CHAPTER 2
READYMADE MENSWEAR BRANDED APPAREL MARKET

Introduction:
The word 'fashion' connotes a lifestyle trend and the business of fashion significantly meets the ever-changing needs of ever-changing lifestyle trends and menswear constitutes an important segment in the overall fashion industry. It gives, always, something new to aspire for.
The business was much simpler even a decade ago. It was then all about manufacturing - whatever one thought would sell and reaching them out to consumers through various channels of distribution. The fashion industry today is one of the most exciting and glamorous industries. Fashion has always served a need - be it social, sexual, cultural or individual. The business of fashion is all about anticipating these very needs of the people and turning them into desirable stylistic trends.
The growth of readymade men's wear business in India was very slow till the early-1980s. The main reason for this was that Indian men were used to buying cloth and getting their outfits tailored - mainly through local tailoring shops from the unorganized segment. Consequently, there were no national level brands in this category of menswear ready to wear apparel for a long period apart from few brands like Raymonds and Park Avenue, but they were also especially in suits only. By the mid-1980s however, customer mindset seemed to have started changing gradually along with increasing urbanization, and changes in the social and economic status and lifestyles. As in many other industries in the nation, the move towards 'branding' soon took momentum in the menswear market. The market evolved into three broad segments: premium, mid-priced and economy, with each segment having its own sub-segments. Several other factors like clothing or fashion turning into a mode of self-expression; increasing consumerism; proliferation of the Indian middle class, and the increase in its purchasing power contributed to this growth. Players from the organized segment could no longer ignore these developments and soon began entering the industry.
Kolkata is one of the most intriguing cities of the world with fascinating amalgam of life extremities where there is an increasing premium and luxury brand market as well as a large middle class market and where old conventional markets and ultra modern malls thrive alongside. Recently, Kolkata witnessed some of the biggest information technology ventures. Apart from the seven million resident populations, this metropolis attracts another seven million
floating population, visiting daily for services, business and entertainment. On this macro note
Indian menswear market has developed into an extremely difficult proposition and advertising
promotion has become a popular marketing strategy. Major companies are trying to reinvent
their positioning in the cluttered menswear business and renaming a product category with
some finer changes can be the other strategy. The modern market keeps on evolving and the
modern man is in a position to demand and get what he wants in his fast changing lifestyle.

The Shirt Market:
The shirt as a category has perhaps the biggest market size and also the maximum number of
players competing for a slice of the pie. According to Images-KSA Technopak the shirt market
in India is estimated at Rs.11020 crore and it registered a growth rate of 12.91% in value terms
in 2004 over the previous year but the volume appreciated just 3.23% for the same period. The
growth in value and volumes in the previous year were slightly lower at 12.8% and 3.2%
respectively. The shirt market has experienced tremendous value addition with the demand
more skewed towards premium offerings. In men’s shirts, the market has grown at a faster
pace, 12.85%, in value terms in 2004 as compared to the overall menswear segment, 11.81%.

Market Size of Shirts: (Unit for Volume in '000: Unit for Value in Rs.Crore)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shirts</td>
<td>278</td>
<td>303690</td>
<td>8450</td>
<td>313050</td>
<td>9535</td>
<td>10760</td>
<td>10760</td>
<td>333</td>
</tr>
<tr>
<td>Super Premium</td>
<td>1300</td>
<td>590</td>
<td>75</td>
<td>710</td>
<td>100</td>
<td>130</td>
<td>130</td>
<td>1520</td>
</tr>
<tr>
<td>Premium</td>
<td>950</td>
<td>7630</td>
<td>725</td>
<td>8090</td>
<td>820</td>
<td>935</td>
<td>935</td>
<td>1090</td>
</tr>
<tr>
<td>Medium</td>
<td>600</td>
<td>24960</td>
<td>1500</td>
<td>25960</td>
<td>1665</td>
<td>1855</td>
<td>1855</td>
<td>690</td>
</tr>
<tr>
<td>Economy</td>
<td>325</td>
<td>59360</td>
<td>1930</td>
<td>62920</td>
<td>2210</td>
<td>2530</td>
<td>2530</td>
<td>360</td>
</tr>
<tr>
<td>Low</td>
<td>200</td>
<td>211140</td>
<td>4225</td>
<td>215360</td>
<td>4740</td>
<td>5315</td>
<td>5315</td>
<td>240</td>
</tr>
<tr>
<td>Tops (woven)</td>
<td>164</td>
<td>12480</td>
<td>205</td>
<td>13300</td>
<td>230</td>
<td>14080</td>
<td>260</td>
<td>181</td>
</tr>
<tr>
<td>Super Premium</td>
<td>800</td>
<td>90</td>
<td>5</td>
<td>100</td>
<td>10</td>
<td>110</td>
<td>10</td>
<td>930</td>
</tr>
<tr>
<td>Premium</td>
<td>525</td>
<td>820</td>
<td>45</td>
<td>900</td>
<td>50</td>
<td>980</td>
<td>55</td>
<td>580</td>
</tr>
<tr>
<td>Medium</td>
<td>400</td>
<td>1150</td>
<td>45</td>
<td>1240</td>
<td>50</td>
<td>1340</td>
<td>60</td>
<td>440</td>
</tr>
<tr>
<td>Economy</td>
<td>175</td>
<td>2930</td>
<td>50</td>
<td>3100</td>
<td>55</td>
<td>3290</td>
<td>65</td>
<td>190</td>
</tr>
<tr>
<td>Low</td>
<td>75</td>
<td>7570</td>
<td>55</td>
<td>7950</td>
<td>60</td>
<td>8350</td>
<td>70</td>
<td>80</td>
</tr>
<tr>
<td>Total</td>
<td>274</td>
<td>316170</td>
<td>8655</td>
<td>326350</td>
<td>9765</td>
<td>336870</td>
<td>11020</td>
<td>326</td>
</tr>
</tbody>
</table>


