

**Images
Business of
Fashion**

IMAGES

BOf

VOLUME XXVI

NUMBER 10

OCTOBER 2025

₹100

www.imagesbof.in



Summerwear

Embraces Sustainable Comfort

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Printed & published by SP 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-I, New Delhi-110020 and published by S P Taneja from S-61 A, Okhla Industrial Area Phase - II, New Delhi. 110020 Editor : Amitabh Taneja

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Dear readers,

Innerwear in India is quietly transforming the way we think about fashion and personal comfort. At first glance, it might seem like just another retail segment, but look a little closer, and you realise it is a category that combines intimacy, comfort, and self-expression in ways very few others do. Innerwear is no longer just about basic coverage; it's about how a person feels throughout the day—confident, comfortable, and even empowered. That makes it one of the most essential categories in fashion today.

Over the past few years, the segment has witnessed an influx of international brands, each bringing global design sensibilities and a promise of quality. These brands are not just introducing premium aesthetics; they are educating consumers about fit, support, and lifestyle-led designs. Today, Indian consumers are spoilt for choice whether it's seamless T-shirt bras, shapewear that doubles as confidence boosters, or athleisure-inspired innerwear that moves effortlessly from home to gym. Strengthening this momentum, bigger players like Reliance have formed a 50:50 joint venture with Israeli apparel major Delta Galil to design, manufacture, and sell innerwear in India. This partnership brings Delta Galil's global brands and manufacturing expertise to Reliance's retail platforms, supplementing its existing portfolio of Clovia, Zivame, and Amante; a move that directly challenges market leaders and elevates competition in the evolving innerwear space..

Technology has been a game-changer. AI-driven fit recommendations, virtual try-on tools, and seamless garment engineering are helping brands deliver precisely what consumers need. Fabric innovations are equally exciting: breathable microfibers, bamboo blends, and moisture-wicking, anti-microbial textiles ensure that comfort is never compromised, while sustainable materials are helping brands respond to the growing eco-conscious consumer.

What strikes me personally is how these innovations are making innerwear more than just a purchase as they are creating an experience. Each piece tells a story of design, research, and care, turning what was once a hidden necessity into a thoughtful expression of personal style and comfort. For a market that touches so intimately on daily lives, the evolution of innerwear in India is not just business; it's transformation, one garment at a time.



Amitabh Taneja

BEYOND THE BASICS

Inside the Transformation of India's \$20 Billion Innerwear Industry

The Indian innerwear market presents a compelling growth narrative, projected to expand by nearly 11% from approximately \$8.52 billion in FY 2024 to \$9.43 billion in FY 2025.

Madhulika Tiwari, Partner & Parmesh Chopra,
Head Content Writer, The Knowledge Company

The Indian innerwear retail experience has undergone a revolution. What was once a hushed, often awkward transaction conducted in the back of a small shop has transformed into a confident, informed, and expressive act of personal choice. Today, a consumer in a Tier-2 city can browse an endless digital aisle on their smartphone, consult a sophisticated online fit-calculator, and make a purchase guided not by a reticent shopkeeper, but by a trusted social media influencer discussing comfort, style, and body positivity in a candid Instagram Reel. This seismic shift from a hidden necessity to a celebrated lifestyle category is the engine behind one of the most dynamic segments in Indian apparel.

From A Hidden Necessity To A High-Growth Powerhouse

The Indian innerwear market presents a compelling growth narrative, projected to expand by nearly 11% from approximately \$8.52 billion in FY 2024 to \$9.43 billion in FY 2025 (The Knowledge Company estimates). A strategic analysis of the market segments reveals that this growth is not uniform; instead, it is overwhelmingly dictated by the women's innerwear category. The women's segment is not just the largest but the market's primary anchor, valued at \$5.39 billion for FY 2025 and accounting for a commanding 57% of the entire industry. While the men's segment provides a stable

and significant contribution, growing from \$2.38 billion to \$2.62 billion, its scale is less than half that of its female counterpart.

