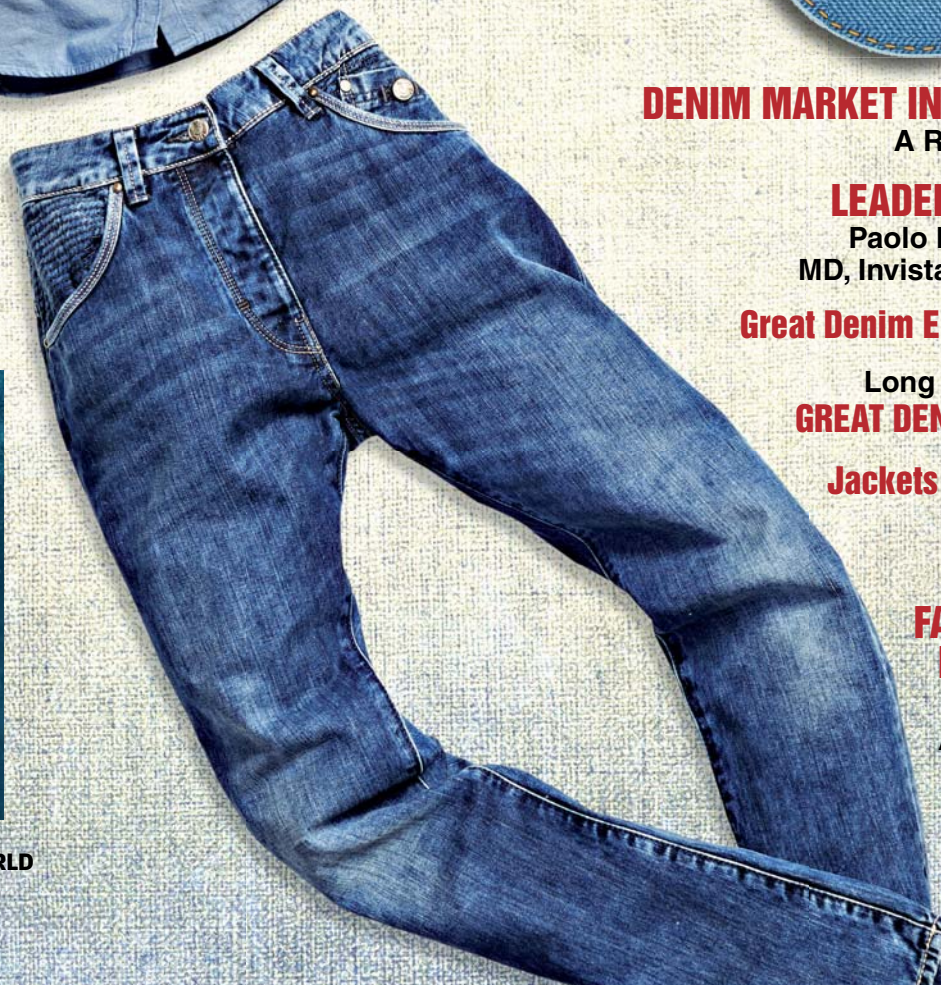


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DENIM MARKET IN INDIA:
A Research

LEADER TALK:
Paolo Briatore,
MD, Invista (Lycra)

Great Denim Elements

Long Live the
GREAT DENIM ADS

Jackets in India

**+
INDIA
FASHION
FORUM
2015:
A Sneak
Preview**



**BEST IN MERCHANDISE AND
TRENDS FROM ACROSS THE WORLD**

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What better way to sign off this year than to take the dynamic *denims* category as the subject. This September we had also put together, perhaps, the first fashion category study volume in India—The Denim Bible India. It was the first of a series of category-studies we have planned over a two year period. Readers who wish to have a deeper understanding of denim dynamics in India are recommend it.


In this issue we look at the Indian denim market, size, segments, and the latest in denim retailing in India through a special research by Technopak. We take a look at denim jackets globally as they gather momentum in India. Fashion academician Sanyogietaa Chadha looks at the little details that make denims great. A term study on denim fabrics and denim trends are unveiled in the InFashion section.

