

# Research Report on China's Underwear Industry, 2011-2012

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## Abstracts

Underwear refers to the clothes next to the skin, and thus they are also called "inside fashion". Underwear can be divided into three categories, namely undershirt, adjusting underwear (also known as correcting underwear) and ornamental underwear (also known as supplementing underwear).

Since the 1980s, with the continuous deepening of Chinese reform and opening-up, and the improvement of people's living standards, international underwear enterprises have begun to enter the Chinese market. In China's underwear market, the average growth rate of sales amount and sales volume of bras, warmth underwear, etc. remain around 15%-20%, far exceeding the growth level of China's GDP.

China's underwear industry started with knitted underwear and cotton jersey at the beginning of reform and opening-up. After going through price war, concept war, advertising war represented by environmental underwear at the initial stage of brand pioneering, its development is gradually mature, the brand distribution and industrial pattern are initially shaped, and the product segmentation is basically completed, forming a relatively complete industrial plate covering knitwear, warmth underwear, pajamas, T-shirt, women's underwear, etc. The scale of underwear industry has been developed. Currently, there are such well-known brands as AB, Threeguns, etc. in China's underwear industry.

With the continuous increase in domestic demand for China's clothes, the underwear market is entering the segmentation age. First-tier cities gradually enter the consumption level of fashion-orientation and personalization; second-tier cities follow up, still giving consideration to the radiation effect of practical products on subordinate cities; third-tier cities focus on practical consumption; the specialized underwear

consumption in counties and cities subordinate to counties starts. The segmentation of ages becomes a major segmentation orientation in recent years in underwear development, while various underwear categories ranging from personalized and fashion-oriented underwear to functional underwear are all separated from traditional underwear.

Since the underwear foreign trade and processing industry is one of the major development origins of China's underwear industry, a number of underwear can match international brands in product design, technical skill and other aspects. But due to the lack of brand popularity, the sales prices are far lower than those of international brands. Since the period for brand cultivation and development is relatively short, and the ability to research, develop and process products is not strong, the channel controlling ability is still weak for some brands growing up in the market.

According to the development status of China's underwear industry recently, the market segmentation orientation and principles are gradually clear. In market segmentation, brands occupy different segmentation fields by differentiated competition methods; the concentration degree of various segmented brands will be increasingly high, and the segmented brand pattern of "national brand + regional brand and personalized brand + popular brand" at all levels will be formed.

With the improvement of Chinese living standard, underwear is no longer the inside clothes, but a supplement of the coat; it's a development trend to match underwear with fashion; the technology content in personalized products and traditional products is increasingly high. Except for beauty, women's underwear should also have such functions as body beautification and body strengthening.

**More following information can be acquired from this report:**

Development Status of China's Underwear Industry

Key Enterprises in China's Underwear Industry and Their Operations

Market Competition in China's Underwear Industry

Consumer Behaviors in China's Underwear Industry

Segmented Industries of China's Underwear Industry

## Development Trend of China's Underwear Industry

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