

The European market potential for bridal wear

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Bridal wear is an increasingly interesting product segment for exporters from developing countries due to the great acceptance of bridal wear made outside of the European Union and the quickly-changing fashion in bridal wear. Although wedding rates in most European countries have decreased since the 1970s and 1980s, many couples are spending more money on bridal wear and the entertainment of their guests. The number of weddings in Europe has increased by an annual average rate of 2% from 2014 to 2019, primarily driven by growing wedding rates in countries like Hungary (11%), Cyprus (8%) and Luxembourg (5%).

The European bridal wear market can be estimated at €2.9 billion in 2019 and is growing by approximately 4% per year due to the slightly growing number of marriages in the EU, the growing spending on marriages and the increasing purchasing power of Europeans. Years in which members of European royal families have been married show a significant increase in wedding expenditure in the marriage market (especially in the United Kingdom).

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1. Product description

Bridal wear is primarily defined as clothing worn by brides during and after the wedding ceremony. In most cases, this clothing has the shape of a gown which is usually sold in dedicated bridal stores throughout Europe or through the internet. Bridal gowns are usually worn once in a lifetime and are significantly more expensive than normal every-day gowns. Many brides in Europe wear two different dresses during their wedding day; a simple dress for the marriage in court and an elaborate wedding gown for the wedding ceremony in the church. The high season for weddings in Europe is May-October due to the pleasant climate during that time. However, there is also demand for gowns made of thicker, warmer materials for weddings in winter.

Popular gown shapes include ball gowns, mermaid gowns, trumpet gowns, sheath gowns, A-line gowns, fit-and-flare gowns, tea-length gowns and column-shaped gowns. The most common materials used for bridal gowns are satin, chiffon, organza, tulle, lace, and charmeuse. In contrast to the early 2000s, brides now prefer light fabrics and elaborate lace designs. The three most-preferred lace types are Chantilly (an open lace with a defined border), Alençon (a lace trimmed with cord and featuring bold motifs on the net) and Venise (a heavy, more textured lace often used for winter weddings).

The demand for a variety of different shades of white in bridal gowns has dramatically increased in the last few years; while traditional wedding gowns have been aimed to be as pure white as possible, many brides now prefer other shades like off-white, natural/milk white, ivory, cream, and champagne. Additionally, white is often combined with a touch of pastel colours for popular gown colour shades like nude (with a touch of light skin-

colour), mocha (with a touch of brown), peach (with a touch of apricot colour), blush (with a touch of rose), powder (with a touch of light rose), and lavender (with a touch of purple). Other trend colours include gold, silver, grey, and blue.

Bridal wear fashion changes as quickly as any other apparel trends these days. Traditionally, brides searched for the perfect dress by going from one shop to the other. Today, young brides follow designers on Instagram and get inspired by fashion influencers and other brides. They often choose dresses from online catalogues and then visit the local stores to try on the gown and discuss any necessary adjustments.

Figure 1: Bridal wear examples



Photo Source: Unsplash

2. What makes Europe an interesting market for Bridal Wear?

There are no Eurostat statistics available on production, imports or exports of bridal wear in Europe, but the market can be estimated based on the marriage rates in Europe and the average European spending on bridal gowns. In 2019, 2.048 million weddings were performed in Europe. Likewise, an approximate equal amount of wedding gowns were purchased during this period. Obviously, there have been weddings in which the bride did not wear a dedicated wedding gown but, at the same time, there are marriages for which brides buy more than one gown.

Based on the top-6 countries, the average spending for weddings gowns in Europe is €1,406, resolving in an estimated market value of €2.9 billion in Europe. Europe produces approximately 1.9 million units of bridal gowns per year with an estimated growth of around 4% annually. Spain is by far the largest exporter of bridal wear in the European Union, while all countries in the European Union import large amounts of dresses from other European countries as well as China and (Asian) developing countries.

