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# INNERWEAR INNOVATORS

*Leading Trends  
& Market Strategies*

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Dear Readers,

The September issue of BoF turns its focus to the ever-evolving innerwear market in India, fuelled by rapid urbanisation, evolving consumer demographics, and a heightened focus on personal well-being. Once viewed primarily as a necessity, innerwear has now emerged as an essential part of the fashion industry, reflecting a fusion of style, functionality, and innovation.

According to 1Lattice, by 2029, the innerwear market is expected to reach Rs 1,07,308 crore, growing at a compound annual growth rate (CAGR) of 10% from Rs 66,703 crore in 2024. A significant driver of this growth is the lingerie segment, anticipated to hit Rs 70,186 crore by 2029. This is primarily driven by shifting cultural attitudes towards body positivity and self-expression, with women's lingerie accounting for the largest share, followed by men's and kids' undergarments.

Product innovation is at the heart of this expansion. Consumers are increasingly seeking versatile innerwear that caters to different occasions, from everyday wear to athletic needs. Technological advancements and sustainability have also become pivotal in shaping this sector. New fabric technologies like moisture-wicking microfibers ensure comfort and durability, while the growing demand for eco-friendly innerwear has pushed brands to adopt more sustainable production practices.

The rise of e-commerce and customisation has further transformed the market. Brands are leveraging virtual fitting rooms and inclusive size ranges, while physical stores are enhancing the shopping experience with curated offerings. Celebrity endorsements and influencer marketing are playing a crucial role in shaping consumer preferences, with digital campaigns boosting visibility and engagement.

As the innerwear market continues to evolve, it is poised to set new standards, blending fashion, comfort, and sustainability to meet the diverse needs of modern consumers. The future of innerwear in India looks promising, offering vast opportunities for growth and innovation. We invite you to explore this exciting sector with us. For more insights and detailed analysis, visit our website at [www.imagesbof.in](http://www.imagesbof.in).



Amitabh Taneja

NEW COLLECTIONS

## BIBA launches autumn-winter 2024 collection

**B**IBA has launched its autumn-winter collection 2024, celebrating India's cultural heritage with contemporary designs, vibrant colours, and luxurious fabrics. The collection caters to modern Indian women and young girls, offering a diverse range of styles including classic Indian wear and celebration wear.

The autumn-winter 2024 collection features designs for all three generations, with options for every occasion. It includes modern geometric prints and fusion wear, blending tradition with contemporary trends. The collection also introduces a line of clothing for young girls, allowing mothers and daughters to embrace BIBA's elegance together.

"Our Autumn-Winter 2024 Collection is a true testament to BIBA's commitment to bringing the best of traditional Indian craftsmanship and modern design to our customers," Siddharath Bindra, Managing Director, BIBA said. "We are particularly passionate about BIBA Girls, the collection celebrates young girls, allowing them to shine with confidence during the festive season and beyond. With the festive season approaching, we hope our collection brings them as much joy and inspiration as it has brought us," Bindra added.

The autumn-winter 2024 Collection is available at all BIBA stores nationwide and online at the brand's official website.



## Under Armour launches UA SlipSpeed Mega with enhanced features

**S**portswear brand Under Armour launched the UA SlipSpeed Mega, the latest iteration of its dual-mode footwear designed for versatile use. The UA SlipSpeed Mega builds on its predecessor with a supersized midsole for enhanced cushioning and energy return. It retains the convertible heel design, allowing wearers to switch between slip and speed modes.

The UA SlipSpeed Mega features several upgrades, including an increased midsole height for added comfort and a run-trail-inspired aesthetic. The upper has been updated with ripstop material and graphics that rise from the midsole, and a narrowed toe box provides a sleeker style. The shoe also incorporates Under Armour's UA Flow technology for lightweight cushioning and traction, along with the BOA Fit System for a personalised fit.

Additional features of the UA SlipSpeed Mega include a breathable upper, an Iso-Chill padded interior, and a machine-washable design. The shoe's convertible heel allows athletes to transition easily between training and recovery modes without compromising performance.

## Snitch launches Snitch PLUS in a bid to redefine inclusive fashion

Men's fast fashion brand, Snitch has launched Snitch PLUS, a line dedicated to cater to sizes ranging from 3XL to 6XL. This diversification marks a significant milestone in Snitch's commitment to inclusivity, ensuring that stylish and comfortable clothing options are accessible to everyone.

Snitch PLUS debuts with an exclusive collection of shirts and T-shirts, crafted with the same attention to detail and fashion-forward ethos that defines the core Snitch brand.

