



GRAVITY'S GOOD





The main trends defining Gen Z are wellness, connection, technology, nostalgia, and sustainability. Gen Z values meaningful connections and seeks a balance in a fast-paced world by redefining traditional notions of adulthood and embracing a sense of childlike wonder. They desire comfort without guilt and use cute aesthetics to soften the harsh realities of life, finding joy and new avenues for self-expression and connection. Additionally, they are bringing back childhood icons as part of their cultural landscape.

Gen Z Overarching Pillars



Wellness & Community

Gen Z are embracing wellness as a means to foster a sense of community, seeking to integrate it into their lifestyle. Brands like Alo are introducing sanctuary store concepts that align with Gen Z's perception of wellness. While traditional low-impact activities such as pilates and yoga remain popular foundations, Gen Z is increasingly drawn to raw and intense workouts aimed at enhancing strength, flexibility, and muscle definition.

Recent trends show a significant rise in interest in workouts like Solidcore and SLT Pilates in the US, with Google searches surging by 550% and 350% respectively year over year. Weight training is also experiencing a surge in popularity, particularly among 18- to 24-year-olds. The younger generation's shift towards more challenging workouts underscores the growing importance of rest, recovery, and self-care. This emphasis on holistic well-being is particularly crucial as Gen Z grapples with mental health challenges at nearly twice the rate of older age groups.

56% of US Gen Z consider fitness a 'very high priority'

Quest for

Nostalgia

Search trends reveal that the 18-24 age group dominates searches for 2000s fashion, seeking items that evoke a sense of nostalgia and comfort. The emotional fatigue experienced by Gen Z has prompted a trend towards embracing playful nostalgia as a means of finding solace and joy amidst today's chaos. This trend goes beyond mere idealization of the past; it serves as a tool for self-expression and empowerment.

Design and experiences that provide childlike comforts are gaining popularity, catering to a deeper emotional need for security and familiarity. Customization has evolved into a form of self-care, particularly for Gen Z individuals who view personal style as a means of asserting their uniqueness and finding meaning in a turbulent world.

Moreover, the younger demographic is displaying a shift towards emotionally-charged consumption habits, evident in their interest in travel mementos, nostalgic toys, and significant collecting endeavors. This trend underscores a desire for emotional connections and a sense of belonging in an increasingly fast-paced and disconnected world.

Over a third of global Gen Z

feel nostalgic for the 90s despite being born in the 00s.



Teen

Gen Z's relationship with technology is complex. They are simultaneously embracing AI and digital tools to simplify their lives and save money, such as using ChatGPT for various tasks like planning workouts or providing therapy-like support, and curating outfits. However, there is also a growing emphasis on the importance of rest as a new status symbol, as seen in the popularity of sleep trackers and wellness apps, shifting away from a busy lifestyle.

Moreover, the idea of JOLO (Joy of Logging Off) is gaining traction among Gen Z as they seek to disconnect from the digital world in pursuit of more meaningful real-life connections. In terms of their approach to body-related products, Gen Z expects seamless transitions between their online and offline identities. Products should be effortless, enjoyable, and attractive around the clock, suitable for featuring in #GRWM videos while also being comfortable for relaxation.

Gen Z significantly leads other generations in using digital wellness apps, with 66% leveraging these tools for health monitoring and 22% using digital mental health programs



SPORTY & RICH

Sustainability

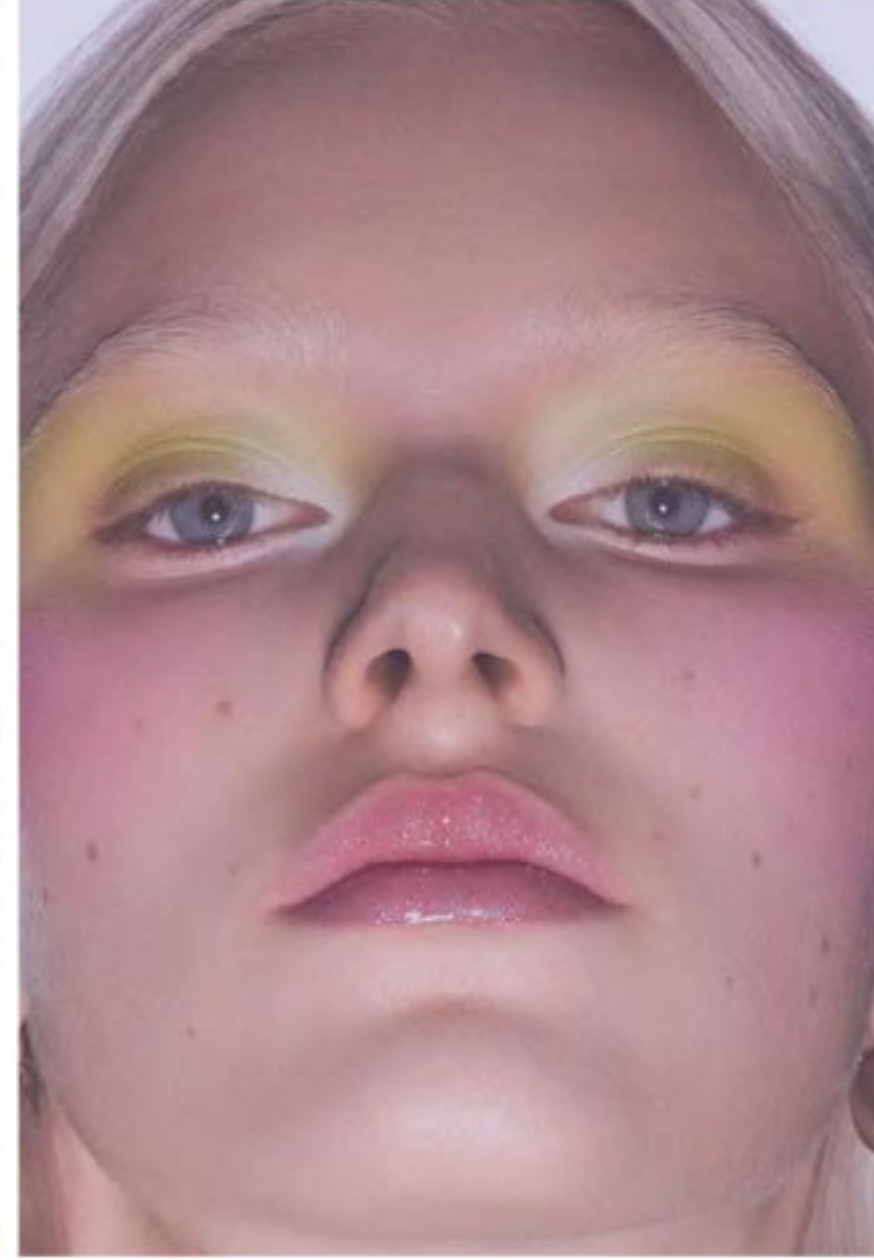
By the year 2026, consumers, particularly led by Generation Z, will start resisting excessive consumption and instead seek products that align with a slower, more deliberate way of living. The popular TikTok trend of "de-influencing" has garnered over 71,000 posts, and challenges like no-buy fashion continue to gain traction. A majority (56%) of Generation Z individuals express feeling overwhelmed by the constant influx of social media content. As a response, they are gravitating towards timeless styles and personal expression, moving away from short-lived trends and micro-aesthetics. This change in mindset is fueling the demand for high-quality basics, repurposed items, and fewer but more meaningful purchases.

58% of AUS Gen Z seek to buy products that are sourced sustainably.



THE ART OF JOY

Effervescent and chirpy, the colors in this colour palette spark joy as much as they ignite a sense of tingling friction. Derived from our unserious wellness trend, these saccharine pastels teeter on the edge of over-the-top sweetness, but stop just short of biting freshness.



PANTONE
12-0322 TCX
Butterfly

PANTONE
13-1318 TCX
Tropical Peach

PANTONE
13-3207 TCX
Cherry Blossom

PANTONE
14-3612 TCX
Orchid Bloom

PANTONE
13-4307 TCX
Lemon Meringue

PANTONE
13-4304 TCX
Ballad Blue

PANTONE
15-4030 TCX
Chambray Blue

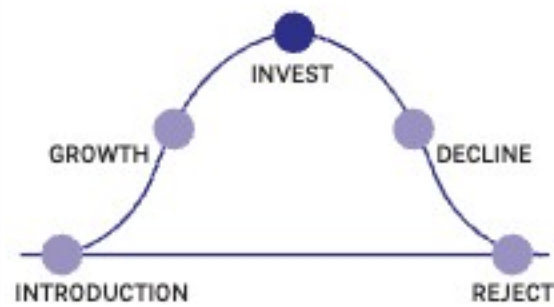
TRENDING COLOURS: BRIGHT PASTELS

BRIGHT PASTELS



FW25 CATWALK
VS
FW24 CATWALK

TREND CYCLE



BRIGHT PASTELS

BRIGHT PASTELS HAVE HAD A NOTABLE IMPACT ON THE SS26 CATWALK, EMERGING AS A KEY TREND TO WATCH IN THE FASHION WORLD. THESE GENTLE, BRIGHTER TONES HAVE BEEN GAINING MOMENTUM SINCE NEW YORK FASHION WEEK, SIGNALING A CONTINUED SHIFT TOWARDS A SOFTER SEASONAL PALETTE. THE SS26 CATWALK SHOWCASED A SIGNIFICANT INCREASE IN THE PRESENCE OF BRIGHT PASTELS, WITH DESIGNERS EMBRACING THESE HUES TO TRANSFORM CLASSIC STYLES.

