

# Underwear - UK - March 2010

Report Price: £1500 / \$3000 / €2250



## What is this report about?

Mintel estimates the total market for underwear was worth £2.57 billion in 2009, and it should show a small increase to £2.59 billion in 2010. In real terms, cheap imports and tight margins are also holding back prices. Overall the underwear market has slightly outperformed the clothing sector during recession, and that growth has come mainly from the all-important women's sector, which accounts for almost 75% of total sales.

Replacement is the fundamental underlying driver to sales, but more discretionary purchase is rising in response to both aesthetic and practical factors. Fashion and styling for instance are increasingly relevant, as they are in outerwear, but so too are innovation and improved product performance.

The challenge for retailers and brands is how far and how fast they can drive these trends on a long-term basis. In addition they need to persuade more consumers to trade up to higher price points, if only marginally. This should be achievable with continuing product improvements, especially as economic conditions start to ease up.

## What have we found out?

- In a challenging economic environment, the £2.57 billion underwear market has held up reasonably well, although there have been some casualties – notably Intimas.
- Although people might be cutting back on their underwear purchasing, just 3m men and 1m women did not buy new underwear in 2009.
- Women account for more than 70% of underwear spend because they buy a greater number of items. Women buy underwear for a host of reasons or occasions, whereas men stick largely to replacement buys.
- Replacement might be the key reason for buying underwear for more than 30m adults but 15m are prompted to buy new underwear by a price offer, such as a sale or a voucher.
- More than 10m people buy underwear either on impulse (ie as a treat) or for a special occasion, such as going on holiday.

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EMEA: +44 (0)20 7778 7151  
 Americas: +1 (312) 932 0600  
 APAC: +61 (0)2 8284 8100