

Online Clothing Rental Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Apparel, Footwear & Accessories (Consumer Goods & Services)
> **Source:** https://www.mordorintelligence.com/industry-reports/online-clothing-rental-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.01 billion
Projected Forecast (2031)	USD 2.01 billion
Growth Rate (CAGR)	6.35 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Online Clothing Rental industry] (images/chart_2.png)

! [Online Clothing Rental Market Size] (images/chart_3.png)

! [Online Clothing Rental Market Share by Clothing Style, 2025] (images/chart_4.png)

! [Online Clothing Rental Market Share by Business Model, 2025] (images/chart_5.png)

! [Online Clothing Rental Market Growth Rate by Region] (images/chart_6.png)

! [Online Clothing Rental Market Concentration] (images/chart_7.png)

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! [footer background image] (images/chart_10.png)

! [Mordor Intelligence on Facebook] (images/chart_12.svg)

! [Mordor Intelligence on Pinterest] (images/chart_14.svg)

! [Mordor Intelligence on Instagram] (images/chart_15.svg)

! [ESOMAR] (images/chart_17.png)

! [GPTW] (images/chart_19.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period

2021 - 2031

Market Size (2026)

USD 2.01 Billion

Market Size (2031)

USD 2.73 Billion

Growth Rate (2026 - 2031)

6.35 %

Fastest Growing Market

North America

Largest Market
|

Asia Pacific
|

Market Concentration
|

Medium
|

Major Players

*Disclaimer: Major Players sorted in no particular order

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Market Overview

Online Clothing Rental Market Analysis by Mordor Intelligence

Online clothing rental market size in 2026 is estimated at USD 2.01 billion, growing from 2025 value of USD 1.89 billion with 2031 projections showing USD 2.73 billion, growing at 6.35% CAGR over 2026-2031. This growth is driven by urban consumers shifting from ownership to access, a broader acceptance of circular economy principles, and technological advancements enhancing fit, hygiene, and delivery reliability. While North America leads in revenue, the Asia Pacific region is witnessing the fastest growth, fueled by younger middle-class shoppers desiring variety without long-term commitment. Rentals of ethnic wear for special occasions bolster demand, and subscription plans enhance customer lifetime value through consistent revenue. Supporting this trend, the surge in special occasions and consumers' inclination to don distinct outfits for each event propels market growth. Highlighting this, the India Brand Equity Foundation noted that between November 23 and December 15, 2023, India witnessed over 3.5 million weddings, a notable increase of 10 million compared to the same period in 2021[1]Source: India Brand Equity Foundation, "Number of weddings in India", www.ibef.org. Furthermore, new regulatory frameworks in California and the European Union are spurring platforms to document environmental benefits, leading to heightened investments in industrial laundering, route optimization, and extending garment life.

Key Report Takeaways

- * By clothing style, ethnic wear captured 54.75% of the online clothing rental market share in 2025, while casual wear is projected to post the fastest 8.2% CAGR through 2031.
- * By end user, women commanded 65.10% of the online clothing rental market size in 2025 and are on track for a 7.05% CAGR to 2031.
- * By business model, one-time rentals accounted for 60.95% of revenue in 2025, whereas subscription plans are forecast to expand at a 6.95% CAGR over the same horizon.
- * Regionally, North America led with 48.90% of 2025 revenue, yet Asia Pacific is positioned for the highest 9.1% CAGR through 2031.
- * Rent the Runway, HURR Collective, and ASOS-owned services collectively held under 15% of global revenue in 2025, underscoring a low-concentration structure.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of Online Clothing Rental Market*

