

India Sleepwear Market Overview, 2029

Base Year: 2023 | Published: April-2024

sales@bonafideresearch.com | +91 7878231309

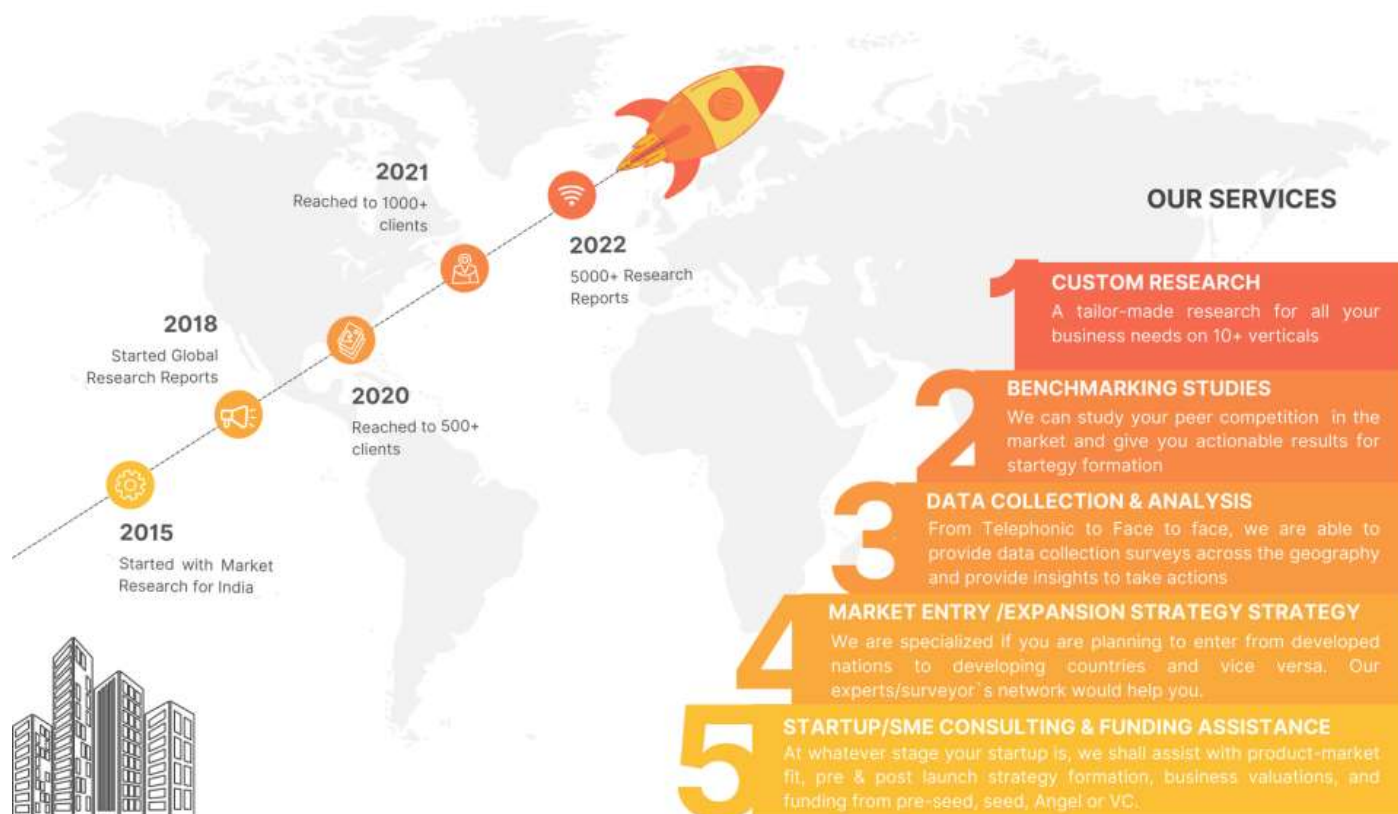
About Us:

Bonafide Research is a distinctive and contemporary market research and consulting firm with an unparalleled level of resilience and integrated approaches. We are determined to unearth the best market opportunities and foster efficient information for your business to thrive in the market. We endeavor to provide appropriate solutions to complex business challenges and initiate an effortless decision-making process. Bonafide Research scoops out precise data and actionable insights into research reports on B2B emerging companies which impact worldwide revenues. We delve into current and future trends in your industry and help you leverage the knowledge to ensure optimum growth in the market. Apart from Fortune 500 companies we also aid small and medium-sized enterprises, to remain at the vanguard of the market. The market data included within our reports are gathered through wide and reliable secondary sources and our in-depth interviews with the key players in the market. We leverage our state-of-the-art technological and analytical tools, along with the expertise of our analysts and consultants, to help you easily grasp the expansive market data and aid you in formulating industry and business strategies, which ensure that you emerge as a leading force in your field.

01	8+ Years In the Industry
02	47% Repeat Customer
03	100+ Industry Experts
04	500 days Report update
05	10+ Industry Covered



History & Services



License Options

Single User	Hard Copy	Site License	Global License
ONE authorized user the right to store, display, use, or stockpile the report	ONE authorized users can access, store, display, use, or stockpile the report.	TEN authorized user the right to store, display, use, or stockpile the report	The report can be circulated within an organization and/or among its subsidiaries.
10% Customization & 16 Hours Post Sale Support	10% Customization & 16 Hours Post Sale Support	10% Customization & 16 Hours Post Sale Support. Free report on update within 100 Days from purchase	10% Customization & 16 Hours Post Sale Support. Free report on update within 100 Days from purchase
Printing not allowed	Further Printing not allowed	Unlimited print within the organization	Unlimited print within the organization
Content citation not allowed	Content citation not allowed	Content citation not allowed	Content citation allowed

The electronic or hard copy of this report bears an underlying contractual agreement between Bonafide Research and the buyer. The complete or part of the content of the report cannot be shared or made available to other persons, other divisions, subsidiaries of same company or other companies. The reproduction or redistribution of the report in any manner is strictly prohibited without the prior permission of Bonafide Research. In case the purchaser wishes to share the content of the report with other members or departments of company, the license type of the report should be upgraded depending upon the sharing requirement. Additional copies for this report may also be order at discounted price for use by addition readers/users.



Key benefits:



Table of Contents

1	Market Structure.....	9
1.1	Market Considerate	9
1.2	Assumptions.....	10
1.3	Limitations.....	10
1.4	Abbreviations	11
1.5	Sources	11
1.6	Definitions	12
1.7	Geography.....	14
2	Research Methodology	15
2.1	Secondary Research.....	16
2.2	Primary Data Collection	17
2.3	Market Formation & Validation.....	18
2.4	Report Writing, Quality Check & Delivery.....	20
3	India Macro Economic Indicators	21
4	India Sleepwear Market Overview.....	23
4.1	Market Size By Value.....	23
5	India Sleepwear Market Segmentations.....	25
5.1	India Sleepwear Market, By Type	25
5.1.1	India Sleepwear Market Size, By Top Wear, 2018-2029.....	25
5.1.2	India Sleepwear Market Size, By Bottom Wear, 2018-2029.....	26
5.1.3	India Sleepwear Market Size, By Night Dresses and Gowns, 2018-2029.....	27



5.1.4	India Sleepwear Market Size, By Sleepwear Set, 2018-2029.....	28
5.2	India Sleepwear Market, By End User.....	29
5.2.1	India Sleepwear Market Size, By Women, 2018-2029.....	29
5.2.2	India Sleepwear Market Size, By Men, 2018-2029	30
5.2.3	India Sleepwear Market Size, By Kids, 2018-2029	31
5.3	India Sleepwear Market, By Material	32
5.3.1	India Sleepwear Market Size, By Cotton, 2018-2029.....	32
5.3.2	India Sleepwear Market Size, By Silk, Model & Rayon, 2018-2029	33
5.3.3	India Sleepwear Market Size, By Polyester, 2018-2029.....	34
5.3.4	India Sleepwear Market Size, By Linen & Bamboo, 2018-2029	35
5.3.5	India Sleepwear Market Size, By Wool & Flannel, 2018-2029.....	36
5.3.6	India Sleepwear Market Size, By Others (Jersey, Fleece etc.), 2018-2029	37
5.4	India Sleepwear Market, By Distribution Channel.....	38
5.4.1	India Sleepwear Market Size, By Supermarkets and Hypermarkets, 2018-2029	38
5.4.2	India Sleepwear Market Size, By Specialty Stores, 2018-2029	39
5.4.3	India Sleepwear Market Size, By Online Stores, 2018-2029	40
5.4.4	India Sleepwear Market Size, By Discount Stores, 2018-2029	41
5.4.5	India Sleepwear Market Size, By Others, 2018-2029.....	41
6	Disclaimer.....	43



List of Figures

Figure 1: India Sleepwear Market Size By Value (2018 to 2029F) (in USD Million)	23
---	----

