

Denims

on a high growth curve with new styles and features

India's denim growth story continues as newer players enter this space. With demand forecasted to increase in future, denim makers are keeping up with latest global trends while offering great value propositions to the discerning Indian consumer, write **Shubhangi Bidwe** and **Ajay Kumar Goswami**

According to industry experts, the Indian denim market, estimated at Rs 20,205 crore in 2016, is projected to grow at a CAGR of 14.5 per cent and reach Rs 39,651 crore by 2021, and Rs 77,999 crore by 2026. Of this, the men's denim segment comprises 84 per cent while women's and kids' denim segment comprise 10 and 6 per cent respectively. It is thus definitely a segment that garment

- Denim among the highest growth categories in Indian apparel market
- Has the largest number of local and global players
- Denim sells well across all economic segments
- Natural fabrics with sustainability properties gain popularity
- High-end finishes, innovative product designs gaining popularity. Colors, structures, patterns becoming cleaner and muted
- Omnichannel retail strategy to drive future denim growth



Neha Shah

Assistant General Manager-Marketing, Pepe Jeans

“Our new collection through its cappuccino, forest green, ochre, pops of orange, blue and grey tones offers a feeling of warmth. The menswear range, a mix of urban and countryside clothing, features tactile chunky knits, hoodies, plaid shirts and archive logo T-shirts, duffle coats and bright outdoors-techwear. The folksy womenswear collection offers fringed jackets and bright knits in decorative and graphic patterns, colourful fuzzy jackets, hoodies and overcoats in 70s and 80s style.



Manjula Gandhi,
Chief Product Officer,
Numero Uno

“Our denims are available in myriad shades of indigo, ranging from pale, sun-faded and bleached out blues to brighter mid-tones, vintage and heavily washed, to deep raw clean look. Also, frayed denim with boro-inspired repairing is a highlight. Our denims range named ‘Amekazi’ takes inspiration from native American culture, military clothing and vintage denim styles amalgamated with Japanese design to form a distinctive Japanese-American aesthetic.”

manufacturers are including in their general apparel portfolio even if they are not a strictly a denim company. Denim sells well across all economic segments as it is affordable, trendy and widely accepted in society as it covers all and reveals nothing.

Leveraging growth opportunities through expansion plans

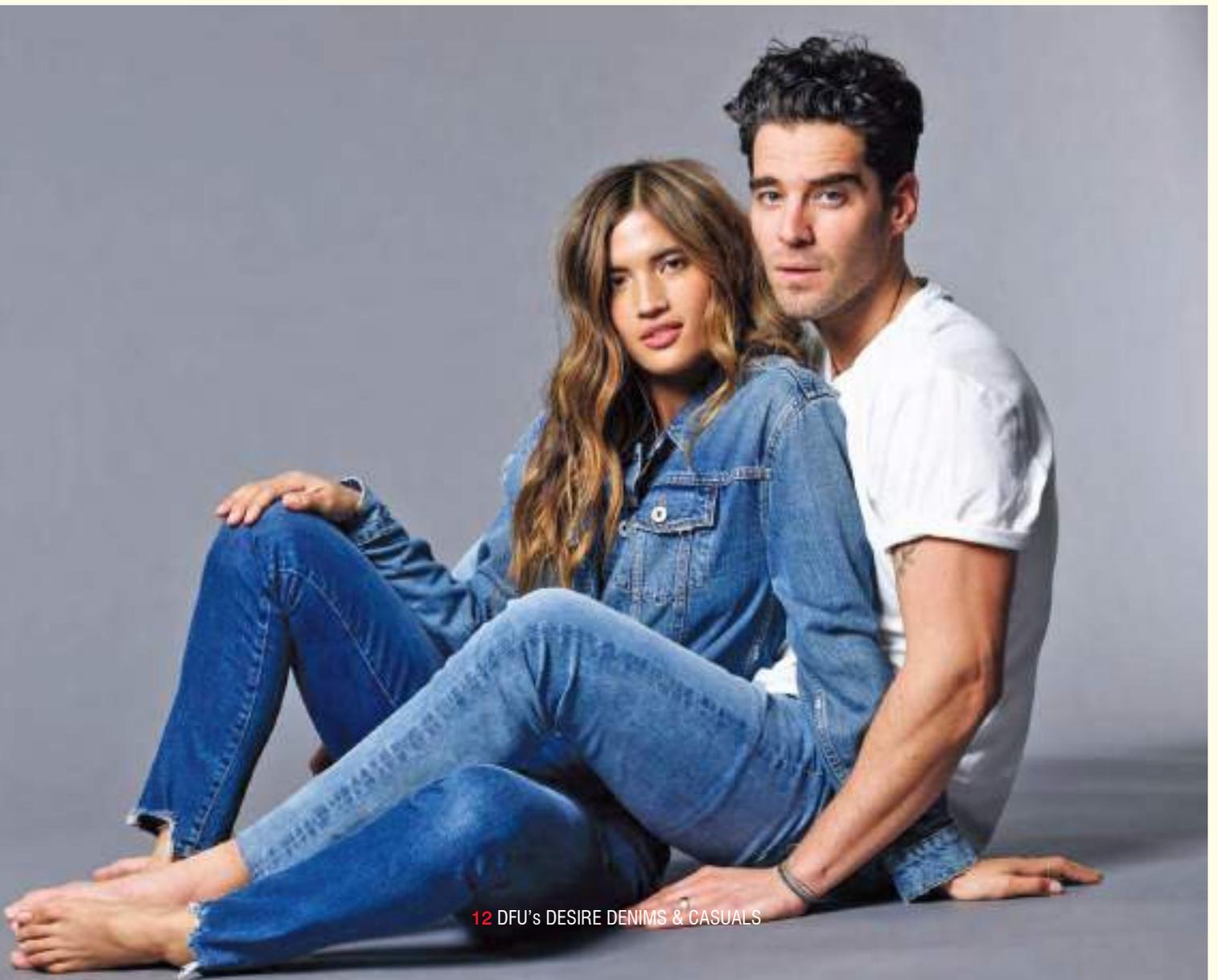
To leverage this growth potential many denim brands have embarked on expanding their product lines and retail network. Prominent amongst these is the premier denim brand Pepe Jeans. The brand recently launched its autumn/winter 2019 collection that focuses on making its customers feel cozy. The collection through its cappuccino, forest green, ochre, pops of orange, blue and grey tones offers a feeling of warmth. “The menswear collection, a mix of urban and countryside clothing, features tactile chunky knits, hoodies, plaid shirts and archive logo T-shirts, duffle coats and bright outdoors-techwear. The folksy womenswear collection offers fringed jackets and bright knits in decorative and graphic patterns, colourful fuzzy jackets, hoodies and overcoats in 70s and 80s style. Its tech-puffa jackets add a layer of warmth to the entire collection,” notes Neha Shah, Assistant General Manager-Marketing of the brand.

