

The Indian Innerwear Market Outlook to 2015 - Growth Opportunity for International Brands

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Abstracts

Executive summary

The report titled “The Indian Innerwear Market Outlook to 2015 – Growth Opportunity for International Brand” provides a comprehensive analysis of market size of men’s and women’s innerwear on the basis of value and volume, market segmentation by organized, unorganized, low, economy, medium, premium, super premium and average selling price. The report also provides competitive landscape and profile of major players operating in the innerwear industry.

Indian innerwear market is a fragmented market with top 10 players contributing around ~% of the total Indian innerwear industry. The market has experienced a growth of ~%, with total revenue of INR ~ million in 2011. Over the coming years, the sales of the innerwear are projected to rise at a CAGR of 18.61% to INR ~ million by 2016 with an increase in number of shopping malls, MBO and other retail outlets which offers a better buying space to the consumers.

The Indian innerwear market had shown a continuous increase in value over the period 2006-2011 at a CAGR of 14.61%. The share of men and women in terms of value has grown at a CAGR of 12.67% and 15.62% respectively which underscored that the women’s innerwear market had outgrown the men’s innerwear market in terms of value. The increase in women’s innerwear market in comparison to men’s innerwear is largely due to the rise in the population of working women in the country. The surging working women population has led to increase in their personal disposable income which encouraged them to have a faster shift in their lifestyle.

The menswear segment has witnessed a decrease in contribution from ~% in 2006 to

~% in 2011, whereas the value has showcased an increase from INR ~ million in 2006 to INR ~ million in 2011. The growth in the revenue has been influenced by an incline in the price of the menswear with an increase in the cost of raw material such as fabrics, lace, elastic and others in the Indian market.

The men's innerwear segment in value is being dominated by the premium segment with the share of ~% in 2011. The contribution of super premium and premium segment have inclined from ~% and ~% respectively in 2006 to ~% and ~% respectively in 2011. The growth in the premium and super premium segment has been influenced by an increase in the consumer spending with the surge in the employment rate, rise in the awareness about the brand through advertisement which are shown during the peak hours on TV and radio.

In 2011, the women's innerwear market by volume terms was dominated by the economy segment while in terms of value sales, the medium segment commanded this industry. This is due to low price of economy products in comparison to medium segment products. The economy segment holds approximately ~% share in total woman's innerwear industry in 2011. The industry has witnessed an incline in the contribution of medium segment products from ~% in 2006 to ~% in 2011. The growth in the segment is influenced by the changing preference of women which have shifted from economy to medium segment and from low to economy segment. This is due to rise in consumer spending supported with a surge in the employment rate among women inspiring them to change their preference.

Rupa is the leading player with sales of INR ~ million in 2011. The company has enhanced their distribution network with more than ~ retail stores operating throughout the country. Page industries which operates in the market with the product name Jockey, has a market share of ~% with annual sales of INR ~ million in 2011. The company with a strong focus on building brand image in the market has invested ~% of the revenue on advertisement in 2011.

The market of the Indian innerwear is expected to grow at a CAGR of 18.61% from 2011 to 2016. The market in the near future is expected to witness consolidation and higher competition level with the entrance of organized players in the rural market.

Key topics covered in the report

The market size of the men's and women's innerwear industry by value and volume, 2006-2011

Market segmentation of menswear and womenswear on the basis of organized, unorganized, low, economy, medium, premium, super premium and average selling price, 2006-2011

Trends and developments in the innerwear industry

SWOT analysis in the innerwear industry

Market share of the top players in the innerwear industry, 2011

Future outlook and projections on the basis of value and volume, FY'2012-FY'2015

Macro-economic and industry factors including male and female population, working women population, personal disposable income and consumer expenditure on clothing, 2006-2015

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