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# DENIMANIA

Denimwear consumption patterns and styles | an IMAGES report

## MARKET WATCH

From new washes, fabrics to innovative technologies, the experimentation of the denim brands and manufacturers

## EXPERTSPEAK

Industry experts Amit Gugnani, Technopak and Kaustav SenGupta, NIFT, on the magic of denim

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A very Happy New Year to our readers!

Denim. Youth. One cannot think of one without thinking of the other. It is really not surprising that this fashion trend has found favour with the large populace of India that is predominantly young. I was not surprised that this was one category that escaped the ramifications of the recent economic slowdown, showing a steady growth instead.

Currently estimated at ₹5,200 crore and expected to reach ₹10,920 crore by 2015, its average compound annual growth rate (CAGR) is 8-10 per cent. The potential is a clear writing on the wall. Indian retail is largely unorganised, but what is heartening to note is the growing trend in the last years towards modern retailing. Yes, competition is stiff but the international players who have entered the Indian market have shown the advantages of a controlled supply chain logistics. What stops our domestic brands to follow their example to reap benefits?

On this thought, the *IMAGES Business of Fashion* team decided to track the denimwear market potential as the lead story for January 2012. What emerged is quite in keeping with the new year - hope. The untapped potential, especially in the women's category, leaves the field wide open. And with 100 per cent FDI likely to be allowed in single-brand retail it should be worthwhile to see who the latest entrants are going to be.

What is also interesting is how denim brands create an impact with their customers. The editorial team decided to compile the most interesting ad campaigns that use shock value to grab attention.

Hope you enjoy the issue...



Amitabh Taneja

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## 76 COVER STORY

### DENIMANIA IMAGES BUSINESS OF FASHION

conducted a survey to understand the denim consumption, style preferences and its various categories.

#### 18 MY THOUGHTS

##### The World of Denim

**Narendra Singh**, MD, Numero Uno, talks about the magic of denim and its potential in the Indian market.

#### 52 BRAND DEBUT

##### Into the Retailing Biz

Menswear brand Brittonwoods makes its debut in the apparel retail industry.

#### EXPERTSPEAK

##### 94 Blue Rules

**Amit Gugnani**, VP, Apparel Operations, Technopak, provides an insight into key factors affecting denimwear business.

##### 98 Revolutionary Blue

**Kaustav SenGupta**, Associate Professor, NIFT, Chennai, throws light on how denim became a personality-defining apparel.

#### 108 BRAND CAMPAIGNS

##### Shockvertisements

A collection of interesting denim campaigns that used shock technique to grab eyeballs.

#### 114 MARKET WATCH

##### Stretching to the Next Level

Brands and manufacturers experiment with denims to meet consumer expectations through new washes, new fabrics and creative technology.

#### 122 INNOVATION

##### As Denim Excels

**Aamir Akhtar**, CEO, Arvind Denims, reveals the technological process of creating Excel Denim fabric.

## 58



### EVERY MONTH

11 EDITORIAL

17 LETTERS TO THE EDITOR

30 DECEMBER IN BRIEF

54 TRADE CALENDAR

58 SEASON'S OFFERINGS

68 OUTLETS

155 WINDOW TRENDS

**126 BRAND WATCH**  
**Creating Connection**  
**Sandeep Varma**, VP, Killer and Easies, emphasises the value and fashion elements as key purchase-decision factors.

**132 Triggering Success**  
**N. Rajagopalan**, Director – Marketing, Trigger, emphasises on brand focus and consumer feedback.

**134 TREND WATCH**  
**The Magic of Denim**  
 Denimwear trends that brands will be showcasing in the coming season.

**140 THE JOURNEY**  
**Inching Its Way Ahead**  
**Alok Dubey**, COO - Sportswear Youth and Denim Division, Arvind Lifestyle Brands, sketches the journey of Flying Machine.

**150 IN THE CLOSET**  
**Blending Comfort with Style**  
 Founder and CEO of MTC Retail and Mylace.in, **Karan Behal**, believes in creating a fashion statement.

**154 EVENTS**  
 M & Park Avenue walk the ramp

## HARD TALK

### The FDI Factor

Harminder Sahni on opening up of FDI and creation of a significant domestic fashion retail fraternity.