The volume and value growth over the last two years have remained more or less equal except in the premium and the super premium ranges. There was substantial volume (20.33%)
as well as value (30%) growth in the super-premium shirt range in 2004. Besides the super
premium shirt range, above industry average volumes growth, about 6% was recorded in premium and economy ranges as well.

There are many established players in this market, which makes it difficult to create a distinct identity in the category yet there is scope for the marketers to get into the economy or mass segment. Because of the changing lifestyle and demographic pattern of the Indian population there is a need for aspiration brands. At the product level, there is demand for variations in the fabric patterns and fiber content depending upon the usage area and the customer segment. On the distribution front, while upmarket brands may see their sales increasing through exclusive outlets and departmental stores, mass-market brands may have to be sold through multibrand outlets.

The companies should prioritise their spending on distribution penetration, logistical issues and retailer margins as compared to that on branding. Creating a pull will be difficult to sustain as an advantage; initiation will need to happen through the push force.

Market observations:
Super premium segment in the shirt market has shown the fastest growth in volume because of the following reasons;

- Eveningwear segment, which also include partywear and loungewear primarily constituting super premium range has emerged and it have a good demand as a special occasion wear.
- Arrival of international brands is creating a completely new market in this segment with lot of luxury products and better merchandise categories.
- Significant Indian brands in premium segment have introduced products at new high price points to pull in the super premium segment and have done lots of value addition.

Trend towards readymade is more pronounced with the low-end segment showing a significant growth in value. There is an increased awareness of international trends and exposure to fashion. Over that the lifestyle pattern of the young Kolkatans have changed a lot in the last few years with extending nightlife.

Product Preferences:

- More of casual shirts are in demand in comparisons to formal wears as because now a day the office environment in multinational companies is becoming more informal. As a result casual and semi casual are the segments which are in great demand.
Bottom down shirts are out. There is a clear preference for semi-cutaway collars and shirts with fitted silhouettes among the consumers.

Sales in check style have shown an increase and regular collar is still preferred.

Earlier people went for varieties in sleeves, styles, cuffs, collars, fabrics or colours; now professionalism and formal dressing once again demands regular patterns of the earlier days. For partywear floral prints with variations in fabric, colour and style are in demand.

Basic colours like black, blue etc are much more preferred because they go very well with both formal and semiformal outfits.

Stripes across the occasions seem to be in vogue.

