



Euromonitor
International

Apparel and Footwear in India

April 2025

Table of Contents

EXECUTIVE SUMMARY

Apparel and footwear in 2024: The big picture
2024 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

- Table 1 - Sales of Apparel and Footwear by Category: Volume 2019-2024
- Table 2 - Sales of Apparel and Footwear by Category: Value 2019-2024
- Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2020-2024
- Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2021-2024
- Table 7 - Distribution of Apparel and Footwear by Format: % Value 2019-2024
- Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2024-2029
- Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Childrenswear holds steady with high single-digit growth in a sluggish year for apparel
“Mini-Me” dressing becomes mainstream in festive fashion
Practical sustainability drives childrenswear choices

PROSPECTS AND OPPORTUNITIES

Childrenswear set to claim a larger share of parental wallets amidst rising affluence
Offline expansion to accelerate as D2C childrenswear brands embrace omnichannel growth
Children to emerge as independent influencers of fashion preferences in the forecast period

CATEGORY DATA

- Table 13 - Sales of Childrenswear by Category: Volume 2019-2024
- Table 14 - Sales of Childrenswear by Category: Value 2019-2024
- Table 15 - Sales of Childrenswear by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Childrenswear by Category: % Value Growth 2019-2024
- Table 17 - NBO Company Shares of Childrenswear: % Value 2020-2024
- Table 18 - LBN Brand Shares of Childrenswear: % Value 2021-2024
- Table 19 - Forecast Sales of Childrenswear by Category: Volume 2024-2029
- Table 20 - Forecast Sales of Childrenswear by Category: Value 2024-2029
- Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029
- Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

Apparel Accessories in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Post-pandemic normalisation prevents value growth in 2024
Hats/caps gains steady traction, as everyday utility and sun protection drive uptake
Consumers are highly price-sensitive for most apparel accessories

PROSPECTS AND OPPORTUNITIES

Largely unorganised, gloves and scarves to maintain low engagement
Apparel accessories will remain a functional add-on, not an area of focus in the Indian market
Travel and sports set to drive growth for hats/caps

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2019-2024
Table 24 - Sales of Apparel Accessories by Category: Value 2019-2024
Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2019-2024
Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2019-2024
Table 27 - NBO Company Shares of Apparel Accessories: % Value 2020-2024
Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2021-2024
Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2024-2029
Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2024-2029
Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029
Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

Menswear in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Menswear records single-digit growth in 2024, with a focus on utility and value
Aditya Birla Fashion & Retail demerger signals sharper brand focus and portfolio agility in menswear
Middle-market brands face pressure from both the high and low ends

PROSPECTS AND OPPORTUNITIES

Menswear set to grow at a solid single-digit CAGR, backed by demand for a versatile wardrobe
Tier-2 and tier-3 cities likely to drive the next wave of menswear premiumisation
Made-to-order clothing expected to gain prominence in menswear

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2019-2024
Table 34 - Sales of Menswear by Category: Value 2019-2024
Table 35 - Sales of Menswear by Category: % Volume Growth 2019-2024
Table 36 - Sales of Menswear by Category: % Value Growth 2019-2024
Table 37 - NBO Company Shares of Menswear: % Value 2020-2024
Table 38 - LBN Brand Shares of Menswear: % Value 2021-2024
Table 39 - NBO Company Shares of Men's Nightwear: % Value 2020-2024
Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2021-2024
Table 41 - NBO Company Shares of Men's Outerwear: % Value 2020-2024
Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2021-2024
Table 43 - NBO Company Shares of Men's Swimwear: % Value 2020-2024
Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2021-2024
Table 45 - NBO Company Shares of Men's Underwear: % Value 2020-2024

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2021-2024

Table 47 - Forecast Sales of Menswear by Category: Volume 2024-2029

Table 48 - Forecast Sales of Menswear by Category: Value 2024-2029

Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2024-2029

Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2024-2029

Womenswear in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Festive and wedding season lifts sales of womenswear in 2024
- Womenswear sees a clear divergence between value-driven shoppers and premium seekers
- Offline womenswear retail faces pressure, prompting store consolidation and a digital focus

PROSPECTS AND OPPORTUNITIES

- Fast fashion set to accelerate in India as Gen Z-centric brands gain momentum
- Private label womenswear poised for a stronger role, led by a value positioning
- Womenswear brands expected to expand further into home categories as lifestyle positioning takes priority

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2019-2024

Table 52 - Sales of Womenswear by Category: Value 2019-2024

Table 53 - Sales of Womenswear by Category: % Volume Growth 2019-2024

Table 54 - Sales of Womenswear by Category: % Value Growth 2019-2024

Table 55 - NBO Company Shares of Womenswear: % Value 2020-2024

Table 56 - LBN Brand Shares of Womenswear: % Value 2021-2024

Table 57 - NBO Company Shares of Women's Nightwear: % Value 2020-2024

Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2021-2024

Table 59 - NBO Company Shares of Women's Outerwear: % Value 2020-2024

Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2021-2024

Table 61 - NBO Company Shares of Women's Swimwear: % Value 2020-2024

Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2021-2024

Table 63 - NBO Company Shares of Women's Underwear: % Value 2020-2024

Table 64 - LBN Brand Shares of Women's Underwear: % Value 2021-2024

Table 65 - Forecast Sales of Womenswear by Category: Volume 2024-2029

Table 66 - Forecast Sales of Womenswear by Category: Value 2024-2029

Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029

Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

Jeans in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Jeans in India sees double-digit value growth in 2024, amidst shifting consumer preferences
- Levis maintains its position as the top-selling jeans brand in India in 2024
- Gen Z-focused D2C brands expand their presence in jeans