The market is attractive due to the overall growth of marriages in Europe, as well as the growing purchasing power in Europe and the increasing spending on weddings in general. These days, European brides are very eager to spend more on the “perfect dress”, driven by a new wedding trend which gets supported by influencers (on Instagram) and new TV shows which broach the issue of the search for the perfect dress for the contestants (for instance “Say Yes to the Dress” in the United States and the United Kingdom, “La robe de ma vie” in France, and “Zwischen Tüll und Tränen” in Germany).

Bridal gowns imported from extra-European Union countries are highly accepted by consumers in Europe. China is the world’s largest exporter of bridal dresses, exporting one third of its 12.2 million annually produced bridal gowns each year. The country is followed by Vietnam, producing 2.5 million dresses each year, and the US, producing 2.2 million annually. Each of these countries export their gowns to the EU with great success. French bridal wear experts believe that 90% of bridal gowns sold in France have been produced in China.

Key players in the bridal gown industry can be roughly divided into two different groups; high-end dresses designed by (European) bridal wear designers and low-budget dresses which are sold to a more general clothing portfolio. The latter group includes players such as BonPrix, C&A, Next, Zara and H&M. Popular European players focused on bridal wear include Prenovias, Lilly, Anna Kara, Cymberline, Oksana Mukha, Allure, Ladybird, and others.

3. Which European countries offer most opportunities for Bridal Wear?

Germany, France, Italy, Poland, Spain, and Romania show the highest rate of weddings in the EU. Together, these six countries account for 64% of all weddings in the European Union in 2019. Out of these top-6 countries, only Germany, Spain, and Romania have experienced an increase in weddings since 2014 and likewise show a growing tendency for the purchase of wedding gowns. The statistics show that, apart from the traditionally big markets in Western Europe, Eastern-European countries like Poland, Czechia, Hungary and Romania show increasing potential due to a further growth in weddings annually and the local growing interest in classical white gowns (instead of traditional bridal wear). Generally, the bridal wear industry is seeing a decrease of their sales in the market, much influenced by imports from China and other Asian countries and consumers' search for low-budget gowns.

Table 1: Top 10 European Union countries with the highest marriage rates

| Country | Number of marriages 2019 | Number of marriages 2015 | Calculated annual average growth rate (5 years, 2014-2019) |
|------------------|--------------------------|--------------------------|------------------------------------------------------------|
| Germany | 416,324 | 385,952 | +1.53% |
| France | 227,000 | 241,425 | -1.22% |
| Italy | 184,000 | 189,765 | -0.62% |
| Poland | 183,371 | 188,488 | -0.55% |
| Spain | 165,177 | 160,256 | +0.61% |
| Romania | 128,610 | 118,075 | +1.72% |
| Hungary | 65,268 | 38,780 | +10.97% |
| Netherlands | 63,565 | 65,333 | -0.55% |
| Czechia | 54,870 | 45,575 | +3.78% |
| Sweden | 48,481 | 53,113 | -1.81% |
| EU in total | 2,048,385 | 1,851,707 | +2.04% |
| Source: Eurostat | | | |

Germany

Germany is showing the highest number of marriages annually. The number of marriages grew at an average annual rate of 1.53% between 2014 and 2019, proving Germans are still getting married frequently. At the same time, Germany is the number one importer of apparel in Europe, with a yearly import value of €33.9 billion.

Wedding couples in Germany spend on average between €5,000 to €10,000 on their wedding celebration. On average, they spend an average of €1,250 of their total budget on the bride's wedding gown. Likewise, the purchasing value for bridal gowns in Germany assumed to an approximately amount of €521 million in 2019.

Table 2: Marriage statistics for Germany in 2019

| GERMANY | Number of marriages in 2019 | CAGR 2014-2019 | Average bridal dress price (EUR) | Estimated bridal wear value in 2019 (EUR) |
|---------|-----------------------------|----------------|----------------------------------|-------------------------------------------|
| | 416,324 | +1.53% | 1,250 | 521 million |

Only 5% of the brides in Germany do not buy a dedicated wedding dress for their wedding, but choose a more daily outfit or a "Dirndl" (a traditional local dress worn in Southern Germany and Austria) for their special day. According to surveys, 40% of German brides marry in classical white gowns with lace, 28% in modern simple dresses, 11% in festive princess dresses, 21% found other solutions.

