

# INDIA'S GYM AND FITNESS INDUSTRY REPORT

In-depth market analysis by:  
THE INDIA WATCH



# TABLE OF CONTENT

Summary Overview

Market size of the Indian fitness industry

Top 5 branded chains (revenue-wise)

Top 5 branded chains (no. of outlets wise)

Celebrity Investment in Fitness Sector

Rise of online fitness in India

Size of online fitness & supplement market

Top 5 online players

Key growth drivers of online fitness in India

Category-wise key players

How The India Watch can help

About the India Watch



# EXECUTIVE SUMMARY

Gym and fitness centre penetration in India stands at a modest ~ 0.5%, yet the market is growing at a steady pace. Conducive macroeconomic factors such as growing economy, rise in disposable income, attractive demographic dividends, and increased urbanization are driving the growth gyms, fitness centres, lifestyle training centres, and numerous other ancillary business units.

65% of the Indian population is aged below 35, which is a critical growth driver. Health and fitness awareness are rising among Indian youth, which is good sign for Gym business to flourish in the country. The growing influencer culture in India, marked by rise in popularity of Instagram influencers, fitness podcasts, healthy vlogs are also acting as a growth multiplier. Not only it is increasing general health & fitness awareness but also pushing demand for athletic body types amongst Indian youths and even other age groups. By 2028, India's gym & fitness industry is slated to grow at a CAGR of 16.8%.

Interestingly gyms are no more just a men phenomenon, as around ~ 40% of enrolment comprise of females in India. Gyms are also now changing their offering, making them more appealing to the wider audience. Apart from traditional weight training and cardio, numerous gyms and fitness centres are offering other services such as Zumba, Pilate, Yoga, etc. Many are venturing into diet & nutrition coaching, merchandize, supplement selling, health screening and much more, thereby adding to the revenue base.

As per the study by The India Watch, India has close to 69,400 gyms and fitness centres. The majority of the market is run by individual gyms, while organized branded players encompass 14%. Major gym & fitness chains in India include Cult Fit, Talwalkars, Gold's Gym, etc. Cult Fit is the largest Gym chain in India with around ~ 580 units all over the country. Due to India's expanding fitness industry, numerous international chains such as Myfitness, Snap Fitness, Ozone Fitness, etc. are also expanding their foothold in the country.