# advertiser's INDEX

**RED FLAME:** Front Gate Fold

**SPARX:** Inside Front Cover

**BRITTONWOODS:** Inside Back Cover

**COTSTYLE:** Back cover

**E TEENZ, SUCCESS, PROTEENS, BIG WHEEL:** Dog Ear

Brands	Page nos.	Brands	Page nos.	Brands	Page nos.	Brands	Page nos.
APPLE EYE	81	EPSONS	37	KIVON	117	SNX	39
ARVIND EXPERIENCE STORE	67	EWDP	131	LAKME	12	SUBSCRIPTION FORM	156, 157
ASPIRE	115	FRAGRANCE	93	LINO PERROS	59	T-BASE	57
AVANI RIVERSIDE	101	GESTURE	9	MAGNET MALL	24, 25	TANTRA	95
BARRY & CLARK	61	GGMA	106, 107	MANCHALI	43	TSG BREEZE	91
BEST SELLER	74, 75, 148, 149	HKTDC	105	MEGAMART	45	TWILLS	65
BHAGWATI STEEL & IRON WORKS	17	IFF 2012	28, 29	MISS – T	53	URBAN NAVY	119
BODYCARE	41	IN FASHION	10	MOJAVE	79	VACHI	97
BONGIO	73	INDIA INTER FRANCHISE	129	MOXI	49	VERO MODA	14
BONJOUR	63	INFINITY MALL	26, 27	ONLY	8	WYM	55
CHARCHIT APPARELS	127	ISAF 2012	16	PINK CHOICE	121	X'POSE	5
CLASSIC POLO	47	ISHANYA	144, 145	PRITIKA FASHIONS	20, 21	YEBHI.COM	103
CRUSOE	6	ISP & BMI	139	RECRON	164		
DEAL	7	JACK N JONES	22, 23	SAFEXPRESS	99		
		JANAKSONS	34	SHAPES	51		



■ MY THOUGHTS ■

# The world of Denim

IT IS THE FAVOURITE AMONGST THE YOUTH WORLDWIDE. NARENDRA SINGH, MD, NUMERO UNO, REFLECTS ON THE MAGIC OF DENIM AND ITS POTENTIAL IN THE INDIAN MARKET.

**A**s I write this piece, my mind constantly keeps going back to the modest beginnings that the Indian denim industry had back in 1986. I would say it was more like a lost piece of an intimidating puzzle in the face of a turbulent economy. Largely unorganised, this industry was thriving on exports and back then, I was a part of this segment. The puzzle started to fall in place as the government floated the trade liberalisation policy which was more like a life boat in the turbulence that existed. While all this happened, even I didn't look at it as liberalisation or changing Indian economy or for that matter even the industrial norms; to me it was an opportunity to source denim domestically and manufacture jeans. It was an incredible feeling to be able to buy material off the counter and convert it into a product.

I am a staunch believer of the fact that jeans is the most imperative piece of clothing in our everyday life. It encompasses the entirety of our personality and sets our inhibitions free. There are innumerable people who want to rid themselves off formals or officewear and hop into their pair of jeans every time they can. Its comfortable fit and feel is addictive with use.



# Into the Retailing Biz

MENSWEAR BRAND BRITTONWOODS MAKES ITS DEBUT IN THE APPAREL RETAILING INDUSTRY. **AJAY KABRA**, DIRECTOR, AJAY SYNTHETICS PVT LTD., REVEALS THE BRAND'S FUTURE PLANS.

## When was Brittonwoods launched?

Brittonwoods was launched nationwide during the festive season of 2011. The concept is to establish a premium suit and tie brand in India and also venture into neighbouring countries. Since suits and ties are Westernwear, we decided to give the brand an English name.

## What triggered the idea to enter the apparel retailing business?

The idea is to move towards forward integration because the future lies in the final products. Currently, we are into the business of suits, blazers and ties. And during the festive season of 2012 we plan to launch premium trousers in 100 per cent cotton, terry rayon, poly viscose with spandex and linen. In 2013 we plan to launch premium shirts in partywear, designer and semi-formal categories in natural fibre fabrics.

## What is your current product assortment and the price range?

We retail formal, designer and partywear suits. The formal suits range from ₹5,995 to ₹7,995. Designer and partywear suits are priced between ₹7,995 and ₹8,995. Formal blazers starts at ₹4,995 whereas the designer and partywear range between ₹5,495 and ₹5,995. Our ties are priced between ₹345 and ₹695.

## What are your retail formats?

We are retailing only through multi-brand family-owned large format stores. We have targeted 300 shops with retail chain stores nationwide. Currently, we have no plans for any exclusive brand outlets.

## Give us an insight about your retail presence.

The brand is present in 80 MBOs in cities including Kochi, Kolkata, Mumbai, Pune, Hyderabad, Delhi, Meerut, Vijaywada and Indore. We have identified 50 regions across the country and plan to be present in tier I and II cities. We plan to have presence in 250 MBOs by mid-2012 in cities including Vishakapatnam, Nasik, Bangalore, Kolhapur, Coimbatore and Madurai.

## Do you have a manufacturing unit?

Presently, we outsource the manufacturing of suits and ties to three manufacturing units in Delhi, Mumbai and Bangalore, which produce 4,500 – 5,000 suits and 8,000 ties per month for us. We provide the fabric, design and fit to these manufacturers and ensure that they are strictly followed. We are in the process of setting up our own manufacturing unit which will be ready by mid-2012.

## What are your marketing and advertising strategies?

We are concentrating mainly on in-store branding and advertising. We are also planning for tie-ups with cinema halls nationwide to display our short film commercial.

## What is your take on the proposed 100 per cent FDI in single-brand retail?

FDI will not affect the Indian apparel brands to a great extent because foreign brands are mainly into luxury segment or into discount format. But I feel duty free import from Bangladesh will affect the Indian brands because it will create issues with our existing production facilities. 

# Blue Rules

THE INDIAN DENIM MARKET IS GROWING AT A FAST PACE AND AMIT GUGNANI, VP, APPAREL OPERATIONS, TECHNOPACK PROVIDES AN INSIGHT INTO KEY FACTORS AFFECTING BUSINESS.

