Beachwear: the Italian market is worth over 830 million euros. The premium segment is growing at more than double the average rate, whilst multi-brand boutiques are holding their own

The first study dedicated to the sector, carried out by Sita Ricerca on behalf of Underbeach and AIMI (the Italian Association for Swimwear), has been presented. The sector is set to remain stable in 2025, driven by the women's segment. Exports are in surplus for the second consecutive year

Milan, 30 June 2026 – The Italian beachwear market is showing signs of strength, with a total value exceeding **830 million euros**, driven mainly by the women's segment and by the growth of the premium segment. This is according to the study "**Consumption, Exports and Imports of Beachwear in Italy 2025**", carried out by **Sita Ricerca** for **Underbeach** and **AIMI – the Italian Association for Swimwear and Lingerie**, which collectively represents manufacturers, companies and operators in the swimwear, lingerie and beachwear supply chain. The study is the first analysis dedicated exclusively to the Italian beachwear market, offering a detailed snapshot of consumption, distribution channels and the commercial dynamics that shape the sector.

The survey shows that Italian spending on beachwear stands at a total of **665 million euros**, up by around **29 million compared with the 2023–2025 period** and essentially stable compared with 2024, recording a +0.1% increase. If we add to these figures the spending by tourists in Italy, estimated at around 166 million euros, the total value exceeds 830 million. Women account for the lion's share of the market, making up 80% of purchases. At European level, beachwear is valued around 23 billion euros, with strong growth projections estimating that it will exceed 35 billion euros by 2032 (Source: Zion Market Research). Here too, the women's segment dominates sales, accounting for over 70 per cent of the total sales. The bikini remains the most selling style, followed by the one-piece swimsuit, which is increasingly worn and designed and worn as a bodysuit, to be shown off even away from the beach.

Sales channels: more purchases in boutiques and fewer online

Sales are driven by high-street shops, which play a more central role in beachwear compared to the rest of the fashion sector. E-commerce, in fact, accounts for **less than 15%** of total sales, compared with an average of over 20 per cent in the clothing sector. This difference reflects consumers' preference for trying on products and receiving personalised advice – factors that are particularly important when choosing swimwear, where fit and comfort play a decisive role. Against this backdrop, multi-brand retailers are recording the most significant growth, accounting for 51.7% of purchases in the men's segment and gaining almost 1% in the women's segment.

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Growth in the premium segment

Growth in the **premium** segment has been particularly significant. Between 2023 and 2025, the segment recorded an **11.3% increase** in value, more than double the growth of the market as a whole (+4.7%). This trend is driven primarily by purchases made by tourists, 80% of whom buy from the premium-priced segment, pushing its value to over 200 million euros.

Estimates for resortwear

Alongside beachwear, **resortwear** - the high-end apparel segment designed for holidays and leisure in resort destinations - is also gaining momentum. This category includes silk kaftans, long linen dresses, yachtwear ensembles, luxury footwear, and accessories designed for life beyond the beach, and is largely dominated by leading luxury fashion houses. Although there are no official surveys dedicated to this segment, cross-referencing data on fashion retail, high-end tourism and international markets allows us to estimate its value at **between 700 and 900 million euros**.

This sector is closely linked to luxury tourism, with iconic Italian destinations – from Capri to Portofino, from the Costa Smeralda to Positano – serving as its main driver of growth. When beachwear and resortwear are considered together, the total value of beachwear in Italy can be estimated at between 1.4 and 1.7 billion euros, whilst the premium segment, which accounts for a large part of the resortwear market, is valued at between 800 and 900 million euros.

Imports and Exports

With exports expected to reach **235 million euros** in 2025 – a slight decrease compared with 2024 (-1.4%) – aggregate estimates place the global beachwear market, including resortwear, at around 1 billion euros, with the 'cruise' collections, 'resort' or 'summer capsule' collections from major Italian fashion brands accounting for over €600 million. Imports from non-EU countries, meanwhile, stand at €127 million (+2.5% compared to 2024), whilst those from EU countries amount to €99 million (-13.9%). China remains Italy's suppling market, accounting for 16.6%, followed by Croatia (9.7 per cent) and Sri Lanka, at 9.5%.

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