

VOLUME TWO NUMBER ONE

# SHIRTOPEDIA

2025

INDIA'S 1<sup>ST</sup> COFFEE TABLE BOOK ON SHIRTS



## The Shirt Story: STYLE | RETAIL | SUSTAINABILITY

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Cover Price

**₹10,000 | US\$ 150**

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Printed & published by S P Taneja on behalf of IMAGES Multimedia Pvt Ltd. Printed at Modest Print Pack (P) Ltd. C-52, D.D.A. Shed Okhla Industrial Area Phase -1, New Delhi - 110 020 and published by S P Taneja from S - 61A Okhla Industrial Area Phase - 2, New Delhi 110 020. Editor: Amitabh Taneja

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# A word about IMAGES

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**IMAGES**  
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Established in 1992, IMAGES Group is India's most prolific and influential disseminator of retail intelligence. Recognised by Indian and international retail communities through its B2B Magazines,

Conferences, Exhibitions, Research Reports and Web Portals, the IMAGES Group is the largest retail intelligence organisation in South Asia and the Middle East, whose multiple products and services function as catalysts for the profitable growth of modern retail through knowledge platform leadership.

The Group's knowledge platforms include print and online reportage, research studies, and major annual business events with Conferences, Master-Classes and Workshops serving multiple verticals/segments/operations of retail. The mega industry events include: Phyigital Retail Convention, India Food Forum, India Fashion Forum, Shopping Centres Next, Internet Commerce Summit, India D2C Summit, Saudi Retail Forum and Middle East Retail Forum.

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# Preface

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## **Dear Readers,**

The journey of shirts in India has been as dynamic as the fashion industry itself. From being a wardrobe staple for every man to becoming a canvas for innovation and self-expression, shirts have continually evolved to meet the changing tastes and lifestyles of consumers. Delving into this rich diversity is *Shirtopedia*, a comprehensive guide that celebrates the multifaceted world of shirts. This second edition dives deep into the fascinating segment of shirts, exploring its historical significance, current trends, and the immense potential it holds for the future.

The Indian shirt market has witnessed significant fluctuations in recent years, shaped by global events, changing consumer preferences, and economic pressures. Starting at \$6.13 billion in 2019, the market experienced steady growth to \$6.73 billion in 2020, before dipping to \$4.48 billion in 2021 due to the pandemic-induced shift toward casual wear and remote working lifestyles. However, resilience marked its recovery, with the market rebounding to \$6.11 billion in 2022 and surging to an impressive \$8.13 billion in 2023. This growth underscores the enduring relevance of shirts in the menswear category.

Shirts are no longer confined to formal wear; they now play a pivotal role in shaping men's fashion. From trendy casual styles to sophisticated evening looks, shirts have become a key component of the modern man's wardrobe. Their versatility allows them to effortlessly bridge the gap between functionality and style, making them an essential part of everyday fashion.

Through this edition of *Shirtopedia*, we once again aim to explore how the shirt market continues to evolve with innovative designs and retail experiences that captivate customers. Whether it's through cutting-edge fabrics enhanced by technological advancements or the integration of artificial intelligence (AI) in designing, marketing, and personalising shirt offerings, the industry is undergoing a digital transformation that promises to redefine customer engagement. These advancements not only enhance the shopping experience but also push the boundaries of what shirts can represent in the fashion world.

While the shirt market has made remarkable strides, it also presents an untapped opportunity – the potential for a premium men's shirt and formal wear brand. As consumer preferences shift toward quality and exclusivity, this segment holds immense promise for brands willing to innovate and deliver exceptional products. The future of the Indian shirt market is bright, shaped by the perfect blend of tradition and innovation. From sustainable practices to tech-driven solutions, this sector stands on the cusp of a revolution that will transform the way shirts are designed, manufactured, and marketed and *Shirtopedia* is your guide to understanding this dynamic market, exploring its evolution, and unlocking the opportunities it offers.

We hope this book inspires fashion enthusiasts, retailers, and entrepreneurs to appreciate the versatility and potential of shirts as both a timeless classic and a modern trendsetter.

A handwritten signature in black ink, appearing to read 'Amitabh Taneja', with a long horizontal line extending to the right.

**Amitabh Taneja**  
*Editor-in-chief, IMAGES Group*

# SHIRTOPEDIA

## VOLUME 2

### – OUR CORE PURPOSE & VISION

Shirts are the most common, yet most versatile items to be found in every wardrobe. Their utility ranges from casual to formal occasions. Over the years, the humble shirt has prominently led the development of the readymade garment industry in India and has been responsible for the birth of some of India's biggest brands.

