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# THE BLUE REVOLUTION:

*Denim's Timeless Reign*

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Dear Readers,

Denim, a fabric that transcends age, culture, and geography, has journeyed from its humble workwear origins to a global style statement. What makes it so special? Its versatility. It can be rugged or refined, casual or couture, and everything in between. Denim has a story to tell, not just in its stitches or washes, but in the way it adapts to the wearer, becoming a second skin and a canvas for personal expression.

According to a study by Technopak, the Indian denim market is poised for significant growth, with a projected CAGR of 15% from FY2023 to FY2028. By FY2028, the market size is expected to reach USD 7.82 billion. A key segment of India's apparel industry, denim's share is expected rise from 5% in FY2022 to 7% by FY2028.

As the world moves towards sustainable choices, denim is undergoing its own evolution. Innovations in technology and eco-friendly practices are reshaping the industry, ensuring that this beloved fabric aligns with the values of environmentally conscious consumers. From water-saving techniques in production to biodegradable alternatives, the future of denimwear is as exciting as its past.

In its November 2024 edition IMAGES Business of Fashion dive deeps into the fascinating world of denim – a symbol of resilience, rebellion, and individuality.

In this issue, we celebrate the journey of denim brands and manufacturers in India and beyond through style, sustainability, and innovation. These efforts align with the values of environmentally conscious consumers, ensuring a balance between growth and responsibility.

Be they classic blue jeans enthusiast or bold trendsetting denims, the journey of Indian retailers has helped define denim not just as a piece of clothing, but as a legacy that has evolved with the times.

As always, we hope you find this issue informative. Don't forget to log onto our website, [www.imagesbof.in](http://www.imagesbof.in) for more in-depth information on all things denim.



**Amitabh Taneja**

## NEW COLLECTIONS

## India Circus launches new fashion vertical

Godrej Enterprise brand India Circus by Krsnaa Mehta has officially launched its new fashion vertical, integrating traditional Indian motifs with modern aesthetics. This collection aims to redefine contemporary fashion while honouring India's rich heritage.

The fashion line includes a diverse range of clothing such as co-ord sets, kurtis, kaftans, men's shirts, and scarves, designed to enhance everyday wear. The

collection draws inspiration from India's culture, featuring motifs inspired by nature, architecture, and traditional art forms. Each design, whether a bold floral print or an intricate geometric pattern, is crafted to reflect Indian craftsmanship while remaining contemporary.

Krsnaa Mehta, the Founder, stated, "Our customers have long intended for our prints on clothing, and here we are with our debut."



## Arrow launches AW24 collection

Arrow has announced the launch of its Autumn-Winter 2024 (AW24) collection, designed to merge innovative fabrics with classic styles aimed at the modern man's dynamic lifestyle. The AW24 lineup features the Autopress line, which includes non-iron fabrics with DP ratings of 3.5 and 4.0, providing wrinkle-free wear for professionals seeking a sharp appearance throughout the day. The Autopress FLX variant incorporates stretchable fabrics that adapt to movement, enhancing comfort for all-day wear. For active lifestyles, the Dynamax line emphasises practicality, offering UV protection, anti-static properties,

and odour resistance, making it suitable for long hours of commuting or work. The Velocity collection pairs premium cotton fabrics with travel-friendly designs, catering to the man on the go.

The Air Soft line focuses on lightweight luxury, utilizing breathable materials for extended comfort, while the Moments line, including the 1851 and Italian Elegance sub-lines, features luxurious weaves and meticulous craftsmanship, embodying timeless sophistication.

This new launch reflects the brand's mission of combining style and functionality.

## Orry x Flying Machine capsule collection launches in Bengaluru

Apparel brand Flying Machine has launched its limited-edition Orry x Flying Machine capsule collection in Bengaluru after a successful debut in Delhi. This collaboration features a range of unisex pieces designed for a contemporary audience, including T-shirts, shirts, vests, caps, bucket hats, jorts, parachute pants, and jeans.

The collection showcases vibrant colours and bold designs inspired by Orry's style, reflecting Flying Machine's focus on modern fashion. At the launch event

at the Flying Machine store in Phoenix Marketcity, Shailesh Chaturvedi, MD & CEO of Arvind Fashions, noted the collaboration's success, stating, "The Orry X Flying Machine Collaboration has been a phenomenal hit across the country. This will surely strengthen the relationship of Flying Machine with Gen Z consumers and especially its position as the brand who is on top of the pulse."

