



Shapewears in India: A Study of Evolution & Current Scenario

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Abstract

Shapewear has gained popularity in India over the past few decades, evolving from being an imported luxury to a mainstream garment with wide acceptance across various socio-economic classes. This study traces the evolution of shapewear in India, analysing its growth from traditional undergarments to modern, body-enhancing apparel. With the influence of globalisation, changing fashion trends, and increasing body consciousness, shapewear has seen a steady rise in demand among Indian consumers, particularly urban women. The research examines key factors driving this shift, such as the impact of Bollywood, Western fashion influences, and the proliferation of e-commerce platforms. It also explores the socio-cultural implications, including shifting perceptions of body image and the role of shapewear in boosting self-confidence. Moreover, the study assesses the competitive landscape of the Indian shapewear market, highlighting the role of domestic brands, international players, and innovations in material and design technology. By reviewing consumer behavior, marketing strategies, and the challenges faced by manufacturers in balancing functionality with comfort, the research provides a comprehensive overview of the current shapewear scenario in India, along with future growth prospects in an increasingly body-conscious society.

Keywords: Shapewear, Fashion, Brands, Globalisation, Market, Industry.

Introduction

The period from 2007 to 2017 witnessed a remarkable transformation in Indian society's attitude towards fashion, body image, and consumer behaviour, greatly influencing the rise in popularity of shapewear. During these years, globalisation significantly impacted Indian fashion, introducing Western beauty ideals that emphasised slim and toned figures. With increased exposure to Western media and cinema, Indian consumers—especially in urban areas—began adopting body-conscious clothing, such as fitted saree blouses and Western wear, thereby elevating the demand for shapewear as a practical solution to achieve sleek, flattering silhouettes. Bollywood and media played pivotal roles in shaping body image trends, as the portrayal of slim, toned figures in films and celebrity endorsements reinforced these ideals. As body-hugging fashion gained momentum, shapewear became essential for women seeking confidence in wearing such outfits. Additionally, the evolution of traditional attire, like the saree, saw the rise of saree-specific shapewear, blending modern aesthetics with cultural heritage. The growing urban middle class, marked by rising disposable incomes and increasing exposure to the global market, also contributed to shapewear's ascent. The rapid expansion of retail, both online and offline, made these products more accessible, allowing women from diverse socio-economic backgrounds to embrace shapewear for both fashion and functional purposes. Celebrity endorsements, aggressive marketing campaigns, and the rise of fashion



magazines and social media further fuelled its mainstream acceptance, normalising its use in daily wardrobes. Technological advancements played a critical role in enhancing the comfort and functionality of shapewear, transforming it from uncomfortable, constrictive undergarments into breathable, lightweight, and versatile apparel. With diverse styles catering to different body types and needs, including postpartum shapewear and gym-friendly designs, shapewear became relevant across various segments of society. This shift also aligned with the broader empowerment movement among Indian women, who increasingly viewed shapewear as a tool for self-care, confidence, and personal grooming rather than mere societal conformity. By 2017, shapewear had transitioned from being a concealed accessory to an integral part of women's fashion, shedding its stigma and becoming widely accepted. People embraced shapewear as an essential element of personal style and self-expression, no longer viewing it as a taboo or secretive item. This normalisation reflects a broader societal change, where women's empowerment, body positivity, and fitness awareness have intersected to create a market and cultural space for shapewear in India.

Literature Review

The history and evolution of shapewear date back to ancient times, originating as foundation garments crafted from materials such as leather, bone, and steel. Mycenaean Greece designed early examples, such as corsets, to create an hourglass figure, a trend that persisted in various forms across different cultures, including the Romans and Victorians, who favoured tight corsets and breast binders. By the 20th century, the use of lighter, more comfortable fabrics, such as elastic textiles, marked a shift towards girdles and other forms of body-shaping undergarments. Modern shapewear has since evolved, prioritising comfort through innovations like seamless designs and advanced fabrics such as elastane and spandex (Laver, *The Concise History of Costume and Fashion*, 2010).

