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Beyond Basics

Insights into the
booming innerwear
market

UNVEILED
CMAI's
Nationwide
*Apparel
Consumer Survey*

Beyond Basics:

Insights Into The Booming Innerwear Market

As body positivity makes noticeable gains, the innerwear market is all about comfort, confidence and a cool quotient that is increasing

Text | Bindu Gopal Rao

Consumers today are more discerning, seeking comfort, performance, and style, making India one of the most promising innerwear markets globally.

MARKET MUSINGS

The Indian innerwear market, including men's and women's innerwear, loungewear, shapewear, and sportswear, is currently valued at around \$10.24 billion (2024) and is projected to reach \$19.25 billion by 2033, growing at a CAGR of 6.7%. Women's innerwear leads the category, expected to grow from \$4.4 billion in FY2020 to \$8.5 billion by FY2025, while men's



innerwear is projected to grow from \$1.9 billion to \$3.1 billion in the same period. The loungewear and athleisure segments are expanding rapidly due to rising comfort-focused and work-from-home lifestyles. Key drivers include higher disposable incomes, a younger consumer base (15–34 years), rapid urbanisation, a shift to organised retail, and increasing preference for branded and premium products.



“Consumers are placing more value on comfort, versatility, and premium quality, and this is driving some exciting changes in the industry.”

- Yogesh Kabra, YXXX Apparels

GROWTH TRAJECTORY

Consumers are becoming more discerning in their choices; though it is a gradual shift, it is definitely underway. “We are also seeing strong growth in work leisure, as functional clothing is being embraced globally. On our side, our oversized products sell out every time, which gives us confidence to expand that segment. Overall, consumers are placing more value on comfort, versatility, and premium quality, and this is driving some exciting



changes in the industry,” says Yogesh Kabra, Founder, YXXX Apparels. Among all categories, athleisure and sports innerwear are witnessing the most rapid growth. Women today are prioritising versatility, with a clear preference for products that blend comfort, performance, and style, whether they are working out or simply lounging.

MATERIALLY SPEAKING

Innerwear continues to be one of the fastest-growing categories, with fabrics like modal and Tactel gaining significant traction due to their comfort and breathability. Satin-touch blends, laces, and viscose blends along with sustainable elements are in demand right now. Fabric preferences are cyclical and season-led. Cotton-spandex continues to dominate in warmer months, offering breathability and stretch, while polyamide-based blends gain traction in the latter half of the year for their sleek finish and



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durability. “These materials are gaining popularity due to their softness, breathability, and overall comfort. There has also been a noticeable rise in the demand for functional fabrics, which is evident in the rapid adoption of products like our cargo joggers, mobile pants, and shackets. Consumers are clearly looking for a blend of comfort, style, and practicality, and these fabrics are perfectly catering to that need,” says Kabra.

“The future of innerwear in India will be driven by intelligent fabric choices, elevated experiences and a deeper understanding of what women truly want from their innerwear wardrobe.”

- Spokesperson, Reliance Retail’s Amante



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NEW TRENDS

There has been a noticeable shift in how consumers approach buying innerwear, and it starts with how much more informed they have become. Today, shoppers are no longer just picking up underwear out of habit; they are actively thinking about fabric, fit, and functionality before making a purchase. This change in mindset is fuelling the rise of functional clothing, where comfort, performance, and style all matter. A spokesperson from Reliance Retail’s Amante says, “At Amante, we are seeing a transformative shift in how Indian women approach their innerwear choices—functionality,

“With rising comfort in online shopping even in tier 2 and 3 cities, consumers are becoming more confident in buying intimate wear online, especially with easy returns and better size guides.”

**- Masumi Mewawalla,
Emblaze & Emem Wellness**

comfort, and innovation are now top priorities. Consumers today are not just buying a product; they are investing in how it makes them feel throughout the day. As demand grows across metros and smaller cities alike, our focus remains on delivering quality and performance through thoughtfully designed collections. The future of innerwear in India will be driven by intelligent fabric choices, elevated experiences—both online and offline—and a deeper understanding of what women truly want from their innerwear wardrobe.”

ONLINE JOURNEY

E-commerce platforms like Amazon have played a huge role in this transformation. Not only have they made it easier to shop, but they have also become important discovery and education channels. Consumers now browse, compare, and read up on what they are buying. They are curious and, more importantly, are willing to make the switch when they find something better. Masumi Mewawalla, Founder & Director of Masumi Mewawalla,



Emblaze & Emem Wellness, says, “I see e-commerce playing an even bigger role in all the segments over the next three years.

With rising comfort in online shopping even in tier 2 and 3 cities, consumers are becoming more confident in buying intimate wear online, especially with easy returns and better size guides. E-commerce will continue to drive growth, discovery, and deeper brand-consumer relationships in this space.”

COMPETITIVE CUES

In the Indian market, price continues to be an important consideration, but there’s a clear shift among consumers, particularly in urban and semi-urban areas, towards prioritising comfort, fabric performance, and most importantly, versatility. The rise of D2C players reflects a shift in the market towards digital-first, experience-led innerwear brands that prioritise comfort, quality, and relevance. At the same time, international brands bring strong legacy and global



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appeal. But local D2C brands often have the edge when it comes to understanding Indian body types, climate, and cultural nuances.

CHALLENGE FACTOR

While India continues to attract global innerwear brands, D2C startups have yet to cause meaningful disruption in the category. Established players with deep consumer insights, strong distribution, and product innovation continue to lead. Joyce Motirale, Founder & Director of Bold and Bae Fashion, a leading and fastest-growing D2C women's fashion and lingerie brand, says, "One of the biggest challenges is the limited domestic production of high-tech fabrics that meet global performance standards. There's a reliance on imported spandex blends, moisture-wicking materials, and seamless fabric tech, which increases cost and lead time. Furthermore, inconsistent quality from local mills poses scalability issues for D2C and premium brands." Sourcing quality fabrics at scale in India comes with its own set of challenges. "One of the key issues is limited technical innovation. Compared to countries like China or regions in Europe, Indian mills often lack the advanced R&D capabilities needed to produce high-performance or eco-friendly textiles at scale. This also affects how quickly they can respond to fast-changing global fashion trends, with noticeable delays in fabric development and trend alignment," adds Kabra.

POLICY SUPPORT

A more uniform and reduced GST structure for essential innerwear could help boost demand and formalise the market. There is also a need for greater support for domestic fabric innovation and production, especially in performance fabrics like moisture-wicking, antimicrobial, and stretch



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"Lower cost of procurement will lead to a lower cost of production, and this will automatically make us more competitive in the international world."

- Anubhav Jain, Kidley, Ambi Knitwear

materials. "A major change that is required is for the government of India to promote new technology by making sure that it is not at a very high cost by lowering customs duties. Also, a lower cost of procurement will lead to a lower cost of production, and this will automatically make us more competitive in the international world," says Anubhav Jain, CEO, Kidley, Ambi Knitwear. Policy support for domestic textile innovation, improved access to sustainable raw materials, and incentives for local manufacturing would significantly benefit innerwear brands and the broader apparel ecosystem. 📌