Looking ahead, the brand plans to expand the Snitch PLUS collection to encompass products, including Blazers, denims, and cargos.

"We are thrilled to unveil Snitch PLUS, a new collection that embodies our core value of inclusivity," said Siddharth Dugarwal, Founder & CEO at Snitch. "With Snitch PLUS, we reaffirm our commitment that everyone should have access to perfectly fitting, empowering fashion that allows them to express their unique style."



## Clovia launches plus-size and minimiser bras

Clovia launched its first-ever plus-size bra collection. This new collection aims to cater to the increasing market that requires fashionable, comfortable, and well-fitting lingerie for plus-sized women. Neha Kant, Founder of Clovia, stated, "We understand the unique challenges that come with finding the right fit, especially in the plus-size segment. Our goal is to ensure that every woman, regardless of size, has access to lingerie that not only fits perfectly but also makes her feel confident."

The plus-size bras are designed to support, contour, and reshape larger busts. They feature full-coverage cups to control spillage and have broad underbands and shoulder straps for optimum uplift and support. The range includes several size options from 32B to 44F. The minimiser bras are crafted to make bigger busts appear one size smaller, with a comfortable compression that reduces bust projection. They feature high-coverage full cups and comfortable compression technology to offer a secure fit while creating the illusion of reduced bust size.

## Frontier Raas launches 'The Three Graces' collection by Taraasa

Frontier Raas launched 'The Three Graces' by Taraasa, an Indian Bridal Couture brand committed to empowering women through fashion. This new collection celebrates diversity, sustainability, and the essence of womanhood, inspired by the timeless elegance of Neoclassical sculptures.

The collection draws inspiration from Pradier's iconic sculpture, featuring ensembles that encapsulate the spirit of the mythical goddesses Euphrosyne, Aglaea, and Thalia. It showcases soft, flowing silhouettes in

net and organza fabrics, with delicate floral net and geometric motifs reminiscent of classical drapery and ancient architecture.

The colour palette combines soft, romantic hues like blush pink, lavender, and champagne with vibrant pops of colour. 'The Three Graces' includes a variety of silhouettes and necklines, such as trail lehengas with voluminous skirts and sweetheart necklines while providing choices for both traditional and modern styles. The collection is available at Frontier Raas stores nationwide.



# EXPLORING THE INNERWEAR MARKET IN INDIA

*The innerwear market is expected to grow at a CAGR of 10% between 2024-2029, driving the market from Rs 66,703 crore to Rs 1,07,308 crore with lingerie as the largest contributor...*

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Ambuj Gupta, Group Manager;  
Muskan Kesarwani, Senior Associate; Sanchi Gupta, Analyst;  
Consumer and Retail, 1Lattice



The innerwear market in India is undergoing a remarkable transformation. Once viewed merely as a functional necessity, innerwear is now celebrated for its innovative features and stylish designs. This dynamic shift is driven by various factors including rapid urbanisation, evolving consumer demographics, and heightened awareness of personal style and well-being. As the market is set to grow significantly in the coming years, reaching an impressive Rs 1,07,308 crore in 2029, it reflects a broader trend of integrating innerwear into the fabric of daily fashion and lifestyle.

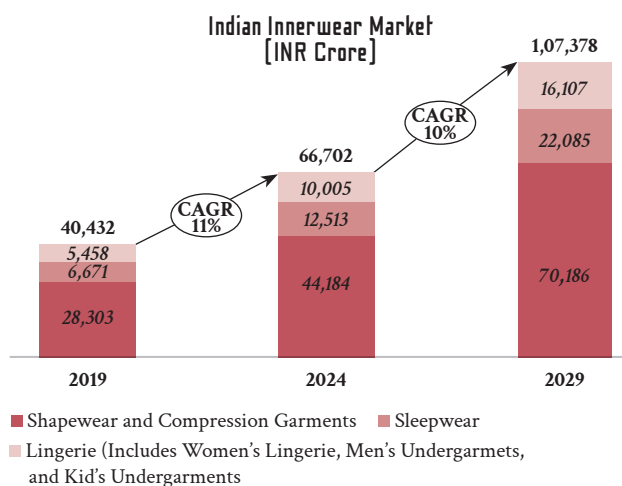
The diverse categories within innerwear underscore the sector's expanding role in personal apparel. With segments like bras and brassieres leading the change and new categories like compression garments gaining more mainstream and commercial traction, the industry is witnessing an unprecedented level of product innovation. The surge in demand for stylish, relaxing, and eco-friendly options is prompting brands to invest in advanced technologies and sustainable practices. As a result, the innerwear market in India is not only growing in size but also sophistication, reflecting a profound shift towards blending fashion with function.