This segmentation underscores a critical strategic imperative for any brand or investor seeking to capitalise on the market's potential: a women-centric portfolio is no longer an option but a prerequisite for achieving scale. Furthermore, the data highlights a noteworthy asymmetry in the kids' category, where the girls' segment (\$1.04 billion) is nearly three times larger than the boys' (\$0.37 billion), suggesting distinct consumer purchasing behaviors and a significant opportunity for focused product innovation and premiumisation. For incumbents and new entrants alike, this data provides a clear



THE INTIMATE REVOLUTION

Why Innerwear in 2025 is All About Mood and Empowerment

With the lines between inner and outerwear continuing to blur, lingerie is confidently stepping into the light, becoming an integral and visible component of the modern woman's wardrobe.

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

The world of women's innerwear is changing dramatically. No longer confined to a purely functional role, lingerie has emerged as a powerful medium for self-expression, personal comfort, and sophisticated style. A/W 26/27 perfectly captures this shift by presenting a story full of contrasts. It is a time that champions both ornate, expressive maximalism and a deep, intuitive need for restorative softness and well-being. With the lines between inner and outerwear continuing to blur, lingerie is confidently stepping into the light, becoming an integral and visible component of the modern woman's wardrobe.

The Rise of Expressive and Visible Innerwear

The A/W 26/27 season signals a definitive embrace of visible innerwear—pieces crafted not just to be worn, but to be seen and celebrated. It's a confident, conscious choice where lingerie acts as a key styling element, telling a story of glamour, empowerment, and historical romance. This trend moves away from fast fashion and microtrends, instead favouring investment in beautifully crafted items that make a strong, personal statement.

There is a growing fascination with ornate, almost theatrical designs that draw inspiration from history





Festive seasons have always symbolised new beginnings, joy, and an irresistible call to celebrate style. At Amazon Fashion and Beauty, this spirit comes alive in the form of 'MAGAZINE: Festive Edit', a lookbook that feels both personal and pioneering.

MAGAZINE: Festive Edit, now in its second edition, captures the season's essence with fresh clarity. Conceived as a guide to celebration and self-expression, it curates fashion, beauty, and lifestyle in ways that feel intimate yet expansive. Each page brings together carefully chosen edits, featured looks that inspire, and interactive elements designed to dissolve the distance between print and digital. With scannable pages, QR codes, and instant shopping pathways, the lookbook does more than showcase trends as it invites customers to participate in them. It is editorial in spirit, immersive in execution, and inclusive in reach.

AMAZON'S NEW APPROACH TO CUSTOMER ENGAGEMENT

Driving Innovation in Festive Fashion with **Romita Bhandary**

The second edition of 'MAGAZINE: Festive Edit' brings the season alive, curating fashion, beauty, and lifestyle with interactive stories, scannable pages, and seamless digital engagement for an immersive festive experience.



From L-R: On: Mimi Indo Women's Sherwani Trouser Set, Khaiki On: Mimi Embellished Co-ord Set, Sadee Clutch, The Sun Glass, On: Mimi Kurta, Vanshraj: Churidar, Vanshraj: On: Mimi Sandhani-Print Kurta, Sadee Ring, Mochi, On: Mimi Printed Kurta Set, Mangrove



Scan to shop

Colour Me Festive



JEWELS

BRIGHT, BOLD, AND UNDENIABLY REGAL: THESE TONES TRANSFORM EVERY LOOK INTO A VISION OF MODERN OPULENCE.



From L-R: Kurta, Bikha, Dosa, Label Bikha Karan

Red Alert

Fiery, fearless, and unapologetic—red blazes through as the season's statement.

Scan to shop

1. Lotus Tiram, Tini-Bibiana 2. Pungit Jutti, Pheeb 3. Cat Eye Sunglasses, Ganes 4. Embroidered Kurta Set, Mangrove 5. Elliot Women's Watch, Couch 6. 925 Sterling Silver Studs, Clara 7. Choker, Rubana 8. Glass Shine Lip Gloss in 02 Berry Glass, Brava 9. Lingerie, Favorite 10. Oppose Quick Dry Mat Padlock - Bright Red Colour, OPI 11. Embroidered Clutch, Sadee 12. Embroidered Suit Set, Mya 13. Sequined Clutch, Artika 14. Striped Pillow Covers, Abel 15. Elnora Vase, Vanshraj 16. Ceramic Dinner Plates Set, ExclusiveLane 17. Cardini Set, Flarey Decor 18. Earrings, Skining Diva Fashion

ARM CANDY

The perfect plus-size to every outfit!