TREND CONCEPTS //: FW26/27

PASTEL COLOUR GLASH



BUILDING ON THE EMOTIONAL RESONANCE OF PASTELS, THIS DIRECTION INTRODUCES MORE CONTRAST AND CHARM. THINK LAVENDER ICE, PISTACHIO MILK, PEACH WHIP, AND PARMA VIOLET, NOSTALGIC SHADES REIMAGINED THROUGH A CONTEMPORARY LENS. THE FEEL IS BOTH RETRO AND REFRESHINGLY MODERN, WITH COLOR-BLOCKED LACE, GINGHAM CHECKS, AND BABY BRIGHTS NODDING TO INNOCENCE BUT STYLED WITH EDGE. THIS IS SOFTNESS WITH SPIRIT. AIRY, OPTIMISTIC, AND EASY TO WEAR.

PANTONE
13-1318 TCX
Tropical Peach

PANTONE
14-3612 TCX
Orchid Bloom

PANTONE
13-4304 TCX
Ballad Blue

PANTONE
13-4307 TCX
Lemon Meringue

PANTONE
13-4307 TCX
Lemon Meringue

PANTONE
13-3207 TCX
Cherry Blossom

GUMMY GLOW

Concept:

A delectable blend of soft jelly textures in soft sherbet hues, these gummy drops bring playful versatility.

Design Direction:

This is a hyper-sensory world and the patterns mesmerize with stained-glass, iridescent effects, conjuring lollipops and a translucent digital sweetness. Ideal for dye effects, stripes, or color blocking, the look can shift from dreamy ombré to futuristic and inviting with speckled gummy formations. Quilted textures and embossed details add depth whilst milky, opaque jerseys and sheer silks or viscose organza enhance the syrupy shine, creating an alluring play of light and tactility.

Key Items:

- Sheer bras
- Bralette



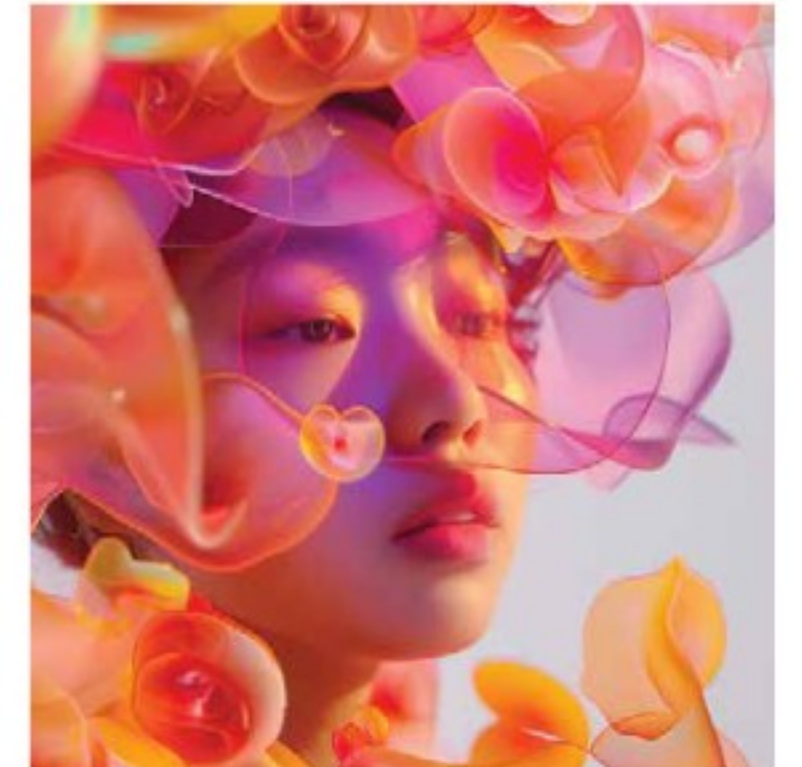
@autreaura



DANBI



JONATHAN FRANTINI



JELLY SHEERS



FABRIC DIRECTION

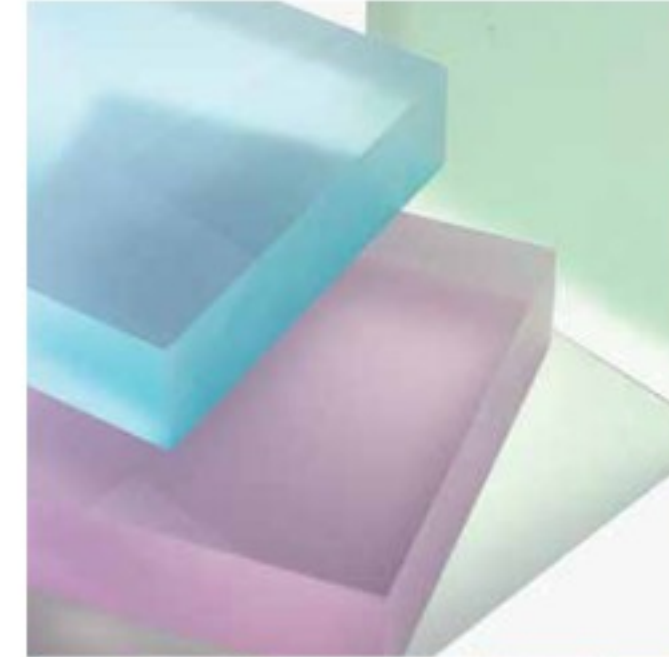
JELLY SHEER MICRO

56% Polymide

44% Elastane



CREATIVE DIRECTION



COLLECTION://

003-TT-00067 Bodysuit

003-TT-00065 Underwired padded bra

003-TT-00066 Micro Thong

FABRICS TO SOURCE: SHEERS



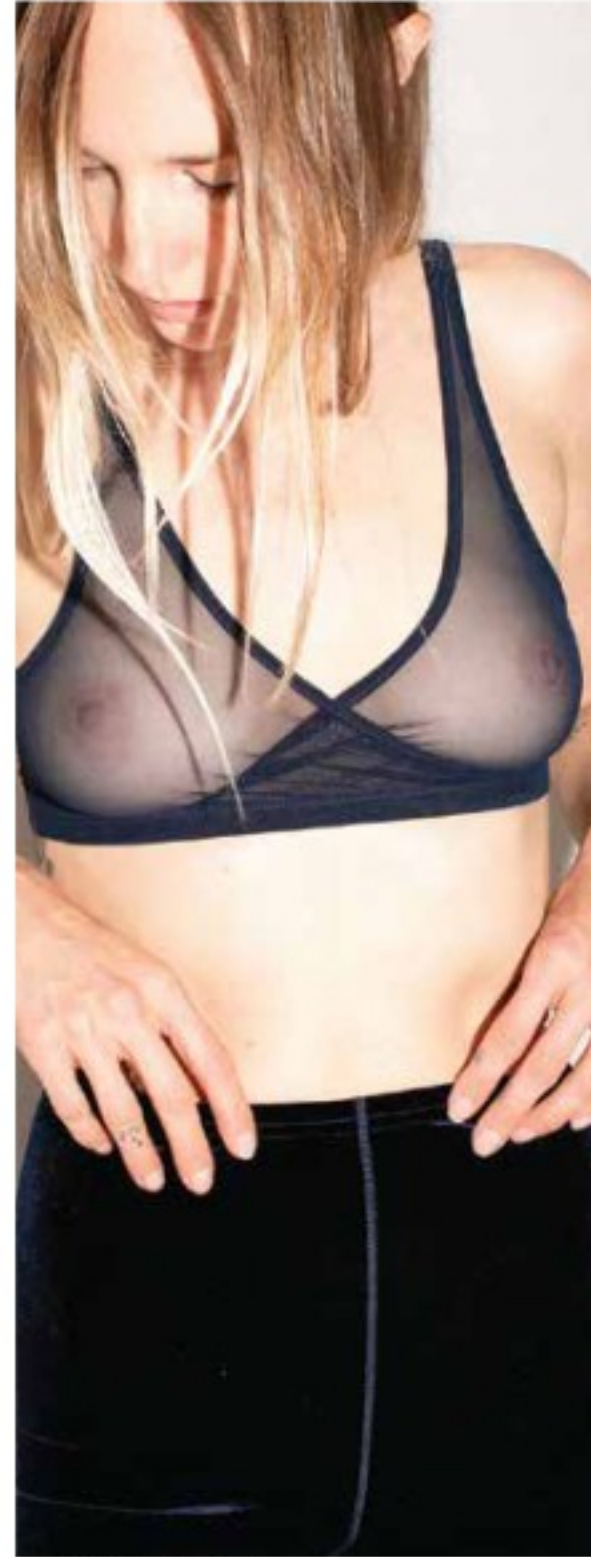
ALBERTA FERRETTI



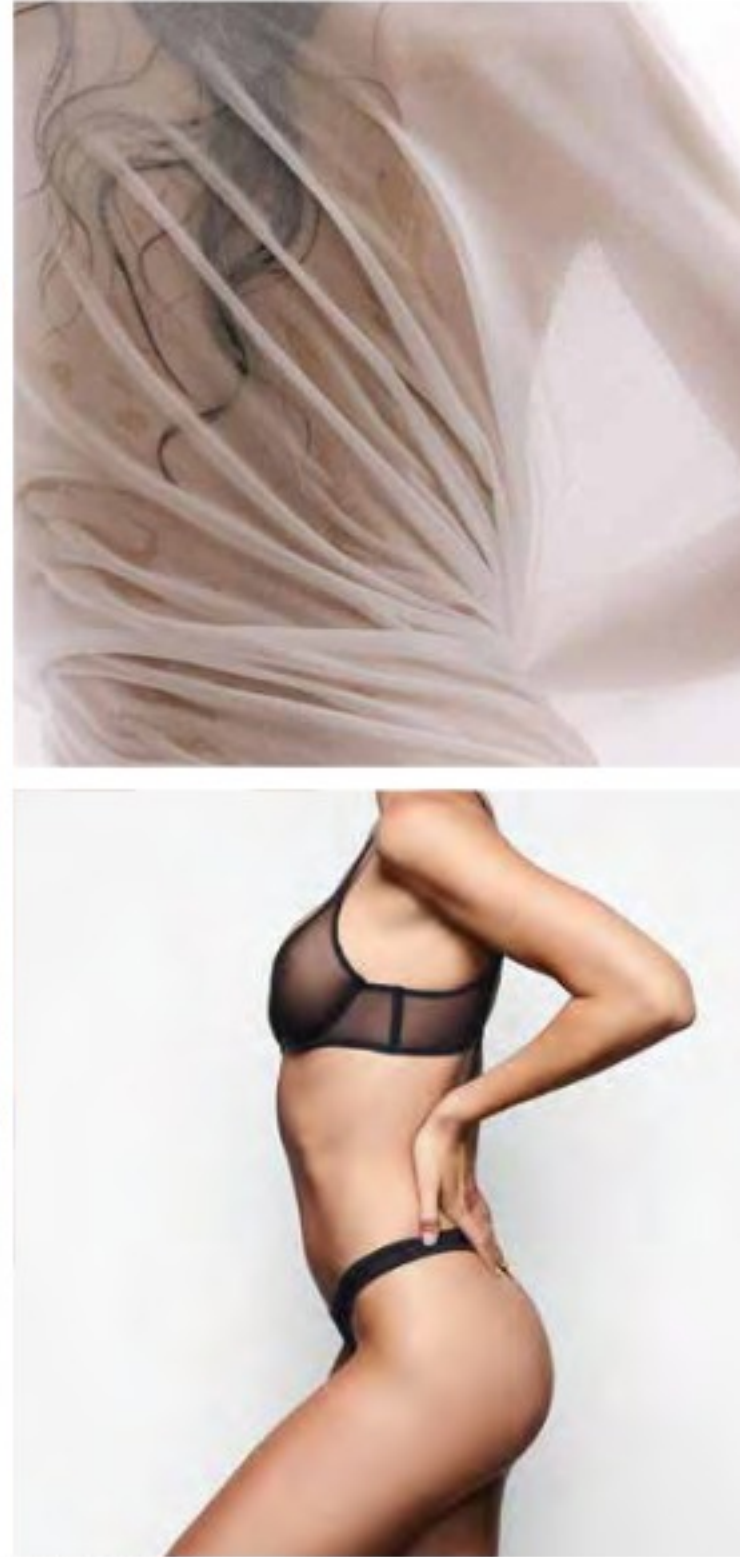
ALAIA



STELLA MCCARTNEY



SIMONE WILD



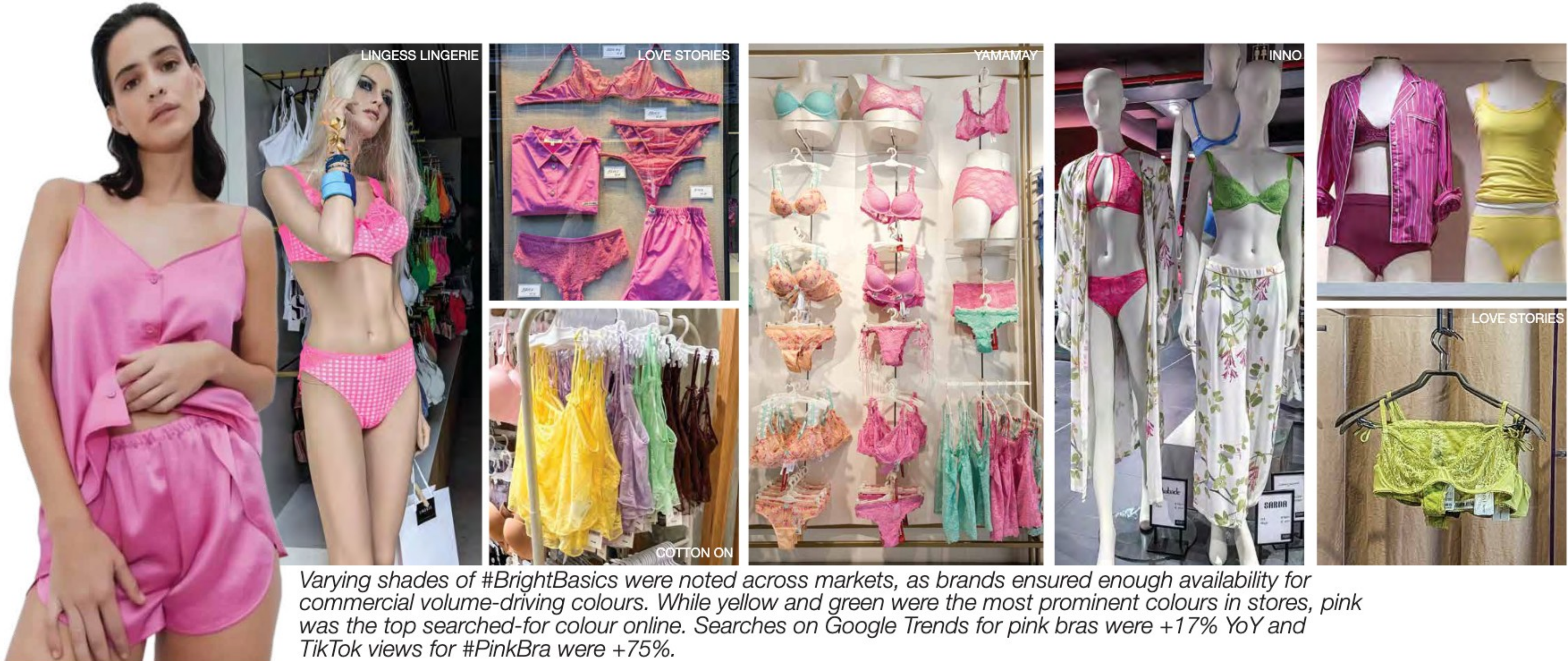
SKIMS

Sleek second skin materials in hosiery-like semi-sheer and opaque qualities inspired bodywear.

Strategy:

Semi-sheer fabrics emerged as a strategic statement in SS26 bodywear and lingerie, blending sensuality with modern elegance. Alaïa showcased sculptural transparency, while Dior's debut by Jonathan Anderson featured ethereal layers and sheer Bar jackets. Stella McCartney embraced eco-conscious sheers, including a plant-based bodysuit with "fevvers," merging sustainability with seduction.

COLOUR USAGE: BRIGHTS IN RETAIL



Varying shades of #BrightBasics were noted across markets, as brands ensured enough availability for commercial volume-driving colours. While yellow and green were the most prominent colours in stores, pink was the top searched-for colour online. Searches on Google Trends for pink bras were +17% YoY and TikTok views for #PinkBra were +75%.