List of Table

Table 1: India Sleepwear Market Size of Top Wear (2018 to 2029) in USD Million	25
Table 2: India Sleepwear Market Size of Bottom Wear (2018 to 2029) in USD Million	26
Table 3: India Sleepwear Market Size of Night Dresses and Gowns (2018 to 2029) in USD Million	27
Table 4: India Sleepwear Market Size of Sleepwear Set (2018 to 2029) in USD Million	28
Table 5: India Sleepwear Market Size of Women (2018 to 2029) in USD Million	29
Table 6: India Sleepwear Market Size of Men (2018 to 2029) in USD Million	30
Table 7: India Sleepwear Market Size of Kids (2018 to 2029) in USD Million	31
Table 8: India Sleepwear Market Size of Cotton (2018 to 2029) in USD Million	32
Table 9: India Sleepwear Market Size of Silk, Modal & Rayon (2018 to 2029) in USD Million	33
Table 10: India Sleepwear Market Size of Polyester (2018 to 2029) in USD Million	34
Table 11: India Sleepwear Market Size of Linen & Bamboo (2018 to 2029) in USD Million	35
Table 12: India Sleepwear Market Size of Wool & Flannel (2018 to 2029) in USD Million	36
Table 13: India Sleepwear Market Size of Others (2018 to 2029) in USD Million	37
Table 14: India Sleepwear Market Size of Supermarkets and Hypermarkets (2018 to 2029) in USD Million	38
Table 15: India Sleepwear Market Size of Specialty Stores (2018 to 2029) in USD Million	39
Table 16: India Sleepwear Market Size of Online Stores (2018 to 2029) in USD Million	40
Table 17: India Sleepwear Market Size of Discount Stores (2018 to 2029) in USD Million	41
Table 18: India Sleepwear Market Size of Others (2018 to 2029) in USD Million	42



1 Market Structure

1.1 Market Considerate



1.2 Assumptions

PARAMETERS	ASSUMPTIONS
Economic stability	A positive economic climate is assumed to continue through 2028. The growing economy is estimated to attract key companies to the market and increase spending. While forecasting the market outlook, no macroeconomic collapses or recessions are predicted in the global economic landscape.
Exchange Rate	The average USD exchange rates of all the foreign currencies have been considered as of 2020. Bonafide Research assumes that the fluctuation of the USD value will not be significant enough to affect the projections to a notable extent. Market forecasting was carried out under the assumption that the value of the USD (\$) is likely to remain constant during the forecast period.
Political Stability	While arriving at the market size, the global political environment was assumed to remain stable by 2028.
Data Authenticity	The qualitative analysis conducted from the quantitative data arrived at is solely based on the understanding of the market and its trends by the team of experts involved in making this report. Regional trends and dynamics are assumed for the derivation of market size at regional levels. Due to the data triangulation process of multiple methodologies and approaches, the final estimates are a weighted average of each approach. Revenues and segment-specific information were derived from the annual reports of the respective companies.
Pricing Trend	Inflation was not considered for pricing. The values are rounded off at subsequent levels. Prices have been assumed to be constant during the forecast period.
General Assumptions	There will be no drastic changes in the market scenario during the forecast period. There will be no huge changes in regulations that have a huge impact on the industry.

1.3 Limitations

PARAMETERS	LIMITATIONS
Primaries by Key Player	The quantitative information for some of the market segments is kept confidential by industry players. Hence, qualitative insights gathered during the course of the study have been used to arrive at the market size.
Primaries by Region	At times, there are limited numbers of industry experts available. In these cases, the market size is derived on the basis of weighted averages assigned based on the qualitative insights from industry experts and typical market trends.
Company Revenue	Some companies in the market are privately owned, and their revenues are not available in the public domain.
Company Developments	Company developments not reported in the public domain are not included in the report.

1.4 Abbreviations

PARAMETERS	ABBREVIATIONS
SW	Sleepwear
CW	Cotton Wear
LW	Loungewear
KN	Kaftan Nighty
TB	Thermal Bottoms
TT	Thermal Tops

1.5 Sources

SECTIONS	SOURCES
Market size (Value)	• Company Financials • Magazines & Journals • Press Releases • Paid Databases, and Bonafide Research's Data Repository
Revenue of Companies	• Annual Reports • Company Websites • Public Databases
Qualitative Information (Market Dynamics, Market Trends)	• Company Websites • Annual Reports • Press Releases, • Bonafide Research `s Data Repository



1.6 Definitions

Definitions	Top Wear	Bottom Wear	Night Dresses and Gowns	Sleepwear Set
	For women category, T-shirts if purchased individually, it falls under top wear. Pyjamas, which typically consist of pants or shorts of all material comes into bottom wear category. Night dresses and gowns include loose-fitting dresses that extend to various lengths, often knee-length or full-length and nightshirts, similar to nightgowns but typically shorter and styled like a long shirt. Whereas sets (more than one items and night suits) falls under sleepwear set category.			
Women				
	In case of men's category, T-shirts if purchased individually, it falls under top wear. Pyjamas, which typically consist of pants or shorts of all material comes into bottom wear category. Night dresses and gowns include loose-fitting dresses that extend to various lengths, often knee-length or full-length. Whereas sets (more than one items and night suits) falls under sleepwear set category.			
Men				

Kids

Kid sleepwear is designed with the utmost emphasis on safety, comfort, and ease for children, ensuring a restful and secure night's sleep. T-shirts if purchased individually, it falls under top wear. Pyjamas, which typically consist of pants or shorts of all material comes into bottom wear category. Night dresses and gowns include loose-fitting dresses that extend to various lengths, often knee-length or full-length. Whereas sets (more than one items and night suits) falls under sleepwear set category.



1.7 Geography

The Country has a population of 1,350,590,492 as on year 2021. It has been divided four regions.

North: Uttar Pradesh, Himachal Pradesh, Uttarakhand, Haryana, Punjab, Jammu and Kashmir, Ladakh, Delhi.

East: Bihar, Orissa, Jharkhand, West Bengal, Assam, Sikkim, Nagaland, Meghalaya, Manipur, Mizoram, Tripura, Arunachal Pradesh, Chhattisgarh.

South: Andhra Pradesh, Karnataka, Kerala, Tamil Nadu, Telangana, Pondicherry, Lakshadweep, Andaman and Nicobar.

West: Gujarat, Maharashtra, Goa, Rajasthan, Madhya Pradesh, Dadra and Nagar Haveli, Daman and Diu.



Region	Population	Share
North	358,257,457	26.53%
East	392,915,585	29%
West	314,992,211	23.32%
South	284,425,239	21.15%
Source: U.S. Census Bureau		

2 Research Methodology

Research Process



2.1 Secondary Research

Based on the understanding of requirements, we conducted secondary research through synthesis of existing publications across the web to gather meaningful insights on the current situation of the market, technological developments, and any other market-related information. A broad array of secondary research includes but is not limited to:



Analyst first shortlists the market intelligence sources and starts data collection and aggregation. By this stage, we obtain important information about the top companies, market classification and Segmentation according to industry trends to the bottommost level, and key developments related.

2.2 Primary Data Collection



Spread of Interviews: Interviews spread across regions based on share in the market.

Respondents: Interviews covering varying profile of experts across entire value chain.

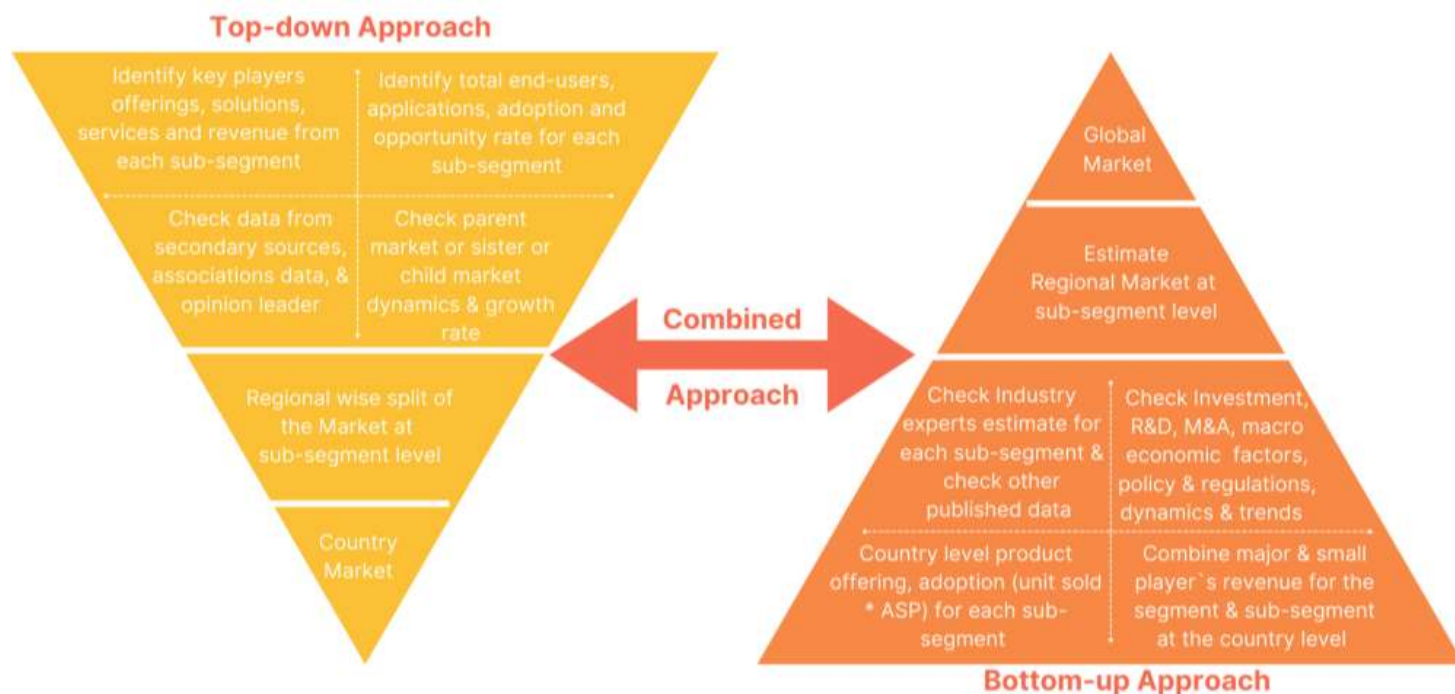
Blind/open interviews: Blind interviews without revealing the sponsor of the study.

