

Intimate Lingerie Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Briefs, Bras, Shapewear, Others), By Distribution Channel (Online, Offline), By Region & Competition, 2021-2031F

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Abstracts

The Global Intimate Lingerie Market is projected to expand from USD 20.34 Billion in 2025 to USD 32.08 Billion by 2031, reflecting a CAGR of 7.89%. This sector covers a wide array of women's innerwear, such as bras, panties, sleepwear, and shapewear, all engineered to offer hygiene, support, and aesthetic value. Growth is primarily fueled by the increasing disposable income of working women and a significant structural evolution toward inclusivity and comfort. Rather than following temporary fads, these drivers reflect a deep-seated change in consumer priorities, with demand now heavily influenced by body positivity and the need for versatile, high-quality garments that can be worn throughout the day.

However, market progression is hindered by supply chain instability and the intricate logistics involved in sourcing. Manufacturers are under considerable pressure to spread out their production capabilities to avoid economic and geopolitical vulnerabilities. Data from the United States Fashion Industry Association indicates that in 2024, 43 percent of major fashion firms reported sourcing less than 10 percent of their apparel from China. This statistic underscores the significant sourcing shifts and operational reorganizations that are currently causing disruptions across the wider intimate apparel landscape.

Market Driver

The adoption of AI-powered personalization and virtual fitting tools is transforming the

Global Intimate Lingerie Market by resolving the difficulties associated with online sizing. By utilizing computer vision and sophisticated algorithms, customers can now visualize how items fit on various body shapes, which boosts buyer confidence and lowers return rates. This technology is proving commercially vital; for example, Retail Tech Innovation Hub reported in November 2024 regarding the article 'Inclusive lingerie specialist Adore Me deploys Veesimal AI powered virtual try-on experience technology' that Adore Me experienced a 48 percent increase in conversions from category page visits after implementing Veesimal's virtual try-on system. These advancements are essential for maintaining consumer engagement in a digital retail world, offering an experience comparable to in-store service.

Simultaneously, the industry is being driven by a rising demand for ethically sourced and sustainable materials, compelling brands to switch to eco-friendly options like recycled polyester. While this transition invites strict supply chain oversight, it presents operational hurdles regarding material access. As per the 'Materials Market Report 2024' by Textile Exchange in September 2024, recycled polyester comprised 12.5 percent of the global market share in 2023, reflecting the sector's slow but steady structural adjustment. Despite these challenges, the market remains financially robust. Victoria's Secret & Co., for instance, announced in December 2024 that its third-quarter net sales reached \$1.347 billion, a 7 percent year-over-year rise, highlighting the persistent demand for innovative intimate apparel.

Market Challenge

The growth of the Global Intimate Lingerie Market is significantly hampered by logistical complexities and supply chain volatility, which interfere with the timely manufacturing of premium garments. As producers diversify their manufacturing hubs to reduce risk, they face a fragmented landscape that makes quality control difficult and lengthens lead times. This fragmentation is especially problematic for the intimate apparel industry, as producing items like shapewear and bras demands specialized equipment and uniform materials that are hard to coordinate across geographically separated facilities.

Consequently, this operational stress compels firms to oversee extensive vendor networks, escalating freight and administrative expenses. According to the United States Fashion Industry Association, nearly 70 percent of large fashion enterprises reported in 2024 that they sourced from ten or more distinct countries to broaden their supply base. While necessary, this diversification drains resources that could otherwise support innovation and decelerates the supply chain. Ultimately, the struggle to streamline these intricate logistics restricts the market's ability to quickly replenish stock

and satisfy the rising consumer desire for comfortable, diverse products.

Market Trends

The Global Intimate Lingerie Market is undergoing a fundamental shift toward wireless and comfort-oriented athleisure designs, fueled by consumers seeking versatile clothing that serves as both loungewear and innerwear. This movement moves away from restrictive, traditional structures in favor of soft, stretchy fabrics suited for active lifestyles and a 'gym-to-street' look. Brands bridging the gap between intimate apparel and activewear are gaining significant ground; FashionUnited reported in December 2025 in the 'American Eagle posts strong Q3 driven by Aerie and marketing campaigns' article that Aerie led growth for American Eagle Outfitters with an 11 percent increase in comparable third-quarter sales, proving the commercial success of comfort-first strategies.

In contrast, there is a simultaneous resurgence of retro-inspired corsetry and structured silhouettes, focusing on defined contours and body sculpting. Modernized with advanced compression fabrics, this trend offers an hourglass look without the discomfort of historical corsetry, effectively merging shapewear with fashionable outerwear. This is a major revenue driver rather than a niche fad, as consumers seek confidence and physical transformation. As noted by The Guardian in December 2025 in the 'I feel shrink-wrapped: the reluctant rise of shapewear for men' article, Skims is projected to exceed \$1 billion in annual sales, highlighting the immense demand for body-enhancing apparel and the acceptance of shapewear as an essential wardrobe element.

