

North America Lingerie - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The North America Lingerie Market size is estimated at USD 13.94 billion in 2024, and is expected to reach USD 17.20 billion by 2029, growing at a CAGR of 4.29% during the forecast period (2024-2029).

Lingerie has evolved beyond traditional undergarments and has become an integral part of fashion. Evolving fashion trends, including a greater emphasis on self-expression, body positivity, and inclusivity, have led to a wider variety of lingerie styles, designs, and sizes. The increasing participation of women in physical activities has further propelled the sale of sports innerwear in recent years. Moreover, with the advent of artificial intelligence (AI) and 3D scanning technologies, brands can provide consumers with personalized fitting experiences through online apps. For example, in March 2024, DOUBL, a Canadian company specializing in made-to-measure bras fueled by AI technology, introduced the First AI-Fitted Bra. DOUBL developed a made-to-measure bra that can be fitted and ordered directly from an app using advanced technology to capture body measurements. The app creates a 3D body rendering without taking or storing photos or videos. Moreover, players established pop-up stores and boutique platforms that exclusively offer numerous options, including regular ones and premium or luxury lingerie pieces. These stores also provide personalized services and expert help to identify suitable fabrics and fit for consumers, per their requirements and budget. Such factors are anticipated to fuel the market growth during the study period.

North America Lingerie Market Trends

Influence of Endorsements and Aggressive Marketing

With the growing influence of social media on the buying behavior of consumers, companies are evolving and stepping up their advertising and endorsement strategies across different distribution channels to garner consumer attention. Consumers feel more sympathetic toward a brand if their products are promoted by a celebrity they admire or relate to. Therefore, manufacturers are collaborating with celebrities to endorse their lingerie collection. For instance, in March 2024, Victoria's Secret launched its latest bridal collection starring Hailey Bieber. The photos were posted on Instagram, and Bieber was wearing white lingerie from The Bridal Collection. In addition, manufacturers focus on marketing expenditures, including advertising and endorsements, pricing, positioning, customer service, digital commerce platforms, digital services and experiences, and social media presence to increase portfolio awareness and sales.

United States Holds Largest Share

The United States is home to many of the foremost lingerie connoisseurs, including LVMH, Calvin Klein, and Victoria's Secret. Sports bras have become one of the preferred innerwear options among Americans, with a trend toward casualization and comfort in American fashion. Thus, manufacturers expand their catalogs to include various products and meet consumers' demand for trendy, fashionable lingerie. For example, in August 2023, Under Armour launched an all-new HeatGear Armour high sports bra. This new sports bra is ideal for female players needing a compression bra that provides unmatched support when leaving it all on the pitch. Besides, celebrities and influencers, including Heidi Klum, Kim Kardashian, and Rihanna, have opened their lingerie-focused clothing lines. According to a January 2022 article in Women's Wear Daily, brands owned by Rihanna (SavagexFenty), Kim Kardashian (Skims), and Sofia Vergara (EBY) were seeing skyrocketing sales. These intimate brands have attracted further investment in the past few years, totaling millions of dollars.

North America Lingerie Industry Overview

The North American lingerie market is highly fragmented and intensely competitive, with numerous local and international players competing for a significant market share. Victoria's Secret & Co., HanesBrands Inc., PVH Corp., AEO Inc., and Nike Inc. are among some significant players. The major players are engaging in industry

consolidation through partnerships or acquisitions of well-known domestic companies, which has heightened competition among other existing players in the market. Further, the players are focusing on launching new products per consumer demand and promoting their newly launched products through innovative marketing strategies to penetrate the regional market.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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