

Indian Lingerie Industry: Trends and Opportunities



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India holds immense growth potential for the lingerie industry, which is evident from the entry of large international brands in the Indian market in the last few years. A key factor characterizing the blooming Indian lingerie market is the increasing size of the organized market and the declining share of the unorganized market resulting in growing independent brands taking charge of the market. In addition, growing income levels of Indians and their changing lifestyles has rechristened lingerie from just an undergarment to a fashion clothing item, at least in the urban centers.

Times have changed for the better for the Indian women like never before in terms of fashion style and statement coupled with growing wealth that is helping the growth of the organized lingerie industry. From being a market worth Rs. 780 crore (US\$175.9 million) in 2003, the organized lingerie market has almost doubled to Rs. 1645 crore (US\$370.3 million) bustling business in the last five years.

Trade analysts and the industry insiders believe that this is because the whole scale of the Indian market has improved beyond recognition during the last five years following the advent of multinational brands in the market place and the growth of organized retail. This, perhaps, is the reason why the premium and super-premium segment of the lingerie industry, with brassieres priced above Rs. 200 (US\$5) and mostly characterized by the presence of international brands, are witnessing higher growth compared to mid-market and low/economy segments.

In view of the current situation, the premium and super-premium segments of the industry are advancing following a consumer shift from economy and mid-market segments to the premium segment, while the low and economy segment is gaining from the industry being more organized.

Characterizing the premium segment are either international brands or joint venture of Indian manufacturers with international companies. Lovable, Enamor and Triumph have successfully established themselves as premium lingerie brands and brands that are in expansion mode include Etam, Benetton, La Perla and About U.

The mid-market segment is characterized by the presence of national players like Maxwell Industries (with Daisy Dee brand), BodyCare, Groversons, Red Rose, Juliet, Jockey, and Libertina.

Factors like growth in income level, preference for recognizable brands and rapid growth of organized retail is anticipated to increase the current share of the organized lingerie market of 28% in the next three years.

The study titled "Indian Lingerie Industry: Trends and Opportunities" analyzes the overall Indian lingerie market in the context of growth and developments in the niche segment of the apparel industry. The apparel and textile industry has also been examined in the first section of the report.

This study is an attempt to explore the lingerie industry through primary and secondary research and to bring out the market potential and major industry trends. As classified on the basis of price, the three broad segments of the Indian lingerie industry – low and economy, mid-market and premium and super-premium - have been analyzed in-depth to understand the growth pattern and functioning of the leading players in the

respective segments. Further, supply chain of the Indian lingerie industry has been assessed and major sales channels for lingerie evaluated.

The positioning of the leading players in different segments has been analyzed in terms of brands, collaboration and distribution.

The survey on consumer and retailers helped in developing an understanding of the market from both the business and consumer perspective.

Research Methodology

Koncept Analytics commissioned exclusive consumer research for this report, which was conducted by Market Insight Consultants in the months of June – August 2008 to understand the business and consumer side of the lingerie industry. This study was conducted in the four metropolitan cities – Delhi (National Capital Region), Mumbai, Kolkata, and Chennai.

From the consumer perspective, the survey was administered to a random sample of 1600 women, 400 each from the four metropolitan cities, who had purchased brassieres and briefs for themselves in the past 12 months.

From the business perspective, the study interviewed 80 retailers, 20 from each metropolitan city to understand the performance and functioning of leading lingerie brands. Further, chief executives and prominent people from leading lingerie manufacturing companies were also interviewed to gain an insight on the major developments in the industry.

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