### Market Size

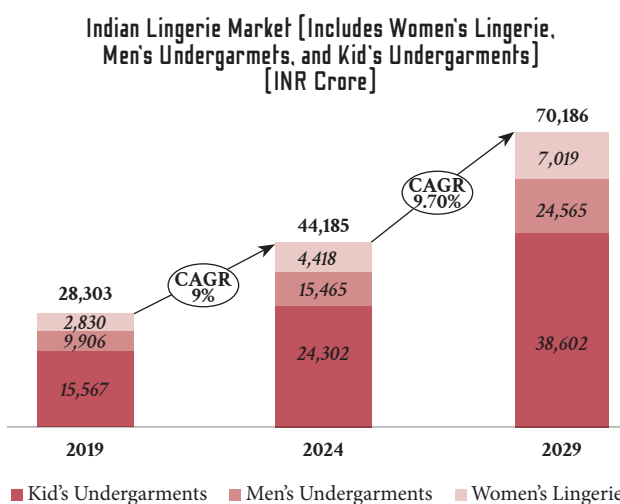
The innerwear market, as a whole, is expected to grow at an encouraging CAGR of 10% between 2024-2029, driving the market from Rs 66,703 crore in 2024 to Rs 1,07,308 crore in 2029. The largest segment, lingerie, which 1Lattice estimated to be valued at Rs 44,185 crore in 2024, is expected to show a promising CAGR of 9.70% to reach a market size of Rs 70,186 crore in 2029. This segment's fast growth can be attributed to the positive wave of body positivity and self-expression that has taken over India.

Bras and brassieres emerge as the largest subsegment in the lingerie segment because of their variety and versatility. Women's lingerie makes up the majority of this segment. A whopping 55% of all lingerie comprises women's lingerie while the remaining 35% and 10% is credited to men's and kids' undergarments respectively. This split values the women's lingerie market at Rs 24,302 crore, men's undergarments market at Rs 15,465 crore, and kids' undergarments at Rs 4,418 crore in 2024, with the women's, men's, and kids' markets roaring up to Rs 38,602 crore, Rs 24,565 crore, and Rs 7,019 crore respectively in 2029.

A smaller but emerging segment under innerwear is shapewear and compression garments, a segment that 1Lattice estimates to grow from Rs 10,005 crore in 2024 to Rs 16,107 crore in 2029 at a CAGR of 10%. Compression wear, especially, is expected to grow rapidly within this segment because of increased health consciousness amongst customers. As customers' interest in fitness peaks, so will the demand for compression garments as it is a popular choice of clothing for heavy workouts. Lastly, 1Lattice estimates that sleepwear is expected to show the highest growth



■ Shapewear and Compression Garments ■ Sleepwear  
■ Lingerie (Includes Women's Lingerie, Men's Undergarments, and Kid's Undergarments)



■ Kid's Undergarments ■ Men's Undergarments ■ Women's Lingerie

Note(s): 1. Women's lingerie includes bras, bralettes, sports bras, bikinis, panties, briefs, etc.  
2. Men's undergarments includes briefs, boxers, trunks, vests, etc.  
3. Kid's undergarments includes briefs and vests



# Beyond Comfort: The Future of Women's Sleepwear & Intimates

*From eco-conscious materials to bold colour palettes, women's sleepwear and intimates blend innovation with intimacy, making the personal profoundly political...*