Orry attended the launch event, generating excitement among attendees and online audiences.



# THE INDIAN DENIM MARKET IN 2024:

## An Analytical Overview

*The Indian denim market is poised for significant growth, with a projected compound annual growth rate (CAGR) of 15% from FY2023 to FY2028. By FY2028, the market size is expected to reach USD 7.82 billion...*

Madhulika Tiwari, Partner, Retail & Consumer Goods  
Parmesh Chopra, Head Content Writer, Technopak Advisors

The Indian denim market has shown consistent growth over the years and remains a key sector in the country's apparel industry. In the last decade, the market has evolved significantly, driven by changes in consumer preferences, rising disposable incomes, and the increasing influence of Western fashion trends.

### Market Overview: Market Size & Projections

The Indian denim market has been a vibrant and dynamic sector, undergoing

significant changes over the last decade. From being a primarily casual wear fabric, denim has expanded into various categories such as semi-formal and even workwear.

### Market Size & Growth (2018–2023)

The Indian denim market is poised for significant growth, with a projected compound annual growth rate (CAGR) of 15% from FY2023 to FY2028. By FY2028, the market size is expected to reach USD 7.82 billion. Denim has been a key segment in India's apparel industry, representing a 5% share of the apparel market in FY2022,



# Exploring the **DENIMWEAR** Market in India

*The denimwear market is on track for remarkable growth, projected to hit an impressive ₹1,05,500 crore by 2029...*

Ambuj Gupta, Group Manager; Ridhi Kalra, Analyst;  
Sidapara Nancy Arvindkumar, Analyst; Consumer & Retail, TLattice

**D**enimwear in India is experiencing a significant evolution, moving beyond its origins as a rugged workwear fabric to become a fashion essential embraced by all demographics. This transformation is fuelled by a blend of cultural shifts, increasing disposable incomes, and the influence of global fashion trends. The growing demand for stylish, comfortable, and eco-friendly denim products is driving brands to adopt advanced technologies and sustainable practices. The denimwear market is on track for remarkable growth, projected to hit an impressive Rs. 1,05,500 crore by 2029. The various segments within the denim market highlight its expanding role in the fashion industry. The women's denim segment is expected to grow significantly, rising from 11% in 2019 to an anticipated 15% by 2029. This trend highlights a shift in consumer preferences, indicating that while the economy segment currently dominates denim sales by volume at 54%, there is a growing demand for women's denim.

From classic jeans and jackets to innovative denim accessories and sustainable options, the industry is witnessing a surge in product diversity and innovation. Both men and women are embracing denim in unique ways. Men are exploring various styles like slim and skinny fits, while women are opting for high-waisted jeans, skirts, and dresses. In the upcoming sections, we'll dive into the key factors fostering the growth of the denim market, highlighting why consumers are increasingly drawn to denim. We'll also uncover the latest trends shaping the industry, emphasising denim's popularity as a go-to choice for comfortable and leisure everyday wear. Ultimately, understanding these factors will provide valuable insights into the evolving landscape of denim wear in India.

## Market Overview

The denimwear market expanded significantly, achieving a CAGR of 14% between 2019 and 2024. During this time, the market size grew from ₹30,137 crore in 2020 to ₹57,550 crore by 2024. Beyond 2024, the market is expected to continue its robust growth, with a slightly lower CAGR of 13%, reaching a projected size of ₹1,05,500 crore by 2029. This steady expansion highlights the rising consumer demand and increasing penetration of denimwear in India, with the market more than tripling from 2020 to 2029.

While men's denim share is gradually declining, it remains the dominant segment. In 2019, men's denim accounted for 84% of the market, and although this share is expected to decrease to 80% by 2029, it continues to hold the largest portion. The slight reduction in men's market share is offset



# GLOBAL TRENDS

## in Denim and Consumer Preference

*As denim continues to be a global fashion staple, the industry is embracing new trends and sustainability practices to meet evolving consumer demands...*

Sharmila Gupta, Business Development, AGS Group, USA

### Global Denim Fabric Market Overview

**M**ost commonly used for jeans, a fundamental component of the casual wardrobe, denim has become a staple textile within the global apparel market. The market value for denim fabric was estimated to be worth 27.1 billion U.S. dollars in 2022 and was expected to increase to over 35 billion U.S. dollars by 2027.

