

Lingerie and beachwear: the “comeback” of retail: “A market in transition; the future lies with hybrid stores”

The importance of a multi-channel approach is growing, combined with specialized consultancy services and trade fairs. Alessandro Legnaioli (President of AIMI): “It’s no longer enough just to sell; what’s needed today is an entrepreneurial vision”

Florence, 27 May 2026 – The Italian lingerie and beachwear market is undergoing a transformation and increasingly focusing on a ‘hybrid’ model in which digital platforms, personal advice and physical retail coexist. This transformation is captured by **Alessandro Legnaioli, president of AIMI** (Italian Association of Swimwear and Lingerie), the representative body for the country’s intimate apparel, lingerie and beachwear companies, who believes the sector is undergoing “the most radical metamorphosis of recent decades”, driven by the rise of e-commerce, social media and evolving consumer habits.

*“The illusion of a purely online experience is showing its limitations,” observes **Legnaioli**, “because in our sector, aspects such as fit, materials and the direct product experience remain essential. The mismatch between expectation and reality in terms of fit and texture, coupled with often vague ethical transparency, is driving customers back to physical shops, which must, however, evolve to survive, transforming from mere retail outlets into spaces offering experiences and expert advice.”*

The “role” of e-commerce

According to the research commissioned by **AIMI** and **Underbeach** (the company that organizes the lingerie and beachwear trade fairs, **Immagine Italia & Co.** and **Maredamare**), and conducted by **Sita Ricerca**, online sales are expected to account for less than 15% of the lingerie and beachwear market by 2025 (11% for lingerie and 14% for beachwear), driven by consumers’ preference for personalized, high-quality shopping experiences.

“In the underwear and beachwear sector,” adds Legnaioli, “the challenge lies primarily with small independent retailers, who are being called upon to become true entrepreneurs. It is no longer enough simply to know how to sell; one must also know how to manage cash flow, stock, purchasing and digital communication. Paradoxically, the scope for those offering technical expertise and quality is greater now than in the past. However, this opportunity belongs only to those who have the courage to invest time and resources in developing their professional skills.”

The central role of trade fairs

In this context, trade fairs are also regaining their central role, as they are increasingly seen as key platforms for networking and securing orders.

*“A critical issue, often underestimated, concerns the crisis in the supply chain,” concludes Legnaioli. - The role of the sales agent, the traditional link between manufacturers and retailers, is suffering from a lack of generational renewal that threatens the stability of the traditional distribution system. Against this backdrop, we are witnessing a strategic return to trade fairs. These are regaining their central role, no longer merely as a showcase, but as a key hub for networking, training and order processing. The trade fair becomes the physical venue where the vision and feel of the collection – essential elements in the lingerie sector – can be fully experienced. This trend also confirmed by the growth of leading trade fairs in the sector such as **Immagine Italia & Co.** and **Maredamare**, which in 2025 recorded an increase in exhibitors and a significant rise in foreign buyers, who have risen by +47% over the last three years.”*

Industry figures

In **Italy**, the lingerie and beachwear sector is **worth around €4.5 billion**, whilst exports exceed **€2.53 billion** (source: analysis by Sita Ricerche for AIMI and Underbeach). According to industry data, **around 1,100 operate in the lingerie and underwear sector in Italy**, employing a total of **over 16,300 people**. This is a sector that continues to stand out for its high level of manufacturing specialization and export capacity, with around 70% of production destined for foreign markets.