Inputs Collected: Raw data and intelligence, market insights, dynamics and other validation level inputs.



2.3 Market Formation & Validation

The market is analyzed based on combined Approach (Top-down and Bottom-up), various recommended statistical methods to derive market sizing, segmenting, and market estimation process to ensure that data is accurate and reflects trends.



Revenue Based Approach: In addition to global players, we identify key players in major countries based on desk research, service portfolio, product offerings, and primary interviews with key stakeholders across the ecosystem. The revenues of key market players are extracted and estimated based on their annual reports, paid secondary sources, product portfolios, key developments, and geographical presence. Then we start segmental revenue estimations (% share of total revenue) based on the product type, product, pricing & marketing strategies, product development & deployment, end-user, investment made, R& D, and M&A, for each market player estimated the market share of key players in the market and calculated the sum of the market values of key market players and other companies to arrive at the total market.

Product Based Approach: We consider country-level market potential for the product and estimate its current adaptation to the market. List the product offerings of various players and calculate the average selling price (ASP) based on features; price, availability, distribution channel, and so on. We estimate units sold based on sub-segments and multiply the same with ASP. Aside from numerical Figures, we take into account country-level macroeconomic data, sector investment, R&D activities, mergers and acquisitions, policy and regulatory parameters, market dynamics, and trends for each country. We estimate the same for all the major countries to derive the regional market and then the global market.

Validation: Once we have the market estimation, we cross check the same via a combination of economic tools, data analysis models, association data, and our internal database of cross-industry and cross-country data. We are experienced enough to address any questions regarding the target market as we have completed many studies in those regions and we can use our cross industry and cross country data. Our multidisciplinary team of in-house subject matter experts understands the industry scenario better and points out the emerging market patterns.

Forecasting: Once the historic and current data have been finalized, we start forecasting using our extensive database of microeconomic and sector-specific data. The initial base line forecasts are generated with the most recent market data using various recommended statistical methods. After the initial baseline forecast, all the future events and assumptions are based on extensive primary and secondary research. This process of revision was done in two phases for authenticity of the data and negligible errors in the report.

Our research goes beyond the process of gathering information; rather, it is also about finding answers to unanswered questions as part of discovering and/or creating new knowledge.

2.4 Report Writing, Quality Check & Delivery

The report writing process starts with the profiling of the major companies of the industry. Post this; the bifurcated data are plotted in accordance of the report requirements, which is explained by our content team with validated supporting explanations. Our team takes the utmost care to identify the upcoming trends & dynamics which are discussed in detail. We do not only document information, but also recommend the course of action for our clients. The report ends with the drafting and preparing competitive landscape, a crisp executive summary and publishing of the marketing JJJs.

Quality Check: At the beginning, our in-panel QC validation ensures that it compliance with analytical guidelines, quality guidelines, presentation guideline and client specific guideline. Other than this, to ensure the best quality of report being delivered, our quality checking team would review the report and make sure for that our client gets the unique report as per their requirement. Experts help in checking accuracy of the data and channelizing the representation skills of the analyst to make sure it can be easily understood by our customers and fulfills the clients' requirements. Our industry experts can point out the emerging market patterns and help us validate our findings further cross-validated with published sources. After quality check, a final review of the report was done to look after the presentation, formatting and to recheck if all the requirements of the clients were addressed.



The next phase remains dispatch of the report to the client. However, if we missed any portion we allow 10% customization to each of our client. Moreover, we provide 16 hours post-sales support which allows our client to resolve their questions if any.

3 India Macro Economic Indicators

This section will include the statistics or data readings that reflect the economic circumstances of a particular country. They are basically a macroeconomic measurement used by analysts to understand current and future economic activity and opportunity. Macroeconomic indicators are used to analyses current and future trends – whether for investment purposes or to judge the health of an economy. Most economic indicators are official data releases, produced by governments or non-profit organizations.

Table 1: India Economic Snapshot 2020

Particulars	India
GDP (Current Prices, US Dollars, Billion)	3385
Annual GDP growth rate	8.40%
GDP Share of World Total (PPP % in GDP)	3.28
GDP Per Capita (Current Prices, US Dollars)	2085
Inflation, GDP deflector (annual %)	3.3
Inflation (Average Consumer Price Change %)	6.83
Inflation (End of Year change %)	6.83
Total Government Net lending/Borrowing (% of GDP)	-2.3
Agricultural value added (% of GDP)	16.62
Industry value added (% of GDP)	27.7
Services value added (% of GDP)	48.6
Population (in Millions)	1428.628
Total land area (in km square)	3.287
Population Density (people per sq. km of land area)	464
Majorly aged in population in years	15 to 64
Gross National savings (% of GDP)	28.90
Urbanization rate	36%
Rural area rate	65.07%
Literacy rate	69%
Poverty rate	20.80%
Internet usage	50%

Technology usage	50%
Annual Environmental growth	7.70%
Military expenditure (% of GDP)	2.5
Merchandise trade (% of GDP)	38.50
Imports of goods and services (% of GDP)	26.00
Exports of goods and Services (% of GDP)	23.00
FDI, net inflows (BOP, Current US\$ billions)	50610
Life expectancy rate	70.42
GDP per capita PPP (USD)	7096
AGR (%)	7.8
% Share from Construction	25.6
% Share from Manufacturing	13.32
% Population Growth Rate	0.81
% World Share	17.76
House Hold Size	4.57
Median Age	28.7
Trade	-1.8E+08
Consumer Price Index	186
Inflation Rate	6.83
Interest Rates	18

Source: World Bank

The performance of India over the years,

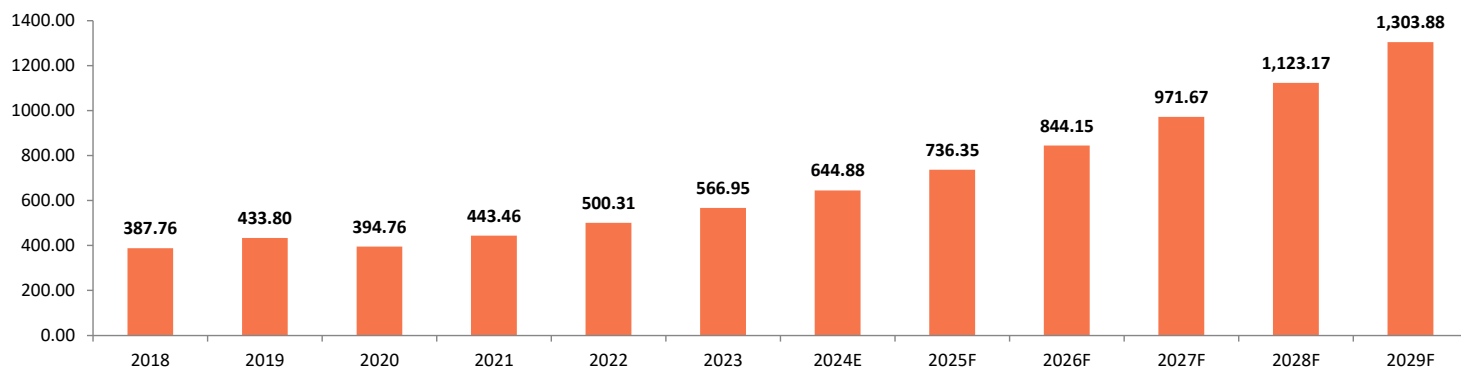
Table 3: Average Exchange Rates for Converting Foreign Currencies into U.S. Dollars

Country	2016	2017	2018	2019	2020	2021
India - Rupee	70	67.8	68.4	70.4	74.1	73.9

Source: Internal Revenue Service, United States federal Government

4 India Sleepwear Market Overview

4.1 Market Size By Value



Source: Bonafide Research

Figure 1: India Sleepwear Market Size By Value (2018 to 2029F) (in USD Million)

Key Take Ways

- The India sleepwear market is anticipated to reach market size of USD 1303.88 Million by 2029, with progressive CAGR of 15.12% by 2024-29. The sleepwear industry in India has witnessed significant growth over the past decade. Traditionally, sleepwear in India consisted of simple and utilitarian garments, but evolving fashion trends, increasing disposable income, and a growing awareness of comfort and lifestyle have transformed this sector into a dynamic and profitable market.
- India's sleepwear market is characterized by a diverse range of products catering to different demographics and preferences. From traditional nightgowns and kurtas to modern pajamas, loungewear, and night suits, the industry offers a variety of options for men, women, and children. The market is driven by both domestic brands and international players, with increasing online retailing playing a crucial role in expanding reach and accessibility.