**The Trouser Market:**
The trousers segment in the country has grown at a faster pace than the overall industry average in value terms both in the menswear and the ladieswear. According to the Images-KSA Technopak 2005 study the Indian apparel market is currently valued at Rs.78, 094 crore in value terms which is an overall growth of 12.5% over 2003, when it stood at Rs. 69,401 crores. The men’s apparel market in India valued at Rs.32, 640 crore for the year 2004 has grown nearly 12% over the previous year in value terms, though volumes have grown just 3.6%. The trousers market in India, estimated at Rs.8, 230 crore, registered a growth rate of 13.13% in value terms in 2004 over the previous year. This growth gains significance in view of the fact that the volumes appreciated just 3.74% for the same period at 2022 crore units in 2004 as compared to about 1950 crore units sold in 2003. The growth in value and volumes in the previous year was 12.53% and 3.62% respectively.
Market Size: (Units for Volume in '000; Unit for Value in Rs. Crore)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Men's trousers</td>
<td>340</td>
<td>179360</td>
<td>625</td>
<td>185300</td>
<td>6715</td>
<td>191630</td>
<td>7520</td>
<td>395</td>
</tr>
<tr>
<td>Super Premium</td>
<td>1600</td>
<td>350</td>
<td>55</td>
<td>420</td>
<td>75</td>
<td>510</td>
<td>100</td>
<td>1940</td>
</tr>
<tr>
<td>Premium</td>
<td>1100</td>
<td>5180</td>
<td>570</td>
<td>5950</td>
<td>720</td>
<td>6840</td>
<td>910</td>
<td>1330</td>
</tr>
<tr>
<td>Medium</td>
<td>800</td>
<td>8960</td>
<td>715</td>
<td>10040</td>
<td>865</td>
<td>11240</td>
<td>1050</td>
<td>930</td>
</tr>
<tr>
<td>Economy</td>
<td>400</td>
<td>11880</td>
<td>475</td>
<td>12830</td>
<td>550</td>
<td>13860</td>
<td>635</td>
<td>460</td>
</tr>
<tr>
<td>Low</td>
<td>275</td>
<td>153000</td>
<td>4210</td>
<td>156060</td>
<td>4505</td>
<td>159180</td>
<td>4825</td>
<td>300</td>
</tr>
<tr>
<td>Women's Trousers</td>
<td>500</td>
<td>8800</td>
<td>440</td>
<td>9680</td>
<td>560</td>
<td>10650</td>
<td>710</td>
<td>670</td>
</tr>
<tr>
<td>Total Trousers</td>
<td>345</td>
<td>188160</td>
<td>6465</td>
<td>194980</td>
<td>7275</td>
<td>202280</td>
<td>8230</td>
<td>410</td>
</tr>
</tbody>
</table>


Market Observations:

- Age group of 18 – 25 years is becoming more vocal about their likings and dislikings and is becoming more product specific according to their preferences.

- A trend has been observed where buyers above fifty years of age are also converting to readymade segment, but previously they were very much sceptical about the ready to wear garments because of the fit. This is a new and attractive segment for the retailers and the brands. The middle aged has more buying power and on the other hand purchasing power of the higher income group is on the up.

- Previously, the clientele generally comprised the high profiled, well traveled individuals. With greater visibility of the brands people from all walks from life are becoming customer of this segment. Also with a noticeable superiority in the products with marginal difference in price, a certain segment of the consumers are becoming brand loyals.

- Mature and financially well off customers are buying more than the 18-25 years age group. Share of aspirational customers are increasing drastically.
• People want to be in touch with trends and also like to experiment. Consumers do not mind spending on a good product, though they are still price conscious, without compromising on quality.

• Increasing disposable incomes, mainly because of the rise of the BPO and ITES jobs in the younger age group is leading to increase in proportion of younger consumers.

• Consumers have started dressing differently for different occasions i.e. they are lookout for occasion-led dressing which is giving rise to new segments in the apparel retail market more frequently.

• Most of the successful retailers are launching new trousers in trendy fabrics with new design, style and fits for leisurewear, partywears and casualwear with latest accessories. They will gradually understand that the product presence in all categories has become very much important in order to penetrate wide across the segment.

• The retailers are introducing environment friendly trousers as environment friendly fabrics and apparels are gaining large demand in the market because of the increasing awareness among the consumers.

• The retailers are trying to maintain quality standards at par with the multinational brands and providing high quality products. Compromisation on the quality should be the last option for them.

• The retailers should focus on to widen retail network by launching more retail shops both in the metropolitan cities and in the B category cities to have a greater penetration into the market at every segment.

• Some retailers and manufacturers are trying to set up dedicated trouser manufacturing units at various locations.

• The retailers should try to create more brand awareness and increase the brand visibility as much as possible to create a specific brand image through larger media coverage and innovative advertisements campaigns with new medias.

• The retailers are trying to strategised lots of innovative and attractive type of sales promotions in the market like giving discounts, BOGO offer, coupons etc.

• Most of the companies are stressing on category management and visual merchandising. The retail counters are becoming more spacious, decorative and attractive day by day.
• The retailers are introducing more value added services, to create a perfect shopping ambience for the shoppers and enhancing the customer experience.