SOFT GIRLHOOD

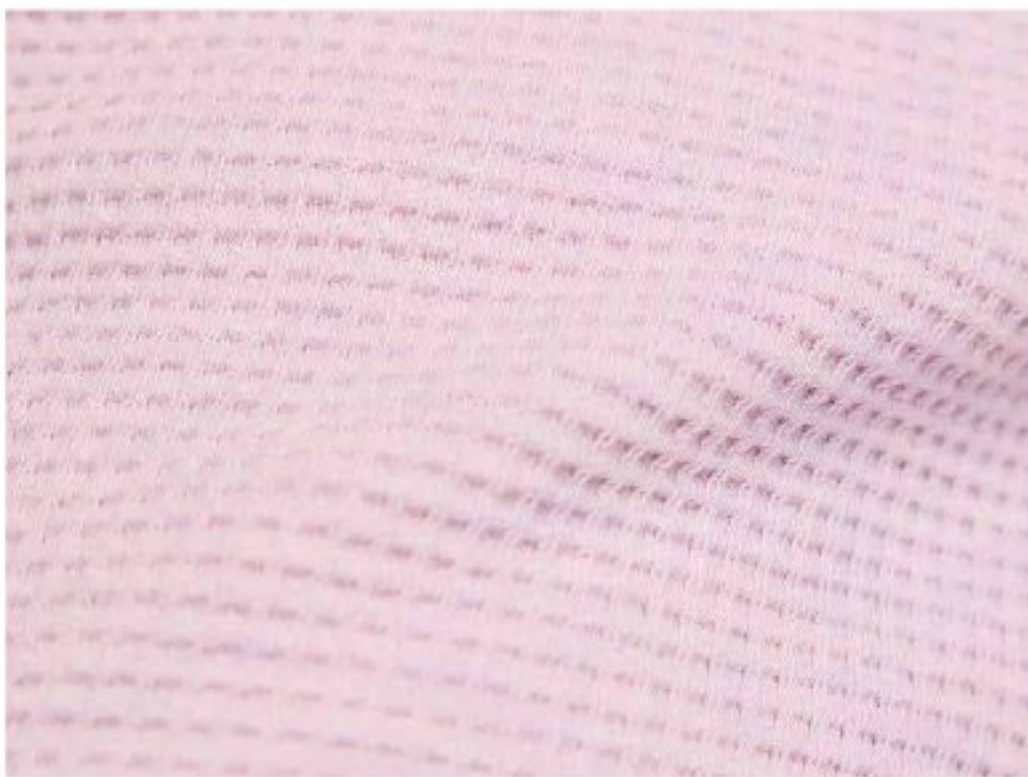
Don't be afraid to experiment with hyper-femininity to appeal to Gen Z. This group is tapping into nostalgia to redefine modern womanhood, shaping it according to their life experiences and values.

Design Direction:

Use pastel tones to bring a sense of softness to brand campaigns. Incorporate props and visuals that evoke elements of girlhood culture, sparking feelings of childhood nostalgia. Highlight themes of friendship and intimate bedroom settings to reflect delayed adulthood and challenge chrono-normativity—the societal expectation of achieving life milestones at a prescribed age.



SOFT TEXTURES



NEGATIVE UNDERWEAR



MAGDA BUTRYM

**KEY DATA POINTS:
TIKTOK SHOP**

**TikTok Shop (US),
the Women's
Sleepwear &
Loungewear
category had a
GMV of \$11M**



SOMA

Feel Appeal is now an important emotional lever for purchasing, with tactility drawing customers looking for clothing offering gentle indulgence and comfort. As furry and plush products have environmental and ethical impacts, this report highlights lower-impact options that don't compromise on the feel-good factor while offering potential Good, Better, and Best sourcing strategies based on price and volume.

Strategy:

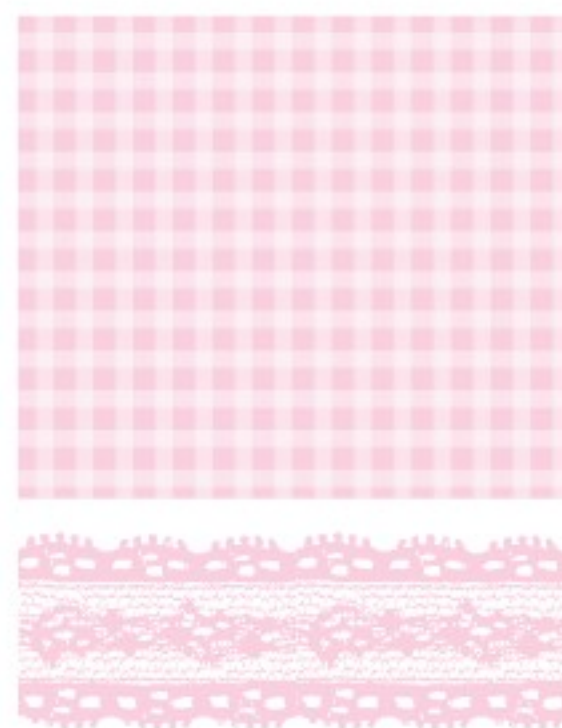
Loungewear continues to see strong year-over-year growth, with some products experiencing over 48% quarter-on-quarter increases, especially those combining style and comfort. Soft fabrics traditionally used in loungewear—like brushed jersey, modal, and waffle knits—are now influencing lingerie and underwear design, as consumers prioritize comfort without compromising on aesthetic appeal or wearability.

WAFFLE MANIA



FABRIC DIRECTION

Waffle Jacquard
49% Cotton, 49% Modal,
2% Spandex



CREATIVE DIRECTION



COLLECTION://

- 003-TT-00021 Rockerwire Bra
- 003-TT-00022 Wireless Padded Bra
- 003-TT-00023 Bikini
- 003-TT-00024 Cami Top
- 003-TT-00025 Boyshorts
- 003-TT-00026 Scrunchie

TRENDING PRINT: CHECKS

CHECKS



FW25 CATWALK
VS
FW24 CATWALK



SANDY LIANG
SS26

BURBERRY
SS26

CAROLINA HERRERA
SS26

YUHAN WANG
SS26

PAUL COSTELLOE
SS26

EMILA WICKSTEAD
SS26

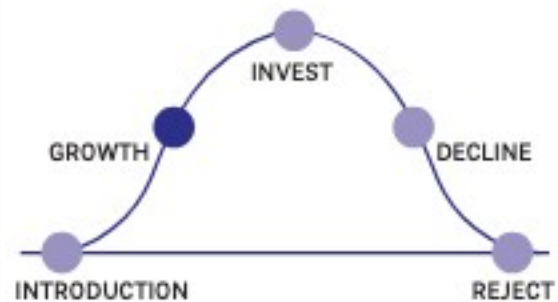
CAROLINA HERRERA
SS26

CHECKS

CHECKS AND PLAID HAVE MADE A STRIKING IMPRESSION ON THE SS26 CATWALK, EMERGING AS PROMINENT TRENDS TO MONITOR IN THE FASHION INDUSTRY. THESE PATTERNS HAVE THE ABILITY TO TRANSFORM ANY OUTFIT, INFUSING IT WITH A REFRESHING VIBE AND REVITALIZING CLASSIC PIECES INTO CONTEMPORARY SILHOUETTES. THE SS26 CATWALK REVEALED A NOTABLE SURGE IN THE INCORPORATION OF CHECKS AND PLAID. BURBERRY HAS REIMAGINED THEIR TRADITIONAL PRINTS INTO MORE VIBRANT AND DARING COLOR PALETTES, WHILE CAROLINA HERRERA HAS UTILIZED CHECK PRINTS TO DESIGN STUNNING DRESSES THAT EVOKE AN ITALIAN SUMMER VIBE.

TREND CONCEPTS //: FW26/27

TREND CYCLE



CHECK MATE



FABRIC DIRECTION

100% COTTON



CREATIVE DIRECTION



COLLECTION://
003-TT-00068 Crop
003-TT-00069 Padded demi bra
003-TT-00070 Thong

COTTAGE CORE POPLINS

Poplin continues to be a key fabric in the cottagecore trend for SS26, offering a crisp yet soft structure ideal for romantic silhouettes. Designers are embracing historic-inspired cotton poplin dresses and bloomer shorts, enriched with handcrafted details like frills, ruffles, pin tucks, peplum accents, and lace inserts. These nostalgic touches evoke a sense of artisanal charm and timeless femininity. Country-inspired prints such as ditsy florals, garden blooms, and classic gingham patterns enhance the seasonal appeal, making poplin perfect for picnic-ready looks. Its breathable nature and versatility ensure it remains a staple for both casual wear and elevated countryside aesthetics.