And since an issue on a glamour category like jeans would never be complete without a look at some great jeans ads, we present a visual feature on some of the best. Apart from the above, we also study the growth of jackets as an emerging mega-fashion segment in India. Also a look at some star retailers and brands, and exclusively for the readers of Images Business of Fashion we also share a sneak look at what to expect at the Images Fashion Forum which is scheduled for mid-March 2015.

I wish you, dear readers, a Merry Christmas and a Happy New Year, and share this quote by the brilliant actor Jeremy Irons - "We all have our time machines. Some take us back, they're called memories. Some take us forward, they're called dreams."

May 2015 be the year we make our dreams come true.

Hope you like reading the issue.



Amitabh Taneja

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As a symbol of youth and rebellion, denim jackets have always ruled the roost

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Corrigendum Images BoF November 2014

Page 23: The name of Sameer Manglani, COO, Meena Bazaar was misspelled.

Page 98: Manyavar has 10 exclusive stores by 1998 and not one as published.

Page 112: The name of Pratik Rajpuria, Director, Manish Creations was misspelled.

Page 102-103: Wrong store picture was published.

The errors are regretted.



DENIM MARKET IN INDIA

CONSUMERS, ESPECIALLY THE YOUTH, IN CITIES BEYOND THE METROS AND MINI METROS ARE GROWING EXCEPTIONALLY ASPIRATIONAL. THEY ARE INCREASINGLY ACCEPTING DENIM AS A CORE APPAREL CATEGORY TO BE WORN AS AN EVERYDAY CASUAL GARMENT. **AMIT GUGNANI**, SVP - FASHION (TEXTILE & APPAREL), **TECHNOPAK** SHARE MORE INSIGHT ON THE DENIM MARKET.

MARKET SIZE AND GROWTH

Denim is of the most promising category in India's apparel market. In 2013, the denim market of India was worth ₹13,500 Cr. which accounts for 5 percent of the total apparel market of the country. The market is projected to grow at a CAGR of 15 percent to become ₹27,200 Cr. market in 2018.

The denim market in India is skewed towards men's segments with 85 percent contribution coming from it. Women's denim segment contributes 9 percent to the market and the kids segment the rest 6 percent. The women's and kid's denim segments are expected to witness higher growth rates due to their lower base and increasing focus of brands and retailers on those segments.

COMPARISON WITH DENIM CONSUMPTION OF SOME OTHER COUNTRIES

In general the western lifestyle and western fashion has accelerated the trend of casualisation across the globe. This trend has boosted the consumption of casual fashion apparel like denims, dress shirts, tees, casual shirts among both men and women consumers in all developing countries including India. The average number of denim items owned by Indian consumer is much lower in

A NEW VISTAS IN DENIM COMFORT & SHAPE

INVISTA HAS LED THE GLOBAL FASHION INDUSTRY WITH ITS TECHNOLOGICAL EDGE IN DELIVERING A NEW ERA OF COMFORT AND SHAPE TO ITS CONSUMERS WORLDWIDE. WITH ITS ICONIC BRAND LYCRA IT HAS MAJOR PLANS FOR INDIA. IMAGES BUSINESS OF FASHION SPEAKS TO **PAOLO BRIATORE, MD, INVISTA, SOUTH ASIA.**



●●● We hear that INVISTA is looking at India in a much bigger way now. What is going to be the crux of your strategy for India?

India has emerged as a key global opportunity for domestic business development for INVISTA. There are some key growth drivers for apparel and LYCRA fibers. Firstly, India is a young country with a growing population of over 1.2 billion, with an average age still at 25 years. Secondly, almost 2/3rd of the population is in the working age group with an increasing number of women seeking employment. The third and most important socio-economic and socio-cultural trend is the emergence of the middle class in India with a substantial purchasing power.

There is also an important attitudinal trend among young India which is that it has no baggage of the past. This has resulted in a lifestyle change with the emergence of new value propositions like fashion, convenience and comfort rather than merely price. Apparel is the most accessible tool to help them live the upgraded lifestyle.