- The proliferation of online shopping platforms has significantly impacted the sleepwear industry. E-commerce giants like Amazon, Flipkart, and Myntra, along with niche sleepwear brands, have made it convenient for consumers to explore and purchase a wide range of sleepwear products. The digital marketplace offers extensive choices, competitive pricing, and home delivery, contributing to the industry's growth.
- Several Indian brands have emerged as key players in the sleepwear segment. Brands like Clovia, Zivame, and Nykd by Nykaa have carved a niche for themselves by offering diverse and quality sleepwear collections. These brands focus on understanding the preferences of Indian consumers and delivering products that cater to local tastes and climatic conditions.
- With increasing awareness about environmental issues and sustainable fashion, there is a growing demand for eco-friendly sleepwear. Brands are now incorporating sustainable practices in their production processes, using organic fabrics, and promoting ethical labor practices. This trend is likely to gain momentum as consumers become more conscious of their purchasing choices. Some sleepwear brands in India, like Catnap Sleepwear, focus on sustainability by using eco-friendly materials and ensuring that their products do not end up in landfills.
- The sleepwear market in India is highly competitive, with both organized and unorganized players vying for market share. Brands like Sleep-ins and Mystere Paris have successfully capitalized on this demand, expanding their market share and retail presence across the country. India's sleepwear industry has the potential to expand its export market, particularly to countries in the EU and the Gulf. Brands like Sleep-ins are already receiving export enquiries and are planning to enhance their production capacity to meet this demand. Sleepwear brands in India are expanding their presence across the country, with Sleep-ins having a significant presence in major cities like Mumbai, Delhi, and Hyderabad.
- Young adults and teenagers form a significant segment of the sleepwear market. Brands are targeting this demographic with trendy, youthful designs and collaborations with popular influencers and fashion icons. Also, some Indian sleepwear brands are integrating technology into their products. This includes features like moisture-wicking fabrics, temperature regulation, and even sleep-tracking sensors to enhance the quality of sleep.

5 India Sleepwear Market Segmentations

5.1 India Sleepwear Market, By Type

5.1.1 India Sleepwear Market Size, By Top Wear, 2018-2029

The Indian sleepwear market, especially in the top wear segment, is thriving with emerging trends. As cities across India expand and people's lifestyles become busier, there's a growing desire for comfortable yet stylish sleepwear. Higher disposable incomes mean that more people in India are willing to invest in quality nightwear. Consumers today are very particular about the fabrics they choose, preferring soft, breathable materials like cotton and modal that feel good against the skin. Women in India often opt for nightshirts and camisoles that combine comfort with a touch of elegance, while men prefer casual sleep shirts and T-shirts. Kids' sleepwear in India is all about fun designs and safety. The rise of online shopping has made it easier for people in India to access a wide variety of options, with platforms like Amazon and Mantra leading the charge. However, physical stores still play a crucial role, especially in smaller cities where people prefer to see and feel the products before buying.

Table 1: India Sleepwear Market Size of Top Wear (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	42.64	47.83	43.64	49.15	55.59	63.16	71.99	82.36	94.61	109.12	126.38	147.01
CAGR	8.17%						15.35%					

Source: Bonafide Research

The market is bustling with competition from both domestic brands like Clovis and international ones like Marks & Spencer, not to mention the growing presence of private labels. Innovations in fabric technology, like moisture-wicking and anti-bacterial properties, are becoming popular, and there's a notable shift towards sustainable and eco-friendly sleepwear. Despite the fierce competition, there's plenty of room for growth, particularly in semi-urban and rural areas of India. As consumer preferences continue to evolve and global fashion trends make their mark, the Indian sleepwear top wear market is set to keep expanding, offering exciting opportunities for brands that can keep up with these changes. Cotton is a preferred fabric for sleepwear in India due to its comfort and breathability, especially in the hot and humid climate of many parts of the country. However, satin and silk sleepwear is also popular for their luxurious feel. Different states in India have their own traditional styles of sleepwear. In North India, there is more usage of loose-fitting kurtas or nighties, whereas in South India, lightweight cotton nighties or lungis (sarongs) are common. While traditional sleepwear might have been more gender-specific in the past, modern designs increasingly offer unisex options or styles that cater specifically to men's and women's preferences.

5.1.2 India Sleepwear Market Size, By Bottom Wear, 2018-2029

The bottom wear segment of the Indian sleepwear market offers a fascinating insight into the diverse preferences and evolving trends within the industry. Comprising a variety of styles and fabrics, this segment caters to a wide range of consumer needs and preferences. Alongside traditional materials, there's a noticeable shift towards eco-friendly options like modal and bamboo-based fabrics, prized for their softness and sustainability. In terms of design, the bottom wear segment encompasses a rich array of choices, spanning from classic pajamas and salwar bottoms to more contemporary options like lounge pants and shorts. Women's bottom wear commands a significant portion of the market, offering everything from timeless pajama sets to fashionable leggings and shorts tailored to different age groups and style preferences. Meanwhile, men's bottom wear tends to focus on practicality and comfort, with options including pajamas, lounge pants, and shorts. Children's bottom wear often features playful designs and vibrant colors, catering to the whimsical tastes of younger consumers. With the rise of e-commerce, the bottom wear market has witnessed a surge in online sales, providing consumers with a convenient platform to explore a diverse range of options. Competition within this segment is fierce, with both domestic and international brands vying for market share. In India, the bottom wear segment of the sleepwear market is experiencing a shift towards comfort and versatility, with consumers seeking softer fabrics like modal and bamboo-based materials.

Table 2: India Sleepwear Market Size of Bottom Wear (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	75.07	83.76	76.02	85.18	95.85	108.34	122.80	139.72	159.62	183.09	210.89	243.97
CAGR	7.61%						14.72%					

Source: Bonafide Research

On the other hand comfort, there's a growing demand for fashion-forward designs, ranging from classic pajama sets to bold prints and patterns. E-commerce platforms have played a significant role in driving growth by offering a convenient way for consumers to explore and purchase a wide variety of options online. Private labels from major retailers are gaining traction, offering consumers affordable yet stylish alternatives. Sustainability is emerging as a notable trend, reflecting a growing consumer preference for eco-friendly and organic products. Lounge pants have gained popularity in recent years as versatile bottom-wear sleepwear. They are comfortable for sleeping as well as lounging at home, making them a practical choice for many Indians.

5.1.3 India Sleepwear Market Size, By Night Dresses and Gowns, 2018-2029

In India, the segment of night dresses and gowns within the sleepwear market is undergoing a fascinating transformation. Historically associated with luxury and elegance, these garments are now not only symbols of style but also reflections of evolving consumer lifestyles and preferences. One noticeable trend is the growing emphasis on comfort without sacrificing aesthetics. Consumers are increasingly drawn to nightwear options crafted from soft, breathable fabrics like cotton, modal, and satin, providing a luxurious feel while ensuring a restful night's sleep. This shift towards comfort-driven designs is complemented by a demand for versatile styles that seamlessly transition from bedtime attire to loungewear or even occasional wear for special events.

Table 3: India Sleepwear Market Size of Night Dresses and Gowns (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	95.76	106.33	96.03	107.07	119.89	134.84	151.22	170.26	192.45	218.42	248.94	284.95
CAGR	7.08%						13.51%					

Source: Bonafide Research

There's a rising interest in modest yet fashionable designs, catering to consumers' desire for both elegance and practicality. Indian consumers are also gravitating towards night dresses and gowns adorned with intricate detailing, delicate lacework, and subtle embellishments, further enhancing the allure of these garments. Influencers and celebrities often showcase their nighttime routines and loungewear attire, inspiring their followers to invest in stylish and luxurious night dresses and gowns. As a result, there's a growing desire among consumers to emulate the glamorous lifestyles portrayed on social media, driving demand for high-quality sleepwear options. The increasing prevalence of themed parties and intimate gatherings has fueled demand for statement-making night dresses and gowns that make a lasting impression. The proliferation of e-commerce platforms has played a pivotal role in shaping the market dynamics, offering consumers an extensive array of choices from a diverse range of domestic and international brands. This increased accessibility, coupled with the convenience of online shopping, has fueled the growth of the segment, making luxurious yet comfortable nightwear options more accessible to a wider audience. The night dresses and gowns segment in India continues to evolve, driven by shifting consumer preferences, technological advancements, and the ever-changing landscape of the fashion industry. Many Indian night dresses and gowns feature intricate embroidery, lacework, or embellishments. These details often reflect regional craftsmanship and add a touch of elegance to the sleepwear.