# EXECUTIVE SUMMARY

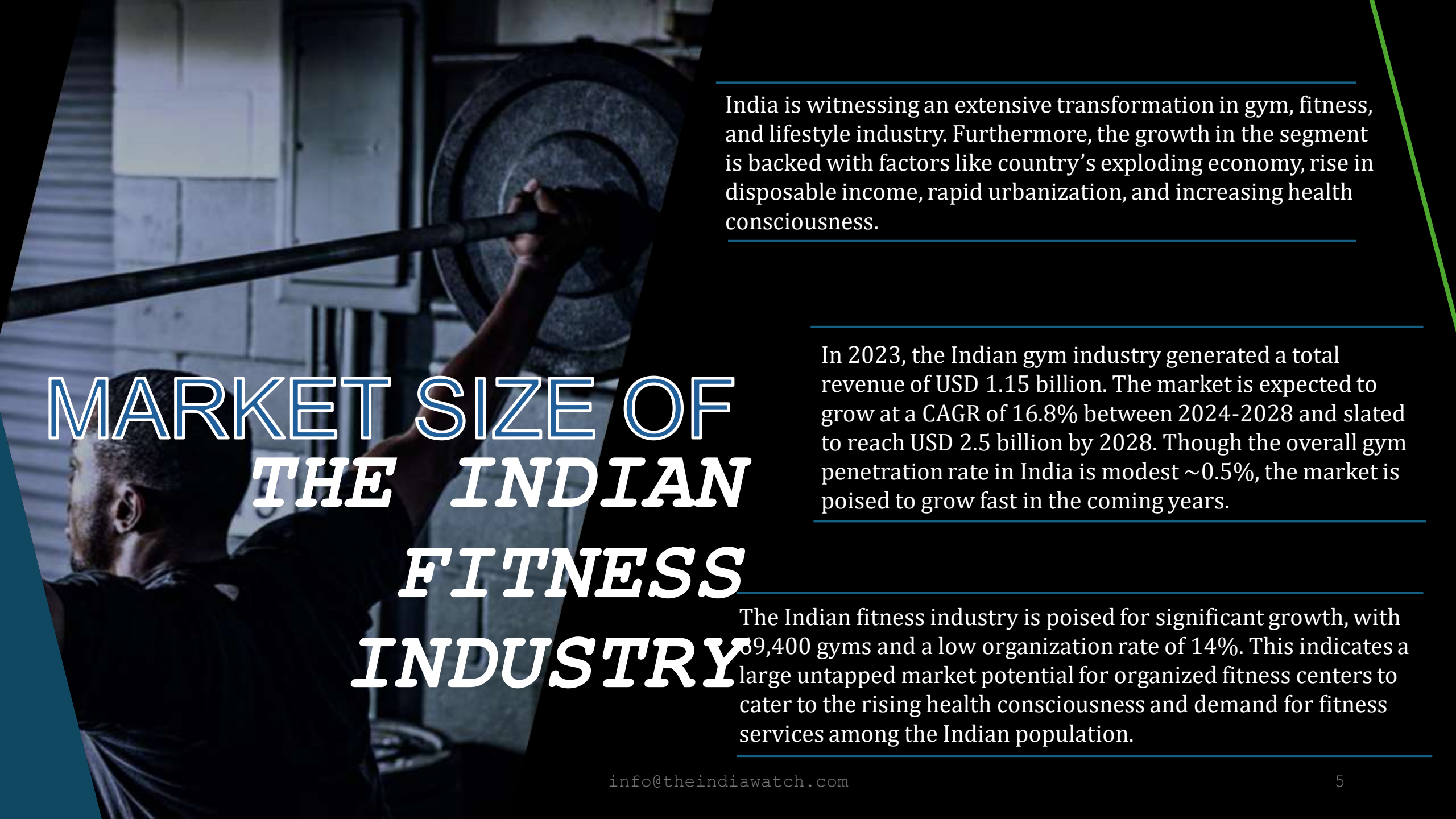
Like other industries, the fitness sector in India also embraced digitization during the time of pandemic, marked by proliferation in health and fitness apps. Growing digitization has also resulted in emergence of fitness and lifestyle e-commerce players selling various kinds of protein supplements, pre-workouts, nutrition, weight-loss supplements, creatinine, merchandizes, etc. Not to mention detox waters, Ayurveda medicines, nutrition bars, gym gears, etc. Hassle free home delivery of supplements and other nutrition are intriguing Indian gyms goes and fitness lovers, thereby resulting in accelerated growth of the segment.

Though online fitness is highly fragmented industry, there has been emergence of both D2C players as well as third party marketplaces. The top 25 companies which includes Muscle Blaze, Kapiva, Healthkart, etc. have collectively clocked a revenue of USD 277 million in 2023, as per the market study by The India Watch. The segment is poised to further grow and evolve in foreseeable future and set to reach USD 396 million by 2027.

Overall, the times ahead are exciting for Indian Gym, Fitness, Supplement industry, stemmed by rise in demand and growing health awareness. While existing brands will grow, new entities will continue to emerge across multiple segments spanning gyms & fitness centres, supplement selling, online training, subscription-based apps, gyms gears & equipment, etc.

In this interesting time, companies like The India Watch will also play pivotal role by bridging the information gap with the help of tailor-made research services, insights, and feasibility study solutions.



A person is shown from the side, lifting a barbell with weights in a gym. The background is slightly blurred, showing gym equipment and a window. The overall tone is blue and professional.

# MARKET SIZE OF *THE INDIAN FITNESS INDUSTRY*

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India is witnessing an extensive transformation in gym, fitness, and lifestyle industry. Furthermore, the growth in the segment is backed with factors like country's exploding economy, rise in disposable income, rapid urbanization, and increasing health consciousness.