PROSPECTS AND OPPORTUNITIES

- Relaxed-fit denim expected to gain prominence as comfort becomes a key driver
- Sustainability to remain niche for consumers, but a strategic imperative for denim brands in India
- E-commerce and brand partnerships to shape denim distribution in the forecast period

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2019-2024

Table 70 - Sales of Jeans by Category: Value 2019-2024

Table 71 - Sales of Jeans by Category: % Volume Growth 2019-2024

Table 72 - Sales of Jeans by Category: % Value Growth 2019-2024

Table 73 - Sales of Men's Jeans by Category: Volume 2019-2024

Table 74 - Sales of Men's Jeans by Category: Value 2019-2024

Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2019-2024

Table 76 - Sales of Men's Jeans by Category: % Value Growth 2019-2024

Table 77 - Sales of Women's Jeans by Category: Volume 2019-2024

Table 78 - Sales of Women's Jeans by Category: Value 2019-2024

Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2019-2024

Table 80 - Sales of Women's Jeans by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Jeans: % Value 2020-2024

Table 82 - LBN Brand Shares of Jeans: % Value 2021-2024

Table 83 - Forecast Sales of Jeans by Category: Volume 2024-2029

Table 84 - Forecast Sales of Jeans by Category: Value 2024-2029

Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2024-2029

Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2024-2029

Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2024-2029

Table 88 - Forecast Sales of Men's Jeans by Category: Value 2024-2029

Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029

Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029

Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2024-2029

Table 92 - Forecast Sales of Women's Jeans by Category: Value 2024-2029

Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029

Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

Hosiery in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hosiery grows in the high single digits in 2024, driven by non-sheer hosiery, along with the rise of athleisure in India

Sheer hosiery also maintains its growth trend

Unlike apparel accessories, hosiery is a focus category for new D2C brands, driving freshness and innovation

PROSPECTS AND OPPORTUNITIES

Demand for non-sheer hosiery to remain strong, driven by hygiene, coverage, and everyday wear needs

Hosiery to evolve as a style statement, with brands targeting Gen Z through character-led and trend-driven designs

Segmented hosiery with specific functions

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2019-2024

Table 96 - Sales of Hosiery by Category: Value 2019-2024

Table 97 - Sales of Hosiery by Category: % Volume Growth 2019-2024

Table 98 - Sales of Hosiery by Category: % Value Growth 2019-2024

Table 99 - NBO Company Shares of Hosiery: % Value 2020-2024

Table 100 - LBN Brand Shares of Hosiery: % Value 2021-2024

Table 101 - Forecast Sales of Hosiery by Category: Volume 2024-2029

Table 102 - Forecast Sales of Hosiery by Category: Value 2024-2029

Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

Footwear in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Footwear in India records high single-digit growth amidst shifting spending dynamics
BIS norms strengthen organised footwear in 2024
Bata maintains leadership in footwear in India through wide reach and brand consolidation

PROSPECTS AND OPPORTUNITIES

Premiumisation in footwear to revolve around personalisation and immersive experiences
Foot Locker's entry into India set to influence the sneaker culture and footwear
Quick commerce platforms to open new avenues for footwear brands in India

CATEGORY DATA

- Table 105 - Sales of Footwear by Category: Volume 2019-2024
- Table 106 - Sales of Footwear by Category: Value 2019-2024
- Table 107 - Sales of Footwear by Category: % Volume Growth 2019-2024
- Table 108 - Sales of Footwear by Category: % Value Growth 2019-2024
- Table 109 - NBO Company Shares of Footwear: % Value 2020-2024
- Table 110 - LBN Brand Shares of Footwear: % Value 2021-2024
- Table 111 - Distribution of Footwear by Format: % Value 2019-2024
- Table 112 - Forecast Sales of Footwear by Category: Volume 2024-2029
- Table 113 - Forecast Sales of Footwear by Category: Value 2024-2029
- Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2024-2029
- Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2024-2029

Sportswear in India

KEY DATA FINDINGS

2024 DEVELOPMENTS

Evolving fitness habits drive the adoption of everyday sportswear
Competitive landscape intensifies, with global brands dominating, but local brands gaining ground
Sportswear brands align with younger consumers' lifestyles and values to build stronger connections

PROSPECTS AND OPPORTUNITIES

Daily movement and micro-fitness routines to power demand for sportswear across India
Local manufacturing to drive growth and global expansion in sportswear
Evolving retail channels to expand the reach of sportswear in the forecast period

CATEGORY DATA

- Table 116 - Sales of Sportswear by Category: Value 2019-2024
- Table 117 - Sales of Sportswear by Category: % Value Growth 2019-2024
- Table 118 - NBO Company Shares of Sportswear: % Value 2020-2024
- Table 119 - LBN Brand Shares of Sportswear: % Value 2021-2024
- Table 120 - Distribution of Sportswear by Format: % Value 2019-2024
- Table 121 - Forecast Sales of Sportswear by Category: Value 2024-2029
- Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/apparel-and-footwear-in-india/report.