5.1.4 India Sleepwear Market Size, By Sleepwear Set, 2018-2029

The sleepwear set segment in India represents a dynamic and evolving market characterized by a wide range of options tailored to suit diverse consumer preferences and lifestyles. Traditional pajama sets, comprising of matching tops and bottoms typically made from breathable fabrics like cotton or linen, continue to be a popular choice among consumers seeking comfort and functionality. These sets are perfect for bedtime routines, providing a cozy and relaxed fit that promotes a restful night's sleep. On the other hand, there's a growing trend towards contemporary loungewear sets that blur the lines between sleepwear and casual wear. These sets often feature stylish designs, trendy silhouettes, and luxurious materials such as silk or modal, making them suitable for both nighttime relaxation and daytime activities. In addition to traditional and loungewear sets, themed sleepwear sets have also gained traction in the Indian market.

Table 4: India Sleepwear Market Size of Sleepwear Set (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	174.29	195.89	179.07	202.06	228.98	260.61	298.87	344.01	397.47	461.05	536.95	627.95
CAGR	8.38%						16.01%					

Source: Bonafide Research

These sets are often inspired by popular culture, cartoons, or seasonal motifs, adding a playful and personalized touch to bedtime attire. Whether it's a whimsical cartoon character or a festive print celebrating a holiday, themed sleepwear sets allow consumers to express their individuality and personality through their sleepwear choices. The accessibility of online shopping has played a significant role in driving the growth of the sleepwear set segment in India. With the proliferation of e-commerce platforms, consumers have access to a wide variety of options from both domestic and international brands, making it easier than ever to find the perfect sleepwear set tailored to their unique needs and preferences. This increased accessibility, coupled with the convenience of online shopping, has fueled the growth of the segment, making luxurious yet comfortable sleepwear options more accessible to a wider audience. Sleepwear sets are often included in bridal trousseaus in India. These sets are specially designed for the bride and can range from elaborate silk nightgowns to intricately embroidered pajama sets. Also, there is a growing market for maternity and nursing sleepwear sets in India. These sets are designed to provide comfort and convenience for pregnant women and new mothers, often featuring adjustable waistbands, easy access for breastfeeding, and soft fabrics.

5.2 India Sleepwear Market, By End User

5.2.1 India Sleepwear Market Size, By Women, 2018-2029

The segment of women's sleepwear in the Indian market is a vibrant and evolving sector that caters to the diverse needs and preferences of female consumers across the country. Over the years, there has been a noticeable shift in the demand for women's sleepwear in India, driven by changing fashion trends, lifestyle preferences, and an increased emphasis on comfort and style. From traditional nightgowns to modern pajama sets and loungewear ensembles, women's sleepwear options have expanded to offer a wide range of choices to suit various occasions and personal preferences. The main significant trend within this segment is the growing popularity of versatile sleepwear options that seamlessly transition from bedtime to lounging at home or even casual outings. Women in India today are seeking sleepwear sets and loungewear ensembles that not only provide utmost comfort but also reflect their personal style and fashion sensibilities. There has been an emergence of stylish and trendy designs in women's sleepwear, featuring chic silhouettes, fashionable prints, and luxurious fabrics like satin, silk, and modal. There has been an increasing demand for functional and practical sleepwear options among women in India. Many women prioritize comfort and functionality in their sleepwear choices, opting for breathable fabrics like cotton and modal that ensures a comfortable night's sleep.

Table 5: India Sleepwear Market Size of Women (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	280.80	312.89	283.59	317.31	356.55	402.42	454.99	516.41	588.46	673.29	773.60	892.68
CAGR	7.46%						14.43%					

Source: Bonafide Research

There is a growing awareness of the importance of sleep hygiene and its impact on overall health and well-being, leading women in India to seek sleepwear options that promote better sleep quality and relaxation. Another notable trend in the women's sleepwear segment in India is the rise of sustainable and eco-friendly options. With a growing emphasis on sustainability and ethical consumerism, many women in India are gravitating towards sleepwear brands that prioritize eco-friendly materials and ethical manufacturing practices. There has been an increase in the availability of organic cotton sleepwear, bamboo-based fabrics, and other sustainable alternatives in the market, catering to the eco-conscious consumer in India. The advent of e-commerce has also played a significant role in shaping the women's sleepwear market in India. Online retail platforms offer women a convenient and hassle-free shopping experience, allowing them to browse through a wide selection of sleepwear options from the comfort of their homes.

5.2.2 India Sleepwear Market Size, By Men, 2018-2029

The market for men's sleepwear in India presents an intriguing landscape marked by a nuanced interplay of comfort, style, and functionality tailored to suit the discerning preferences of male consumers across the nation. Over the past decade, there has been a notable evolution in men's sleepwear trends, characterized by a departure from conventional styles towards more contemporary and versatile options. Traditionally, men's sleepwear offerings were limited to simple pajama sets and nightshirts crafted from basic fabrics like cotton or flannel. With the advent of global fashion influences and the burgeoning demand for more stylish and comfortable sleepwear alternatives; the market has witnessed a remarkable diversification. A prominent trend within this End user is the burgeoning popularity of loungewear sets and separates among men in India. These sets typically feature a combination of comfortable yet fashionable tops and bottoms, often fashioned from soft and breathable fabrics such as cotton, modal, or jersey knit. Unlike traditional pajama sets, loungewear ensembles blur the boundaries between sleepwear and casual wear, allowing Indian men to seamlessly transition from bedtime to leisure time or even errands without compromising on comfort or style.

Table 6: India Sleepwear Market Size of Men (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	66.01	74.29	68.01	76.86	87.23	99.44	113.95	131.10	151.41	175.60	204.49	239.18
CAGR	8.54%						15.98%					

Source: Bonafide Research

This shift underscores a growing preference among consumers for sleepwear options that offer versatility and adaptability to modern lifestyles. In addition to loungewear sets, there is a rising demand for athleisure-inspired sleepwear among Indian men. Athleisure sleepwear merges the performance and functionality of athletic wear with the design and aesthetics of traditional sleepwear, resulting in garments that are both practical and fashionable. In case of material for sleepwear, polyester material is highly used for men compared to women and child. Over 25% of the material's share falls into men's category. These sleepwear options often incorporate performance-oriented fabrics like moisture-wicking materials or stretchy blends, catering to men who prioritize comfort and mobility during sleep or lounging activities. The sustainability and eco-consciousness have emerged as significant considerations in the men's sleepwear market in India.

5.2.3 India Sleepwear Market Size, By Kids, 2018-2029

The India sleepwear market, with a specific focus on the segment catering to kids has emerged as a vibrant and rapidly expanding sector within the country's retail landscape. This growth trajectory can be attributed to a confluence of factors that collectively contribute to the evolving dynamics of consumer preferences, economic prosperity, and cultural shifts. The primary drivers behind the surge in demand for kids' sleepwear are the changing lifestyle patterns prevalent among Indian families. As urbanization accelerates and nuclear families become more common, parents are increasingly prioritizing the well-being and comfort of their children, even during sleep hours. This shift in mindset has led to a heightened awareness of the importance of high-quality sleepwear tailored specifically for kids, considering their delicate skin and developing bodies. The rising disposable income levels across various strata of Indian society have played a pivotal role in fueling the demand for premium sleepwear options for children. With more discretionary spending power at their disposal, parents are more inclined to invest in products that promise superior quality, durability, and comfort for their little ones. Consequently, manufacturers and retailers operating in the Indian sleepwear market have seized this opportunity to diversify their product portfolios and introduce innovative designs, fabrics, and features tailored to meet the unique needs and preferences of young consumers.

Table 7: India Sleepwear Market Size of Kids (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	40.95	46.62	43.16	49.30	56.53	65.09	75.93	88.84	104.28	122.79	145.08	172.03
CAGR	9.71%						17.77%					

Source: Bonafide Research

The influence of Western fashion trends and the globalization of consumer culture have significantly impacted the choices and expectations of Indian consumers, including those pertaining to children's sleepwear. The proliferation of digital media platforms and social networking sites has exposed Indian parents and children alike to a myriad of fashion influences from around the world, leading to a growing demand for trendy and stylish sleepwear options that resonate with contemporary sensibilities. This trend is particularly pronounced among urban consumers and those belonging to the millennial and Gen Z demographics, which prioritize self-expression and individuality in their fashion choices. The advent of e-commerce platforms has revolutionized the retail landscape in India, offering parents unprecedented convenience and accessibility to a wide array of sleepwear options for their children. The ease of browsing through online catalogs, comparing prices, reading reviews, and making purchases from the comfort of their homes has significantly contributed to the growth of the kids' sleepwear segment. This digital revolution has also enabled smaller, niche brands to reach a wider audience and compete with established players, thereby fostering innovation and driving overall market growth.