We believe that LYCRA fiber is most suited to meet their quest of their desires.

We also believe that emergence of organized retail will add fuel to the growth of apparel with LYCRA fiber as it will allow a young consumer to experience the benefits of garments with

WELCOME TO THE IN FASHION SECTION OF **IMAGES BUSINESS OF FASHION**. IN THIS SECTION, WE BRING TO YOU THE LATEST VISTAS AND INSIGHTS IN FASHION CREATION ACROSS FASHION DESIGN, FASHION TRENDS AND FASHION INGREDIENTS

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DELVING DEEPER INTO DENIM FABRICS IN INDIA

INDIAN DENIM FABRIC INDUSTRY IS EXPECTED TO GROW AT SIX PERCENT CAGR OVER 2013-18 DRIVEN LARGELY BY VOLUME GROWTH. IMAGES BUSINESS OF FASHION ANALYSES GROWTH LEVELS, LATEST TRENDS AND FUTURE OF DENIM FABRIC IN INDIA. BY GURBIR SINGH GULATI

 Denim is a vital component in the world of fashion. There is no second opinion that it has today emerged as a staple in every wardrobe. It is a fabric of choice for the youth. The Indian denim industry which started cementing its roots in 1986 has today grown to a dynamic hub of over 32 denim mills producing a total 1,100 million meters per annum denim fabric collectively.

GROWTH LEVELS

The domestic denim fabric industry is expected to grow at six percent CAGR over 2013-18 driven largely by volume growth (healthy demand for denim jeans and RMG). Domestic demand for RMG is also expected to grow at a CAGR of 5.5 percent to ₹1,705 billion over 2013-18 driven primarily by volume growth of four to five percent, while realisations are expected to grow one percent.

Rural demand is expected to outstrip urban demand for RMG, as the rural market remains significantly under-penetrated.

India's exports of RMG are expected to grow faster than domestic market, and is estimated to register CAGR of six to seven percent over 2013-18. Growing demand for RMG, in both domestic and export markets, is expected to boost the domestic denim fabric industry.

Within the RMG market, the jeans segment is expected to witness steady growth. CRISIL Research expects the market size for denim jeans to reach ₹114 billion in 2018 from ₹89 billion in 2013, implying a five percent CAGR over the period. Growth is expected to be driven by volume growth of four percent, while realisation growth is likely to be muted at one percent. The domestic denim fabric market is expected to grow in line with the denim jeans market. Increase in demand for jeans is expected to be driven by three factors:

- Increasing preference for casual and semi-formal clothing
- Many corporate, led by Business Process Outsourcing (BPO) and Knowledge Process Outsourcing (KPO) firms accepting casualwear as office wear
- Changing demographic profile of consumers owing to higher disposable income

Currently, the jeans market in India is under penetrated – per capita consumption of jeans is 0.3 pairs per year, significantly lower than two to three pairs per year in developed nations such as the US and the EU. This represents a very significant growth potential for the industry.

DENIM MILLS WITH THEIR CAPACITIES

The denim fabric industry in India is fragmented – over 32 denim mills with capacities ranging from 10 MMPA to 110 MMPA manufacture denim in India. While some of these

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This time we travelled north to find some inspiration for store design and visual merchandise – but see for yourself in our store selection

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We asked four industry insiders: what was the worst business crisis you ever had to overcome and how were you able to do so? They share their tales from the trenches

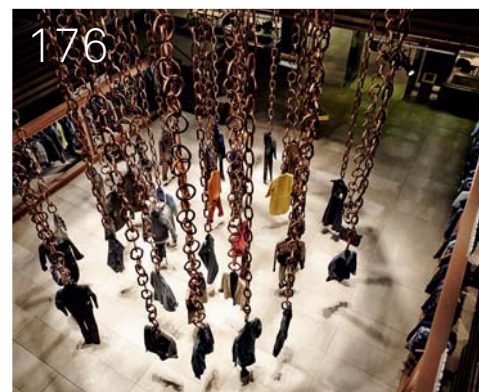
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Credits for India Capsule