India's shirt market is a dynamic blend of tradition and modernity, valued at approximately ₹7.95 billion in 2024, with a projected CAGR of 3.69% over the next three years. The sector comprises 60% branded and 40% unbranded players, reflecting a growing preference for organised retail. Cotton shirts dominate the market, accounting for over 70% of sales due to India's strong cotton production. Major domestic players like Arvind Fashions and global brands like Tommy Hilfiger contribute to this expansion. Rising demand for sustainable fabrics and the e-commerce boom have further accelerated the sector's growth, making it a key apparel category in India.

**The Shirt Market:** Shirts are a cornerstone of the retail sector, driving significant revenue and offering diverse styles that cater to various consumer preferences and occasions. Over time, the market has grown and along with rapid casualisation, the bespoke, designer, premium and women's shirt segments have boomed. Fabrics have shifted from just silk, linen and cotton to a variety of blends, weaves, specialty and smart fabrics, recycled fibers and dyes and finishes that give shirts an added appeal.

- 2024: The shirts market in India amounts to US\$7.95 billion
- It is projected to grow annually at a CAGR of 3.69% from 2024 to 2028

#### Factors Bolstering the Market Include:

- Increasing disposable income
- Urbanisation
- The rise of e-commerce

- Proliferation of organised retail outlets across India
- A growing fashion-conscious male population

**Objective:** As the market and its consumer base grow exponentially, IMAGES Group is rolling up its sleeves to bring you SHIRTOPEDIA: VOLUME 2, a 360° market analysis on the Indian Shirts Segment.

**Our Mission:** SHIRTOPEDIA aims to illuminate every facet of shirt production, showcasing the intricate craftsmanship and innovation at each stage.

**What We Have Achieved:** This visually stunning book features research, market trends, expert insights, high-quality images, and personal stories from fiber producers, fabric mills, embellishment artists, interlining manufacturers, designers, and retailers.

**What's Inside:** SHIRTOPEDIA: VOLUME 2 is an exhaustive exploration of the shirt manufacturing ecosystem, tracing the journey from raw fibers to retail fashion.

- Research & Trends: Size, Segments & Opportunities in the Indian Shirts Market
- Innovation: Featuring Creative & Innovative Launches of FY24
- Technology: New Fibres, Yarns, Blends & Designs
- Sustainability: Recycled Raw Material, Eco-Friendly Dyes
- Adjacents: Cuffs, Collars, Interlining & Buttons
- Bespoke: Mapping the Made-to-Measure Segment

A myriad of brands, manufacturers, fabric mills, embellishment experts, interlining companies, and retailers have participated SHIRTOPEDIA: VOLUME 2, aligning themselves with excellence and sustainability in fashion, and all the while gaining exposure to a discerning audience of fashion enthusiasts and industry professionals.

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**JOIN IMAGES GROUP AS WE CELEBRATE THE ART AND SCIENCE OF SHIRT MAKING AND COMMIT YOURSELF TO QUALITY AND INNOVATION.**



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**The Shirt Story:**  
STYLE | RETAIL | SUSTAINABILITY

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Publication

# The Shirts Market in India

– By **Amit Gugnani**, Senior Partner & Head of Fashion;  
**Parmesh Chopra**, Head Content Writer; Technopak Advisors



**T**he shirts market in India has grown steadily over the past decade, reflecting the country's expanding economy, changing consumer preferences, and the increasing influence of modern retail. Over the past decade, this market has experienced remarkable expansion, driven by the dual forces of rising consumer incomes and the modernisation of retail. From corporate offices in bustling cities to rural areas where Western attire is gaining popularity, shirts have become a wardrobe essential for millions of Indians across different demographics and regions.

India's fashion landscape is unique, blending traditional values with global influences, and the shirts market is no exception. Formal shirts are a staple for the country's growing corporate workforce, casual shirts are increasingly



## Industry Speak

“ A shirt not only evokes a personal identity, professionalism and maturity to an Indian but acts almost like a tool of blessing and recognition when a father gifts a formal shirt to the son prior to his job interviews. Therefore, a shirt is indeed entangled with our social practices and rituals ”

– **Dr. Kaustav Sengupta,**  
Director - Insights, VisioNxt



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