This growth is driven by increasing demand for denim products across varied demographics, with jeans remaining a popular staple in fashion worldwide. The global denim market is diverse, spanning across regions with North America, Europe, and Asia-Pacific as primary markets, while emerging markets in Latin America and Africa are also contributing to growth.

In terms of volume, the denim fabric market alone is estimated to be over 5 billion meters annually, reflecting the vast global appetite for denim in various forms, from jeans

and jackets to accessories. This demand for denim is fueled by a mix of consumer preferences for comfort and versatility, along with lifestyle shifts emphasising casual and functional apparel.

### Denim Supply Chain for India

India's denim industry, with 30-40 major mills in hubs like Gujarat, Maharashtra, and Tamil Nadu, has a production capacity of 1.5 to 1.8 billion meters annually. Leading mills include Arvind Limited, Nandan Denim, Jindal Worldwide, Raymond UCO Denim, Bhaskar Denim, Suryalakshmi Cotton Mills, and KG Denim Ltd.

These mills offer denim from 4.5 to 16 oz per square yard, covering lightweight (shirts, dresses), midweight (jeans, jackets), and heavyweight (workwear, premium denim) applications.

Popular blends include:

- **Cotton-Polyester:** Durable, used in mid to heavyweight denim

# A CLASSIC THAT NEVER FADES: Reinventing Denim for the Modern Era

*From waterless dyeing technologies to denim made from recycled cigarette butts, today's denim industry is evolving to meet the demands of both fashion and sustainability all while staying true to its timeless appeal...*

Kajal Ahuja



Few textiles enjoy the enduring appeal of denim. Originally designed as workwear for durability and utility, denim has transformed into a staple for both high-fashion and streetwear, making it a pivotal category in fashion retail.

With recent shifts in consumer behaviour, sustainability demands, and digitalisation, the denim industry in India has evolved significantly. As consumers become more eco-conscious, brands are innovating to reduce environmental impact while maintaining the quality and appeal of denim.

### Market Dynamics

According to a I-Lattice study, the denim market in India is expected to reach Rs 1,05,500 crore by 2029. The market is expanding across demographics, with the women's denim segment anticipated to grow from 11% in 2019 to 15% by 2029. Despite this shift, men's denim still dominates, although its market share is gradually decreasing.

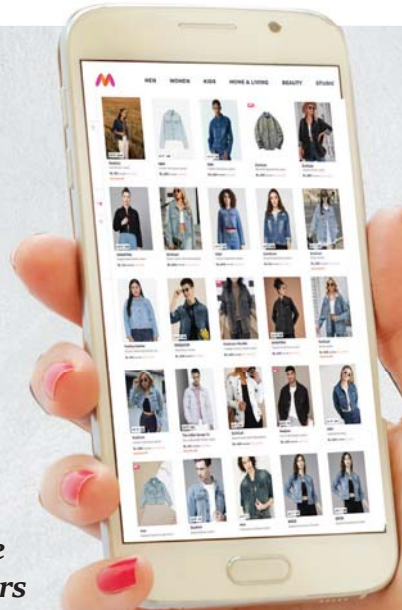
The global denim jeans market is also set to grow from \$64.5 billion in 2022 to an estimated \$95 billion by 2030, according to a recent report by Statista. As a key segment within the broader apparel market, denim's growth aligns with the rising trajectory of global fashion consumption, reflecting its enduring appeal and evolving consumer preferences.



# MYNTRA'S DENIM SUCCESS:

## Innovation, Celebrity Collaborations, and Tier II Expansion

*The growth of denimwear market - through e-commerce platforms like Myntra - indicates how the category caters to the dynamic parameters of functionality, style, and self expression...*



### IMAGES Business of Fashion

E-commerce platform, Myntra has made significant strides in the denimwear market, catering to a diverse audience with a wide range of products. The e-commerce giant's approach to denimwear combines a broad selection of stylish products with innovative customer services and a focus on sustainability. Some of the most notable denimwear brands Myntra platforms are Roadster, Nautica, Mango and Mast & Harbour. The growth of denimwear market - through e-commerce platforms like Myntra - indicate how the category caters to the dynamic parameters of functionality, style, and self expression.

