

Sports Underwear Market Outlook 2026-2034: Market Share, and Growth Analysis By Product (Sports Bras, Boxer Briefs, Trunks, Briefs, Thongs, Base Layers), By Material (Synthetic (Nylon, Polyester, Spandex), Natural (Cotton, Bamboo), Blends), By Gender, By Application, By Distribution Channel

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Abstracts

The Sports Underwear Market is valued at USD 3.91 Billion in 2025 and is projected to grow at a CAGR of 6.9% to reach USD 7.13 Billion by 2034.

Sports Underwear Market

The Sports Underwear Market spans performance bras, briefs, trunks/boxers, compression shorts/tights, base layers, and seamless multipurpose styles engineered for moisture management, support, and comfort across training, running, court/field sports, cycling, studio, outdoor, and athleisure. Designs combine technical knits (nylon, polyester, polypropylene) with elastane, zoned mesh, and filament yarns to accelerate wicking and dry times while minimizing chafe. Key trends include seamless 3D knitting, bonded finishes, laser-cut ventilation, antimicrobial/odor-control treatments, recycled and bio-based fibers, and size-inclusive, gender-inclusive fits. Sports bras lead innovation with impact-tiered support (low/medium/high), encapsulation/compression hybrids, adjustable hardware, and bounce metrics from lab testing; for men, ergonomic pouches, no-roll waistbands, and stay-put leg designs anchor comfort during high-mobility sessions. Drivers include growth in female participation, home/connected fitness, run clubs and boutique studios, outdoor lifestyles, and the blending of performance underwear into daily wear. The competitive landscape mixes global athletic majors, outdoor specialists, DTC upstarts, intimates brands extending into

performance, and private labels; differentiation rests on fabric science, pattern engineering, validation from biomechanics labs, and durable hand-feel after repeated wash cycles. Retail shifts toward e-commerce, subscription replenishment, and fit-finder tools, with in-store bra fitting and try-on policies shaping conversion. Challenges include sizing complexity, return costs, durability of finishes, odor-treatment stewardship, and sustainability expectations (recycled content, microfibre management). Overall, sports underwear is transitioning from basic “base layers” to science-backed essentials where fit, support, and thermoregulation drive measurable performance and all-day wear appeal.

Sports Underwear Market Key Insights

Fit science is decisive: Pattern blocks with multi-density zones, encapsulation for high-impact bras, and supportive pouches reduce bounce and friction; motion-capture and treadmill lab tests validate claims and reduce returns.

Seamless & bonded construction: 3D circular knitting and bonded seams deliver second-skin comfort and fewer abrasion points; laser-cut hems and bonded straps maintain stability without bulky elastics.

Moisture/thermo mastery: Hydrophilic–hydrophobic yarn mapping, micro-mesh ventilation, and quick-dry finishes keep microclimate stable across HIIT and endurance sessions, improving perceived exertion and adherence.

Odor control with care: Zinc/silver-free and bio-based antimicrobial approaches emerge alongside durable wash-resistant chemistries; transparent stewardship avoids greenwashing and skin-sensitivity concerns.

Support tiering expands access: Clear low/medium/high-impact labeling, adjustable bands/straps, and inclusive cup/band ranges unlock confident participation and reduce injury risk.

Sustainability signals: Recycled nylons/polyesters, solution-dyed yarns, dope-dyed elastics, and mono-material designs enable lower footprint and easier end-of-life pathways.

Men’s comfort renaissance: Ergonomic pouches, stay-put legs, and no-chafe gussets win loyalty for running and strength training; lightweight compression supports recovery and proprioception without restriction.

Athleisure crossover: Clean aesthetics, soft hand-feel, and invisible lines grow everyday usage; multi-pack subscriptions balance premium hero SKUs with value replenishment.

Digital fit & personalization: Size quizzes, return analytics, and 3D avatars cut guesswork; modular strap/pad systems and interchangeable bands personalize fit and extend product life.

Retail and community: Run clubs, studio partnerships, and athlete creators provide honest reviews and fit tips; in-store bra fittings and flexible exchange policies convert first-time buyers.

Sports Underwear Market Regional Analysis

North America

High penetration of boutique fitness, run communities, and outdoor activities sustains demand for high-impact bras and anti-chafe men's designs. Consumers expect size inclusivity, adjustable hardware, and durable odor control. E-commerce and subscription bundles drive replenishment, while specialty retailers win with expert bra fitting, bounce demos, and flexible returns. Sustainability cues - recycled fibers, traceable supply - aid premium trade-up.

Europe

Performance credibility and sustainability weigh equally: recycled content, dope-dyed yarns, and responsible odor treatments influence listings. Running, cycling, and hiking dominate use cases; cold-to-warm layering favors lightweight, fast-dry base layers. Retailers emphasize standardized impact labeling and independent lab verification. Fit variety for fuller-bust and petite frames, plus minimal seams for long-distance comfort, are key purchase drivers.

Asia-Pacific

Urban fitness growth and heat/humidity conditions prioritize quick-dry, breathable knits with lightweight support. Japan/Korea favor refined seamless aesthetics; Australia/New Zealand lean into outdoor endurance; China scales via social commerce and KOL try-

ons. Size ranges expand as women's participation broadens; compact packs and wash-durable finishes suit frequent-laundry households. Localized colorways and seasonal capsules accelerate adoption.

Middle East & Africa

Climate extremes favor cooling, breathable fabrics with modest coverage options and secure, bounce-limiting designs. Premium malls and boutique gyms lead discovery, with emphasis on durable odor control and easy-care construction. Multilingual size guidance and inclusive styling broaden reach. Outdoor running and team sports programs in GCC cities drive men's anti-chafe and women's high-impact solutions.

South & Central America

Growing running and studio scenes in major metros boost demand for supportive bras and anti-slip, quick-dry men's trunks. Consumers balance value with performance; multipacks and mid-tier price points perform well. Bright colorways and limited drops resonate culturally. Retailers highlight fit guidance and exchange-friendly policies to mitigate return friction in online channels.

Sports Underwear Market Segmentation

By Product

Sports Bras

Boxer Briefs

Trunks

Briefs

Thongs

Base Layers

By Material

Synthetic (Nylon

Polyester

Spandex)

Natural (Cotton

Bamboo)

Blends

By Gender

Men

Women

By Application

Running

Gym & Training

Yoga

Outdoor Sports

Cycling

Casual Wear

By Distribution Channel

Online Retail

Sporting Goods Stores

Supermarkets & Hypermarkets

Exclusive Brand Outlets

Key Market players

Nike, Adidas, Under Armour, Puma, Lululemon Athletica, ASICS, New Balance, Hanesbrands (Champion), Jockey International, Calvin Klein (PVH Corp.), SAXX Underwear, 2XU, Odlo, Craft Sportswear, Björn Borg AB

Sports Underwear Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Sports Underwear Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Sports Underwear market data and outlook to 2034

United States

Canada

Mexico

Europe — Sports Underwear market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Sports Underwear market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Sports Underwear market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Sports Underwear market data and outlook to 2034

Brazil

Argentina

Chile

Peru

* We can include data and analysis of additional countries on demand.

Research Methodology

This study combines primary inputs from industry experts across the Sports Underwear value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Sports Underwear industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Sports Underwear Market Report

Global Sports Underwear market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Sports Underwear trade, costs, and supply chains

Sports Underwear market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Sports Underwear market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Sports Underwear market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Sports Underwear supply chain analysis

Sports Underwear trade analysis, Sports Underwear market price analysis, and Sports Underwear supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Sports Underwear market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

* The updated report will be delivered within 3 working days

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