Adding to this range of innovations is the Brand Being Human. For its denim range

this season, the brand, on one hand, digs into American heritage to reinterpret it for the modern times. “On other hand, we have launched a fun holiday collection high on 90s youth fashion inspiration, resort shirts and acid washed jeans summing up the look perfectly. With an effortless, casual and laid back style, we have worked on seven themes in this collection, five big ones and two capsule. For the athleisure line, we have ‘Lab Sports’ and ‘Deconstruction’ as themes the first is minimalist and the other is techno grunge. For the denim line the themes include Americana, Poetic Nature and Soda Punk, visually they are very different but denim is central highlight of all these themes. Apart from these five we have Africanation and Art not War as capsule collections,” says Kunal Mehta, VP, Marketing and Business Development, Being Human Clothing.

Innovations in fabrics and yarns

Denim mills today are focusing on a range of innovation in their fabrics and high quality yarns to fight their way to the top in this competitive scenario. A traditional cotton yarn player is now increasing its product portfolio to include denim in both top and bottom wear. Manjula Gandhi, Chief Product Officer of Numero Uno notes, “We have innovated with an interesting mix of natural and sustainable fabrics, technology driven sustainable washing: ‘One Glass Water



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Emerging denim styles

The emergence of tattered denim has provided a perfect option for fashion conscious youth. The applications of distressed/ripped/tattered/patched denim in many new forms come every season and can also be seen in jackets, shorts and skirts along with denim jeans. New denim fabric washes, which are basically shades of the denim fabric are created by the top players who focus on achieving different hues of blue by washing the fabric in certain dyes, bleaches or other agents that affect the denim colour. Dark indigo, faded blue/vintage/aged, stone wash and distressed jeans are new denim fabric washes trending now.



Vijay Kapoor

Managing Director, Derby Jeans Community

"Sustainability in fashion will be the biggest drive for future. Hybrid products from Derby's Denim DNA will be our unique style statement. Our hybrid workwear will feature clean rinse washed jeans that can be worn for work & casual lifestyle. Our range will complement our hybrid jeans and provide a wide variety of product mix for urban and aspiring market segments. Some of the key fabrics used with denim this season include a few regenerated fibers like Tencel, Excel are blended onto natural fibers for a soft hand feel and comfort, stretch fabrics are our brands' strength that offers unmatched comfort."



Sustainability to drive future growth

"Sustainability in fashion will be the biggest drive for future," says Vijay Kapoor, Managing Director, Derby Jeans Community. The brand is listed amongst the top 100 sustainable brands within the country as it does not use synthetic fabrics like polyester that is made from petrochemicals. "Hybrid products from Derby's Denim DNA will be our unique style statement. Our hybrid workwear will feature clean rinse washed jeans that can be worn for work & casual lifestyle. Our range will complement our hybrid jeans and provide a wide variety of product mix for urban and aspiring market segments. Some of the key fabrics used with denim this season include a few regenerated fibers like Tencel, Excel are blended onto natural fibers for a soft hand feel and comfort, stretch fabrics are our brands' strength that offers unmatched comfort," adds Kapoor.

Increasing competition, pricing pose challenges

The Indian denim market is bursting with challenges. The first challenge is stiff competition by both local and international players, the second is pricing of yarns and fabrics going up constantly while MRPs

remain almost static in the basic segment, resulting in a pressure on manufacturers in terms of business, revenue and margins. Most bigger players have a R&D team to visit national as well as international markets and implement their findings in their portfolio. Denim mills today are focusing on a range of innovation in their fabrics and high quality yarns to fight their way to the top. Denim shirting has a good future because the Indian shirting market is largely non denim, leaving enough scope for denim to replace non denim clothing.

The future of denim industry will depend on how brands build their omni-channel strategy and its technology through which they can tap additional customers across smaller cities. The mid segment is stronger and bigger as it reaches a wider number of aspirational customers across Tier II and III cities. The rising aspirations of these price and quality conscious consumers looking for more variety and innovation in the denim segment have led to a growth spurt. And in the premium luxury segment, a variety of designs, mixed blends and sophisticated finishes is the need of the hour. Not only in the western section as bottom and top wear, denim has penetrated into almost every category in women's wear in some form, including blouses and kurtis in ethnic wear. Denim never goes out of style but how brands handle innovation to keep the segment looking and feeling is the magic wand to market success.