1. Silver Clutch, Mocha 2. Red and Gold Watch, Mangrove 3. Embroidered Clutch, Sadee 4. Red and Gold Watch, Mangrove 5. Red and Gold Watch, Mangrove 6. Red and Gold Watch, Mangrove 7. Red and Gold Watch, Mangrove 8. Red and Gold Watch, Mangrove 9. Red and Gold Watch, Mangrove 10. Red and Gold Watch, Mangrove 11. Red and Gold Watch, Mangrove 12. Red and Gold Watch, Mangrove 13. Red and Gold Watch, Mangrove 14. Red and Gold Watch, Mangrove 15. Red and Gold Watch, Mangrove 16. Red and Gold Watch, Mangrove 17. Red and Gold Watch, Mangrove 18. Red and Gold Watch, Mangrove 19. Red and Gold Watch, Mangrove 20. Red and Gold Watch, Mangrove

It also recognises that today's consumer seeks more than just purchasing fashion—they want to engage with it, interpret it, and make it their own. In doing so, it sets a new benchmark for Indian e-commerce, transforming it from a purely transactional space into a cultural movement, from a shopping marketplace into an enabler of identity.

Adding more to the significance, the lookbook arrives just in time for the Amazon Great Indian Festival 2025, which began on 23rd September and will run through Diwali with exciting offers and deals every day.

For Romita Bhandary, Creative Head of Fashion and Beauty at Amazon India, it is more than a campaign. It is a testament to her belief in the transformative power of fashion when creativity, culture, and technology converge. Romita's career has always been about seeing fashion as storytelling rather than just design. A decade in the United States, designing for powerhouse brands such as Donna Karan, Ann Taylor, Intermix, and Loft, sharpened her understanding of the subtle interplay between customer nuance and cultural context.

Drawing on both global experience and local insights, this vision comes alive through the lookbook, embodying the duality of marrying editorial storytelling with the power of technology.



Accessory Edit

ALL EARS

From everyday hoops to statement earrings

1. Gold and Silver Hoop Earrings, Mangrove 2. Gold and Silver Hoop Earrings, Mangrove 3. Gold and Silver Hoop Earrings, Mangrove 4. Gold and Silver Hoop Earrings, Mangrove 5. Gold and Silver Hoop Earrings, Mangrove 6. Gold and Silver Hoop Earrings, Mangrove 7. Gold and Silver Hoop Earrings, Mangrove 8. Gold and Silver Hoop Earrings, Mangrove 9. Gold and Silver Hoop Earrings, Mangrove 10. Gold and Silver Hoop Earrings, Mangrove 11. Gold and Silver Hoop Earrings, Mangrove 12. Gold and Silver Hoop Earrings, Mangrove 13. Gold and Silver Hoop Earrings, Mangrove 14. Gold and Silver Hoop Earrings, Mangrove 15. Gold and Silver Hoop Earrings, Mangrove 16. Gold and Silver Hoop Earrings, Mangrove 17. Gold and Silver Hoop Earrings, Mangrove 18. Gold and Silver Hoop Earrings, Mangrove 19. Gold and Silver Hoop Earrings, Mangrove 20. Gold and Silver Hoop Earrings, Mangrove



amanté

Bringing Together Comfort, Quality, & Design in India's Premium Intimate Wear Market

CEO, Deepak Jain says amanté is focusing on innovation, sustainability, and global best practices—setting benchmarks for intimate wear and for the larger women's lifestyle segment.

Surabhi Khosla

India's intimate wear market, is projected to grow from ₹66,703 crore in 2024 to ₹1,07,308 crore by 2029 at a compound annual growth rate (CAGR) of 10% between in this 5 year time frame. As the innerwear market is evolving and witnessing a shift towards premiumisation, modern consumers too are evolving, demanding comfort, style, and quality in equal measure.