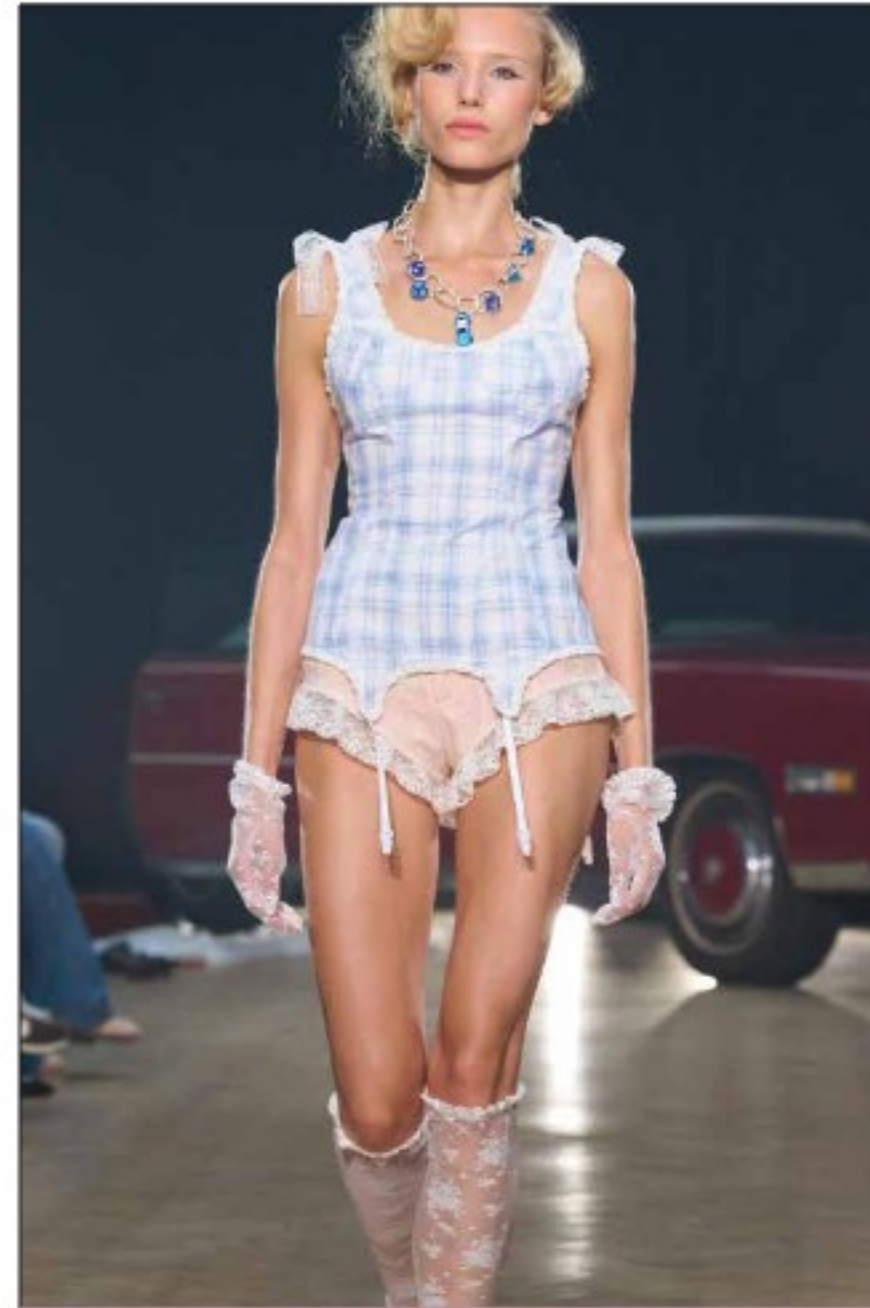
TANNER FLETCHER



BORA AKSU



KWAK HYAN JOO COLLECTION



YUHAN WANG



SANDY LIANG

RETRO PLAY



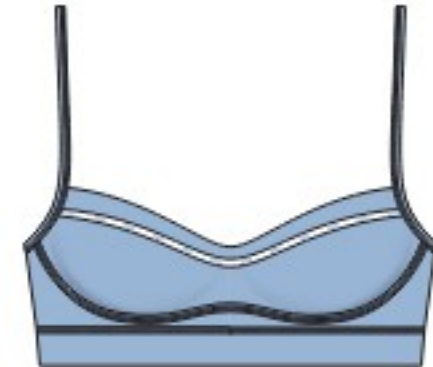
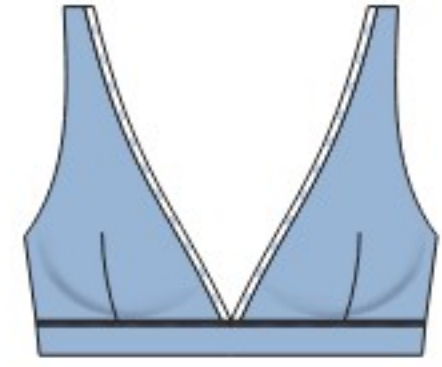
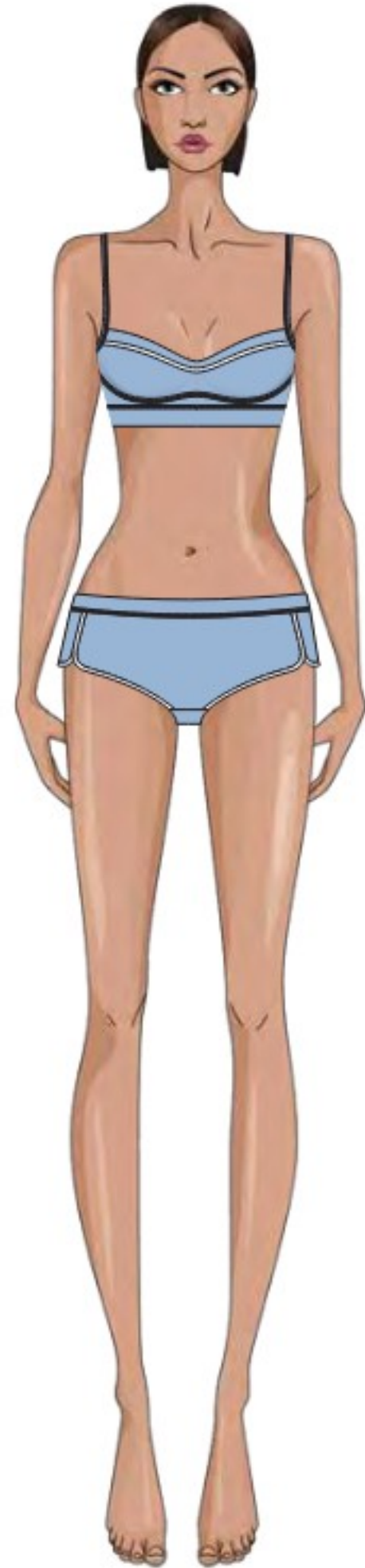
LINGESS LINGERIE



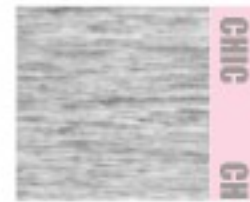
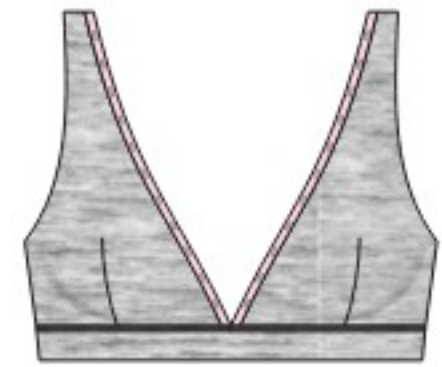
Active intimates for SS27 draw inspiration from retro sportswear, blending nostalgic textures with modern silhouettes. Matching sets include pull-on bras, micro mini slips, and baby tees, designed for comfort and style. Key details like contrasting piping, patterned mesh, and oversized waffle knits add sporty flair. Bright feminine colours—seen on Fendi's catwalk—bring playful energy to this trend, making these pieces perfect for lounging or layering. The result is a confident, athletic aesthetic that celebrates movement and individuality.

TREND CONCEPTS //: SS27

CHIC COTTON



PANTONE
15-4030 TCX
Chambray Blue



Grey Marl Print

FABRIC DIRECTION

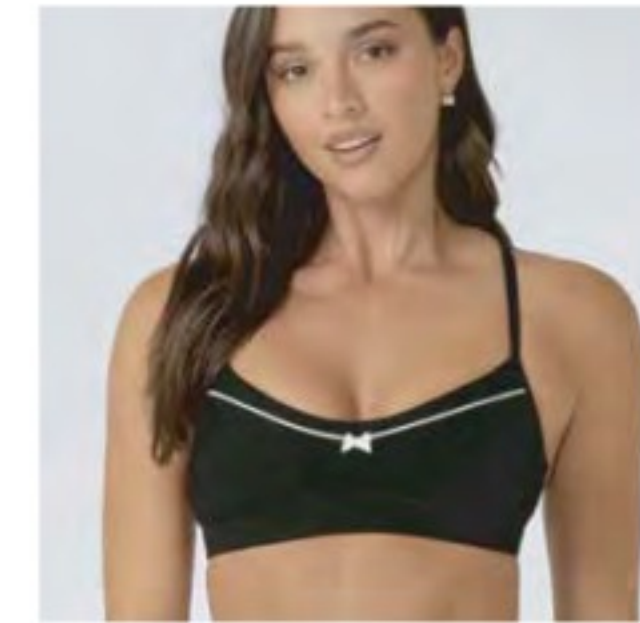
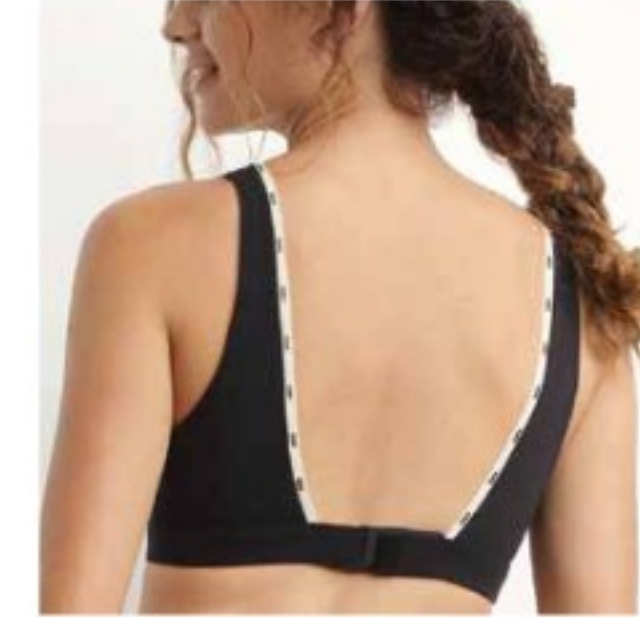
Cotton Spandex
91% Cotton/ 9% Spandex



Matt silicon print on elastic



CREATIVE DIRECTION



COLLECTION://

003-SS-00342 High Apex Bralette

(w removable pad)