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In 2023, the Indian gym industry generated a total revenue of USD 1.15 billion. The market is expected to grow at a CAGR of 16.8% between 2024-2028 and slated to reach USD 2.5 billion by 2028. Though the overall gym penetration rate in India is modest ~0.5%, the market is poised to grow fast in the coming years.

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The Indian fitness industry is poised for significant growth, with 69,400 gyms and a low organization rate of 14%. This indicates a large untapped market potential for organized fitness centers to cater to the rising health consciousness and demand for fitness services among the Indian population.

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# TOP 5 BRANDED CHAINS (REVENUE-WISE)

## Top 5 Branded Gym Chains (2023, USD Million)

Source: The India Watch Analysis



# TOP 5 BRANDED CHAINS (NO. OF OUTLETS)





# CELEBRITIES INVESTING IN FITNESS INDUSTRY

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Salman Khan acquired manufacturing rights of fitness equipment company Jerai Fitness in 2018.

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Malaika Arora & Shahid Kapoor invested in yoga and wellness startup SARVA.

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Star Indian cricketer, Virat Kohli owns a chain of gyms known as Chisel.

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Hirthik Roshan own HRX, a brand of workout gears. He also signed a deal with cure.fit to design specialized workout splits for the app.

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## RISE OF ONLINE FITNESS IN INDIA

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Since the beginning of the pandemic, the fitness industry has also seen a remarkable shift towards online medium. By 2033, global online fitness market is slated to reach ~ 4.5 billion, growing at a CAGR of ~12%. Some key drivers behind this growth include increased demand for advanced workout sessions and a sharp rise of AR or VR-based training.

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Numerous gyms and fitness chains that operate on-ground are now also embracing the digital medium in India, thereby giving push to virtual exercise sessions, consultations, holistic training, etc. Famous chains like Cultfit, Anytime Fitness, Snap Fitness, etc have adopted such programs through their website. They also have their specialized app on App Store and playstore.

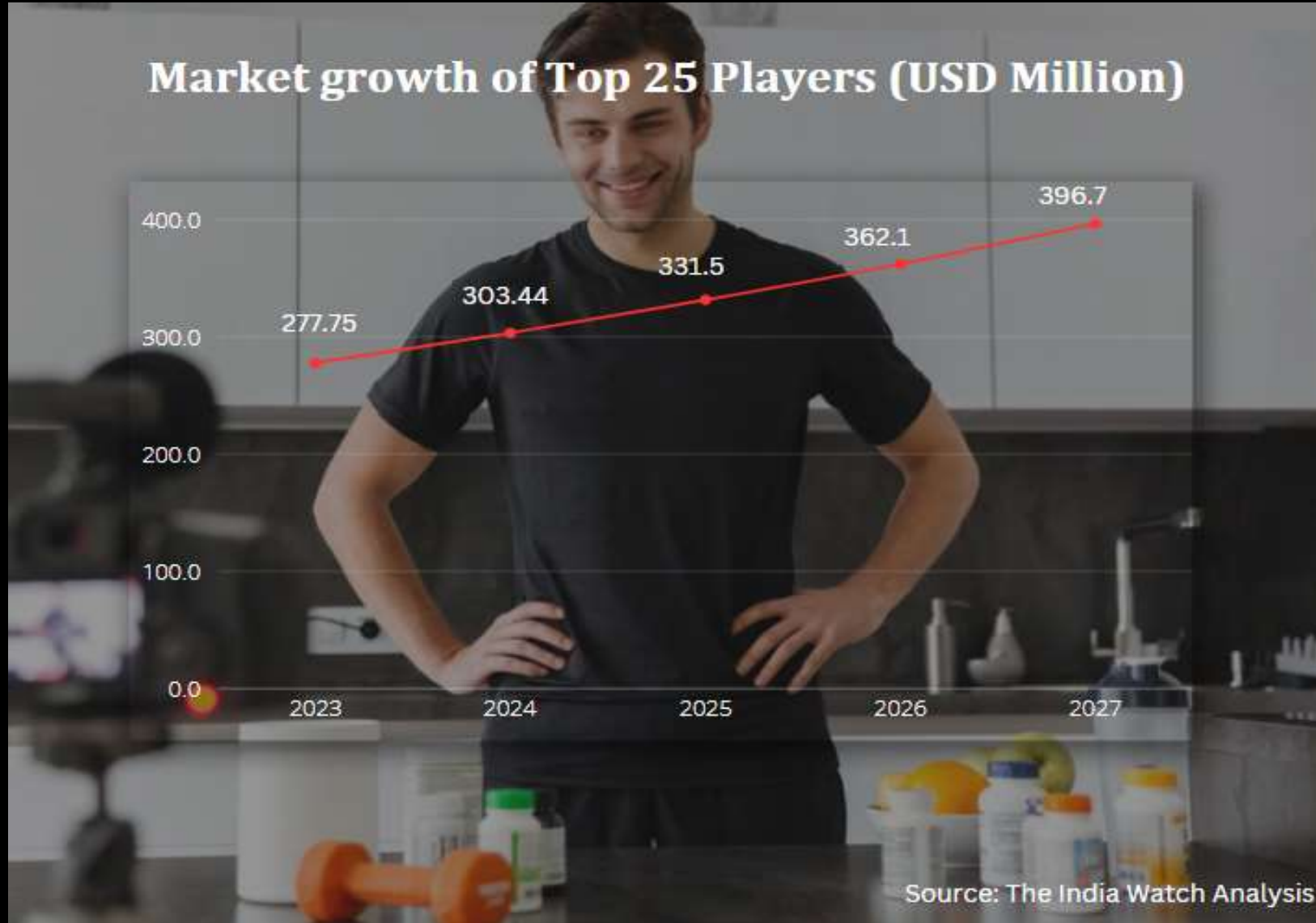
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Some other popular fitness apps include Gympik, HealthifyMe, Nike Training Club, 30-Day Fitness at Home, Sweat and Glo. These online fitness programs in India can be segmented based on: Business Model (Subscription-based, pay-per-class and hybrid models) and Target Audience (General fitness, yoga, dance, strength training and personalized training). The future of online fitness in India looks very promising with trends such as Live Interactive Classes, Gamification and AI-powered personalization.