Today's shapewear market offers a wide variety of products, including control camisoles, corsets, body shapers, and control pants. Technological advancements have enabled the production of shapewear with seamless garments using circular knitting machines, contributing to the comfort and flexibility of the designs (Smith, *Fashion Technology: Today and Tomorrow*, 2014). These developments align with contemporary ideals of body confidence, where shapewear is less about radically reshaping the body and more about offering subtle control and enhancing natural curves.

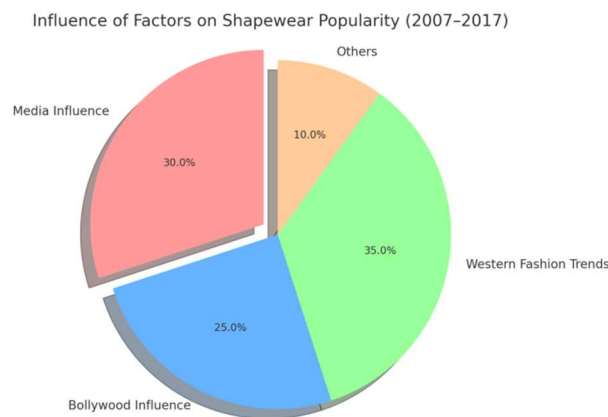
Consumer preferences for shapewear vary significantly based on age, economic status, and fashion needs. Across different demographics, a survey revealed that middle-class consumers highly favour seamless designs and durable fabrics, while elite consumers tend to gravitate towards luxury brands. Preferences for specific control areas, such as the tummy, hips, and thighs, have also emerged as consistent trends in shapewear usage (Davis, *Textiles and Fashion: Materials, Design, and Technology*, 2015).

In terms of production, shapewear manufacturing in India has expanded over the years, with both small and large units playing a role. Small-scale production units such as H.R. Corporation in Meerut produce about 10,000-12,000 pieces per month, while larger companies like Triumph in Chennai have more advanced machinery that allows them to manufacture up to 40,000 pieces

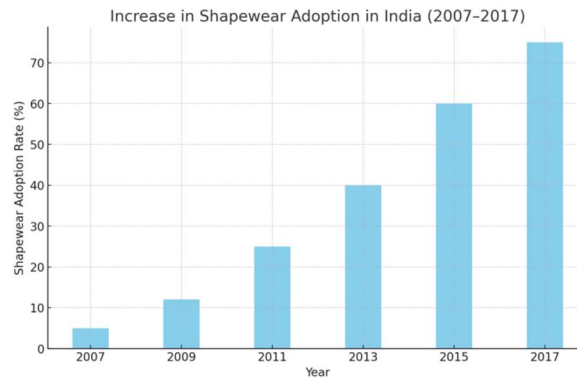
monthly (Rosenberg, *The Textile Industry in India: Challenges and Opportunities*, 2017). The widespread availability of shapewear through online and offline retail channels has contributed to the industry's rapid growth.

Media, Bollywood, and Western fashion trends have significantly influenced the popularity of shapewear in India. The rise of social media platforms and television shows that glamorise Western beauty ideals has made shapewear a staple item in the wardrobes of Indian women. Bollywood celebrities have also played a critical role, with their endorsement of body-hugging outfits further normalising the use of shapewear for achieving a "perfect" figure (Friedman, *Fashioning Bollywood: The Making and Meaning of Hindi Film Costume*, 2013). Additionally, Western fashion trends that favour body-centric clothing, such as fitted dresses and workout wear, have fostered a growing demand for shapewear that complements these styles (Gill, *Globalisation, Media, and Body Image*, 2011).

We expect the ongoing innovations in fabric technology, like the increased use of spandex and Lycra, to further revolutionize the shapewear market by making products more durable, adaptable, and comfortable. These advancements suggest that the Indian shapewear market is poised to compete on a global scale, with seamless technology leading the way into the future (Rosenberg, *The Textile Industry in India: Challenges and Opportunities*, 2017).



The pie chart above illustrates the relative influence of different factors—Media, Bollywood, and Western fashion trends—on the growing popularity of shapewear in India from 2007 to 2017. As seen, **Western fashion trends** and **media influence** had the largest impacts, contributing to 35% and 30%, respectively, followed closely by **Bollywood's influence** at 25%.