5.3 India Sleepwear Market, By Material

5.3.1 India Sleepwear Market Size, By Cotton, 2018-2029

The Market of the sleepwear focused on materials, particularly cotton, holds a significant position within the Indian consumer landscape. Cotton has long been favored for sleepwear due to its inherent properties that promote comfort, breathability, and softness against the skin. In India, where climatic conditions often lean towards warmer temperatures, the preference for cotton sleepwear is particularly pronounced. This natural fabric allows for adequate air circulation, helping to regulate body temperature and prevent overheating during sleep. The cotton's moisture-wicking properties make it ideal for absorbing sweat and keeping the wearer dry and comfortable throughout the night, a crucial factor in a country where humidity levels can be high. The demand for cotton sleepwear in India is further bolstered by cultural and traditional preferences. Cotton is a fabric deeply ingrained in Indian culture, with a rich history of cultivation and weaving techniques dating back centuries. Its association with purity, comfort, and simplicity resonates strongly with Indian consumers, making cotton sleepwear a popular choice across demographics.

Table 8: India Sleepwear Market Size of Cotton (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	201.83	225.16	204.30	228.84	257.41	290.82	329.27	374.17	426.81	488.75	561.93	648.72
CAGR	7.58%						14.53%					

Source: Bonafide Research

With more Indians adopting Western-style sleepwear habits and a growing awareness of the importance of quality sleepwear for overall well-being, the demand for cotton sleepwear is expected to remain robust in the coming years. The proliferation of e-commerce platforms has made it easier for consumers to access a wide range of cotton sleepwear options from both domestic and international brands, further fueling market growth. Handloom cotton sleepwear sets are popular for their craftsmanship and sustainability. They are often woven by skilled artisans using traditional techniques, adding a touch of cultural heritage to the garments. Cotton sleepwear in India often features intricate embroidery work, block prints, or hand-painted designs. These embellishments add aesthetic appeal and showcase the artisanal skills prevalent in different regions of India. Also, cotton sleepwear is easy to care for, as it can be machine-washed and tends to resist wrinkling compared to other fabrics. This convenience makes it a practical choice for daily wear. Cotton sleepwear is favored by people of all ages in India, from children to adults and elderly individuals. Its softness and comfort appeal to families seeking breathable and safe fabrics for sleep.

5.3.2 India Sleepwear Market Size, By Silk, Model & Rayon, 2018-2029

The silk material within the India sleepwear market represents a realm of luxury, elegance, and sophistication. Silk sleepwear holds a distinct allure, captivating consumers with its smooth texture, lustrous sheen, and indulgent feel against the skin. This segment caters primarily to a niche demographic of consumers who value opulence and refinement in their sleepwear choices. Silk sleepwear in India is often crafted from premium-quality silk fabrics, such as mulberry silk, renowned for its superior softness, durability, and breathability. The demand for silk sleepwear is driven by various factors, including rising disposable incomes, evolving fashion trends, and a growing appreciation for luxurious comfort. Silk sleepwear is favored by individuals seeking a sensory indulgence and a touch of glamour in their nighttime attire. It holds particular appeal for special occasions, romantic evenings, or as a treat for oneself or a loved one.

Table 9: India Sleepwear Market Size of Silk, Model & Rayon (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	68.96	77.72	71.26	80.65	91.67	104.66	120.83	140.04	162.95	190.39	223.37	263.20
CAGR	8.70%						16.85%					

Source: Bonafide Research

In India, where cultural traditions often emphasize the importance of luxury and elegance, silk sleepwear finds a receptive audience among those who value fine craftsmanship and superior quality. Silk sleepwear is celebrated for its ability to regulate body temperature, keeping the wearer cool in hot weather and warm in colder climates, making it suitable for year-round wear in diverse regions across the country. On the other hand, model sleepwear in India is heavily influenced by international fashion trends seen on runways and in global fashion magazines. Designs often feature modern cuts, bold prints, and luxurious fabrics. There is a growing demand for model sleepwear that blends luxury with comfort. Silk, satin, and high-quality cotton fabrics are popular choices for their softness and elegance. Celebrities and influencers in India often showcase model sleepwear in their social media posts and public appearances, influencing consumer preferences and driving trends within the fashion industry. Indian fashion weeks and designer showcases often feature model sleepwear as part of their collections, highlighting the importance of sleepwear as a segment of high fashion. Designers in India continually innovate with model sleepwear, experimenting with asymmetrical cuts, sheer fabrics, and intricate draping techniques to create statement pieces that appeal to fashion-forward consumers. Women are considered as the prime end user for these materials in case of sleepwear.

5.3.3 India Sleepwear Market Size, By Polyester, 2018-2029

In recent years, polyester sleepwear has gained significant traction among consumers in India, marking a departure from the traditional preference for natural fabrics like cotton. This shift can be attributed to several factors, including affordability, durability, and practicality in a diverse climate. Polyester, a synthetic fiber known for its resilience and easy maintenance, has found a niche in the sleepwear market in India. Traditionally, Indian consumers favored cotton for its breathability and comfort, particularly in the tropical climate prevalent in most parts of the country. One of the primary reasons for the popularity of polyester sleepwear is its durability. Polyester fibers are inherently strong and resistant to wear and tear, making them ideal for garments that undergo frequent washing, such as sleepwear. This longevity ensures that polyester sleepwear retains its shape and color over time, providing value for money. Polyester sleepwear tends to be more affordable compared to sleepwear made from natural fibers like silk or high-quality cotton. This affordability makes it accessible to a wider range of consumers, catering to various budget preferences without compromising on quality.

Table 10: India Sleepwear Market Size of Polyester (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	71.07	79.28	71.92	80.56	90.61	102.37	115.32	130.42	148.07	168.81	193.25	222.19
CAGR	7.57%						14.02%					

Source: Bonafide Research

The sleepwear market in India is largely unorganized, with price being a significant factor. Organized players like Sleep-ins are focused on offering high-quality products, which sets them apart from the unorganized sector. The brand has expanded its retail presence across the country, with exclusive outlets and partnerships with large departmental stores. The company plans to further increase its production capacity and explore international markets. With the rise of e-commerce, online sales of polyester sleepwear have also increased in India. Websites like Amazon, Flipkart, and Myntra offer a wide range of polyester sleepwear, making it easy and convenient for consumers to shop from the comfort of their homes. Online shopping also provides consumers with the opportunity to compare prices and products from different brands and retailers, allowing them to make informed and cost-effective purchases. To enhance the comfort and breathability of polyester sleepwear, it is often blended with other fabrics like cotton or rayon. The blending of fabrics helps to combine the best features of each fabric, resulting in a high-quality and comfortable sleepwear. For instance, cotton-polyester blended sleepwear provides the softness and absorbency of cotton and the durability and wrinkle-resistance of polyester. Similarly, rayon-polyester blended sleepwear provides the smoothness and drapability of rayon and the strength and resilience of polyester.

5.3.4 India Sleepwear Market Size, By Linen & Bamboo, 2018-2029

Sleepwear is an essential part of one's wardrobe, providing comfort and convenience during sleep. In recent years, there has been a growing demand for sustainable and eco-friendly sleepwear options that not only provide comfort but also contribute to the environment. Linen and bamboo sleepwear are two such options that have gained popularity in India, owing to their natural, breathable, and hypoallergenic properties. Linen is a natural, durable, and breathable fabric made from the fibers of the flax plant. It has been used for centuries in the production of clothing and bedding, owing to its softness and comfort. Linen sleepwear in India is available in a wide variety of styles and designs, including nightdresses, pajamas, and nightshirts. The production of linen sleepwear in India involves the use of flax fibers, which are spun into yarns and then woven or knitted into fabrics. The fabrics are then cut and sewn into various styles and designs of sleepwear.

Table 11: India Sleepwear Market Size of Linen & Bamboo (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	15.16	17.12	15.73	17.84	20.32	23.25	27.02	31.54	36.95	43.46	51.35	60.92
CAGR	8.93%						17.65%					

Source: Bonafide Research

The production of linen sleepwear is a labor-intensive process, which provides employment opportunities to a large number of people, particularly in the textile and garment industry. In India, linen sleepwear is available in various designs and styles, including night suits, nightgowns, and pajama sets. Brands like Sleep-ins offer high-quality linen sleepwear options for men, women, and children, catering to different tastes and preferences. Bamboo is a fast-growing, renewable, and eco-friendly plant that has gained popularity in the production of clothing and bedding. Bamboo sleepwear in India is available in a wide variety of styles and designs, including nightdresses, pajamas, and nightshirts. The production of bamboo sleepwear in India involves the use of bamboo fibers, which are extracted from the bamboo plant and then spun into yarns. The yarns are then woven or knitted into fabrics, which are cut and sewn into various styles and designs of sleepwear. The production of bamboo sleepwear is a relatively new and emerging industry in India, which provides employment opportunities and contributes to the economy. Brands like Vudoire offer high-quality bamboo sleepwear options for women, including 2-piece pajama sets and nightgowns. When compared to women & kids, men are considered as the prime end user for these materials in case of sleepwear.