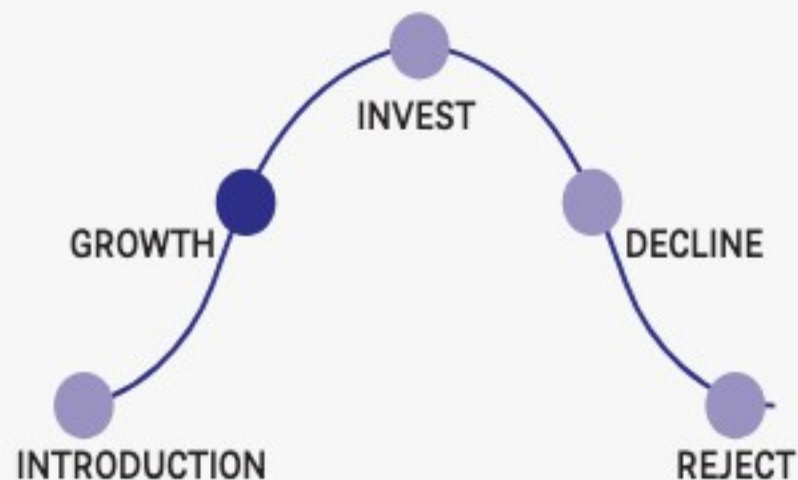
003-SS-00344 Boyshorts

003-SS-00343 Wireless Bra

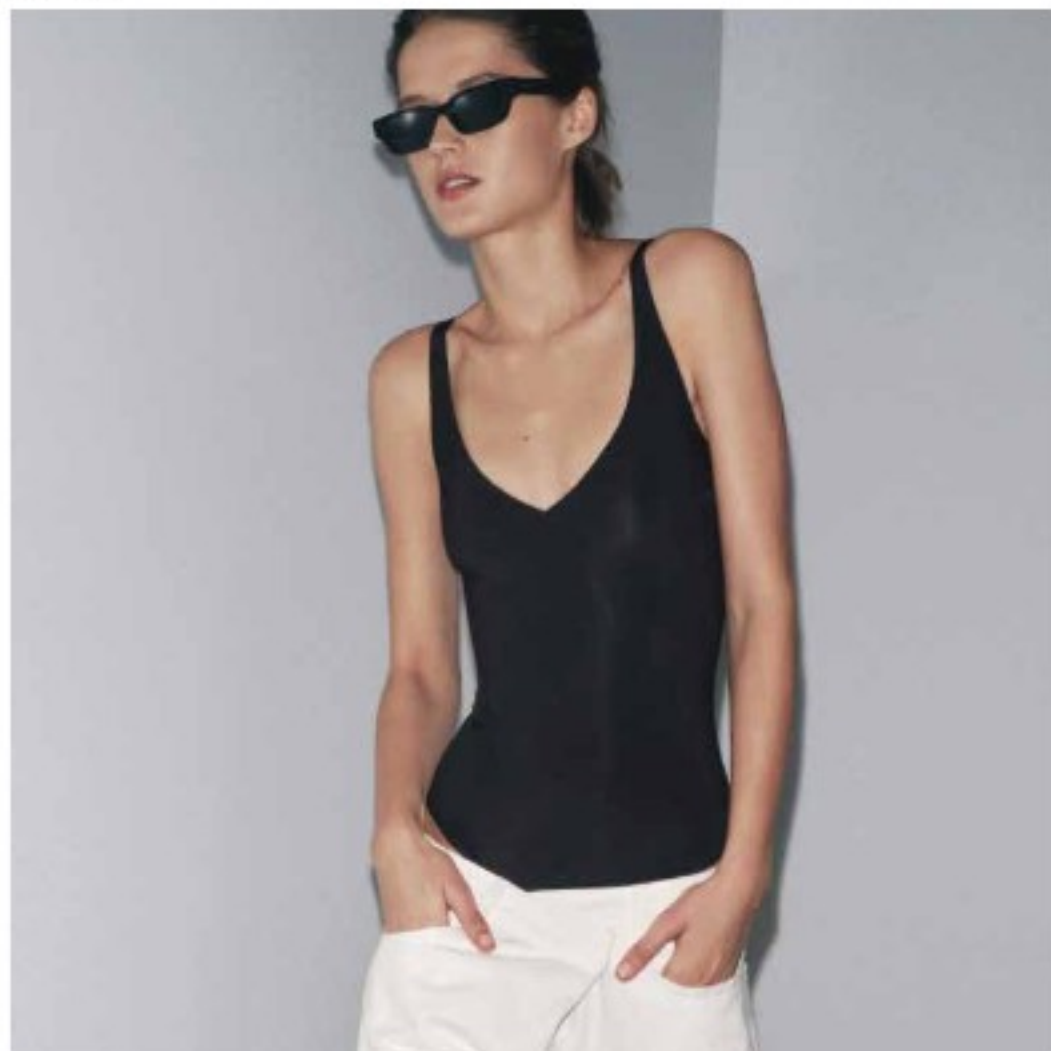
003-SS-00345 Brazilian

KEY SHAPE: BODYSUIT

TREND CYCLE



ZARA



FLEUR DE MAL



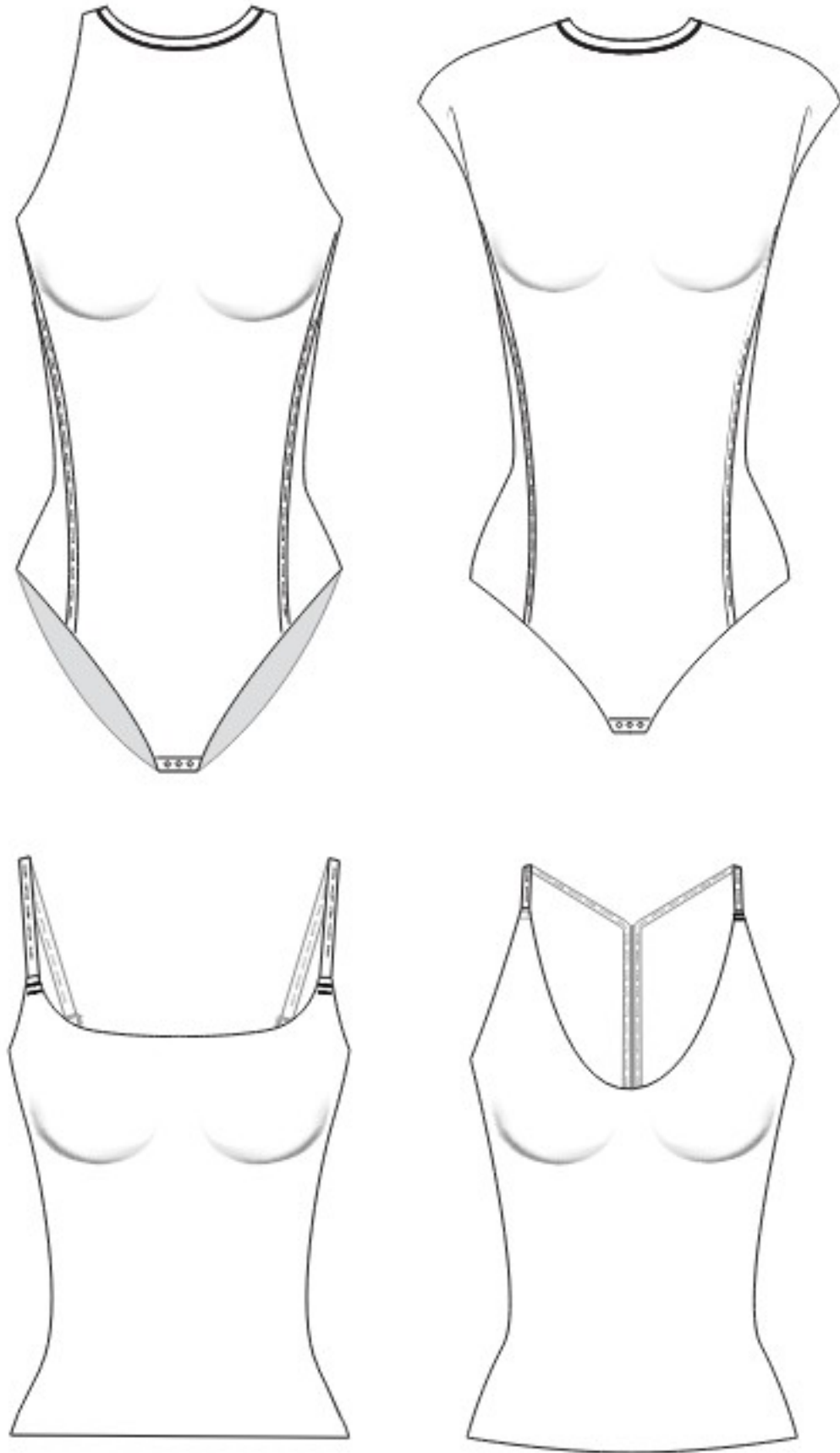
DIOTIMA SS26



KEY SHAPE THE SCULPTED BODYSUIT//:

BODYSUITS REMAIN A SMALL PART OF THE ASSORTMENT, BUT RETURN-TO-OFFICE MANDATES AND THE DEMAND FOR SLEEK, SCULPTED SILHOUETTES PRESENT CLEAR GROWTH POTENTIAL. TIKTOK TRENDS REFLECT THIS SHIFT, WITH #BACKTOOFFICE CONTENT UP 203.9%, AND #OFFICESTYLE AND #OFFICEWEAR GROWING 163.5% AND 188.29% YOY (FEB-JULY 2025 VS. 2024). CAPITALIZE ON THIS MOMENTUM WITH SMOOTHING BODYSUITS THAT CINCH THE WAIST AND FEATURE BUILT-IN CUPS FOR BRALESS COMFORT, ALIGNING WITH THE #SCULPTURALFORM TREND. OFFER VERSATILE #DAYTONIGHT #OFFICEWEAR SILHOUETTES TO MEET EVOLVING WORKWEAR NEEDS. FOR YOUNGER CONSUMERS, EXPLORE ALL-OVER #LACE BODYSUITS AND FLORAL KNITS FOR LAYERED, EXPRESSIVE STYLING.