In Germany, local bridal wear stores can be found in any city and bigger village. In most cases, the gowns are ordered on bridal wear trade fairs or have been designed by the shop owners themselves. Popular key players in Germany include [Weise](#), [Isabel de Mestre](#), [Kleemeier](#), [Lohrengel](#), [Mode de Pol](#), [Sweetbelly](#), [Le Moos](#) and [Amerlie](#).

Important bridal shows in Germany include the TrauDich, Wedding Dreams, Wedding Day, JaWort Bridal Show and Festival, Eleganz Wedding Fair, European Bridal Week, Interbride, The Most Beautiful Day, Hochzeitstage and many more (local) fairs.

France

France shows the second-largest number of marriages a year in the European Union. The number of marriages decreased on an average annual rate of -1.22% between 2014 and 2019, showing that fewer people are marrying from year to year. Nevertheless, France remains an important market for wedding gowns due to the overall size of the market. At the same time, France is the second-largest importer of apparel in Europe, with a yearly import value of €21.7 billion.

Table 3: Marriage statistics for France in 2019

| FRANCE | Number of marriages in 2019 | CAGR 2014-2019 | Average bridal dress price (EUR) | Estimated bridal wear value in 2019 (EUR) |
|--------|-----------------------------|----------------|----------------------------------|-------------------------------------------|
| | 227,000 | -1.22% | 1,500 | 341 million |

Wedding couples in France spend on average between €5,000 and €10,000 on their wedding. On average, they spend on average €1,500 of this amount on the bride's wedding gown. In a growing number of cases, French

brides choose an individually made gown for their wedding which can cost up to €6,000. Likewise, the purchasing value for bridal gowns in France assumed to an approximately amount of €341 million.

Popular key players in France include [Cymbeline](#), [Laure de Sagazan](#), [Créatif Paris](#), [Labert Creations](#), [Corizzi](#), [Bella Créations](#), [Mademoiselle De Guise](#), [Elise Hameau](#), and [Elsa Gary](#).

Important bridal shows in France include the Paris Bridal Fair, Salon des Futurs Mariés du Val d'Europe, Le festival mariage Love.Etc, Grand Salon du Mariage, Le Salon du Mariage au Parc des Expositions de Paris and many more (local) events.

Italy

Italy shows the third-largest number of marriages a year in the European Union. The number of marriages decreased slightly between 2014 and 2019 at an average annual rate of -0.62%, making the number of marriages stagnate in the last five years. At the same time, Italy is the sixth-largest importer of apparel in Europe, with a yearly import value of €14.5 billion in 2019.

Table 4: Marriage statistics for Italy in 2019

| ITALY | Number of marriages in 2019 | CAGR 2014-2019 | Average bridal dress price (EUR) | Estimated bridal wear value in 2019 (EUR) |
|-------|-----------------------------|----------------|----------------------------------|-------------------------------------------|
| | 184,000 | -0.62% | 2,138 | 393 million |

Wedding couples spend an average of €15,000 for a wedding with around 100 guests, but some couples can also easily spend more than €80,000 for a wedding in Italy, these days. The average price for a wedding dress reached approximately €2,100 in 2019, resolving in a market value of approximately €393 million. Italian brides often profit from the local production of handmade dresses and the centralisation of bridal fashion designers in the country. Likewise, they often purchase dresses right from the local designer shop and spend up to €4,000 for the dresses.

Popular key players in Italy include [Eddy K](#), [Nicole Milano](#), [Le Spose di Mori](#), [Le Spose di Giò](#), [Catia Bosica](#), [Luce + Sposa](#) and many other bigger and smaller brands and companies throughout Italy.

