

# **North America Thermal Underwear Market, By Product Type (Tops, Bottom, Sets), By Material Type (Cotton, Synthetic, Wool, Others), By End User (Men, Women), By Distribution Channel (Supermarket & Hypermarket, Specialty Stores, Online, Others), By Country, Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

The North America Thermal Underwear Market was valued at USD 2.54 billion in 2024 and is projected to reach USD 3.67 billion by 2030, growing at a CAGR of 4.02% during the forecast period. Growth is fueled by a rising interest in outdoor recreational activities, particularly in colder regions. The popularity of sports like hiking, skiing, and camping during winter has elevated the demand for thermal wear that combines comfort with thermal insulation. As of 2023, over 61 million Americans participated in hiking, highlighting the significant consumer base for performance-driven winter apparel. The region's cold climate, especially in northern U.S. states and Canada, reinforces the demand for high-quality thermal underwear. Advances in materials, such as moisture-wicking and heat-retention technologies, have enhanced product appeal. Furthermore, increasing health awareness and layering trends for warmth, coupled with growing consumer interest in functional yet fashionable winter wear, are expanding the market's reach.

### **Key Market Drivers**

#### **Rising Outdoor Activities During Winter**

One of the primary factors driving market growth is the surge in outdoor recreational activities during the winter season. As per the Bureau of Economic Analysis,

conventional outdoor recreation accounted for 31.4% of outdoor recreation value-added in the U.S. in 2023. With more consumers engaging in skiing, snowboarding, and winter hiking, there is heightened demand for thermal underwear that delivers insulation without compromising comfort or mobility. Thermal wear has become a core component of cold-weather gear for outdoor enthusiasts seeking to maintain core body temperature during physical exertion in low temperatures. This rising outdoor lifestyle has underscored the importance of performance-oriented, functional thermal clothing in the winter apparel category.

## Key Market Challenges

### Fluctuating Prices of Raw Material

Volatility in raw material costs presents a key challenge for manufacturers in the North American thermal underwear market. Essential components like wool, synthetics, and specialty insulating fabrics are susceptible to price changes influenced by supply chain constraints, geopolitical instability, and climate-related disruptions. These fluctuations elevate production costs, forcing brands to either absorb the impact or pass it on to consumers—both of which affect market dynamics. Moreover, the uncertainty complicates long-term budgeting and inventory strategies, particularly for smaller companies with limited pricing flexibility. This cost instability can also impede innovation and new product development, reducing competitiveness against larger, more resource-rich firms.

## Key Market Trends

### Rising Demand for Sustainable & Eco-Friendly Material

Sustainability is emerging as a significant trend in the North American thermal underwear market. Consumers are increasingly favoring products made from eco-conscious materials such as recycled fibers, organic cotton, and biodegradable fabrics. In response, brands are incorporating green production practices and launching sustainable product lines that combine performance with environmental responsibility. Technological innovations in eco-friendly fabrics have further enhanced product capabilities, offering insulation, breathability, and comfort while minimizing ecological impact. This shift aligns with the broader sustainability movement across the apparel sector, positioning environmentally responsible brands to attract a growing segment of conscientious consumers looking for both functionality and ethical value in their purchases.

## Key Market Players

Adidas America, Inc.

Puma North America, Inc

Hot Chillys

Thermajohn

Heat Holders

Columbia Sportswear Company

Perfect Moment Ltd

Decathlon

Hanesbrands Inc

Marks and Spencer Reliance India Private Limited

## Report Scope:

In this report, the North America Thermal Underwear Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Thermal Underwear Market, By Product Type:

Tops

Bottom

Sets

North America Thermal Underwear Market, By Material Type:

Cotton

Synthetic

Wool

Others

North America Thermal Underwear Market, By End User:

Men

Women

North America Thermal Underwear Market, By Distribution Channel:

Supermarket & Hypermarket

Specialty Stores

Online

Others

North America Thermal Underwear Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Thermal Underwear Market.

### Available Customizations:

North America Thermal 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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