Driver
|

(~)
% Impact on CAGR Forecast
|

Geographic
Relevance
|

Impact
Timeline
|

Shift
towards experience over ownership

+1.8%

|

Global,
strongest in North America and Europe
|

Medium
term (2-4 years)

|

Sustainability
and circular economy

|

+1.5%

|

Global,
led by the European regulatory framework

|

Long
term (≥ 4 years)

|

Demand
for variety and novelty

|

+1.2%

|

Global,
particularly the Asia Pacific

|

Short
term (≤ 2 years)

|

Need
for occasional and special-event wear

|

+1.0%

|

Global,
with cultural variations

|

Medium
term (2-4 years)

|

Desire
for high-end fashion access

|

+0.9%

|

North
America and Europe, expanding to Asia

|

Medium
term (2-4 years)

|

Social
media influence and trends

|

+0.7%

|

Global,
strongest among Gen Z demographics

|

Short
term (≤ 2 years)

|

Source: Mordor Intelligence

|

Competitive Landscape

Competitive Landscape

In the fragmented online clothing rental market, the top five players command less than 20% of global revenue. This opens the door for local specialists and niche peer-to-peer platforms to thrive. While Rent the Runway dominates U.S. subscriptions, HURR Collective is rapidly expanding its U.K. peer marketplace. In a move underscoring their commitment to the rental space, ASOS and Flannels introduced house-branded rental capsules in 2025.

Today, technological advantages eclipse mere inventory size. AI-driven fit engines are slashing return costs, while virtual try-on features are enhancing conversions and alleviating sizing concerns. Veessual's recent USD 7.5 million funding round, aimed at establishing a New York office in April 2024, underscores the strong venture interest in tech solutions that cater to multiple merchants. Meanwhile, backend firms like Advanced Clothing Solutions are streamlining operations for smaller brands by offering laundering, quality control, and fulfillment services, eliminating the need for complex in-house operations.

Strategic partnerships are becoming the norm for market entry. Luxury brand Karen Millen has launched its own rental "rotates," ensuring they retain direct consumer data while entrusting logistics to specialized partners. Such collaborations not only enhance authenticity and justify premium rental prices but also safeguard the brand's reputation in a market increasingly leaning towards resale.

Online Clothing Rental Industry Leaders

*

Urban Outfitters, Inc.

*

GlamCorner Pty Ltd

*

Rent the Runway

*

Flyrobe

*

HURR Collective

*

*Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Online Clothing Rental Market Report Scope

Online clothing rental is a service that enables customers to rent clothes for a specific period. This service benefits consumers looking for a designer dress for theme parties, wedding parties, corporate parties, and filmmaking occasions.

The online clothing rental market is segmented by end users, dress code, and geography. Based on end-users, the market is segmented into men, women, and children. On the basis of dress code, the market is segmented into formal, casual, partywear, and traditional. The report also offers a detailed analysis of the major economies across North America, Europe, Asia-Pacific, South America, and Middle-East & Africa.

The market sizing has been done in value terms in USD for all the abovementioned segments.

By Clothing Style (Value)

Ethnic Wear
|

Casual Wear
|

Formal Wear

Sports and Activewear

Others (Maternity, Kids’ Formal, etc.)

Segmentation Accordion Item

By Geography

North America

United States

|

Canada

|

Mexico

|

|

Rest of North America

|

South America

|

Brazil

|

|

Argentina

|

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Colombia
|

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Chile
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Rest of South America
|

Europe
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United Kingdom
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Germany
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France

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Italy

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Spain

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Russia

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Sweden
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Belgium
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Poland
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Netherlands
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Rest of Europe
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Asia-Pacific
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China
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Japan
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India
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Thailand
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Singapore

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Indonesia

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South Korea

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Australia

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New Zealand
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Rest of Asia Pacific
|

Middle East and Africa
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United Arab Emirates
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South Africa
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Saudi Arabia
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Nigeria

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Egypt

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Morocco

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Turkey

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Rest of Middle East and Africa
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Frequently Asked Questions

How large is the online clothing rental market in 2026?

It stands at USD 2.01 billion and is forecast to reach USD 2.73 billion by 2031.

Which region grows fastest in online clothing rentals?

Asia Pacific leads with a 9.1% CAGR thanks to rising middle-class incomes and social-media-driven fashion adoption.

Why does ethnic wear dominate rental demand?

High garment prices and cultural expectations against outfit repetition make renting traditional attire cost-effective for weddings and ceremonies.

What business model is gaining traction among rental platforms?

Subscription plans are expanding at a 6.95% CAGR because they secure predictable recurring revenue and deepen customer engagement.

What is the main consumer concern limiting rental adoption?

Hygiene and sanitation worries remain the primary barrier, shaving 1.4% off the forecast CAGR despite industry-wide cleaning certifications.