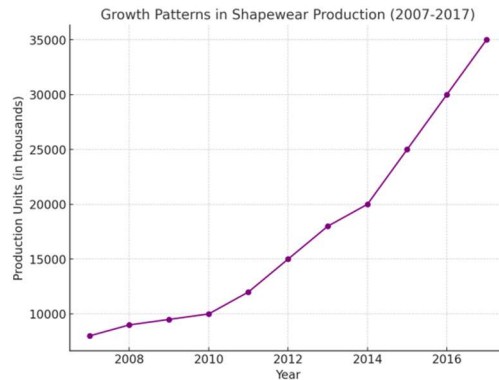


The bar graph above shows the significant increase in the adoption of shapewear in India from 2007 to 2017. Starting with just a 5% adoption rate in 2007, shapewear usage surged to 75% by 2017, reflecting its growing popularity driven by media, Bollywood, and Western fashion influences.

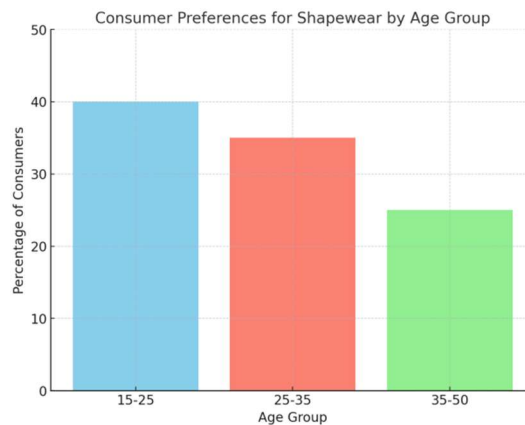
Diagram: Influence Flow on Shapewear Popularity



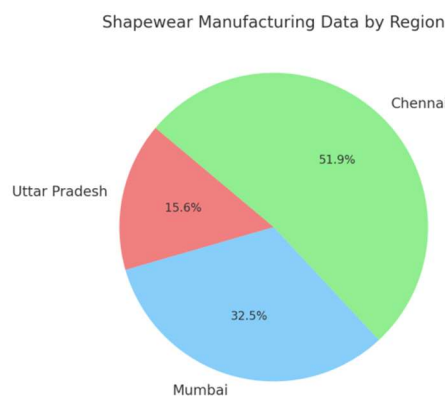
Growth Patterns (increase in shapewear production over time).



Consumer Preferences (preferences by age group or fabric).



Manufacturing Data (production output by region or brand).





In the context of the evolution of shapewear in India from 2007 to 2017, media, Bollywood, and Western influences played a crucial role in shaping consumer attitudes towards body image and fashion.

1. **Media Influence:** The rise of social media platforms and fashion-focused television shows increased visibility of Western beauty ideals in India. Media exposure led to the popularization of shapewear as an essential wardrobe item for achieving a "perfect" silhouette, catering to emerging fashion needs such as body-hugging dresses and traditional saree styles with a modern twist(Grand View Research)(HTF MI).
2. **Bollywood's Impact:** Bollywood celebrities, renowned for their influence on fashion and beauty, became instrumental in popularizing shapewear. Actresses frequently appeared in body-conscious outfits that emphasized toned figures. The public, influenced by these aspirational images, began to see shapewear as a quick solution for attaining a sleek, glamorous look without undergoing cosmetic procedures (Transparency Market Research).
3. **Western Fashion Trends:** Global fashion movements introduced body-centric clothing, such as fitted Western dresses and workout gear, which began to influence Indian fashion trends. Western brands like Spanx and Skims expanded their reach into India, bringing with them innovations in shapewear designs that catered to a more diverse range of body types and fashion needs(StraitsResearch)(Market Research Future).

The growing relevance of shapewear in India during this period was also fueled by increased purchasing power and the rise of online retail, making these products more accessible to a wider audience. These combined factors helped normalize shapewear, making it a staple in women's wardrobes across urban India.

Methodology

Body shapers and shape garments have undergone a variety of changes throughout their lengthy histories and fascinating lives. These changes have occurred in terms of the technology, materials, and patterns that they use. This makes their presence an extremely intriguing phenomenon.

This research aimed to collect data on the technologies used in shapewear creation and the ways individual preferences vary in their selection. To collect data, we conducted a field survey.