**Product Observations:**

- Trouser share in the wardrobe for an average male in Kolkata has gone up and subsequently the shirt-trouser acquisition ratio. Percentage share of flat fronts and cotton blends are becoming higher compared to pleat.
- Some people prefer trendier fits in imported fabrics; even they are 100 per cent polyester and are becoming more and more aware about what to wear on occasions.
- Before 1995 people used to do all their stitching from tailors but now they have started accepting ready made trousers on large scale. Fabrics and fitting changes are taking places.
- Trousers with dark colours and cross pockets are moving in. Pre washed semi-formals are in more acceptance. Casual trousers are more preferred for their comfort and luxury look.
- With a relaxed working environment, stripes and checks have taken space in the officewear segment too. Single-pleated are preferred over bulgy and anti-fit pants. Khakis/chinos are a range with the younger group. Cotton blends and linen/cotton blends are preferred for wrinkle functionality. Baggy pants are completely out of fashion.
- Some people's preference of comfort over all other aspects has increased, forcing manufacturers to focus more on cotton based trousers. Demarcation between casual and formalwear is almost non-existent. Corporates like to have all qualities in one with comfort being the primary objectives.
- Leisurewear moves into officewear with casual dressing becoming common at the workplace and the demand of partywears is increasing.
- People are looking into eco-friendly and environment friendly garments as innovation.
- The discount sale or scheme sale has increased and when customers get good quality products at an economical rate, sale of basic products happen majority in this period as a result of which bottom wear sales is growing consistently.
- A good and wide range of merchandise is now beginning to get sales throughout the year. Festival season sale is increasing but sales are not solely depending on occasions but are turning regular.
Generally four types of shoppers are found for trousers and other apparel merchandise in the retail outlets on the basis of psychographic differences they are; Enjoy Shopping, Value Conscious, Fashion Driven and Time Saver. “Enjoy Shopping” are the shoppers who spend lots of time in selecting their merchandise and are very much specific in their choice. They simply love shopping. Value conscious shoppers are very much price sensitive customers who want the best value for their money and are generally not very much brand conscious or brand oriented and are even not very much brand loyal consumers. Fashion driven shoppers are the shoppers who are very much aware and keep themselves updated. They generally form the premium segment of the market that always search for the merchandise which are latest in the fashion scene and in the fashion either in terms of design, colour or style or fabric. Time saver are the shoppers who does not like to spend much time in the outlet, generally busy with their professional life and lead a fast lifestyle. They like to pick up their product as per their choice at the point of purchase. They are not very much specific in their choices.

Some of the prevalent retailing formats for selling branded trousers in Kolkata are: Shopping Malls, Branded Stores, Departmental Stores, Specialty Stores, Supermarkets, Discount Stores and Hyper Markets.

The five consumer currencies in the apparel market, which the consumers spend, are Information, Energy, Space, Time and Money. There are certain segment of consumers spend time in collection of information about the merchandise or the latest demands in the fashion field. They are investing time and energy to come to the outlet in search of their type of merchandise and at the end obviously investing money on the product, which they treat as a solution.

The consumers today are looking for solution not only products. The solutions provided by the retailers should add value in terms of: saving time; enriching quality of life; enhancing productivity; lifestyle aspirations.

A field survey conducted by Trammell Crow Meghraj Pvt. Ltd. reveals 24% Kolkatans would shop for apparel and accessories at least once a month and 38 % of the city shoppers will spend up to Rs.1000 a month on clothes and accessories. The study also indicates a marked leaning towards branded products, with 79% of the men polled preferring big national or international brands.
**Reasons For Growth of Apparel Retailing:**

Capitalising on especially of the "dinks" or the "double income no kids" class of the population, whose per capita income has doubled in the last 20 years, for something "ethnic" by retail players like Shoppers Stop.

According to CII, the retail industry is hoping to become a $300 billion one by 2010, if it continues to grow at the GDP growth rate of 6-7%. So the Retail Sector in the apparel market will also automatically expand as apparel is the second most attractive sector in retailing.

The government is considering further simplifying procedures to facilitate enhanced inflow of FDI into the country which had witnessed a growth. The readymade garment retail industry has the potentiality to attract a huge amount of FDIs once it is opened up (which can be already observed in the single brand FDI).

The value of Indian garment exports was Rs28,000 crore ($5.4 billion) in the last fiscal. To achieve exports of $25 billion by 2010, India would have to expand its manufacturing capacity five-fold (Source: IMAGES-KSA Apparel Report 2005). With the expansion of the exports trouser manufacturing is also expanding.