#### Trends & Target Audience

"In our current collection, the most popular fits span a variety of styles that appeal broadly across demographics. Roadster, for example, offers a wide range of denim fits for both men and women, all of which are equally in demand," says Prachi Sharma, Director Sourcing - Denim and Knits for Myntra House of Brands. She adds, "Fit has become central to today's fashion, especially as it resonates with trends and generational preferences. For Gen Z,

known for celebrating individuality and redefining fashion norms, denim has evolved beyond a wardrobe staple to become a platform for self-expression and cultural identity."

The collection includes fits such as slim, relaxed, straight, and regular, available across brands like Roadster, catering to all age groups who seek fresh, trend-responsive options.

"For Gen Z in particular, denim fits encapsulate a blend of comfort, individuality, and a nostalgic aesthetic that this generation finds appealing. Brands are increasingly attuned to these elements, creating denim styles that are not only fashion-forward but also meaningful, allowing wearers to connect deeply with the clothing they choose," notes Prachi.

#### Product Portfolio

At Myntra, the denim collection spans a wide range of styles and fits, from classic straight-leg jeans to trendy wide-leg, skinny, and relaxed fits, offering options for every silhouette and preference. The selection includes high-rise, mid-rise, and low-rise cuts, with washes from light to dark, vintage-inspired, acid-washed, and distressed styles.



“The most popular fits span a variety of styles that appeal broadly across demographics. Roadster, for example, offers a wide range of denim fits for both men and women, all of which are equally in demand”

-Prachi Sharma,  
Director Sourcing - Denim and Knits  
for Myntra House of Brands





# KILLER:

## Turning Denim Threads into Trends

*A pioneer in Indian denim since 1989, KILLER continues to redefine fashion with its edgy designs, sustainable innovations, and a bold product range that appeals to the fearless and trend-conscious youth...*

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Kajal Ahuja

**L**aunched in 1989 by Kewal Kiran Clothing Limited, KILLER's journey began with high-quality jeans, which has over the years evolved into a comprehensive range of men's ready-to-wear clothing and accessories. The brand has firmly carved a niche for itself in the Indian premium menswear segment and its sub-brand, KILLER Jeans is one of India's top-selling denim brands with innovative designs including low-rise jeans, shreds, worn-out jeans, and sustainable options like water saver jeans.

Today, KILLER is recognised for developing unique denim washes and creating standout pieces with textures that reflect the evolution of the fabric. Its design team continues to push trends, blending style with innovative functionality for a distinctive, rebellious edge.

### Brand History & Evolution

From its inception, KILLER has been defined by its edgy, youthful identity, becoming a cultural icon for the 16 to 30 age group.

"By empowering young Indians to express their individuality through fashion, the brand quickly gained a loyal following. Its innovative spirit and extensive distribution network propelled KILLER to the forefront of the mass-premium menswear segment, establishing it as a trusted name synonymous with style and accessibility

# FROM SUSTAINABLE STYLES TO VINTAGE VIBES:

## UPCOMING DENIM TRENDS FOR MEN

By Manjula Gandhi, Chief Product Officer, Numero Uno

### VINTAGE-INSPIRED DENIM:

Vintage denim is making a significant comeback. These washes capture the timeless appeal of past decades, offering a nostalgic nod while remaining stylish and relevant today. This resurgence includes a variety of styles, from faded finishes to unique distressing that adds character and tells a story.



### MID-RISE AND RELAXED FIT:

The mid-rise relaxed fit is gaining popularity in 2024, striking a perfect balance between comfort and style. This fit provides ample room through the thigh while tapering slightly at the ankle, making it a versatile option for both casual outings and more polished events. Its adaptability makes it a favorite among those seeking comfort without sacrificing style.

### DENIM SHIRTS:

Denim shirts continue to be a timeless wardrobe staple and remain a key trend in 2024. Whether worn solo or layered, these shirts add a rugged yet polished touch to any outfit. Their versatility allows for numerous styling options, making them an essential piece in every man's wardrobe.