CHIC COTTON



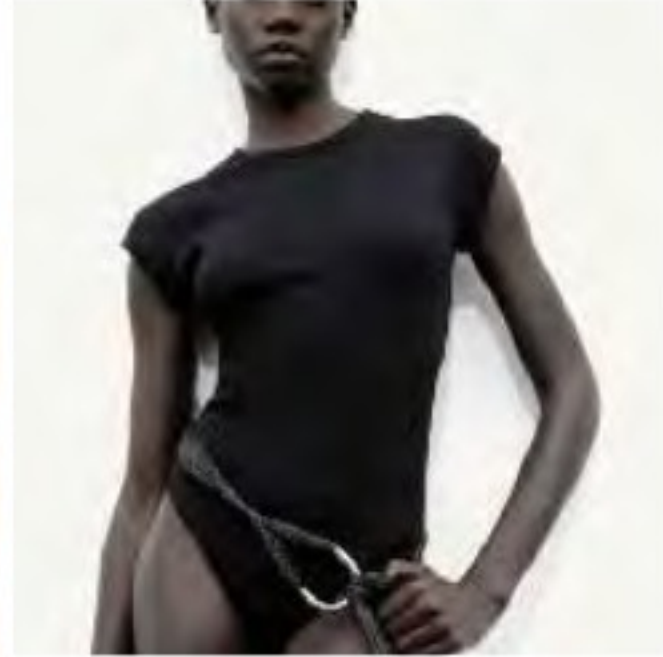
FABRIC DIRECTION

Supima interlock
145gsm

83% COTTON
17% SPANDEX



CREATIVE DIRECTION



COLLECTION://

003-TT-00039 Cap-sleeve bodysuit

003-TT-00033 Scoopneck tank

003-TT-00034 Square-neck tank

003-TT-00032 High-neck bodysuit

KEY FABRIC: SUPIMA INTERLOCK

Supima interlock

Supima is inherently softer and more luxurious because of its extra-long staple fiber.

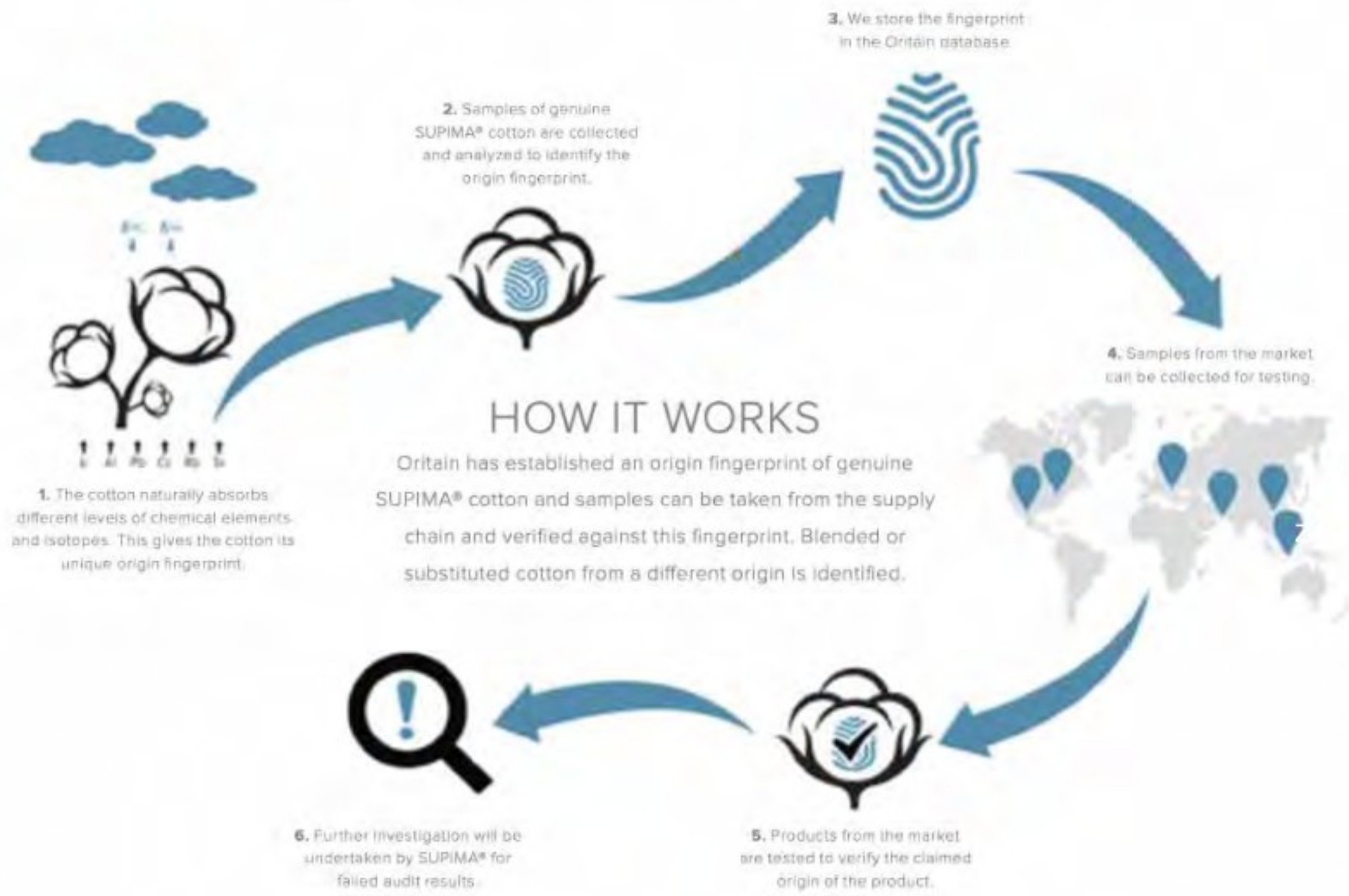
The length of the fiber produces smoother, cleaner yarns that result in a softer fabric that resists pilling. This light weight cotton is made of 120s cotton yarn in a high-gauge interlock knit, giving it a sleek surface and delicate handfeel. The knitting also comes with a slight compression effect due to its high tension and high proportion of spandex.

SUPIMA Traceability: How it works

Dedicated to ensuring that every product that carries the SUPIMA® brand name is made with American-grown, extra-long staple cotton, Supima has partnered with Oritain. A global leader in forensic sciences, Oritain employs a peer-reviewed methodology to analyze trace elements and isotopes to determine a products origin.