From 1 January 2005, the fourth and final phase of liberalisation of the world's textile trade has ended the quota regime, which was in force since 1974, and the last of the 84 per cent quota restrictions will be lifted in keeping with the World Trade Organisation agreements.

As per the estimates of Register General of India, the population is estimated to grow at an average of 1.5% for the next 16 years. The total population of the country is estimated to be 1263.5 million during 2016.

As per the studies of NCAER, there will be an increase in the number of households in middle, upper middle and high-income households during 2001 – 02 to 2006 – 07. The Middle Class is expected to increase by 2.5% in urban areas and by 13.4% in rural areas whereas the Upper Middle Class is expected to increase by 13% in urban areas and by 5.9% in rural areas. The High Class is expected to increase by 15.9% in urban areas and by 14.3% in rural areas.

The per capita monthly consumption in India is expected to increase by 4.9% during 2002—07 and by 5.31% during the XI plan i.e. 2007 –12 which indicates positive future of the Indian economy. (Source: Statistical Outline of India, 2001—2002. Tata Services Limited Table No 173 page 157). The per capita PFCE for Clothing and Footwear market changed by + 14.31% in 2000-2001 in comparison with 1993-94.
Private Final Consumption Expenditure in Domestic Market (Figs. are in Rs. Crores)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing &amp; Footwear</td>
<td>34999</td>
<td>38231</td>
<td>41498</td>
<td>37265</td>
<td>43740</td>
</tr>
<tr>
<td>Clothing</td>
<td>30937</td>
<td>33983</td>
<td>37078</td>
<td>32763</td>
<td>38926</td>
</tr>
<tr>
<td>Footwear</td>
<td>4062</td>
<td>4248</td>
<td>4420</td>
<td>4502</td>
<td>4814</td>
</tr>
</tbody>
</table>

Source: Statistical Abstract, India 2001. Table No 27.6 page 336.

This is the following statistics against the Indian Affluent and Very Rich population about their spending percentage of their total annual household expenditure on Clothing: Year 2000: 6.50%; Year 2001: 4.70%; Year 2002: 6.60%; Year 2003: 6.90%.[Source: Consumer Outlook 2003 (KSA Technopak)].

**T-Shirt Market:**

According to Images-KSA Technopak study the ubiquitous t-shirt sports many a hue from casual and activewear to corporate-casual, it remains an all time favorite across wardrobes, accounting for 4.22 per cent of the total Indian apparel market. Valued at approximately Rs.2419 crore (both men and women), this market is on an upward curve, driven by fast yet carefree, cool lifestyles.

The men's apparel market in India, valued at Rs.32,640 crore for 2004, has grown nearly 12% over the previous year in value terms, though volumes have grown just 3.6%. Though t-shirts market constitutes merely 5.9% of the total men's apparel market, the Images-KSA study observes tendency among consumers upgrading to premium brands and labels, thereby driving volumes in this segment.

T-shirt is one category that has increased its share over the years as we find industrial production of hosiery experiencing a comfortable growth as compared to other woven segments. T-shirts are now being sold at price points unheard of in the past. There are several brands offering a tee at about Rs.700–1000 or above. In fact there has been a remarkable growth, both in value and volume in the higher end price segments. T-shirts are associated with carefree lifestyles of the youth and significant activity is happening in the high-end market with customers looking for branded products.

Primarily, sold through multibrands outlets, except when the brand has much more than knits to offer, the category offers immense potential for brands in the mass segment, as there are not many established players.
Madura Garments – A Case in T-Shirt Market.

In the Madura Garments portfolio of brands, the company had established an early leadership position in the shirts category and quickly translated this to strength in the trouser and suit category and seen some new product categories like t-shirts, casual jackets, sweaters, ties, leather products and other accessories. Core t-shirts are now well established as a category in most leading lifestyle brands selling all round the year.

The knitted product category has now moved from the, limiting t-shirts category to a wider portfolio which includes crews, polos, rugby, golf shorts, sweat shirts, flat-knit tees and even casual shirts etc. MG has even begun separating spring/summer collections and offering a comprehensive range for autumn/winter knits.

In MG the company had the larger challenge of ensuring, differentiated products across the portfolio of brands like Louis Philippe, Van Heusen, Allen Solly, SF Jeans, Peter England and Byford, because often they were available together in the same multibrands outlets. More importantly, the t-shirts had to reflect the image and character of the brand.