Puneet Dudeja, Director - Business Development,  
South Asia, WGSN

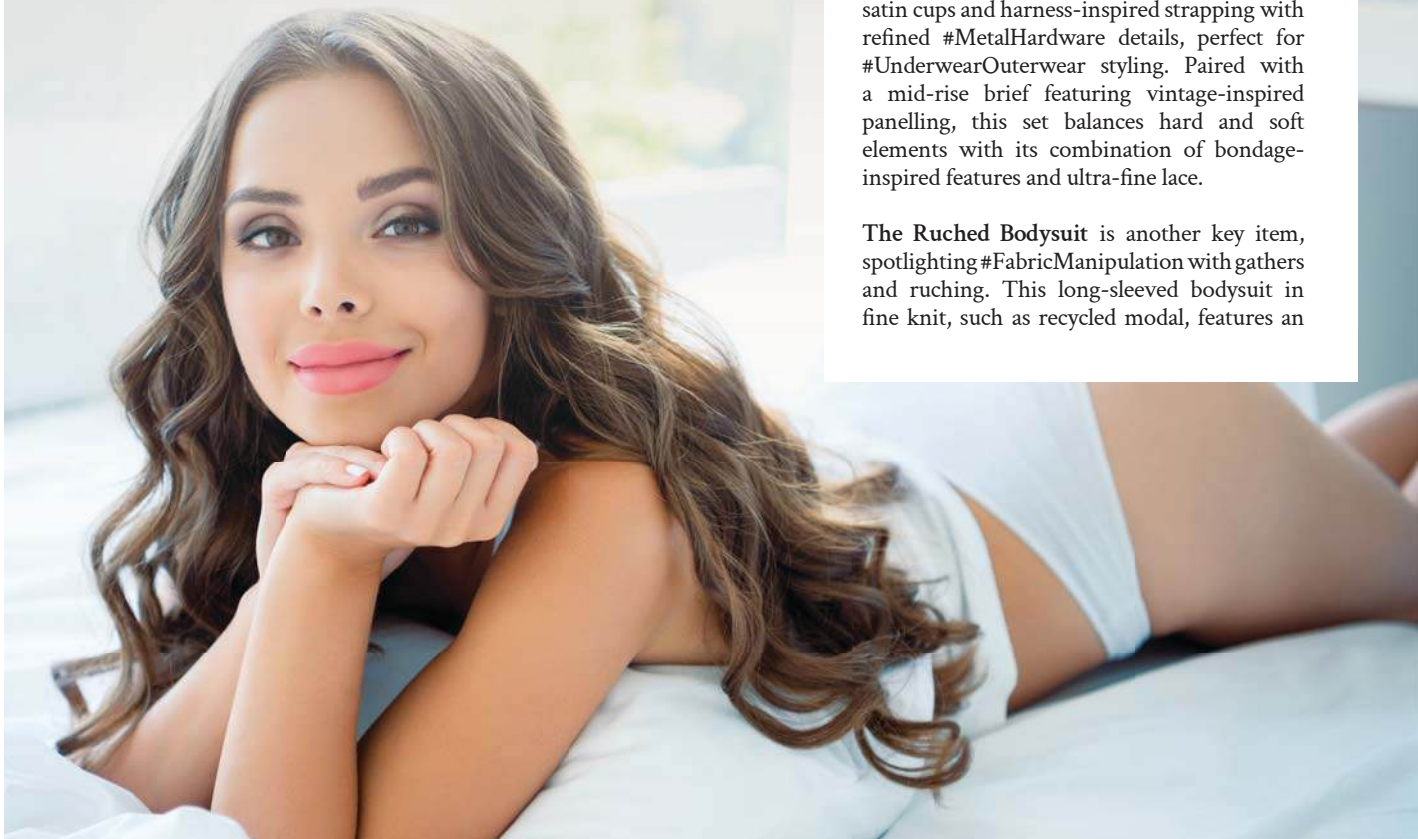
As we enter a new season, women's sleepwear and intimates are evolving, reflecting a world increasingly aware of its challenges and opportunities. This season, intimate apparel transcends comfort and allure, focusing on storytelling, sustainability, and self-expression. The trends showcase a deeper connection between fashion and societal shifts, with designs that are as mindful as they are beautiful. From eco-conscious materials to bold colour palettes, women's sleepwear and intimates blend innovation with intimacy, making the personal profoundly political. This piece dissects women's intimates and sleepwear, focusing on key items, core designs, and forecasts.

## Women's Intimates: Key Items

Women's intimates are embracing a blend of gothic inspiration, AI-driven design, and intricate detailing, setting the stage for key items that are both fashion-forward and evocative.

The #RefinedFetish Set draws from darker trends like #ModernGoth, #Gothlite, and #RefinedFetish, which continue to captivate designers and consumers. This gothic-inspired lingerie is elevated with delicate lace, reflecting #BoudoirDressing themes seen at numerous shows. A standout design includes a boudoir-inspired bustier featuring half-lined satin cups and harness-inspired strapping with refined #MetalHardware details, perfect for #UnderwearOuterwear styling. Paired with a mid-rise brief featuring vintage-inspired panelling, this set balances hard and soft elements with its combination of bondage-inspired features and ultra-fine lace.