## **What has been the growth performance of the Indian denimwear industry in the past few years?**

The denimwear market is growing rapidly in India. It is currently estimated at approx ₹5,200 crore and is expected to reach approx ₹10,920 crore by 2015. The production capacity is expected to grow at 12 per cent annually to increase to 1,130 million metres by 2015 from the existing denim production capacity of 640 metres.

## **Why is the domestic denimwear segment more organised than other apparel categories?**

The reason could be attributed to a variety of factors. One is that the denim industry – both textile and apparel – uses machinery with advanced technologies. Another reason is the vast product basket owing to different kinds of washes and a variety of embellishments. These lead to a more stable market structure for them, further leading to an organised retail market. Also, major denimwear players are from outside the country. Brands such as Levi Strauss, Lee, et cetera work on a more organised supply chain, resulting to an organised retail market.

## **Will FDI be a boon for modern retailing? How will it affect the denim industry?**

When one speaks of brands from outside the country, the attention shifts towards FDI. It will certainly be a boon for the modern retailing industry. With more and more foreign brands coming in, it will give the Indian consumers access to brands that had so far not made their presence felt in the Indian market. FDI would also in a way lead to faster turnaround time as a lot of big players would look to set up their manufacturing facilities in the country. This would lead to smaller lead times, and products would reach stores sooner. FDI would also result in a lot of backward integration activities, as a strong retail presence can be made stronger by moving into back-end operations of manufacturing fabrics and a more lean, agile supply chain.

## **The West saw denim evolve from workwear to fashionwear whereas this is just the reverse in India. Would you agree?**

It is a known fact that growth of the denim market in India has been markedly different from the West. In India the move was from fashionwear towards workwear.

# Stretching to the Next Level

DENIM'S LOOK AND DEMAND HAS SEEN A SEA CHANGE IN THE LAST DECADE. FROM NEW WASHES, NEW FABRICS TO CREATIVE TECHNOLOGY, BRANDS AND MANUFACTURERS ARE EXPERIMENTING WITH DENIMS TO MEET NEW CONSUMER EXPECTATIONS.

by Shweta Jain

**D**istressed, waterless, organic and even water-repellent jeans. Now there are more additions, alterations and innovations to the plain blue pair of yesteryears. As Indian consumers get exposed to international trends they want more value out of their pair and more variety in washes, fits, prints and fabrics.

Some industry experts in India feel that India lacks denim production expertise in terms of technology. The general consensus amongst manufacturers is that the market needs to grow. Chetan Shah, Country Head, Pepe Jeans London, says, "On the denim fabric front, India is not far





## ■ INNOVATIONS ■



# As Denim Excels

ARVIND LTD. AND BIRLA CELLULOSE TIED UP TO MANUFACTURE AN INNOVATIVE DENIM FABRIC - EXCEL. AAMIR AKHTAR, CEO, ARVIND DENIMS, TAKES TISTA SENGUPTA THROUGH THE TECHNOLOGICAL ADVANCEMENT OF THE FABRIC.

**D**enim that was originally meant to be tough and rugged has just got a new identity. Earlier, denims were made of viscose staple fibres that were known to be the first generation fibre, until modal fibres, known as the second generation fibre, entered the market. But with time, experimentation and innovation the industry developed better fibres. This transition from the original to something that has sheen and suppleness has become one of the most innovative and important creations of the denim industry.

Unlike in the past, when denims were more suited for men, women today have become much alert about the quality of the fibre. According to Aamir Akhtar, CEO, Arvind Denims, the denim market today in India is highly dependent on women buyers as they are responsible for 50-60 per cent of denim sales. So, in order to continue being a major player in the denim segment, Arvind Ltd. along with Birla Cellulose came together to produce a unique, soft, light feminine man-made cellulose fibre – Excel Denim – that is not only comfortable and skin-friendly but also has a rich texture. This new fibre is stretchable and can be enhanced or subdued depending on the style of the garment.



# The FDI Factor

**T**he recent assurance by the Prime Minister that the government will push for FDI in retail after the state polls in February this year is a welcome sign but as we all know from experience that it may not mean much as this government hasn't shown much boldness in this specific case. Anyhow, I certainly believe that now this matter is at the centre stage and chances are that sooner than later we will have some changes in FDI that will be a step forward from the current situation. In this article, I wish to address specifically the fashion industry and talk about what some of the changes will mean to the future of fashion branding and retail segments in India.

Majority of the discussions regarding FDI are generally focused on multi-brand and F&G retailers and its potential implications on farmers, small retailers and intermediaries. Most of the objections too also concern the above. So far there has been very little, if at all, objection to the 100 per cent FDI in single-brand retailing. From the fashion retailers' point of view, this is very encouraging as most of the large fashion retailers generally have single-brand retailing format. For example, even if Inditex has many brands such as Massimo Dutti, Bershka, Pull & Bear other than Zara, it has separate single-brand stores for each of these brands. Similar is the case of GAP Inc. that has many brands such as GAP, Banana Republic and Old Navy in its



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