Important bridal shows in Italy include the Si Sposaltalia, Verona Sposi Fair, Ferrara Sposi, Newlyweds Vicenza, Rice and Confetti Pordenone, NewlyWeds, Trendo Sposi and many other local fair trades and events.

Poland

Poland shows the fourth-largest number of marriages in the European Union annually. The number of marriages decreased slightly by an average annual rate of -0.55% between 2014 and 2019, making the number of marriages stagnate in the last couple of years. Nevertheless, the size of the market remains largely stable in comparison to other European countries.

Table 5: Marriage statistics for Poland in 2019

| POLAND | Number of marriages in 2019 | CAGR 2014-2019 | Average bridal dress price (EUR) | Estimated bridal wear value in 2019 (EUR) |
|--------|-----------------------------|----------------|----------------------------------|-------------------------------------------|
| | | | | |

| | | | | |
|--|---------|--------|-----|-------------|
| | 183,371 | -0.55% | 800 | 147 million |
|--|---------|--------|-----|-------------|

75% of Polish couples spend less than €10,000 for their entire wedding, while 22% spend between €10,000 and €35,000, and only 3% of the couples spent more than €35,000. The average price for a wedding dress in Poland is around €800, resulting in a market value of around €147 million.

Popular key players in Poland include [Elizabeth Passion](#), [Anna Kara](#), [Afrodyta](#), [Vanilla Sposa](#), [Alisa](#), [Lanesta](#) and others. Additionally, Poland shows a great variety of online wholesalers on bridal gowns.

Important bridal shows in Poland include the Bridal Fashion Warsaw, Warsaw Wedding Days and the BeautifulDay Poland.

Spain

Spain shows the fifth-largest number of marriages in the European Union annually. The number of marriages has grown by an average annual rate of 0.61% between 2014 and 2019. At the same time, Spain is the fourth-largest importer of apparel in Europe, with a yearly import value of €16.6 billion. Spain is second-largest exporter of bridal wear globally. The bridal business has a total turnover of nearly 13% of the whole Spanish textile sector. The most important part of this comes from Catalonia, which houses more than 40% of production. The industry employs more than 6,000 people in Spain alone.

Table 6: Marriage statistics for Spain in 2019

| SPAIN | Number of marriages in 2019 | CAGR 2014-2019 | Average bridal dress price (EUR) | Estimated bridal wear value in 2019 (EUR) |
|-------|-----------------------------|----------------|----------------------------------|-------------------------------------------|
| | 165,177 | +0.61% | 1,750 | 289 million, 850 million (incl. exports) |

Spain produces bridal gowns with a total worth of around €860 million and is the only European country which produces more clothing units than needed for its own supply. Adding evening dresses, accessories, and footwear, Spanish bridal companies made a total revenue of €1.35 billion in 2019, which is €105 million more than in 2016.

The internal demand for bridal gowns in Spain reached 172,000 units and likewise states 49% of the total European bridal gown production in 2018. Brazil, Mexico, Peru, Chile, Colombia and several Gulf countries show great interest in European bridal gowns and are good customers of Spanish bridal brands. But also, other European countries like Germany, the United Kingdom, and Italy are importing mid- and high segment bridal gowns from Spain.

Spanish couples typically spend between €12,000 and €21,000 for the entire wedding. The average price for a wedding gown in Spain is approximately €1,750, resulting in a market value of around €289 million.

Popular key players in Spain include [San Patrick](#), [Rosa Clará](#), [Pronovias](#), [Yolan Cris](#), [Cortana Bridal](#), [Novia D'Art](#), [Sonia Pena](#), and many more.

Important bridal shows in Spain include Barcelona Bridal Fashion Week, Celebra, 1001 Bodas, Firanovis, Fiesta y Boda, Sevilla de Boda, Valmont Barcelona Bridal Fashion Week, and more.

