

Men's Underwear Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Briefs, Boxer Brief, Trunks, Boxers), By Material Type (Nylon, Cotton, Polyester, Others), By Sales Channel (Supermarkets/Hypermarkets, Specialty Stores, Multi Branded Stores, Others (Distributors, etc.) By Region & Competition, 2021-2031F

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Abstracts

The Global Men's Underwear Market is projected to expand from USD 41.91 Billion in 2025 to USD 66.36 Billion by 2031, achieving a CAGR of 7.96%. This sector comprises various intimate apparel types, such as boxers, trunks, and briefs, engineered to ensure personal hygiene and physical support. Growth is largely driven by rising consumer attention to health standards and a marked preference for garments that offer superior breathability and comfort. This demand for high-quality materials significantly influences manufacturing strategies; indeed, Cotton Incorporated reported in 2025 that 75 percent of global consumers favor cotton and cotton-blend clothing, underscoring the vital role of natural fibers in daily essentials.

Nevertheless, the industry contends with significant hurdles related to supply chain reliability and fluctuating raw material costs. Instability in the prices of key inputs, including high-grade natural fibers and specialized synthetics, adds complexity to production planning and forces retail prices upward. This inflationary pressure poses a risk to volume growth, particularly within price-sensitive market segments where increased costs can deter consumer purchasing.

Market Driver

The proliferation of direct-to-consumer models and e-commerce is fundamentally transforming profitability and access within the global men's underwear industry. Brands are increasingly utilizing digital channels to remove intermediaries, thereby improving profit margins and securing direct customer feedback regarding style and fit. This online pivot is especially advantageous for new market entrants targeting niche needs, such as pouch support and anti-chafing features, allowing them to compete effectively against established players. As evidenced by Step One Clothing Limited's 'Annual Report 2024' in August 2024, the company saw a 29.7 percent revenue surge to AUD 84.5 million, a growth attributed largely to its digital customer acquisition strategies in the United Kingdom and United States.

Furthermore, innovations in moisture-wicking materials and fabric technology serve as major drivers for premiumization and product differentiation. Contemporary consumers now expect functional attributes traditionally associated with sportswear, such as rapid drying and temperature regulation, in their everyday wear. To address this, manufacturers are adopting performance fibers like lyocell, modal, and synthetic blends to enhance hygiene and comfort. Lululemon Athletica Inc. noted in its March 2024 '2023 Annual Report' a 15 percent rise in net revenue for men's products, signaling strong demand for performance apparel. Meanwhile, HanesBrands Inc. reported USD 2.35 billion in net sales for its U.S. Innerwear segment in 2024, demonstrating the immense scale required for traditional giants to remain competitive in this shifting environment.

Market Challenge

Supply chain inconsistency and fluctuating raw material prices constitute a major obstacle to the stability of the global men's underwear sector. The volatility involved in sourcing primary inputs, such as specialized synthetics and premium cotton, fosters an unpredictable manufacturing landscape that hampers production scheduling and inventory management. Consequently, manufacturers must frequently revise pricing structures to safeguard margins against abrupt cost increases, a practice that undermines the continuity essential for maintaining steady supply levels and long-term retail relationships.

This financial unpredictability directly hinders market growth by necessitating higher retail prices, which falls heaviest on price-sensitive demographics. As the expense of these essential items grows, consumers frequently postpone replenishment, leading to stalled volume growth within the mass market. According to the United States Fashion

Industry Association in 2025, more than 70 percent of surveyed executives indicated that rising trade costs and supply chain pressures increased sourcing expenses, resulting in inevitable price hikes. Ultimately, this persistent cost inflation restricts the industry's capacity to stimulate sales volume through competitive pricing.

Market Trends

The mainstream adoption of compression garments and men's shapewear marks a significant market evolution, moving these items from niche medical aids to essential daily wear for aesthetic improvement. Driven by evolving cultural standards regarding male body image and a desire for instant physique enhancement, this trend has prompted retailers to stock high-compression trunks and undershirts that provide slimming effects and posture support. Highlighting this shift, The Guardian reported in December 2025 regarding the article 'I feel shrink-wrapped: the reluctant rise of shapewear for men' that online searches for male shapewear jumped by 40 percent between 2024 and 2025, proving the rapid acceleration of consumer interest in this emerging category.

Simultaneously, the market is experiencing a technical overhaul with the move toward 3D-knitted and seamless construction, which removes traditional stitching to improve durability and reduce skin irritation. This innovation enables the creation of ergonomically contoured underwear featuring woven-in variable compression zones, while also significantly cutting production waste compared to standard cut-and-sew techniques. These operational efficiencies and premium product qualities are boosting financial results for major producers; for instance, Delta Galil Industries Ltd. reported in February 2025, within its 'Fourth Quarter and Full Year 2024 Results', a record annual gross margin of 41.9 percent, driven by a portfolio that includes advanced seamless apparel and men's underwear.

Key Market Players

Hanesbrands Inc.

Naked Brand Group Inc.

Jockey

Levi Strauss & Co.

Perry Ellis International Inc.

Iconix Brand Group Inc.

Penney IP LLC

Under Armour, Inc.

Fibre2Fashion Pvt. Ltd.

PVH Corp

Report Scope

In this report, the Global Men's Underwear Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Men's Underwear Market, By Product Type

Briefs

Boxer Brief

Trunks

Boxers

Men's Underwear Market, By Material Type

Nylon

Cotton

Polyester

Others

Men's Underwear Market, By Sales Channel

Supermarkets/Hypermarkets

Specialty Stores

Multi Branded Stores

Others (Distributors

etc.)

Men's Underwear Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Men's Underwear Market.

Available Customizations:

Global Men's Underwear Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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