

Women's Denim

driven by style, comfort and versatility

Penetrating smaller towns and rural areas, demand for women's denim has been on the rise across India. Aspirational lifestyles have meant demand for branded denim too has gone up even though small time, unbranded players still have larger market share. Brands and manufacturers have responded by revving up their product basket with innovations that are in trend globally, write **Ajanta Ganguly and Ajay Kumar Goswami**

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he women's denim market is currently undergoing a paradigm shift, with more innovative and sophisticated products designs, blends and finishes becoming mainstream and gaining popularity in India with its 'wow' factor. Rapidly growing urbanization with rising incomes and the invasion of digital media has resulted in quick rise

- **Women's denim market undergoing a paradigm shift**
- **Innovative and sophisticated products designs, blends and finishes in demand**
- **There is growing preference for brands even in small towns and rural India**
- **The mid-segment denims have been and will remain the bestsellers**
- **Omni-channel retail has helped in segment growth**





Kavindra Mishra

**Managing Director,
Pepe Jeans India**

“Denims are widely accepted not because of their functionality but also due to their versatility. For instance, in smaller towns a lot of young women are seen opting for denims over ethnic wear. Economic factors have a role to play, disposable incomes, job growth indirectly contribute to consumer spending and in turn impact the fashion industry. The organized or branded market is not just favoured in the urban areas but also rural areas.”



Vasanth Kumar

**Managing Director,
Lifestyle International**

“Denim brands are now looking at athleisure that has gained popularity also among Indian millennials. Being a fashion outpost for the youth, we ensure our consumers get the best of athleisure through curated collections and the best of brands. Currently, our brands Kappa, Forca, Ginger, UCLA & Bossini among others have an extensive athleisure collection for both men and women that comprises latest trends of the season.”



Samresh Das

**Design Manager, Denim, Shirts
and Outerwear, Numero Uno**

“The mid-segment denim segment is much stronger than the premium and super premium segment because it is cost effective. Rapidly growing urban population and their changing lifestyles, increased disposable incomes, increased mobility and exposure to global fashion, have led to an overall increase in demand for women’s denims and casual wear. However, there are not many players in the women’s denims category. The most important factor that makes it sell is the way it fits.”

in sales of the women’s denim segment. To leverage growth in the current market scenario, denim brands are focussing on product innovations, pricing and consumer preferences when curating new collections for their discerning women customers. As more international brands move to Tier II, III cities, a growing preference is seen among these consumers for both brand name as well as it’s aspirational value. However, pricing has always been a crucial point for Indian consumers as women are especially incline towards spending more on upper wear than bottom wear, as the former is more of in-your-face kind of apparel.

Denim growth story continues

The mid-segment denims have been and will remain the bestsellers of this segment for a while. Analysts estimate the Indian market in women’s denims at around Rs 1,800 crores, growing at 18.5 per cent CAGR and expected to reach Rs 3,500 to 3,700 crore by 2025. The trend towards casualization combined with growing preference for look and comfort, drives the women denim market. Experts point out India is the fifth largest destination in global retail space, making the Indian apparel industry the second largest contributor in retail industry with denim being the single most leading segment in the fashion industry.



They say in order to survive in the market, every brand, big or small, should have its own USP in product profile with a different ratio of profitability factor. There is no maturity of the Indian denim market currently, which is good in a way as once any apparel market matures, it is on decline curve.

“Denim as a category has captured not only the cities, but also Tier I, II towns. Denims are widely accepted not because of their functionality but also due to their versatility. For instance, in smaller towns a lot of young women are seen opting for denims over ethnic wear. Economic factors have a role to play, disposable incomes, job growth indirectly contribute to consumer spending and in turn impact the fashion industry. The organized or branded market is not just favoured in the urban areas but also rural areas. Skinny jeans, mom jeans or baggy denims, and slim fits are the top styles. The beauty of skinny jeans is that they can be paired with almost anything, mom jeans are more comfy and stylish whereas slim fits are preferred by everyone because of their versatility and function,” points out Kavindra Mishra, Managing Director, Pepe Jeans India, manufactures of a wide array of chic casual wear for men, women and kids.

Experts also say 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. Denim is one of the most promising categories in the Indian apparel industry as consumers are increasingly accepting denim as core apparel that can be worn as an everyday casual garment.

Brand play on the rise in women's denims

Rising aspirations of these price and quality conscious consumers have driven phenomenal growth in the women's denim segment. Urban India has higher purchasing capacity as well as awareness about fashion trends thereby providing a huge market to denim players in the country. This further indicates preference towards purchasing premium and quality products which has led to deeper penetration of foreign brands and the popularity of private labels.

"Having made an impact in most metros and key markets across India, we are now focusing on expanding in Tier II, III markets. The Indian denim market is evolving at fast pace with the introduction of more styles, colours and diverse trends in offerings. One of the key growth triggers for denim is its versatility. We launched our online store in August 2018, which gives access to shoppers across India to latest trends. So far, we have seen promising results on the new channel. We also have a strong online presence which includes all leading online apparel websites like Myntra, Jabong, Koovs amongst others. The rise of e-commerce has seen some phenomenal changes in the retail segment. It has opened up avenues for retailers to reach consumers in markets they do not have a physical presence," says, a spokesperson for Being Human.