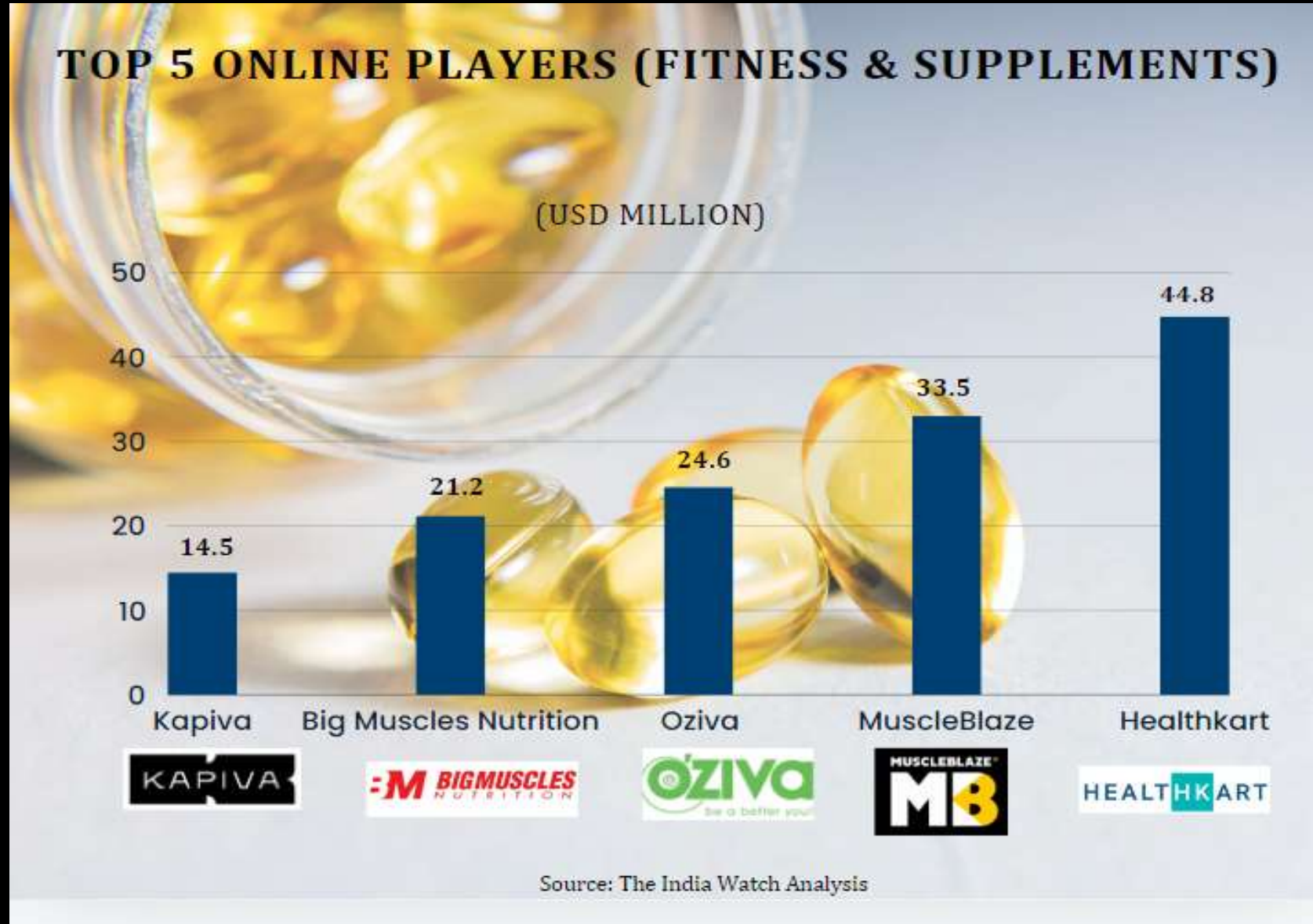
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# SIZE OF ONLINE FITNESS & SUPPLEMENT MARKET