Within this maturing landscape, a key player has emerged in the premium segment – amanté. amanté is redefining how lingerie and adjacent categories are perceived and consumed in a market which has long been under-served. With a portfolio spanning lingerie, athleisure, sportswear, sleepwear, shapewear, swimwear, and loungewear, the brand is positioning itself to meet the lifestyle aspirations of India's new-age women.

In an exclusive interview with Editor, IMAGES Business of Fashion, Surabhi Khosla, Deepak Jain, CEO, amanté talks about his brand and how backed by its commitment to innovation, sustainability, and global best practices, amanté is setting the stage to become the most aspirational and admired intimate wear brand in the country.



The Indian lingerie market is witnessing a remarkable transformation. Once dominated by price sensitivity and an unorganised structure, it has now evolved into a more premium, experience-driven, and consumer-conscious segment.

According to an IMARC report, the market size touched USD 5.4 billion in 2024 and is projected to reach USD 12.0 billion by 2033, growing at a CAGR of 8.40%. Rising disposable incomes drive this growth, the expanding middle class, and increased awareness of lingerie as both a daily essential and a fashion statement. Celebrity influence and aspirational lifestyles further support this momentum.

Factors such as the rise of e-commerce, growing body positivity, and increased awareness of inclusivity, and sustainability have reshaped buying behavior, with women today prioritising both comfort-led everyday

essentials and occasion wear. At the same time, social media has helped normalise conversations around lingerie, providing fertile ground for premium and aspirational brands to flourish.

In this dynamic landscape, Wacoal has emerged as a trailblazer, combining comfort, style, and inclusivity to meet the evolving needs of the modern Indian woman. With a focus on expertise in fit and human-science-based research, Wacoal India under COO Pooja Merani, is redefining what innerwear means today.

Merani says that every Wacoal product is the result of decades of R&D, with rigorous quality checks ensuring consistency. "Our professional fitting services enhance consumer trust, making lingerie shopping more personalised and empowering. By combining Japanese craftsmanship with an understanding of Indian consumers, we create products suited to diverse body types and lifestyles.

Wacoal Focuses on Human Science Research to Redefine Innerwear COO, Pooja Merani

Wacoal has emerged as a trailblazer, combining comfort, style, and inclusivity to meet the evolving needs of the modern Indian woman.

Surabhi Khosla



From functional to fashionable; India's innerwear drawer has had a major glow-up. Shoppers today don't just buy innerwear; they buy comfort with character. They want trunks that move with them, vests that breathe in summer, and lounge sets that double up as casual wear. Brands are responding with new fabric technologies, inclusive fits, and vibrant styles that celebrate individuality. Innerwear is no longer hidden. Today, it is part of how people express themselves, quietly but confidently.

The Indian consumer has evolved faster than the industry ever expected. No longer content with basic utility, shoppers now seek products that combine design, comfort, performance, and identity. This shift has opened doors for innovation in form of microfiber fabrics, anti-odour

finishes, moisture control, and adaptive fits which are now standard expectations. The conversation has also moved beyond gender and price to lifestyle, inclusivity, and sustainability—signalling a new, more aware era for the category.

Behind this shift lies a deeper change in how Indians view comfort, confidence, and self-expression. The modern consumer—especially in urban and Tier-II cities—has become more aware of fit, fabric, and functionality. Exposure to global brands, the influence of social media, and the rise of lifestyle-driven shopping have all played their part.

Understanding Customer Preferences

Innerwear is now seen as a personal comfort investment, not just a necessity. Consumers are willing to pay more for breathable,

Redefining Essentials

Innovation at the Heart of India's Innerwear Market

India's innerwear market is undergoing a transformative phase, where innovation in fabrics, fit, and technology is driving both style and comfort.

Brands are reimagining everyday essentials, blending performance, sustainability, and design to meet evolving consumer expectations.

Sandeep Kumar



TRIUMPH

Triumph in India has progressed from being primarily a functional and dependable lingerie brand to a contemporary, fashion-forward label that harmonises comfort, precise fit, and modern femininity. Today, the brand's narrative emphasises self-expression and confidence, moving beyond the simple act of 'buying a bra' to curating how women want to feel. Triumph's thoughtfully curated offerings cater to women across all life stages, encompassing everyday bras including T-shirt styles, wired, wire-free, and bralettes as well as activewear, maternity designs, briefs, occasional shapewear, and light-support training bras for younger consumers or beginners.