Presently, t-shirts form a part of the portfolio of all the brands, each with a distinct product proposition. Be it the Formal Tees of Van Heusen, Z-Shirts, and Mercerised Golf Tees of Louis Philippe, Boomerang and Bahamas from Allen Solly, Truckers Tees, Celebrity Faces and Ransom Tees of SF Jeans, the Fresher Purista t-shirt of Peter England / Elements, etc. each concept has been worked out by the design team and thereafter engineered to fit the brand image and price points.

Madura Garment’s product strategy is four pronged:

- Engineer the product to the smallest detail – the yarn count, knitting specifications and the like – keeping the end-use and brand concept in mind. This focus on detail ensures that MG replicates the product closest to concept and compromises after production.
- Keep the input base simple—MG tries not to move beyond the agreed matrix of blends and counts making our manufacturing process more controllable.
- One brand-One factory – MG tries to avoid mixing production facilities across brands and encourages the partners to understand each brand’s standards and expectation and helps to differentiate the products.
• Control fabric quality – the most important and unpredictable ingredient in the t-shirt is the fabric, which, if not managed properly can result in huge quality issues. MG’s focus has been to ensure processes and capabilities rather than audit finished product.

Besides branded apparel, MG is among the first organised players to address the corporate and institutional requirements using as the lead product offering. Byford ‘Corporate Gloss’ is an exclusive range of customized apparel and accessories – the perfect corporate incentive and gifting idea. The entire product portfolio can be customized and delivered in quick time.

There are very many other brands and non-brands into institutional selling of this category killer like Classic Polo from the Royal Classic Group, Crocodile and Aiko from Crocodile Products Pvt. Ltd. and Privys and Trevi from Trigger.

**T-Shirt Market**

![T-Shirt Market Graph]

**Jeanswear Market:**

Denim entered India in the swinging sixties. The big splash came much later in 1989 when Arvind Brands Ltd came out with strong promotional campaigns. Walk into the ritziest of parties, and half the crowd will be dressed in jeans. From the hottest designer brands to the mass-produced version and Bangkok fakes, denim shirts, waistcoats, jackets and jeans have become the Great Social Leveller. Everybody’s wearing it; some people actually live in it, as in the innovative washing machine ad. Denim is now just not a fashion article but an all-time favourite. And its sales have been increasing year after year worldwide. From street fashion to
designer duds, denim seems to have that rare appeal—ubiquitous without ever becoming boring or passé.

Jeans made from blue denim have been popular over a longer period of time than any other item of apparel. It is, perhaps, the only material and style used both by parents and children. Till the '80s, the only two choices in denim jeans were unwashed or rinsed, with the additional dark appearance so characteristic of denim. Today, it is bleached, brushed, sand- and ice-washed, ripped, torn and even ridden with bullets to give character to what is otherwise a rather mundane material. Not surprisingly, most people now own several pairs of jeans, all at different stages of their life cycle. However, the concept of stonewashing, a kind of finishing treatment, dramatically altered the industry. The stonewashed product became highly popular and as experiments began with various finishing techniques, the colours became more refined. Then followed fads like 'snow wash', 'ice wash', 'granite wash', along with other innovations in colours: 'midnight blues', 'ink wash', 'deep blues'. The variety is endless.

**Size of Denim Market**

The total current jeanswear market in India is pegged at around 25 million pairs out of which 1.25 million falls in the premium segment and growing at five per cent, 8.2 million in the standard segment and emerging at 15 per cent, 14 million in the value pack with 10 per cent growth. The overall denim market is in the region of Rs 1,200 crore and the premium international brands such as Lee, Levis, Lee Cooper, Pepe and Wrangler account for around Rs 250 crore (Source: IMAGES-KSA Apparel Report 2005).

Though statistics say that the premium denim market is growing by almost 15 percent every year, industry experts feel this growth is rather slow in comparison to the international market. The last couple of years have witnessed something of a denim explosion in India. That is mainly because of the international brands, which have become available in India. Levi Strauss after facing initial market resistance has revised its strategy and started launching its latest international ranges. After Red Tab Jeans, its superior range, it has also launched its Worker range, classified as 'relaxed street wear'.

Lee Cooper, another upmarket brand to enter the Indian scene, retails their products in the price range of Rs 995-1,495. They have a range called LC 10, both in denim and cotton, and in various styles, while their LC-21 is a low-waist hipster in denim, cotton and velour. Lee Cooper will also be launching new range of Tencel Arvind denims. Tencel is a wonder fabric made of natural fibre and its use in denim adds a luxurious, silk-like feel to the garment. Arvind Mills,
which also supplies its Indian-made denim to international brands like Gap, and works closely with Calvin Klein, Tommy Hilfiger, Benetton, Polo and Esprit, Hugo Boss and Liz Claiborne, among others, has a technical collaboration arrangement with Lee to manufacture and market the brand in the region. Arvind also markets its own denim brands. These include Ruggers, Newport, and Ruf 'n' Tuf.