5.3.5 India Sleepwear Market Size, By Wool & Flannel, 2018-2029

Wool, known for its insulating properties and soft texture, offers unique benefits that cater to specific consumer preferences and needs. While cotton dominates the sleepwear market in India due to its breathability and suitability for warmer climates, wool sleepwear serves a distinct segment of consumers seeking warmth and comfort, particularly during colder seasons or in regions with cooler climates. Wool sleepwear in India often features high-quality merino wool, prized for its fine fibers that provide exceptional softness and insulation without being bulky or itchy against the skin. The demand for wool sleepwear in India is influenced by various factors, including seasonal weather patterns, cultural traditions, and lifestyle choices. In regions experiencing colder temperatures, such as the northern parts of the country or hilly areas, there is a heightened demand for wool sleepwear to combat chilly nights and ensure a cozy sleep experience. For wool & flannel material, it is majorly used in kid clothing.

Table 12: India Sleepwear Market Size of Wool & Flannel (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	26.47	29.74	27.18	30.66	34.73	39.53	45.23	51.95	59.92	69.38	80.68	94.22
CAGR	8.53%						15.81%					

Source: Bonafide Research

The wool sleepwear holds appeal for consumers who prioritize natural and sustainable materials, as wool is renewable, biodegradable, and possesses inherent moisture-wicking properties that help regulate body temperature and keep the wearer dry and comfortable. Despite its premium positioning and higher price point compared to other materials like cotton, wool sleepwear enjoys a loyal customer base in India, comprising individuals who value its warmth, durability, and luxury feel. However, flannel sleepwear has carved out a niche in the Indian market as a beloved choice for colder nights, offering warmth, comfort, and a touch of classic charm. While traditionally associated with colder climates, flannel's appeal in India extends beyond practicality to include its cozy feel and variety of designs. Flannel is a soft woven fabric typically made from wool, cotton, or synthetic fibers. It is known for its brushed surface, which creates a fuzzy texture and enhances its insulating properties. Flannel sleepwear is popular for its ability to provide warmth without being overly heavy or restrictive, making it ideal for cooler temperatures.

5.3.6 India Sleepwear Market Size, By Others (Jersey, Fleece etc.), 2018-2029

Sleepwear is an essential part of one's wardrobe, providing comfort and convenience during sleep. In India, sleepwear options are diverse and cater to the different climate and seasonal conditions of the country. Jersey, fleece, and other sleepwear options are popular choices for all seasons, owing to their softness, comfort, and versatility. Jersey is a soft, stretchy, and lightweight fabric made from cotton, wool, or synthetic fibers. It is commonly used in the production of sleepwear, especially T-shirts, nightgowns, and lounge pants. Jersey sleepwear in India is available in a wide variety of styles and designs, including solid colors, prints, and patterns. The production of jersey sleepwear in India involves the use of cotton, wool, or synthetic fibers, which are spun into yarns. The yarns are then knitted into a soft and stretchy fabric, which is then cut and sewn into various styles and designs of sleepwear.

Table 13: India Sleepwear Market Size of Others (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	4.26	4.78	4.36	4.92	5.56	6.32	7.20	8.23	9.44	10.88	12.59	14.63
CAGR	8.21%						15.24%					

Source: Bonafide Research

The production of jersey sleepwear is a labor-intensive process, which provides employment opportunities to a large number of people, especially in the textile and garment industry. On the other hand, fleece is a soft, warm, and lightweight fabric made from synthetic fibers, such as polyester. It is commonly used in the production of sleepwear, especially during the winter season. Fleece sleepwear in India is available in a wide variety of styles and designs, including pajamas, nightgowns, and robes. The production of fleece sleepwear in India involves the use of synthetic fibers, such as polyester, which are spun into yarns. The yarns are then knitted into a thick and dense fabric, which is then brushed to give it a soft and fuzzy texture. The fabric is then cut and sewn into various styles and designs of sleepwear. The production of fleece sleepwear is a relatively new and emerging industry in India, which provides employment opportunities and contributes to the economy. The growth of the market can be attributed to factors such as increasing awareness about the benefits of sleep, growing demand for natural and organic products, and the rise of e-commerce. Lyocell, another form of rayon made from wood pulp, offers similar qualities to modal but with additional advantages such as breathability and biodegradability, appealing to environmentally conscious consumers. Blends of natural and synthetic fibers, such as cotton-polyester blends or spandex-infused fabrics may also be included in the others category, offering a balance of comfort, durability, and stretch.

5.4 India Sleepwear Market, By Distribution Channel

5.4.1 India Sleepwear Market Size, By Supermarkets and Hypermarkets, 2018-2029

The distribution channel of supermarkets and hypermarkets plays a significant role in shaping the landscape of the sleepwear market in India. Hypermarkets, in particular, are large-scale retail outlets that offer a wide range of products under one roof, including apparel, household goods, electronics, and groceries. These mega-stores provide consumers with convenience, variety, and competitive pricing, making them popular destinations for shopping trips in India. In the terms of the sleepwear market, hypermarkets serve as crucial distribution channels, offering consumers access to a diverse selection of sleepwear options from various brands, styles, and price points. The main advantages of hypermarkets in the sleepwear industry are their ability to cater to a broad demographic of consumers across India. These retail giants attract shoppers from different socio-economic backgrounds and age groups, providing something for everyone. Whether it's affordable basic sleepwear essentials or high-end designer loungewear, hypermarkets offer a comprehensive range of choices to suit diverse preferences and budgets. The sheer scale of hypermarkets allows for greater visibility and exposure for sleepwear brands, enabling them to reach a wider audience and drive sales. Hypermarkets also play a crucial role in driving consumer awareness and education about sleepwear trends, styles, and innovations in India. Through strategic merchandising, promotional activities, and in-store displays, hypermarkets highlight the latest sleepwear collections, seasonal trends, and promotional offers, influencing consumer purchase decisions.

Table 14: India Sleepwear Market Size of Supermarkets and Hypermarkets (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	96.37	107.98	98.41	110.72	125.10	141.97	161.91	185.35	213.04	245.86	284.93	331.64
CAGR	8.06%						15.42%					

Source: Bonafide Research

The convenience factor of hypermarkets, with their extended operating hours and central locations, makes them an accessible destination for consumers looking to shop for sleepwear alongside other household necessities. The rise of e-commerce and Omni-channel retailing has transformed the way hypermarkets operate and interact with consumers in the sleepwear market in India. Many hypermarkets have embraced online platforms and digital technologies to enhance the shopping experience, offering consumers the option to browse and purchase sleepwear online for home delivery or in-store pickup. This Omni-channel approach not only expands the reach of hypermarkets but also provides consumers with greater flexibility and convenience in how they shop for sleepwear in India.

5.4.2 India Sleepwear Market Size, By Specialty Stores, 2018-2029

Specialty stores hold a distinctive position within the sleepwear industry in India, offering consumers a tailored and intimate shopping experience focused solely on sleepwear and related apparel. These specialty stores, ranging from boutique outlets to dedicated sleepwear chains, play a crucial role in catering to the diverse preferences and tastes of Indian consumers. In a country known for its rich cultural heritage and intricate craftsmanship, specialty stores in India often showcase a curated selection of premium sleepwear brands, including both domestic labels and international designers. This curated approach allows consumers to explore a range of styles, fabrics, and designs that reflect the unique blend of tradition and modernity inherent in Indian fashion. The specialty stores in India excel in providing personalized service and expert guidance to customers, helping them navigate through the myriad of sleepwear options available. With a focus on quality, comfort, and fit, these stores assist consumers in finding the perfect sleepwear pieces that not only meet their practical needs but also resonate with their individual style preferences.

Table 15: India Sleepwear Market Size of Specialty Stores (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	83.71	94.08	86.00	97.06	110.00	125.23	143.87	165.92	192.11	223.34	260.74	305.72
CAGR	8.39%						16.27%					

Source: Bonafide Research

Specialty stores leverage the power of digital technology to enhance the shopping experience and reach a broader audience across India. Many specialty stores have established online platforms and e-commerce websites, allowing customers from various regions and demographics to browse and purchase sleepwear conveniently from their homes. Factory and brand outlets offer sleepwear at lower prices than regular retail stores, making them an affordable option for shoppers. Factory and brand outlets offer a wide variety of sleepwear options, including different styles, designs, and sizes, catering to the diverse tastes and preferences of shoppers. Factory and brand outlets sell sleepwear directly from the manufacturer, ensuring that the products are of high quality and meet the necessary standards. Delhi NCR is a popular shopping destination for factory and brand outlets for sleepwear, with locations such as Gurgaon, Noida, and Faridabad offering a wide variety of options. Mumbai is home to several factory and brand outlets for sleepwear, with locations such as Andheri, Malad, and Thane offering a wide variety of options. Bangalore is a growing shopping destination for factory and brand outlets for sleepwear, with locations such as Whitefield, Electronic City, and Peenya offering a wide variety of options. Chennai is home to several factory and brand outlets for sleepwear, with locations such as Guindy, Ambattur, and T. Nagar offering a wide variety of options.

