

With \$194 billion in projected sales by 2023, the global market for intimate apparel is robust. Growth of 25% or more is expected across major markets over the next five years, driven by expanding purchasing power in developing markets and increased customization elsewhere. Motivate consumers with new cotton-rich product offerings, customized fits, and performance enhancements.

INDUSTRY OUTLOOK 2018-2023*



»» KEY INSIGHTS



Intimate apparel is a consumer wardrobe staple. Consumers are satisfied with offerings and have their 'go-to' favorite styles and brands.



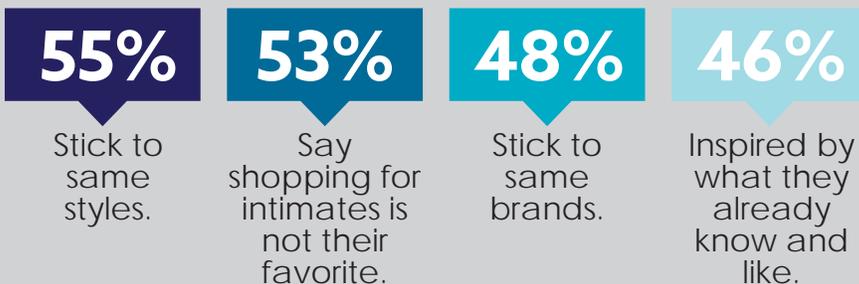
Fiber content matters to consumer purchases and many are concerned that manmade fibers have replaced cotton in intimate apparel.



Brands can energize consumers by adding performance features to cotton-rich intimate apparel, such as anti-microbial protection and moisture management.

MARKET CHALLENGES

LACK OF ENTHUSIASM FOR NEW IDEAS



CONCERNED ABOUT MANMADE FIBERS

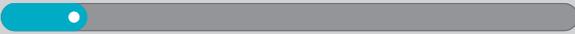


Consumers cite health, allergies, comfort, and preference for cotton.

MARKET OPPORTUNITIES

Market challenges are balanced by market opportunities. Consumers are comfortable shopping for intimate apparel with little embarrassment to the process. They shop often, as 71% say they plan to buy intimate apparel in the next month, and prefer to shop in-person as they look for cotton-rich intimates for all occasions. Performance features, such as antimicrobial protection, odor resistance, or moisture management, motivate purchases and add value to intimate apparel.

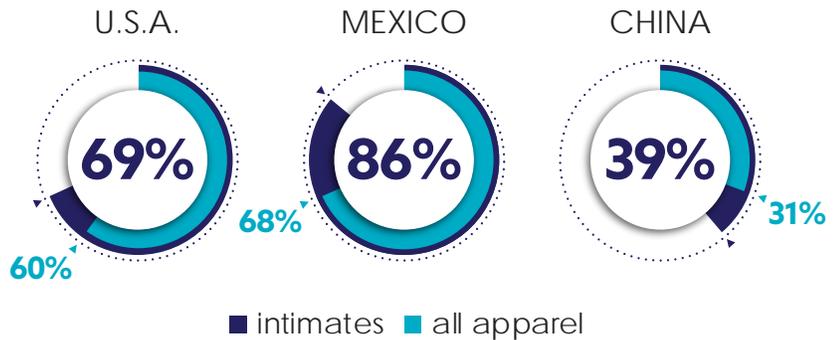
15% say they are "a little embarrassed" to buy intimates



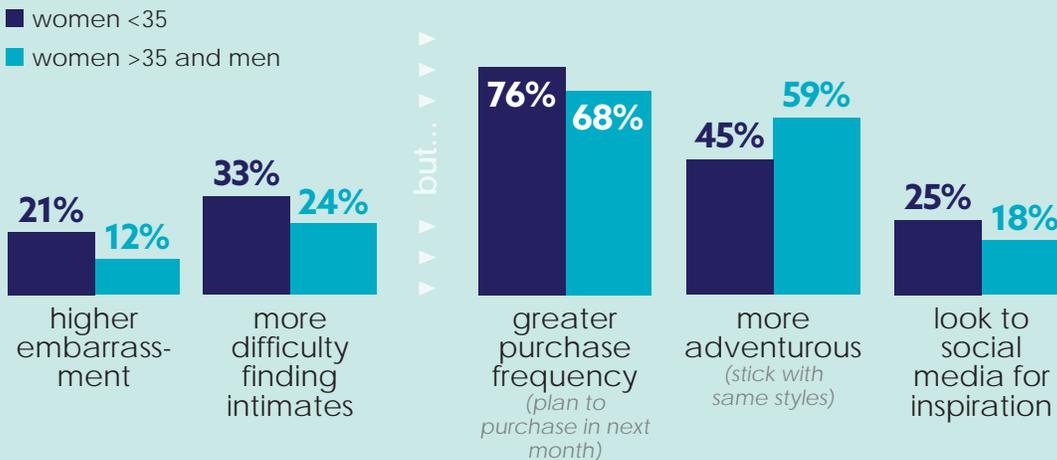
27% say they have a difficult time finding intimates to meet needs



CONSUMERS WHO PREFER TO SHOP IN-STORE FOR INTIMATES



OPPORTUNITY SPOTLIGHT YOUNG WOMEN



51%
Say fiber has a great deal of influence in intimates purchases.

TOP PERFORMANCE FEATURES