Key Market Players

- Victoria's Secret & Co.

- Reliance Retail Limited

- Gap, Inc.

- Triumph Intertrade AG

- Calvin Klein, Inc.

- Wacoal EMEA LTD

%li%Chantelle SA

%li%HanesBrands Inc

%li%HunkemOller B.V.

%li%The Natori Company Inc.

Report Scope

In this report, the Global Intimate Lingerie Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

%li%Intimate Lingerie Market, By Product

%li%%li%Briefs

%li%%li%Bras

%li%%li%Shapewear

%li%%li%Others

%li%Intimate Lingerie Market, By Distribution Channel

%li%%li%Online

%li%%li%Offline

%li%Intimate Lingerie Market, By Region

%li%%li%North America

%li%%li%%li%United States

%li%%li%%li%Canada

%li%%li%%li%Mexico

%li%%li%Europe

%li%%li%%li%France

%li%%li%%li%United Kingdom

%li%%li%%li%Italy

%li%%li%%li%Germany

%li%%li%%li%Spain

%li%%li%Asia Pacific

%li%%li%%li%China

%li%%li%%li%India

%li%%li%%li%Japan

%li%%li%%li%Australia

%li%%li%%li%South Korea

%li%%li%South America

%li%%li%%li%Brazil

%li%%li%%li%Argentina

%li%%li%%li%Colombia

%li%%li%Middle East & Africa

%li%%li%%li%South Africa

%li%%li%%li%Saudi Arabia

%li%%li%%li%UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Intimate Lingerie Market.

Available Customizations:

Global Intimate Lingerie Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

%li%Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL INTIMATE LINGERIE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Briefs, Bras, Shapewear, Others)
 - 5.2.2. By Distribution Channel (Online, Offline)
 - 5.2.3. By Region
 - 5.2.4. By Company (2025)

5.3. Market Map

6. NORTH AMERICA INTIMATE LINGERIE MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Distribution Channel

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States Intimate Lingerie Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product

6.3.1.2.2. By Distribution Channel

6.3.2. Canada Intimate Lingerie Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product

6.3.2.2.2. By Distribution Channel

6.3.3. Mexico Intimate Lingerie Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product

6.3.3.2.2. By Distribution Channel

7. EUROPE INTIMATE LINGERIE MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By Distribution Channel

7.2.3. By Country

7.3. Europe: Country Analysis

- 7.3.1. Germany Intimate Lingerie Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product
 - 7.3.1.2.2. By Distribution Channel
- 7.3.2. France Intimate Lingerie Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Distribution Channel
- 7.3.3. United Kingdom Intimate Lingerie Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Distribution Channel
- 7.3.4. Italy Intimate Lingerie Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Distribution Channel
- 7.3.5. Spain Intimate Lingerie Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Distribution Channel

8. ASIA PACIFIC INTIMATE LINGERIE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product
 - 8.2.2. By Distribution Channel
 - 8.2.3. By Country

8.3. Asia Pacific: Country Analysis

8.3.1. China Intimate Lingerie Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Product

8.3.1.2.2. By Distribution Channel

8.3.2. India Intimate Lingerie Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Product

8.3.2.2.2. By Distribution Channel

8.3.3. Japan Intimate Lingerie Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Product

8.3.3.2.2. By Distribution Channel

8.3.4. South Korea Intimate Lingerie Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Product

8.3.4.2.2. By Distribution Channel

8.3.5. Australia Intimate Lingerie Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Product

8.3.5.2.2. By Distribution Channel

9. MIDDLE EAST & AFRICA INTIMATE LINGERIE MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Product

9.2.2. By Distribution Channel

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Intimate Lingerie Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Distribution Channel
 - 9.3.2. UAE Intimate Lingerie Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Distribution Channel
 - 9.3.3. South Africa Intimate Lingerie Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product
 - 9.3.3.2.2. By Distribution Channel

10. SOUTH AMERICA INTIMATE LINGERIE MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product
 - 10.2.2. By Distribution Channel
 - 10.2.3. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Intimate Lingerie Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product
 - 10.3.1.2.2. By Distribution Channel
 - 10.3.2. Colombia Intimate Lingerie Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Product

10.3.2.2.2. By Distribution Channel

10.3.3. Argentina Intimate Lingerie Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product

10.3.3.2.2. By Distribution Channel

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. GLOBAL INTIMATE LINGERIE MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

14.3. Power of Suppliers

14.4. Power of Customers

14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

15.1. Victoria's Secret & Co.

15.1.1. Business Overview

15.1.2. Products & Services

15.1.3. Recent Developments

15.1.4. Key Personnel

15.1.5. SWOT Analysis

- 15.2. Reliance Retail Limited
- 15.3. Gap, Inc.
- 15.4. Triumph Intertrade AG
- 15.5. Calvin Klein, Inc.
- 15.6. Wacoal EMEA LTD
- 15.7. Chantelle SA
- 15.8. HanesBrands Inc
- 15.9. HunkemOller B.V.
- 15.10. The Natori Company Inc.

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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