A woman shopper's needs are very

different to a man's, since changes based on product offerings of fast-fashion brands that offer an array of trends, patterns, cuts, fabrics on a day-to-day basis. With a variety of options to choose from, brands have to constantly be at the top of their game to ensure that the fashion they offer is on par with international and domestic competition. In India, the mid and economy denim segments are much stronger controlling almost 67 per cent of the market value wise as compared to the premium and super-

premium segments. A large section of Indian consumers belong to Tier II, III cities and rural areas where unbranded players operate in lower price segment, where awareness of quality of fabric, design washes and finishes is relatively low.

Denim with a twist is the new trend

In women's denims, skinny jeans and slim fits are the most popular because of their versatility and function. Denim cuts across all age brackets, shapes and sizes as various innovations in styling, technologies and trends contribute to its consistent growth. Denim features in the high growth casual wear category owing to its versatility, trendiness, comfort, and availability of vast choices, finishes, looks, fits and colours. The growth of indo-western fashion has also shaped the denim story in India. With more women working and the rise in the family disposable incomes, there is now more demand for the premium domestic and international brands in urban India.

"We have an extensive array of enviable options such as distressed denims, acid washes, embroidery to patch work and many more in our collection. Denims with frayed hems, splats, ombre are effects that are most popular among shoppers. In terms of colors, ultramarine, navy blue, indigo, cerulean, cadet grey are top favorites in existing category. The innovations for the recent collections include culottes, denims with a small waist and wider legs, denim footwear and accessories and sequined denims which are on their way to be the next big thing. Extreme laundry and acid-bleach techniques and enzyme washed denims are extremely popular among shoppers across age groups. Also, mom jeans, high



Rahul Gupta
Vice President, Future Lifestyle Fashions (Jealous 21)

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Director, Hoffmen

“Indian youth in 15-29 age group comprise 26 per cent of the consuming population and are key growth factors of denim. Fashion trends have evolved from and now it is an everyday affair with frequent exposures to international brands and domestic apparels reaching across every strata of the society. Right now every brand is focusing on different kind of fits for different body shapes plus different kind of washes apart from blue for wash requirements. And also different patterns of denim which can be worn to parties, offices, general wear and week wear.”

waist and boyfriend jeans continue to be quite popular with consumers. Our brand continues to retain these classic styles while giving it a fashionable twist for the winter season,” points out the brand spokesperson for ONLY.

The Indian denim industry is one with a lot of potential even as demand has been growing robustly over the past few years. For majority of Indian shoppers, denim is not just a usual wear but more of a fashion statement. The entry of international brands, budding economy and a large young consuming population that is driving sales both online as well as offline has contributed significantly to making India a highly lucrative retail market.

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shapes plus different kind of washes apart from blue for wash requirements. And also different patterns of denim which can be worn to parties, offices, general wear and week wear,” explains Aayush Rungta, Director, Hoffmen, a leading manufacturer of jeans and other apparels.

Owning to its fit and comfort characteristic, stretch denim has always been the most popular. Colors, structures and patterns are becoming cleaner and more muted. Deep indigo, greys and black denims have taken centre stage in women’s denims as they can be paired with just about anything. Denim is considered one of the most versatile fabrics and can be worn in many social and corporate settings. Accepted as workwear

on Friday’s in the bigger cities, men and women also pair denim with ethnic wear or kurtas in a mix and match trend.

Many leading brands are now looking at the athleisure segment of denims which combine both fitness with high-fashion with innovations, styles and designs. These denims are worn for casual occasions and for physical activities such as going to the gym or a day out in the sun.

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UCLA & Bossini among others have an extensive athleisure collection for both men and women that comprises latest trends of the season," points out Vasanth Kumar, Managing Director, Lifestyle International.

Mid-segment denims are bestsellers

"The mid segment is stronger and bigger as it reaches a wider number of aspirational customers across Tier II and III cities. The price points majorly hovers between Rs 1499-1999 and in the last 2-3 years, the prices have become more sharper aligning to market requirement. For the season, our brand has taken product innovation to the next level launching products like stay black and dust repellent white denims. Our collection also has a judicious mix of premium stretch fabrics and trendy edgy silhouettes. Currently, the unbranded segment has 60 per cent market share and competes primarily on price. This balance will shift in future driven by not just acceptance of brands in urban areas but also an increasing share of brands in rural areas, as aspirational consumers seek better quality and image," points out Rahul Gupta, Vice President, Future Lifestyle Fashions the force behind Jealous 21, echoing the sentiments of most apparel segment.

Women of all ages believe wearing denim makes them comfortable yet remain trendy and make a style statement of their own.

Being Human

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Many denim and casual wear brands are concentrating on leisure apparels which combine fitness with high fashion elements that include innovation in trends, styles and designs.

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super premium segment because it is cost effective. Rapidly growing urban population and their changing lifestyles, increased disposable incomes, increased mobility and exposure to global fashion, have led to an overall increase in demand for women's denims & casual wear. However, there are not many players in the women's denims category. The most important factor that makes it sell is the way it fits. Indian body types are varied and it is difficult to get the ideal fit for different body types. Achieving the perfect fit requires a lot of research study and technical expertise to crack the code which few brands, like ours, have been able to do. Numero Uno can boast of having achieved the right denim fits for the Indian women," points out Samresh Das, Design, Manager of denim shirts and outerwear, Numero Uno.

The denim wear market is dominated by unbranded denim products which comprises 60 per cent and thus tends to give intense competition to the branded segment. However, with many private labels and international brands entering India, the inclination towards brand denim is increasing. New age consumers with internet and smart phones has lead to immense growth in the e-tailing with the easy option, quick delivery, flexible return policy and cash on delivery. Product innovations, pricing and consumer preferences will be in the forefront for all brands across all segments when curating new collections that shape up new Indian woman.