Romania

Romania shows the sixth-largest number of marriages in the European Union annually. The number of marriages has increased by an annual average growth rate of 1.72% between 2014 and 2019.

Table 7: Marriage statistics for Romania in 2019

| ROMANIA | Number of marriages in 2019 | CAGR 2014-2019 | Average bridal dress price (EUR) | Estimated bridal wear value in 2019 (EUR) |
|---------|-----------------------------|----------------|----------------------------------|-------------------------------------------|
| | 128,610 | +1.72% | 1,000 | 129 million |

Romanian couples typically spend between €40,000 and €50,000 for the entire wedding, whereas most of the money goes into the entertainment of many guests. Weddings in Romania can be roughly divided into modern weddings, in which brides wear classical white bridal gowns, and traditional (village) weddings in which brides wear traditional Romanian wedding gowns. These traditional gowns can weight up to 20 kg and cost between €2,500 to €8,000, depending on the layers of the dress and the level of invested handicraft. The average price for a modern European wedding gown in Romania is approximately €1,000, resulting in a market value of around €129 million.

Popular key players in Romania include [Oksana Mukha](#), [Cristina Săvulescu](#), [Ersa Atelier](#), [Mihaela Lucia Hohan](#), [Manurí](#), [Parlor](#), [Freya Wedding](#), [Divine](#), [Elena Morar](#), and others.

Important bridal shows in Romania include the Bride Show Bucharest, Wedding Fair Contstanta, Wedding Fair Mireasa and Bucharest Fashion District. While there are many bridal stores in Romania, the number of bridal fair trades is small.

Tips:

Focus your exports on the top six markets (Germany, France, Italy, Poland, Spain, and Romania) because they constitute the biggest bridal wear purchasing power in Europe. Nevertheless, as the general average rate of marriages is still increasing, the whole European market for bridal wear is stable and demand is not expected to decrease dramatically within the next years.

Visit local bridal shows/trade fairs in selected markets to gain an overview on bridal fashion and the functionalities of the industry. The events are open to everybody, bring together companies from all over Europe and offer an opportunity to communicate directly with possible competitors and partners.

Due to the growth of the wedding market in many Eastern-European countries, these local markets might make an interesting point of entry for companies from developing countries. Inform yourself about the criteria for market entry and search active exchange with market participants. Specific information can be found on the [CBI website](#), which includes a study on [how to find buyers](#).

4. Which trends offer opportunities or pose threats on the European Bridal Wear market?

The European bridal market follows the general apparel trends related to sustainability, technological innovation

and increased emphasis on corporate and social responsibility. For more information, see the [CBI study on Trends in the Apparel market](#). Aside from these general trends, the bridal wear market has its own, segment-specific trends:

COVID-19

European lockdown regulations since the beginning of the COVID-19 pandemic have resulted in a drastic decrease of number of marriages in Europe. Periodically, court weddings have been suspended or have limited the number of possible wedding guests to very few family members. Depending on the region, bridal wear companies have experienced a decrease in sales of up to 60% in 2020. Likewise, bridal stores have experienced significant losses in 2020.

Nevertheless, the industry is expecting a boom once lockdown and social distancing regulations are eliminated or reduced. Each time the regulations have been relaxed in 2020 and 2021, bridal stores registered an immediate increase in requests for appointments. Likewise, bridal stores expect a dramatic increase of sales in 2021 and 2022 due to the number of marriages postponed.

Second-hand/Rented Clothing

An increasing number of European brides are interested in rental or second-hand services of bridal gowns to save on wedding costs. Most of the stores that offer rental services provide dresses from already married women, but also directly from the creators or the retailers who sell their unsold products or the previous years' designs. Many of these rental services are organised by common or dedicated bridal stores, while there are many online rental services, too. Examples for such services can be found on the websites of [Dressing Club](#) (France), [Marry-Me Verleih](#) (Germany) and [Girl Meets Dress](#) (United Kingdom).

