

China Underwear Industry Overview, 2017-2021

<https://marketpublishers.com/r/CBCA9D63E60EN.html>

Date: September 2016

Pages: 50

Price: US\$ 2,200.00 (Single User License)

ID: CBCA9D63E60EN

Abstracts

Description

Underwear refers to close-fitting clothing also called internal fashion, which can be divided into three types, namely undershirt, adjusting underwear (correcting underwear) and ornamental underwear.

China underwear industry started from knitted underwear and cotton jersey at the beginning of reform and opening-up. During the period of brand start-up represented by environmentally friendly underwear, it suffered from the price war, concept war and advertisement war. Afterwards, its development was relatively mature. The preliminary brand layout and industry layout took shape. There existed basic product segmentation. The sizeable underwear industry included relatively entire industry sectors covering knitted sweater and pant, thermal underwear, pajamas, T-shirt, lingerie, etc. Presently, there are famous underwear brands such as AB and Three Gun in China underwear industry.

The basically perfect and mature industry and market system comes into being in China underwear industry. There emerges production cluster (factories are mainly located in Guangdong Province, Zhejiang Province, Beijing, Jiangsu Province, etc.) in China underwear industry. Moreover, it developed from OEM to a new stage featured with self-owned brand innovation.

According to CRI, the market size of China underwear industry kept growing in recent years. In 2016, the market size of domestic underwear industry surpassed CNY 280 billion. Lingerie accounts for 60% of the whole underwear market, serving as the key section of the underwear industry.

The market concentration rate is quite low in China underwear industry. Based on CRI,

there are over 3,000 brands in China underwear industry, however, the market share of Top 5 enterprises is less than 10%. The market share of international famous brands such as Victoria's Secret exceeds 10% in the U.S. and Japan. The low market concentration rate in China explains the relatively low barriers to entry. It is relatively easy to occupy the market with differentiated products. In terms of the present domestic garment industry, the underwear market enjoys prominent profits and growth rate, providing the access to the domestic underwear market with a golden chance. With the increasing living standards of Chinese residents, their demand for underwear keeps growing accordingly.

Chinese underwear market steps into segmentation era. First tier cities gradually focus on fashion and individual consumption, which are followed by second tier cities combining the radiation effect of practical products on the lower tier cities. Third and fourth tier cities and rural areas pay attention to the utilitarian consumption. The segmentation of ages became a segmentation orientation of underwear development in recent years. Personalized underwear, fashionable underwear and functional underwear gradually separate from traditional underwear.

With the level-up living standard in China, underwear gradually serves as the supplement of outerwear instead of the pure wearing function. The collocation of underwear and fashion is becoming a kind of development trend. No matter the personalized products or traditional ones possess increasingly high technological content. In addition to aesthetics, lingerie needs to be good for both bodybuilding and health care.

Based on CRI, CAGR of Chinese underwear market will maintain around 10% in 2017-2021. The market size of China underwear industry will exceed CNY 450 billion up to 2021. In terms of trend, segmentation of Chinese underwear will be the future development trend of China underwear industry. Underwear brands should further the research on consumers of different levels, ages and consumption structures to design and exploit series products which can meet the consumers' requirements.

Through this report, the readers can acquire the following information:

Development Environment of China Underwear Industry

Development Status of China Underwear Industry

Key Enterprises in China Underwear Industry and Their Operation Status

Market Competition of China Underwear Industry

Consumer Behaviors in China Underwear Industry

Segmentation Industry of China Underwear Industry

Major Driving Forces and Market Opportunities in China Underwear Industry

Threats and Challenges Faced by China Underwear Industry

Development Trend of China Underwear Industry, 2017-2021

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