In fact, the latest trend in jeans is no longer the traditional blue colour, but prints. The new player on the block is Indian Earth, a brand that has come out with a limited but exciting range of vegetable printed and dyed denim in four colours. Also getting away from the traditional colours are brands like Lee Cooper, Chelsea, Killer, and Jealous. Chelsea's stretch jeans include green, bright yellow and maroon, while Killer jeans come in peacock blue as well as silk denims. Lee Cooper gives the customer the retrowash range with burgundy colours, while Pepe, another international brand, offers colours like orange, green and sober beige.

Pepe has also launched two ladies' lines. The first is Dream, made of ring fabric on lightweight indigo with a fine construction, which gives a soft feel and clings to the body. The other line is Stretch: low-rise jeans made of Japanese fabric with 4 per cent Lycra content. Both are priced at around Rs 1,400. Jordache is another international brand making a mark in India. Positioned as an upmarket brand, Jordache's target consumer is in the age group of 16-40, and it is priced as a premium international brand. The success of Jordache in India is attributed to good quality product in terms of fit and competitive prices.

The most dramatic change has been the proliferation of denim products in the economy range. It is the fastest-growing segment of the market, accounting for 65 per cent of the total market (Source: KSA Technopak). Arvind Mills realised this much earlier and the outcome was Newport, the first branded jeans in the economy segment in India. Other players followed suit. The result is a bonanza for denim freaks. Pepe jeans sell an economy-class version for just Rs 399. With the economy segment contributing approximately Rs 500 crore annually, it has registered a growth rate of around 50 per cent against the industry average of 25 per cent. Newport and Ruf-n-Tuf are the two major brands also creating waves in the economy segment (Source: ET). With Levi's, Lee, Lee Cooper, Jordache, Pepe, Flying Machine, Texwood, Claws, Numero Uno, all competing for a slice of the pie, the Indian consumer has never had it so good. And even though multinationals cannot possibly take over the domestic market, the competitive spirit they have induced has made domestic producers more quality conscious and forced them to reshape their marketing strategies.

59
Findings:

Consumer Perspective

Graphical presentations are given in the Annexure

Retailers Perspective

Graphical presentations are given in the Annexure

Major findings of change in trend of shirt, trousers and jeans market from the perspective of retailers and consumer are:-

- There is a clear transition from tailored garments to the readymade garments in consumer preference.
- Consumers have become more brand, quality and fashion conscious.
- In shirts, mainly striped, plain single colour and diagonal stripes are more in demand. Also body fit short shirts are the latest trend.
- Regarding fabrics, cotton and linen shirts are very much in demand.
- In trousers, flat front and pleated are more sold & cotton and linen fabrics are in demand.
- In jeans, medium and dark blue along with faded colours are in demand. Straight and low waist loose fit are more sold to the younger generation.
- Sale of super-premium and premium segments is increasing at good pace.
- Prices have been increasing over the period.
- Sales in western womenswear have been increasing at good rate due to increasing in working class.

Recommendations:

One of most important change in trend is that consumers are now more brands, quality and fashion conscious. Consumers are more disciplined and organized in their shopping behaviour. They have high expectation as they enter in any store; they look for variety in design and style apart from good shopping ambience. They are also price sensitive (discount oriented), although affluent and youth are not so concerned about price and are willing to spend more for fashion. Also increased purchasing power of consumer has led to shift towards the branded and premium products purchase. Customer's foot fall has increased and they are moving towards multi-branded stores like Shopper's Stop, Pantaloon's etc for their shopping needs which illustrate importance organized retail in the current scenario.
The prices have been increasing over the period. For example, smaller brands like Moustache and Hoffman have increased their merchandise prices and still being able to sell higher units. Sales of premium segment brands and label are increasing at higher rate than the economy segment brands. This is indicative of the fact that consumer are ready to accept the higher price range provided that they are of good quality. They are also looking for comfort level, as fabrics which, are more comfortable are in demand (cotton and linen shirts and trousers). They have become more fashionable and have started believing in the concept of power dressing. Today most of the individuals want to look good and presentable. In order to cope up with the changing trends, manufacturers and marketers are coming up with new style and design in apparels and had adopted unique positioning strategies to target the segment. Major brands, come up with new styles and designs in every two months or so like Levi's and Provogue. They are adopting innovative marketing strategies. Like, Provogue has tied up with Reliance and Godrej, and Spykar with Café Coffee day; this store will provide coupons for shopping to their consumers who spends specified amount of money at their store. Various loyalty programs have been introduced to induce repeat purchase at their store like Shopper’s Stop “First Citizen Cards”.