Each collection begins with a strong focus on fundamentals — fit, fabric, and engineering — before layering in design elements such as colour palettes, lacework, and finishes. While seasonal collections are inspired by global trends, core staples ensure continuity, allowing bestsellers to remain available year-round. This balance of functionality and fashion



U.S. POLO ASSN.

Renowned for its premium casualwear, U.S. Polo Assn. (USPA) has successfully ventured into the innerwear segment, extending its sporty, authentic, and aspirational brand identity to everyday essentials. The innerwear line aims to offer consumers a perfect balance of comfort and style, reinforcing USPA's core values while catering to evolving expectations in the premiumised innerwear market. Contributing to around 10% to brand's India business, the category has grown from a supplementary offering into a key player in men's innerwear, driven by strategic positioning, consumer-focused innovation, and impactful brand communication.

The brand offers a comprehensive range of innerwear and loungewear for men and boys, including trunks, briefs, vests, boxers, pajamas, and socks. It primarily targets

working professionals aged 25 and above who seek premium, well-crafted innerwear that delivers both comfort and quality, positioning the brand as a trusted choice for everyday essentials with a stylish edge.

Standing Out in a Crowded Market

U.S. Polo Assn. positions its innerwear as a daily essential, combining premium fabrics with elevated comfort while staying true to the brand's sporty and authentic DNA. Each product undergoes rigorous research and testing to ensure it meets high standards of quality and wearability. Recognising that today's consumers seek more than just functionality, the brand has upgraded fabrics, implemented 20-wash durability tests, and introduced super-soft, no-marks nylon waistbands for all-day comfort. "Our team ensures every innovation goes through an extensive testing phase. We conduct comprehensive

fit trials across all body types, collecting feedback on fit, comfort, performance, and how the product looks before and after washing. This continuous feedback loop helps us refine our designs and deliver the best possible product to our customers," said Preeti Kaushik, Vice President, U.S. Polo Assn.

Decoding The New Consumer Pulse

Men's innerwear preferences in India are deeply influenced by regional climate, culture, body types, and lifestyle habits. In hot and humid conditions, breathable, lightweight, and moisture-wicking fabrics such as cotton blends and microfiber are highly favored, while seamless or minimal-seam designs help prevent chafing. Consumers tend to prefer modest cuts with relaxed fits aligned with traditional clothing styles. Classic shades like white, black, and navy continue



THE 2025 WAVE

20 International Brands Betting Big on India

A roundup of 20 prominent global brands that entered India in 2025, redefining the country's fashion, lifestyle, and luxury landscape.

Kajal Ahuja

India's retail sector in 2025 witnessed an unprecedented wave of global brand entries, reaffirming the nation's status as one of the most attractive markets for international expansion. Luxury maisons, premium fashion houses, fast-fashion leaders, sportswear giants, and beauty innovators all set up shop physically and online, signaling a shift in India's positioning from an emerging to an essential global consumer destination.

The Global Brand Entry Timeline: From Cautious to Unprecedented

A decade ago, international launches were limited—mostly luxury flagships in premium Delhi or Mumbai malls, and just 12 new major entrants per year, according to Cushman & Wakefield. In 2025, however, global names rushed in from every category: athleisure, beauty-tech, children's wear, and high street—all at once. This level of diversity and pace eclipses previous years when luxury dominated, shaking up competition and consumer options.

Why Global Brands are Betting Big on India

International players are flocking to India because of a rare combination of factors:

1. Rapid economic growth with India clocking historic FDI inflows of \$81 billion in FY24-25.
2. The nation's consumer base is young, urban, and upwardly mobile—over half the population is under 30 and per capita income growth is fueling aspirational retail. A young, urban, and expanding middle class demands global fashion, beauty, and lifestyle experiences.
3. Digital infrastructure and e-commerce boom, enabling pan-India scaling beyond metros. The post-pandemic e-commerce boom has allowed brands to scale pan-India efficiently, launching in tier-1 metros first before expanding online into Tier-2 and Tier-3 cities where younger shoppers adopt global trends via social media and online platforms.