1. Surveys:

- **Target Audience:** The document mentions purposive sampling targeting three key age groups:
 - **Middle-aged women (35-50 years):** 10 respondents.
 - **Young adults (25-35 years):** 10 respondents.
 - **Teenagers (15-25 years):** 10 respondents.
- **Survey Focus:** Preferences in shapewear types, brands, fabrics, styles, and reasons for usage.



- **Sample Size:** 30 consumers, 6 retailers, and 3 manufacturing units.

2. Interviews:

- **Key Informants:** Manufacturers, retailers, and consumers.
 - **Manufacturers:** Interviewed in three cities—Meerut, Chennai, and Mumbai.
 - **Retailers:** From different areas of Delhi.
 - **Consumers:** Divided by age groups to provide insights into personal preferences and changes over time.
- **Topics Covered:** Changes in shapewear construction, fabric technology, brand preferences, and style evolution.

3. Secondary Data:

- **Sources:**
 - Lady Irwin College Library.
 - NIFT Library.
 - Market reports and online sources.
- **Focus Areas:** Historical data on shapewear, market trends, and innovations in fabric and machinery.

4. Primary Data Collection (Observational):

- **Site Visits:**
 - Three manufacturing units (small, medium, and large scale).
 - Observations of machinery (circular knitting machines, flatlock stitching machines) and production techniques.
- **Retailers:** Interviewed to assess customer behavior and preferences.

5. Product Categories:

- Shapewear types categorized by product (tops, bottoms), control areas (tummy, waist, thighs), and distribution channels (multi-retail stores, online).

Table: Sample Sizes by Age Group:

| Age Group | Number of Respondents |
|----------------------|-----------------------|
| Middle-aged (35-50) | 10 |
| Young adults (25-35) | 10 |
| Teenagers (15-25) | 10 |
| Total | 30 |

Findings or Outcomes



1. Manufacturing Units Overview:

- **Locations:** The interviews were conducted at manufacturing units in **Meerut, Chennai, and Mumbai.**
- **Scale:** The units were categorized as small, medium, and large-scale industries:
 - **Meerut (H.R. Corporation):** A small-scale unit.
 - **Chennai (Triumph International Pvt. Ltd.):** A large-scale unit.
 - **Mumbai:** A medium-scale unit.

2. Key Observations from Each Manufacturing Unit:

Meerut (H.R. Corporation):

- **Scale:** Small-scale unit producing around **10,000–12,000 pieces per month.**
- **Machinery Used:**
 - Flat-lock stitching machine and over-lock machine.
 - Semi-automated hand-cutting machine.
- **Product Range:** Produced affordable shapewear priced between **Rs.400 and Rs.1200**, using simpler and more basic fabric blends.
- **Challenges:** The unit couldn't afford seamless garment-making machinery, which limited production capacity and innovation.
- **Annual Turnover:** Estimated at **Rs.2–2.5 crore.**
- **Fabric Composition:** Blended fabric of **55% cotton, 30% synthetic fibers, and 15% spandex.**
- **Market:** Mainly catered to the lower and middle-income segments with a focus on affordability over advanced features.

Chennai (Triumph International Pvt. Ltd.):

- **Scale:** Large-scale unit with a production of **35,000–40,000 pieces per month.**
- **Machinery Used:**
 - Circular knitting machines for seamless garments.
 - Flat-lock and over-lock machines for final stitching.
- **Product Range:** High-end shapewear priced between **Rs.1200 and Rs.4000**, with more sophisticated and durable designs. Products were sold globally.
- **Consumer Base:** Primarily catered to **elite customers** who valued quality and were willing to invest more in premium shapewear.
- **Annual Turnover:** Estimated at **Rs.5–6.5 crore.**
- **Fabric Composition:** Blended **71% polyamide and 29% elastane.**
- **Product Innovation:** Specialized in both seamless and high-end shapewear, using advanced fabrics and technology like **plastic bones** for additional support and structure.

Mumbai (Medium Scale Unit):

- **Scale:** Medium-sized unit producing **around 14 styles** of shapewear with varied fasteners.