# TOP 5 ONLINE PLAYERS (REVENUE-WISE)



# KEY GROWTH DRIVERS OF ONLINE FITNESS IN INDIA

01

E-commerce platforms have made it easy to access a variety of supplements through online shopping. Online purchases are supported by an increased infiltration of smartphones and deeper penetration of internet even in tier II and tier III cities.

02

Social media is a powerful driver of growth in the Indian online supplement market due to its vast reach among consumers in the country. Supplements are being endorsed by influencers as well as celebrities who have a large following.

03

The pandemic forced people to adopt home workouts, leading to increased demand for online fitness content and equipment.

04

India's health and wellness journey is being powered with new age technologies like AI, ML, intelligent wearables enabling people to become more focused.

05

Demand for gym supplements such as whey protein, mass gainers, creatine and pre-workouts is fueled by the growing fitness and gym culture in the country.

# Category-wise Key Players in the Segment

## Major Gym Chains



## Major Fitness Supplement Brands



## Online Fitness Platforms



## Yoga and Meditation Centres





## HOW THE INDIA WATCH CAN HELP ?



Feasibility study reports for new gyms, fitness supplements and gym gear ventures

Consumer behaviour surveys (quantitative, qualitative, mixed) to gain valuable insights

Customer satisfaction surveys, brand perception & benchmarking surveys, etc

Strategic intelligence and market knowledge for brands looking to expand and scale up

Pitch decks, investor reports, corporate presentation for clients



# THANK YOU!

## ABOUT US:

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The India Watch is an independent Market Research and Feasibility Study advisory. Through our customized research solutions, we help Corporates, Entrepreneurs, Sovereign Agencies, Family Offices, and institutional investors to make informed business decisions. We have in-depth expertise across a range of sectors such as Manufacturing, Infrastructure & Real Estate, Consumer Retail, Technology, E-commerce, F&B, Hospitality & Wellness, Lifestyle, Agribusiness, Shipping & Logistics, etc.

## THE INDIA WATCH ANALYSIS

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