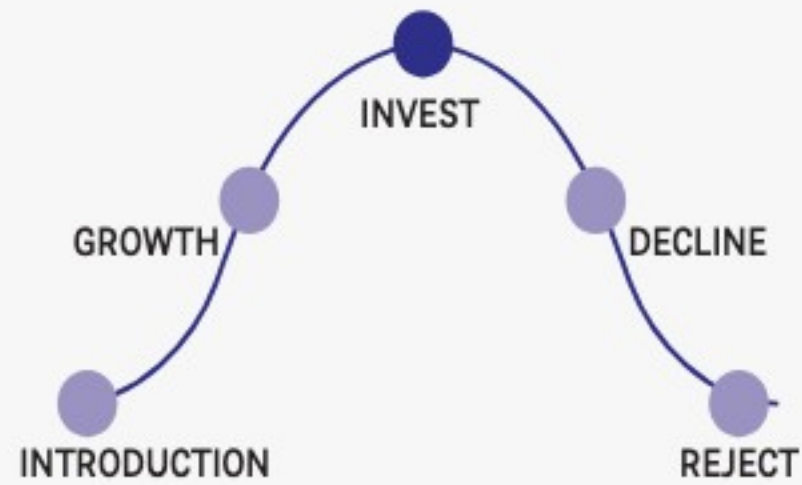


NATURE'S FINGERPRINT



KEY SHAPE: EVERYDAY BRALETTE

TREND CYCLE



SKIMS



PRISM



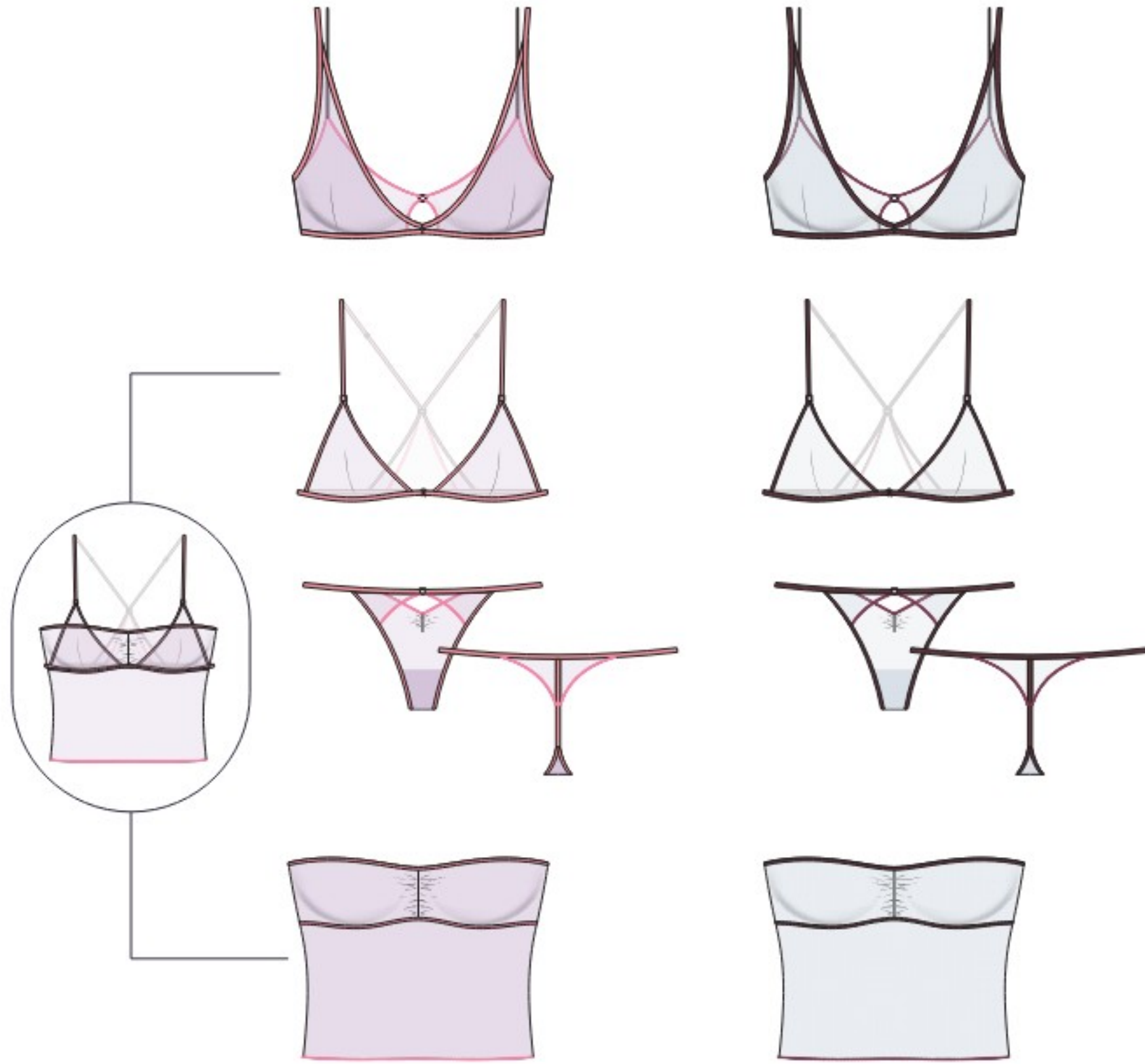
URBAN OUTFITTERS



KEY SHAPE THE EVERYDAY BRALETTE//:

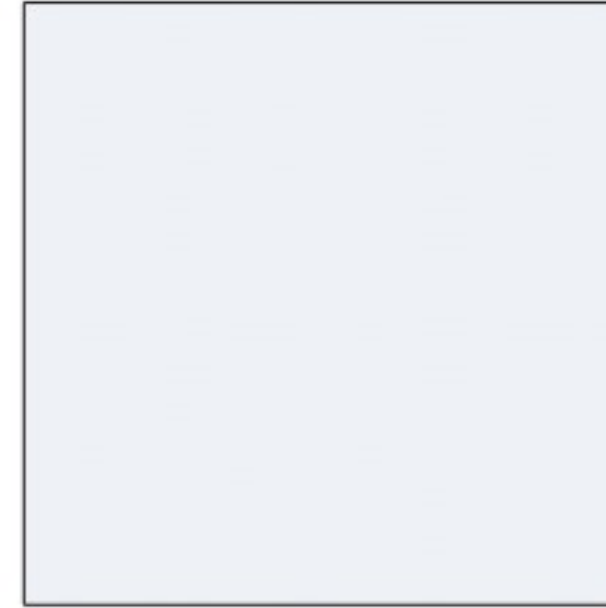
THE BRALETTE IS SET TO DOMINATE SPRING/SUMMER 2027, WITH A FOCUS ON MODERN FEMININITY AND COMFORT. REFRESH SEAMLESS STRETCH STYLES USING PLUNGE, SCOOP, AND STRAPPY SHAPES THAT FLATTER ALL AGES. PRIORITIZE BREATHABLE, SKIN-FRIENDLY, AND COOLING FABRICS FOR EVERYDAY WEAR. ELEVATE SUPER-SOFT JERSEY AND POINTELLE DESIGNS WITH VINTAGE-INSPIRED LACE AND HANDCRAFTED DETAILS FOR A ROMANTIC TOUCH. FOR CASUAL FAVORITES AND ACTIVE INTIMATES, EMBRACE NAUTICAL OR RETRO VIBES WITH BOLD CONTRAST TRIMS THAT ADD A PLAYFUL EDGE. THIS SEASON'S BRALETTE IS BOTH FUNCTIONAL AND FASHION-FORWARD, BLENDING COMFORT WITH STYLE TO MEET THE NEEDS OF A DIVERSE CONSUMER BASE.

COTTON-TOUGH MESH



FABRIC DIRECTION

Cotton Touch Mesh
50% Polyamide,
50% Elastane



CREATIVE DIRECTION



COLLECTION://

003-TT-00035 High Apex Bralette

003-TT-00036 Triangle Bralette

003-TT-00037 String

003-TT-00038 Tube Top



JELLY SHEERS

- 003-TT-00067 Bodysuit
- 003-TT-00065 Underwired padded bra
- 003-TT-00066 Micro Thong



CHECK MATE

- 003-TT-00068 Crop
- 003-TT-00069 Padded demi bra
- 003-TT-00070 Thong



WAFFLE MANIA

- 003-TT-00021 Rockerwire Bra
- 003-TT-00022 Wireless Padded Bra
- 003-TT-00023 Bikini
- 003-TT-00024 Cami Top
- 003-TT-00025 Boyshorts
- 003-TT-00026 Scrunchie



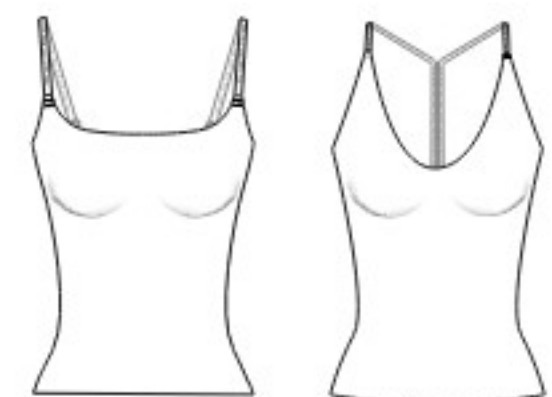
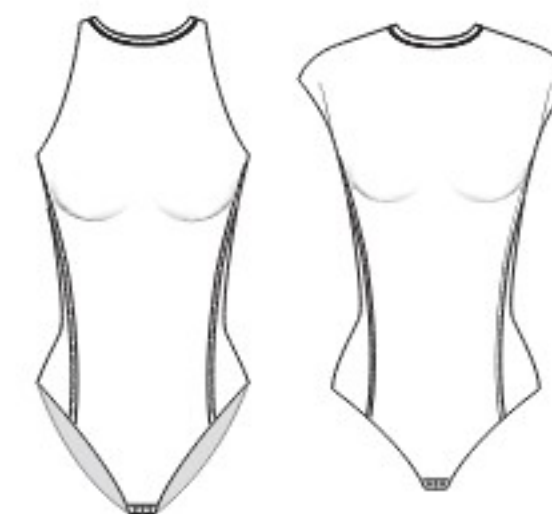
COTTON TOUCH MESH

- 003-TT-00035 High Apex Bralette
- 003-TT-00036 Triangle Bralette
- 003-TT-00037 String
- 003-TT-00038 Tube Top



CHIC COTTON (Intimates)

- 003-SS-00342 High Apex Bralette (w removable pad)
- 003-SS-00344 Boyshorts
- 003-SS-00343 Wireless Bra
- 003-SS-00345 Brazilian



CHIC COTTON (Loungewear)

- 003-RR-00551 Cap-sleeve bodysuit
- 003-RR-00552 V-neck cami
- 003-RR-00551 Square-neck cami
- 003-RR-00552 High-neck bodysuit