Second-hand gowns can be found on any online marketplace which offers the sale of clothing, as well as selected bridal stores. Gowns sold online are often sold by private persons and bridal stores alike. The increased acceptance of brides towards second-hand or rented gowns has potential to challenge the annual sales of new bridal gowns. Nevertheless, bridal wear experts do not expect this trend to influence their sales figures in the short term.

Eco-friendliness: Recycling and up-cycling

As sustainability awareness is increasing, many European brides are now looking for gown alternatives which are explicitly eco-friendly and match the fashion of "Green Weddings". Designers involved in this trend try to use biodegradable or recycled materials or materials which are less water-intensive and environmentally destructive (like, for instance, hemp or organic cotton). Additionally, sustainable wedding gowns are expected to be fairly produced, meaning that the staff working with the raw material and the producers of the dresses have been well paid.

Sustainable gowns are part of a "slow fashion" industry which focuses on the quality of individual dresses instead of the sales of mass products, as it happens in China. Popular brands offering sustainable bridal gowns include [L'Arca Barcelona](#) (Spain), [Rime Arodaky](#) (France), [Therese&Luise](#) (Germany), and [Kisui](#) (Germany).

Micro Weddings

While many couples dream of spending their wedding with all family members, friends and workmates, a certain group of consumers prefers small weddings to limit the overall spending for their wedding. "Micro weddings" are growing popularity especially with younger couples in Europe. In most cases, dresses for this kind of wedding are much simpler and cheaper. This opens market opportunities for manufacturers of low-budget gowns.

Fast Fashion

Besides expensive bridal gowns designed by dedicated bridal designers in Europe, "fast fashion" has established its market presence in bridal wear in the last decade, and now makes most of all wedding gowns

available. International clothing chains have entered the bridal sector, offering bridal gowns mostly as side business to their own portfolio. Fast fashion includes clothing that is mass-produced and mostly of lower quality. Brides often choose fast fashion bridal gowns due to their affordability.

Personalisation

Typically, bridal gowns must be always tried on and adjusted according to the bride's needs. These days, brides are increasingly expecting bridal shops to personalise the gowns by adding accessories or designs, change the shape of dresses, and adding or removing sleeves or other parts of the gown. This demand for customisation also drives the demand for very basic dresses which can be easily adjusted.

Curvy brides

In the last couple of years, bridal wear designers and producers have increased the availability of wedding gowns for curvy brides, due to the increasing demand in this segment. According to Eurostat in 2014, 51.6% of European adults count as obese with growing tendency. In the past, the designs matching the sizes of larger brides have been very limited and, in most cases, smaller gowns were adjusted to a larger size. These days, producers produce their dresses in larger sizes, minimising the extent of adjustments needed, and design dresses which highlight the right body properties for curvy brides.

E-commerce

The general popularity of online sales has also reached the bridal wear market. Especially second-hand and less-expensive gowns (from China) are bought through online channels. Bridal wear experts in Germany estimate the share of online bridal gown sales to have reached 10% of all sales with the potential to reach 30% within the next few years. Bridal wear shops have long reacted to this trend and have started to offer their products online. Nevertheless, these offers are mostly connected to a physical appointment in the local shop to make the needed alterations.

Tips:

If you consider entering the bridal wear market, make use of the consequences of the COVID-19 pandemic and try to sell your products to European companies within the next few years.

Consider entering the fast fashion industry since affordable bridal gowns are in high demand and accepted in the European market. The design of fast fashion gowns is much simpler and market entry into this sub-segment appears much easier than to high-end gowns.

When designing bridal gowns, make sure the gowns are easily adjustable and customisable to the customers' needs.

Think about entering the sustainable branch of bridal gowns using high-quality and eco-friendly fabrics. This would mean you are entering a very young sub-market which is expected to increase its importance in the years to come. Try out innovative materials and promote your eco-friendliness to large company chains in Europe, since these have started to take over sustainable products into their portfolio recently.

This study was carried out on behalf of CBI by [M-Brain GmbH](#).

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