The Ruched Bodysuit is another key item, spotlighting #FabricManipulation with gathers and ruching. This long-sleeved bodysuit in fine knit, such as recycled modal, features an





# AHEAD OF THE CURVE:

## India's Innerwear Brands' Big Inclusivity, Innovation Push

*From moisture-wicking fabrics and seamless designs to eco-friendly materials and inclusive sizing, the innerwear industry is embracing innovation to enhance the wearer's experience like never before...*

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Kajal Ahuja



# NYKD BY NYKAA:

## Disrupting the Innerwear Sector with Innovation & Inclusivity

*Nykd by Nykaa was launched to address the alarming 80% statistic of women wearing the wrong bra size and simplify lingerie shopping through technology, product innovation & targeted marketing...*

Sanya Arora

In the realm of fashion, comfort begins with the right foundation. The innerwear segment of the industry works hard to build this base, but often lags behind in both innovation and inclusivity. In such a scenario, Nykaa's innerwear brand, Nykd, has emerged as a transformative force.

Founded with a clear mission to address the significant gap in the Indian lingerie market, Nykd by Nykaa has quickly established itself as a leader in creating products that cater to real consumer needs. It has since embarked on a mission to empower women on their journey to discovering the perfect innerwear – garments that not only fit flawlessly but also instill unwavering confidence.

Preeti Gupta, Chief Business Officer at Nykaa Fashion, shares insights into her brand's profound journey – the product innovations, technologies used, strategies employed to win and future ambitions.

### A Mission to Simplify Lingerie

Nykd by Nykaa was launched to address a glaring issue in the lingerie sector: a majority of women in India wearing the wrong bra size. With an alarming statistic of 80% women facing this problem, Nykd set out to simplify lingerie shopping and solve real consumer problems through a combination of technology, product innovation, and targeted marketing.





# VAN HEUSEN INNERWEAR: Pulling the Category Out of the Closet

*VH Innerwear's goal is to continue delivering innovative products that meet evolving consumer needs while maintaining the high standards of quality and style that define the brand...*

Surabhi Khosla

In an era where lifestyles are continuously evolving, where comfort, quality and sustainability are at the forefront of consumer minds, being innovatively fashion forward is everything. In such times, and driven by the aforementioned factors, the innerwear fashion category has evolved from being a basic necessity to a booming industry.

With increasing consumer awareness of body positivity and self-care, innerwear is now seen as an essential part of personal style, blending functionality with fashion. Brands are competing to offer a diverse range of products that cater to different body types, preferences, and sustainability concerns.

One innovative brand, which has pioneered the redefinition of category codes in the mid premium innerwear segment is Van Heusen Innerwear & Athleisure.

### Capturing the Innerwear Market

Launched in the year 2016, VH Innerwear & Athleisure is built on the pillars of innovation, performance, sophistication and fashion. "When we analysed the innerwear category, we observed that many international and Indian brands, particularly in the mid-premium space, have struggled over the past two decades. A deep dive into the key success factors revealed the necessity for a focused and dedicated product development engine, coupled with strong distribution expertise in



**‘ Triumph to launch EBOs this year for a more global experience ,’  
Says Ankur Damani**

*Formed in 1886, Triumph goes above and beyond fashion, consciously working on the science of wearing correct bras and their impact on women’s health...*

Surabhi Khosla

**‘ We are market leaders in the premium intimate wear segment. This segment is all about personalisation and trust and the fact that we have been market leaders for almost a century and a half indicates that consumers trust us ,’**

**Ankur Damani,**  
Commercial Director (Country Head) -  
India & Sri Lanka, Triumph  
International

**A**ll retail companies are formulated with the vision of making the lives of the consumers who use their products better. However, very few brands manage to make a lasting impact. One such company is Triumph International, a premium intimate wear brand.

Formed in 1886, Triumph goes above and beyond fashion, consciously working on the science of wearing correct bras and their impact on women’s health. The global brand, which has a huge presence in the premium segment in India, is constantly building on its history of being a legacy intimate wear brand. Inspired by the individuality of its audience, Triumph is creating products after being tirelessly in conversation with the women who wear them.

In a freewheeling chat with Surabhi Khosla, Editor, IMAGES Business of Fashion, Ankur Damani, Commercial Director (Country Head) - India & Sri Lanka, Triumph International details his brand’s strategies for India while also outlining the exciting future which lies ahead!

*Excerpts from the conversation...*

**Please tell us about the rich legacy of Triumph and how you leverage this history and heritage to resonate with modern customers?**

Triumph is a 138-year-old brand and we have a very, very rich heritage and legacy. We are market leaders in the premium intimate wear segment. This segment is all about personalisation and trust and the fact that we have been market leaders for almost a century and a half indicates that consumers trust us. Our fits are also some of the best in the countries that we operate in.

*Triumph*

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