5.4.3 India Sleepwear Market Size, By Online Stores, 2018-2029

The online segment within the India sleepwear market has emerged as a significant avenue for both consumers and retailers, reshaping the traditional landscape of how sleepwear is bought and sold. This segment has witnessed remarkable growth in recent years, propelled by the widespread adoption of digital technology and the increasing comfort level of consumers with online shopping platforms. One of the most compelling aspects of online stores is their unparalleled convenience. Consumers can browse and purchase sleepwear items from the comfort of their homes, eliminating the need for physical store visits and saving valuable time and effort. This convenience factor holds particular appeal for busy individuals, working professionals, and those residing in remote areas that not have easy access to brick-and-mortar stores. The online sleepwear market in India offers an extensive variety of options to consumers. From basic pajama sets to luxurious silk nightgowns, online platforms host a diverse range of sleepwear styles, sizes, colors, and brands to cater to different tastes and preferences. This vast selection ensures that consumers have the freedom to explore various options and find the perfect sleepwear items that suit their individual needs and aesthetic preferences.

Table 16: India Sleepwear Market Size of Online Stores (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	64.42	73.44	68.10	77.96	89.62	103.49	121.48	143.15	169.35	201.18	239.98	287.51
CAGR	9.94%						18.80%					

Source: Bonafide Research

The accessibility of online stores transcends geographical boundaries, allowing consumers from all corners of India to access a wide array of sleepwear products. This inclusivity is particularly beneficial for consumers in tier-2 and tier-3 cities, where the availability of specialty stores may be limited, providing them with access to a broader range of choices that were previously inaccessible. Online platforms facilitate price comparison, enabling consumers to make informed purchasing decisions. The transparency of pricing allows shoppers to compare prices across different retailers and choose the best deals and discounts available, ensuring that they get the most value for their money. This price transparency fosters healthy competition among retailers, driving them to offer competitive prices and promotions to attract customers. The online segment of the India sleepwear market continues to evolve with advancements in technology and consumer preferences. Retailers are investing in user-friendly interfaces, secure payment gateways, and enhanced customer service to provide a seamless shopping experience for online shoppers.

5.4.4 India Sleepwear Market Size, By Garment shop (general retail) Stores, 2018-2029

In India, the sleepwear market is growing, owing to the increasing demand for comfortable and stylish sleepwear options. Garment shops for sleepwear in India are popular shopping destinations, offering a wide variety of sleepwear options to cater to the diverse tastes and preferences of shoppers. Garment shops offer a wide variety of sleepwear options, including different styles, designs, and sizes, catering to the diverse tastes and preferences of shoppers. Garment shops offer personalized service, with knowledgeable staff that can provide guidance and assistance in selecting the right sleepwear. Walking into a sleepwear shop in India is akin to stepping into a haven of comfort. These stores are meticulously curated to offer a wide array of options that blend traditional craftsmanship with contemporary design. Cotton, silk, satin, and blends thereof are commonly featured, ensuring a balance of breathability and luxury. Whether it's a sultry summer night or a chilly winter evening, there's a garment crafted to suit every need and preference. India's rich cultural tapestry is reflected in its sleepwear designs. From intricate hand-embroidered motifs to bold prints inspired by local flora and fauna, each piece tells a story. Garment shops often celebrate this diversity, offering a mix of regional styles alongside globally trending designs. Customers can explore everything from the timeless elegance of Rajasthani block prints to the playful charm of South Indian ikat patterns. In recent years, sleepwear has evolved beyond mere functionality to become a fashion statement in its own right. Leading Indian designers have embraced this trend, infusing their collections with innovative cuts, unconventional fabrics, and avant-garde embellishments. This transformation has not only elevated the appeal of sleepwear but also broadened its acceptance as versatile attire suitable for lounging, leisurely outings, and even casual social gatherings.

Table 17: India Sleepwear Market Size of Garment shop (general retail) (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	123.32	135.90	121.81	134.79	149.78	167.19	184.84	205.15	228.60	255.77	287.37	324.26
CAGR	6.28%						11.90%					

Source: Bonafide Research

5.4.5 India Sleepwear Market Size, By Others, 2018-2029

Boutiques specializing in sleepwear offer a personalized and intimate shopping experience that transcends mere transactional interactions. Nestled in upscale neighborhoods or thriving as boutique hotels' in-house offerings, these establishments curate a carefully selected range of sleepwear, often crafted by local artisans or emerging designers. Each piece exudes a sense of exclusivity, featuring bespoke designs, luxurious fabrics, and meticulous detailing. The boutique setting allows customers to explore and appreciate the finer nuances of sleepwear fashion, from delicate lace trimmings to hand-embroidered motifs inspired by regional aesthetics. The emphasis

on quality over quantity ensures that every purchase is an investment in both comfort and timeless elegance. For instance, Private Lives is a popular boutique brand that offers a range of nightwear, loungewear, lingerie, and beachwear. Their exclusive collection includes nighties, night suits, babydolls, and more, all designed to provide exceptional comfort and style.

Table 18: India Sleepwear Market Size of Others (2018 to 2029) in USD Million

Year	2018	2019	2020	2021	2022	2023	2024E	2025F	2026F	2027F	2028F	2029F
Market Size	19.93	22.41	20.44	22.95	25.81	29.07	32.78	36.78	41.04	45.53	50.14	54.75
CAGR	7.84%						10.80%					

Source: Bonafide Research

Direct-to-consumer brands, meanwhile, bypass traditional retail channels altogether, selling sleepwear directly to consumers through online platforms or physical showrooms. These brands often emphasize transparency, sustainability, and affordability, offering consumers a direct line to the brand and its products. Television shopping has also become a significant channel for sleepwear in India. Platforms like Home Shopping Network (HSN) and Shop CJ offer a range of sleepwear options to consumers. These platforms provide a convenient way for consumers to shop from the comfort of their own homes, often with the added benefit of free shipping and cash on delivery options. Television shopping channels have revolutionized the way Indians shop, combining the allure of live demonstrations with the convenience of doorstep delivery. These channels broadcast round-the-clock showcases of sleepwear collections, allowing viewers to browse, compare, and purchase products from the comfort of their homes. The appeal lies in the comprehensive presentation of each garment, accompanied by detailed descriptions of fabric composition, sizing charts, and styling tips. Experienced hosts engage viewers by highlighting key features and demonstrating versatility, making it easier for customers to make informed decisions. Both boutiques and television shopping channels celebrate India's rich cultural diversity by showcasing a wide array of sleepwear designs and fabrics. Whether it's the timeless allure of traditional handloom textiles or the contemporary appeal of eco-friendly organic cotton, these platforms cater to diverse tastes and preferences. From intricately printed kalamkari nightgowns to minimalist satin pajama sets adorned with delicate embroidery, every piece reflects a harmonious blend of heritage and innovation.

6 Disclaimer

I/We agree to the License Terms on behalf of the organization. It shall be binding upon the user on acceptance of the delivery of Bonafide Research's products (including research reports, survey data, company profiles, custom research services, and any other product created and owned by Bonafide Research) or consulting assignments by Bonafide Research and any of its authorized distributors. The License Terms supersede and replace any other agreement accepted with respect to a prior version of the product or service. Unauthorized access or distribution of Bonafide Research's reports will be considered a serious breach of the terms and conditions as stated herewith and on Bonafide Research's website. Any violation of which shall be treated as per the applicable laws in India or in the jurisdiction of purchase. The products and services offered are the intellectual property of Bonafide Research and are protected by applicable copyright laws, international treaty provisions, and other applicable laws of the country in which they are being used. The publisher will keep the purchaser's details confidential.

No information or part of information can be used for general publication or disclosed to a third party. The contents of this report are based on information generally available to the public from sources believed to be reliable and first-hand. Bonafide Research doesn't make any warranty for the accuracy of the data as these are primarily based on interviews and is not responsible for any errors or omissions or for the results obtained from the use of such information, and especially states that it has no financial liability whatsoever to the subscribers/users of this report. The information herein, together with all estimates and forecasts, can change without notice.

All the Figures provided in this document are indicative of relative market size and are strictly for the client's internal assessment. Transmission and/or reproduction of this document by any means or in any form (including photocopying, mechanical, electronic, recording or otherwise) is prohibited without permission of Bonafide Research.

I/we acknowledge that I/we have read the terms and conditions, disclaimer, and privacy policy listed on the Bonafide Research website and by placing the order online through credit card, wire transfer, or any other means, hereby accept the same.