- **Product Range:** Shapewear priced moderately, with a focus on maintaining quality and variety in products.
- **Machinery Used:** Modern machinery with a focus on producing **14 different styles**.
- **Market:** Mainly focused on producing under its own brand name and selling through online platforms.
- **Innovation:** More advanced than Meerut, with better technology for faster production, but not as expansive as the Chennai unit.

3. Common Findings Across Units:

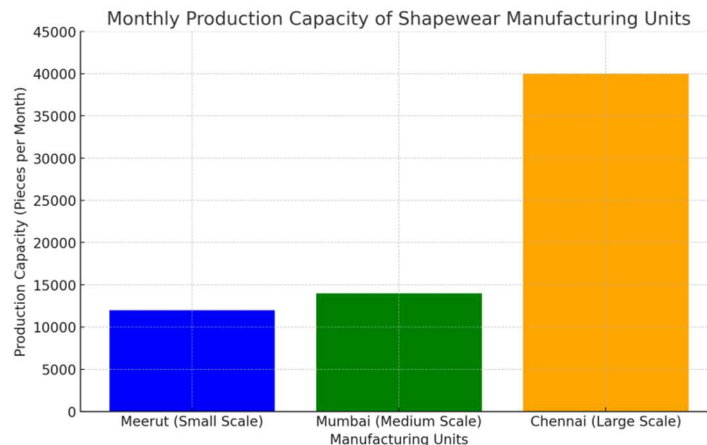
- **Growth Trends:** There has been significant growth in demand for shapewear between **2010–2015**, as more consumers became interested in shapewear for daily and occasional wear.
- **Fabric Technology:** The evolution from thicker, less elastic materials to **spandex and polyamide blends** allowed manufacturers to create shapewear that was more comfortable and functional.
- **Seamless Technology:** The **Chennai unit** led the way in adopting **seamless technology**, which has become a game-changer for comfort and production efficiency.
- **Market Focus:**
 - **Small- and medium-scale units** catered to middle-income groups with affordable shapewear.
 - **Large-scale units** catered to the elite segment, focusing on high-end, durable, and comfortable shapewear.

4. Challenges Faced:

- Smaller units, such as the one in Meerut, struggled to compete due to the high costs associated with seamless garment-making machinery and advanced fabrics.
- There was also a lack of local manufacturing units that could produce shapewear on a large scale, leading to dependence on imported machinery and fabrics.

5. Future Potential:

- **Growth Opportunities:** The shapewear industry is expected to grow further as innovations in fabric and seamless technology improve product comfort and appeal.
- **Investment in Machinery:** The introduction of seamless knitting machines is seen as a key factor for further growth, particularly in larger units like those in Chennai.



Here is the bar graph comparing the **monthly production capacities** of the three shapewear manufacturing units:

- **Meerut (Small Scale):** 12,000 pieces per month.
- **Mumbai (Medium Scale):** 14,000 pieces per month.
- **Chennai (Large Scale):** 40,000 pieces per month.

This graph highlights the differences in scale, with the Chennai unit producing significantly more shapewear compared to the smaller units in Meerut and Mumbai.

Conclusion

The evolution of shapewear reflects significant advancements in fabric technology, construction techniques, and consumer preferences over time. The industry has undergone significant change, starting from ancient times when people used rudimentary garments to shape their bodies, progressing to the Victorian era's tight corsets, and culminating in today's seamless and comfortable shapewear. Modern shapewear caters to a wide range of needs, offering products that enhance body contours while prioritising comfort and flexibility.

The study highlights the shapewear industry's growth in India, with small-, medium-, and large-scale manufacturing units showing varying capacities and technological adoption. While the smaller units struggle with limited machinery and simpler techniques, the larger units, especially in cities like Chennai, have embraced advanced technologies such as circular knitting machines and seamless garment construction, enabling them to produce higher-quality products at scale.

Consumer preferences vary across different age groups and socio-economic classes, with younger consumers seeking trendy and experimental designs, while middle-aged women focus more on comfort and functionality. High-end international brands dominate the elite market segment, while domestic brands serve the middle-class market, focussing on affordability and utility.



The industry shows strong potential for growth, driven by increasing fitness consciousness, demand for body contouring garments, and technological advancements. As Indian manufacturers continue to innovate, the domestic shapewear industry is poised to compete with international players, offering products that meet both local and global standards.

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