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DENIM STRIKES BACK

DENIM IS BACK ON CATWALKS AND IN THE FASHION SCENE. BUT NOW IT IS HYPED WITH NEW FUNCTION, MORE SUSTAINABILITY AND INNOVATIVE HUES AS WILL BE SEEN IN THE S/S 2016 NOVELTIES REVEALED AT DENIM BY PV BARCELONA. BY MARIA CRISTINA PAVARINI

➤ A new desire for blue is in the air. The September 2014 catwalk shows clearly displayed how designers are growing obsessed with denim once more for s/s 2015—whether clean or decorated, raw or washed, mixing different blue hues or adding unique details such as laced-up closures or golden uniform buttons. One thing is sure—denim is back and here to stay. Specialized manufacturers gathered for the November edition of Denim By Premiere Vision presenting fabric novelties for s/s 2016 know it well and are betting even more on this return by hyping their efforts. They will offer the best in terms of innovation, performance, new hands, new optics, body consciousness and sustainability. A general trend in the denim market sees greater attention to finer fibers, special weaves and alternative constructions plus new coatings, origami effects and new second skin denim rollouts. Tricot effects and woolen hands will also be new employs in the denim and sportswear markets (see following pages).

WEAR THIS OUT

Tejidos Royo has developed a selection of new smart denims meant to be worn in the city. The new WTD (Wearable Technology Denim) offers fabrics aimed at skaters and motorcycle and bicycle riders. All materials guarantee extra abrasion-resistance, breathability, thermoregulation and flexibility. Part of this group are denims doubled with a material that has properties and an aspect similar to neoprene.

ORANGE IS COOL

Narindi is a new eco-friendly denim by Denim Valley by Tejidos Royo. It is dyed

with a special indigo dye substance naturally obtained from oranges grown in plantations of the Valencia area. Narindi denim—whose name originates from a mix between “naranja” (the Spanish word for “orange”) and “indigo”—is a blue denim with a slight yellow cast and a delicate orange smell.

WALKING ON THE MOON

Calik Denim introduces a new denim employing Outlast, a technology initially developed for NASA to protect astronauts from extreme thermal changes. The Turkish manufacturer employs this technology that guarantees to keep the wearer cool and fresh in hot and sunny environments and warm and protected in cold climates.

MEASURE YOUR IMPACT

M&J Group, a Bangladeshi specialized garment manufacturer, has recently launched its “Start to Measure” hardware and software system, which is able to trace, scientifically measure and certify the quantity of resources—such as water, energy, chemicals and labor—employed for producing every single garment.

LOVE THE TURTLE

Orta Anadolu continues to support environmental issues. Together with Mavi Jeans and EKAD (Turkish Ecological Research Society) it has joined forces for its new “Indigo Turtles” project aimed at conserving two endangered sea turtles species, the “Caretta Caretta” and “Chelonia Mydas.” The project aims to protect the incubating eggs from unnatural obstacles and to help newborn turtles reach the sea from their nesting grounds. In addition to recruiting volunteers for the project they



BURBERRY / PROFSUM / SPRING / SUMMER 2015

have produced a series of exclusively designed T-shirts sold in Mavi stores and through mavi.com.

TRACING BACK INDIGO TRADITION

Pakistani denim manufacturer Artistic Fabric Mills has developed a groundbreaking indigo piece-dyeing process for denim called Ajrak Technology. The new dyeing technology produces denim fabrics with very rich indigo shades. According to the company, the special technology brings back the over 4,000-year-old indigo-dyeing craftsman traditional technique of the Indus Valley, an area of Pakistan where antique family dyeing techniques passed from generation to generation.

DOUBLE DEALING

Isko is betting on multiple effect and multi-function fabrics. It offers a new double face fabric that has a gray colored front side and a bright colored backside—either soft violet and light blue or a lime and coral pink. It added special coatings to denims such as pearl iridescent

May be,
I'm Nuts...

but my
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to get
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