

UNDERWEAR AND LINGERIE, ITALY IS WORTH OVER €3.7 BILLION. BETWEEN DECLINING VOLUMES, THE PREMIUM BOOM AND CHANGES IN THE GEOGRAPHY OF CHANNELS

The first ever research dedicated to the underwear and lingerie sector has been presented, the result of a survey commissioned by Underbeach and the new AIMI Association to Sita Ricerca. An analysis that provides a snapshot of consumption, channels, the premium segment and international trade in the sector, offering an unprecedented and in-depth picture of the sector, which until now had been aggregated with other categories in the fashion industry.

Florence, 11 February 2026 – The Italian underwear and lingerie market remains strategic for Italian and European fashion, despite a context of progressive transformation in consumption. In **Europe, the sector is worth around €17 billion**, but is set to **grow to €26 billion by 2033** (Market Data Forecast predictions). In this scenario, Italy maintains a central role in terms of domestic consumption, production and exports. According to the analysis “**Consumption, exports and imports of underwear in Italy 2025**” commissioned by **Underbeach** and carried out by **Sita Ricerca**, and referring to the resident population (therefore excluding tourists and community purchases), in 2025 **the total value of the underwear market** – which includes men’s and women’s underwear and hosiery – **stands at €3.105 billion**, slightly down (-0.4%) compared to 2024. The decline is linked to the contraction in volumes (-1.3%), while average prices continue to rise (+0.9%). If we also consider the impact of purchases by foreign tourists, which account for around 20%, the value rises to approximately €3.7 billion.

The **women's segment remains the driving force**, worth over €2 billion, equal to roughly 70% of the total, while men's underwear shows weaker growth. The **European market structure** is heavily concentrated in the economy segment, which accounts for 62.3% of consumption (Source: Market Data Forecast), while in Italy the most significant figure is the growth in the premium segment. In 2025, the value of premium underwear for residents reaches €379.6 million, an increase of almost 10% compared to 2023. Considering that around 80% of purchases made by foreign tourists in Italy can reasonably be placed in the premium segment and that their value is comparable to that of residents, the total turnover of the premium segment can be estimated at around €800 million, equal to approximately 22% of the total sector.

On the distribution front, in 2025, single-brand chains confirm their position as the leading sales channel, with 51.9% compared to 50.8% in 2023, while multi-brand channels will remain stable at 18.9% and pure players (online stores) will remain at 6.5%. Street vendors and food retailers (hypermarkets, supermarkets and discount stores) are experiencing some difficulties, falling from

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7.2% to 7% and from 11.2% to 10.6% respectively. Overall online spending on underwear and lingerie is close to €350 million, accounting for nearly 11% of the market.

Foreign trade shows signs of imbalance. In the first ten months of 2025, Italian lingerie exports fell to €2.3 billion (-2.8%), while imports grew by +6.9% to €2.7 billion. Exports to the European Union in 2025 accounted for almost 59% of the total, showing growth of 1.8%. The main markets are France, Germany and Spain. On the import front, Italy purchases around €1.43 billion worth of underwear from non-European countries (52.2% of the total) and around €1.3 billion from Europe, with Bangladesh, the Netherlands and Sri Lanka being the main exporters of underwear to Italy.

“We wanted to carry out this research together with the newly formed AIMI, Associazione Italiana Mare Intimo (Italian Association of Beachwear and Lingerie), because we believe it is essential for those operating in these markets to have access to dedicated, accurate data that is truly representative of the sector,” explains **Alessandro Legnaioli**, president of Underbeach, the company that organizes the trade shows Immagine Italia & Co., dedicated to underwear and lingerie, and Maredamare, focused on the beachwear sector. Until now, the information available was almost always aggregated within broader macro-categories, such as clothing, making it difficult to understand the real dynamics of our sector. This survey fills a significant information gap and provides a strategic tool for businesses, operators and stakeholders. The process will continue over the coming months: in July, on the occasion of the 2026 edition of Maredamare, specific data on swimwear and beachwear will also be made available”.

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