*Denim has long been a cornerstone of men's fashion, and this year is no exception. With exciting new styles and fresh updates to classic favorites, here are the top denim trends to watch out for in 2024...*

### DENIM JACKETS:

Denim jackets maintain their status as a staple in men's fashion, with fresh updates enhancing this classic piece. Expect to see oversized fits, unique washes, and creative embellishments. Denim jackets can be dressed up or down, making them an adaptable choice for various occasions.



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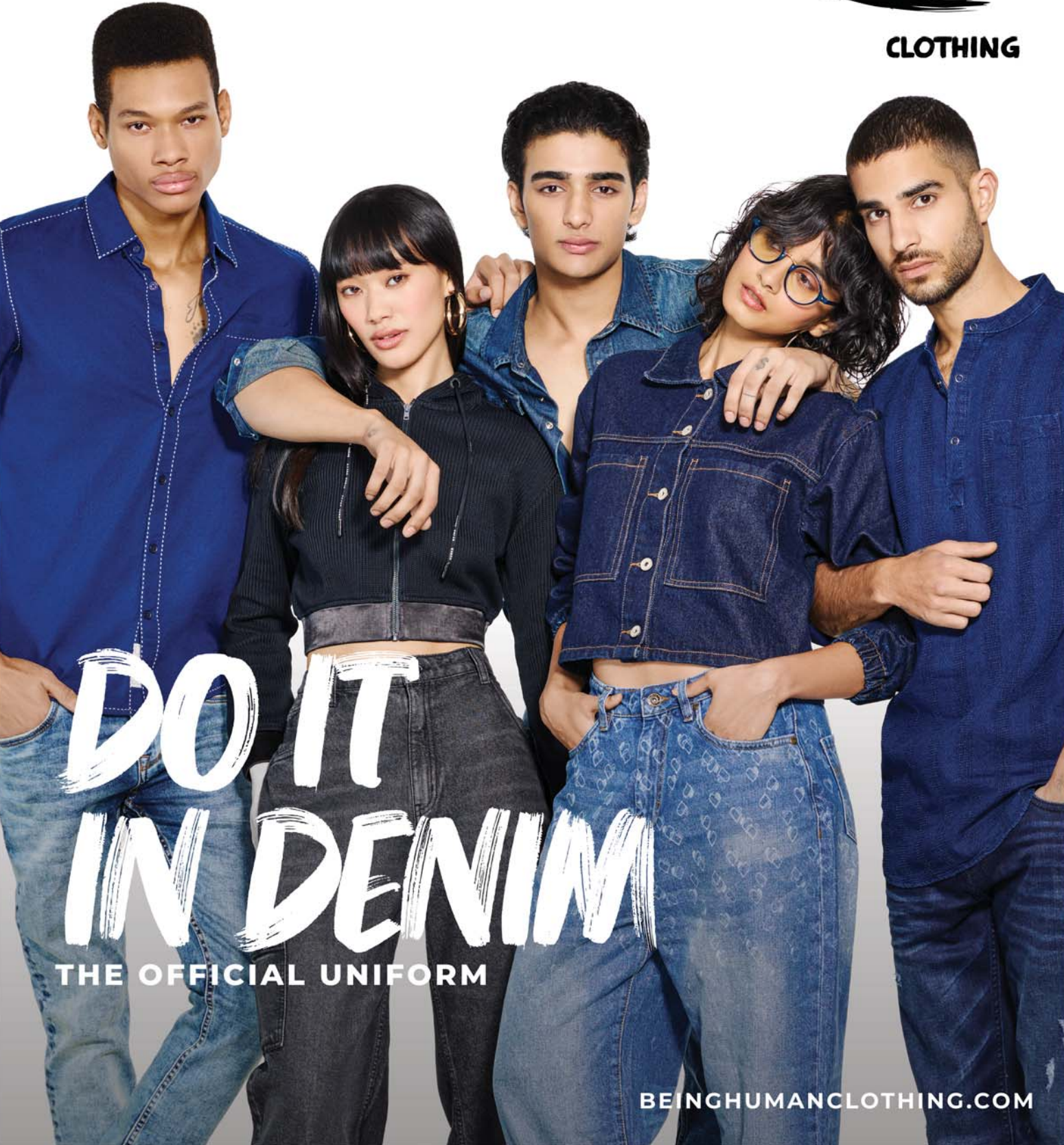
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