- Differentiation and innovation is the key for success in this changing and expanding market.
- The major apparel brands and manufacturers should come up with new and different style and design frequently.
- The present consumer has become brand conscious so proper care and attention should be given towards the brand image of the product.
- They should try to position their products uniquely so that they have an edge over the competitor’s products.
- Proper care and attention should also be given to promotional campaign as these play an important role in attracting people to buy any specific product.
- As consumers are moving more towards retail outlets so these outlets should try to enhance product category, service element and ambience of their store.
- More emphasis should be given towards customer satisfaction and various customer loyalty programs should be introduced.
The branded readymade menswear garment sector has been categorised as follows in the diagram which is being showed in the below mentioned classification:

On the basis of the products we can segregate the menswear market as follows:

1. Shirts
2. Trousers
3. T-Shirts
4. Jeanswear
5. Suit
6. Sportswear
7. Winterwear
8. Ethnicwear

On the basis of the usage pattern we can segregate as follows:

1. Formal Wears.
2. Semi-Formal Wears
3. Casual Wear.
On the basis of special occasions we can segregate the menswear market as follows:
1. Party Wear.
2. Lounge Wear.
3. Wedding Wear
4. Evening Wear.
Each and every category has got several sub-categories in itself.
Presently some of the available apparel brands in the menswear segment in Kolkata:

**Clothing Brand International:**
- Allen Solly
- Daks
- Esprit
- Hang Ten
- Lee
- Mango
- Numero Uno
- Sarar
- Tommy Hilfiger

**Clothing Brands Indian:**
- Blackberry's
- Excalibur
- Gini & Jony
- Khadder
- Newport
- Park Avenue
- Rupa
- Stori
- USI
- Wills Sport
- Moustache

**Brands:**
- Arrow
- Dockers
- Giordano
- Hiedelberg
- Lee Cooper
- Manzoni
- Pepe
- Switcher
- Van Heusen
- Classic Polo
- Exile
- Givo
- Killer
- Oobe
- Parx
- Scullers
- Sweet Dreams
- VIP
- Westside
- DJ

**Conclusions:**
- Benetton
- Enamor
- Giovani
- Hugo Boss
- Levi's
- Hoffman
- Pringle
- Triumph
- Crocodile
- Ermenegildo Zegna
- Hanes
- Lacoste
- Louis Phillip
- Wrangler
- Rockport
- Trussardi
- Color Plus
- Feelings
- Indian Terrain
- Monte Carlo
- Ostermann
- Peter England
- SF Jeans
- Tuscan Verve
- Weekender
- Zod
- Stop
- Easies
- Flying Machine
- John Players
- Newman
- Oxemberg
- Provogue
- Spykar
- Turtle
- Westwood
- Zodiac
- Kashish
Conclusion:
a. Middle-class forms 20-25% of the total population (200-250 million), and is driving demand in the retail sector which deals with products like branded trousers.
b. Increased spending by India's middle class is estimated to be over US$ 300 million where clothing occupies an important arena. Overall consumer spending grew at a pace of 6% pa in last 10 yrs.
c. Lifestyle orientation of people is changing: The super rich class of 17 million will increase to 35 million in 5 years as a result trouser demand in the upper segment of the market will expand.
d. Over 40 million in India have same purchasing power as Americans, which indicates positively in the clothing consumption that too branded ready made sector.
e. Around 75% of population in India is under 40 years of age that means there will be an increasing demand fro lifestyle products like branded trousers and other menswear products.
f. This is the age of Gen X and Discount malls. Malls, with greater than 500,000 sq.ft, of space, large entertainment area and ample parking spaces are creating ideal ambience for selling fashion merchandise. At least 5 outlets in each of the major cities this fiscal is scheduled to provide products that are at least 25-50 per cent cheaper than the retail price, manufacturers can directly sell to the end-users.
So overall the apparel market is facing a huge boost up because of the mentioned reasons and we expect the menswear market will be more expanding and will be contributing in a considerable percentage in the coming fiscal year. But the marketers at the same time should be more conscious and focused about the changing need and the behaviour of the consumers.