is estimated at USD 99.12 billion in 2025, and is expected to reach USD 116.35 billion by 2030, at a CAGR of 3.26% during the forecast period. This growth trajectory reflects a fundamental shift in consumer preferences for lingerie beyond mere aesthetics toward comfort, inclusivity, and sustainability. The market's expansion is outpacing previous industry trends, driven by technological innovations in fabric development and digital retail experiences that are reshaping how consumers discover and purchase intimate apparel. The industry has witnessed a notable shift toward body positivity and inclusivity, with brands increasingly featuring diverse body types in their marketing campaigns and product offerings. Product innovation and sustainability have emerged as critical differentiators in the lingerie market, with manufacturers focusing on eco-friendly materials and production processes.

Global Lingerie Market Trends and Insights

Rising Body Positivity Trends Fuel Demand for Inclusive Sizing and Styles

The body positivity movement has transformed from a social media trend to a business necessity, influencing product development across the lingerie industry. Companies that offer expanded size ranges are reaching previously underserved customer segments. With inclusive sizing becoming a growth driver, manufacturers are investing in research and development to create more diverse product lines. This transformation is most notable in the brassiere segment, with manufacturers focusing on

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comfort-oriented designs and expanded size ranges to accommodate diverse body types. Companies are developing specialized products for different body types and preferences. For instance, in September 2024, the Clovia brand launched a range of plus-size bra collections. These bras include wide wings for side support, full-coverage cups to prevent spillage, and broad underbands. In addition to this, the introduction of adaptive designs for differently-abled consumers has also established new product categories. These emerging segments present significant growth potential in the market studied.

#### Increasing Disposable Income Supports Premium and Luxury Lingerie Purchases

The premium lingerie segment is experiencing growth, driven by increasing disposable incomes in emerging markets. According to the Office for National Statistics data from 2024, the median household disposable income in the United Kingdom was GBP 43,500. The segment demonstrates resilience despite economic pressures, with sustained consumer spending on luxury intimate apparel. Manufacturers are pursuing vertical integration through direct-to-consumer channels to capture higher margins in the premium segment. This strategic shift enables companies to maintain better control over their distribution and pricing strategies. Regional preferences in the premium and luxury lingerie market differ across geographies. Asian consumers prioritize high-quality materials and craftsmanship while choosing premium and luxury lingerie, while Western consumers emphasize brand heritage and sustainability. These distinct preferences require brands to adapt their products and marketing strategies according to regional market demands.

#### Counterfeit And Low-Quality Products Dilute Brand Value and Consumer Trust

The proliferation of counterfeit lingerie products is creating asymmetric market distortions that disproportionately impact premium brands. Beyond immediate revenue losses, these counterfeits create lasting brand equity damage through quality inconsistencies that erode consumer trust. The challenge is particularly acute in e-commerce channels, where visual authentication is limited and price sensitivity often overrides authenticity concerns. According to the United States Customs and Border Protection, counterfeit wearing apparel valued at USD 392.66 billion was seized in the United States during fiscal year 2023, demonstrating the magnitude of counterfeiting and its impact on legitimate businesses. This dynamic is forcing legitimate manufacturers to invest in authentication technologies and supply chain traceability systems, creating additional cost pressures in an already margin-constrained industry. The counterfeit challenge is creating a strategic imperative for brands to strengthen direct-to-consumer channels where they can better control the customer experience and authentication.

Other drivers and restraints analyzed in the detailed report include:

Technological Innovations Like Virtual Fitting Rooms Improve Customer Experience / Rising Demand for Sustainable and Ethically Made Lingerie Influences Buying Choices / Intense Competition from Local and Unbranded Players Pressures Pricing /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

The brassiere segment commands 55.94% of the lingerie market in 2024 and is projected to grow at a 4.64% CAGR through 2030, maintaining its position as both the largest and fastest-growing product category. This dual leadership position stems from continuous innovation in comfort-enhancing technologies and adaptive designs that respond to evolving consumer preferences. For instance, in February 2025, Victoria's Secret & Co. introduced its Digital Product Passport (DPP), enhancing product transparency in the lingerie market. The DPP, implemented on the Signature Cotton T-shirt Bra and VSX Featherweight Max Sports Bra collections, features QR codes that provide customers with material information, supply chain details, and reordering capabilities.

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Technological advancements in the brassiere segment are creating new competitive battlegrounds, with bonding and second-skin technologies emerging as key differentiators. The brief segment maintains steady growth through expanded style options and sustainable materials, while specialty products are finding success in niche applications like period underwear with innovations from companies like Kelheim Fibres and Gebr. This evolution is creating asymmetric growth opportunities for brands that can successfully balance comfort innovations with aesthetic appeal, particularly as the boundaries between lingerie and athleisure continue to blur.

While mass-market products dominate with 76.32% market share in 2024, the premium segment is outpacing overall market growth with a projected 5.03% CAGR through 2030. This counter-intuitive growth amid economic uncertainty reveals a strategic bifurcation in consumer spending patterns, with premium lingerie increasingly viewed as an accessible luxury rather than a discretionary purchase. The premium segment's growth is creating opportunities for vertical integration among manufacturers who can capture higher margins through direct-to-consumer channels.

Mass-market products maintain their dominant position through expanded distribution and value-oriented innovations that deliver premium-adjacent features at accessible price points. The competitive dynamics between mass and premium segments are evolving beyond simple price differentiation to include material innovation, sustainability credentials, and digital experience quality. The success of mass-market offerings focusing on high quality is particularly evident in emerging markets, where rising disposable incomes are creating a new consumer class seeking quality improvements without premium price tags.

The Lingerie Market Report is Segmented by Product Type (Brassiere, Briefs, and Other Product Types), Price Range (Mass and Premium), Material (Cotton, Silk and Satin, and More), Distribution Channel (Supermarkets/Hypermarkets, Specialty Stores, and More), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

#### Geography Analysis

Asia-Pacific holds 60.43% of the global lingerie market in 2024 and is expected to grow at a 4.81% CAGR through 2030, maintaining its position as the largest and fastest-growing region. This growth is driven by favorable demographics, increasing disposable incomes, and changing cultural attitudes toward lingerie consumption. China and India are the key growth markets, supported by their large populations and expanding middle classes. The region's e-commerce infrastructure development has improved access to international brands beyond major cities. In September 2024, Japanese manufacturer Wacoal Holdings acquired UK-based Bravissimo, indicating Asian companies' efforts to expand internationally.

North America and Europe are experiencing market growth primarily through premium product offerings rather than increased consumption volumes. Consumers in these regions show a growing preference for high-quality materials, sustainable products, and inclusive sizing options. These markets show distinct separation between mass and premium segments, with limited growth in the mid-market range. Direct-to-consumer brands using digital channels are challenging traditional retailers.

South America and the Middle East and Africa offer growth potential with unique market characteristics. The South American market growth is driven by retail development and high female employment in the service sector, with Brazil reporting 86% of employed women working in services. The Middle Eastern market shows expansion in the luxury segment. These regions offer opportunities for international brands, requiring adaptation to local preferences and distribution systems. The market structure in these regions features fragmentation and strong local companies with established distribution networks and market understanding.

List of Companies Covered in this Report:

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Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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