



SHIRTOPEDIA

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INDIA'S 1ST COFFEE TABLE BOOK ON SHIRTS

India as a market has more acceptance for shirts even though t-shirts emerge as a competition to the category. Thus shirts category even in a transition phase continues to grow. The biggest challenge is e-commerce and discounting which leads to price competition amongst the brands making it difficult to sustain margins and product quality for domestic retail brands.

But even in such a volatile market, consumers are accepting innovations which might have been shunned previously or were predominantly for womenswear including printed shirts, blends like modal / tencel etc. Also, the brand culture is picking up in Tier II & III cities with consumers becoming more brand conscious. This opportunity can be leveraged by a category like shirts.



Pragati Srivastava

Director & Brand Head – Parx, Raymond Apparels Ltd.



Shirts category is single largest within the menswear market and the casual shirts market itself is estimated to be more than ₹ 10,000 crore, growing faster than the formal shirts market.

The branded segment contribution is growing, and customers are now looking at more technical innovation and comfort in shirts. Along with woven shirts, knitted shirts are also preferred by customers due to comfort and various finishes available.

Stitch-less and antimicrobial finishes are sought after by customers along with various wash effects and softer hand feel.

Suman Saha

Chief Operating Officer, Raymond

The Indian shirts market is the most organised one since the men's formal wear segment has the highest share of organised retail in India and now with the influx of all the major international brands and retailers, the competition is very high. In the near future, the challenge is the shift of consumer's preference towards more casual and sportswear driven styles where shirts are not that important a part of the overall look.

Manish Mandhana

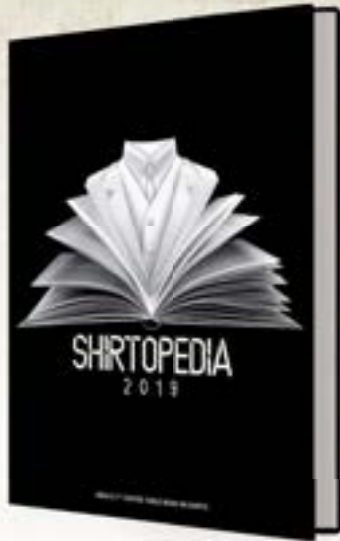
CEO, Being Human Clothing, The Mandhana Retail Ventures Limited



The shirts market in India is the largest category among others for men. This domain is under transition in the last few years from limited colours to expanding in distinct categories and size. With evolving consumer preference we see a huge potential in the market which is likely to be driven by aspiring youth working in the corporate sector. In addition to this, the Indian shirt market shall witness innovative designs, fits, trends and color combinations attracting the consumer for opting for semi-formal shirts over formal shirts.

Nitin Mohan

Founder & Director of Blackberrys Menswear



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The Evolution of The Shirt Through The Finishes: From 1975 To 2018

By **Giovanni Petrin**, Strategic Advisor - Product Innovation Denim Finishing, Arvind Limited & **Andrea Petrin**, Technical Business Developer, Arvind Limited

In the '80s and '90s, the desire for innovation and experimentation created industrial treatments like marble, overdyed, dirty, sand blast and spray with hypochlorite or permanganate that became common in the finishing for play a vintage look, for years the trend of shirts...



Women's Shirt Innovations: Driving Significant Business in Fashion Retail

By **Melissa Moylan**, Vice-President-Creative, Fashion Snoops

Designer Demna Gvasalia has championed classic staple items by reinventing them in new and unexpected ways. Updated design details applied to traditional shirts include elongated sleeves, voluminous shapes, pieced construction and cutouts...

Section Two

Research & Trends


- 2.1 Changing Market & Consumer Trends in the Shirt Business
- 2.2 The Evolving Business of Men's Formal Wear in India
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Indian Shirt Market to Grow at 6% to Become ₹81,578 Crore by 2027

By **Amit Gugnani**, Senior Vice President – Fashion, (Textile & Apparel) with **Saima Nigar**, Associate Consultant, Fashion (Textile Division), Technopak

In the coming years, the growth of shirt market will be driven by the young aspiring youth working in corporate sector. At the same time, innovative designs and colour combinations in semi-formal and casual shirt will continue to attract the fashion-conscious consumer...

A person in historical attire, including a white ruffled collar and a dark patterned garment, is holding an open book and a quill pen. The background is dark and textured.

Section Three

The Shirt Through History

- 3.1 The Shirt Story of Jermyn Street
- 3.2 The History & Evolution of the Shirt
- 3.3 Iconic Shirt Campaigns of Our Times
- 3.4 Top 15 Men's Dress Shirt Collar Trends

Iconic Shirt Campaigns of our Times

Mediocre advertising clings to stereotypes but good advertising breaks all stereotypes and creates a spark that goes down in history as legends. We browsed through the archives to bring forth some of the most creative ads we could find.



Zodiac Man

Zodiac was just an unknown tie brand until the **Zodiac Man** happened, thanks to Ulka Advertising. Headed by none other than the 'The Last of the Great Advertising Nawabs', Bal Mundkur, the campaign catapulted the brand to unprecedented repute, positioning it as a classy and fashionable brand, with quality at the heart. The campaign's influence was such that the word 'Zodiac Man' became synonymous with any man with a handsome beard.

The Arrow Collar Man

The Arrow Collar man campaign dates back to the early 1900s and even predates the Marlboro Man. The Arrow Collar Man was the name given to the various male models who appeared in advertisements for shirts and detachable shirt collars manufactured by Cluett Peabody & Company of Troy, New York. Collaboratively produced by Calkins and Holden, New York, the campaign ran from 1905-1931. Such was its impact that by 1920, the fictional character started receiving fan mails. Even now, the company continues to refer to its consumers as the 'Arrow Man'.



[CASE STUDY]: ZODIAC CLOTHING COMPANY

MY Noorani and his making of Zodiac...

- In the early 50s most of the brands in India were a legacy of the British Raj. It was during this time that MY Noorani was working with an indenting house and wanted to start his own business.
- He imported a consignment of glass juicers which landed in Bombay completely broken and he lost all his capital. He then got another order for silk fabric and borrowed money to import the order.
- When the fabric reached Bombay the person who had placed the order backed out and MY Noorani was left with fabric imported for scarves. Logically he should have thought of cutting his losses but then, MY Noorani had always been made of sterner stuff.
- He took a very bold step – he converted the silk fabric into ties. Neckties – western dressing – were worn only by a handful of executives back then. Even today, ties are the most fashionable element of a formal wardrobe.
- The demand for his ties grew rapidly, with the only competition coming from imported products. Along with this grew a need for a brand name. An august gathering of friends in advertising generated over 1,000 names and Zodiac was finalized.
- The soon to be famous Zodiac logo with the Saturn was created with the help of his cousin who was an art director in one of India's largest ad agencies.
- A brand was born, and in 1954, Zodiac was established.
- Through the '50s, Zodiac established itself as a brand of premium men's accessories. Driven by design foresight and a strong commitment to quality an entire range of ties, belts, wallets, cufflinks, tie pins, socks and hankies were launched.
- Zodiac was rapidly growing its distribution nationally. MY Noorani realized that while distribution and sales were growing, support from marketing was required and this thought process opened up a whole new dimension for the brand Zodiac.
- In the '60s the world was seeing 'flower power' and the 'peace' movement and being 'hip' was all about being anti-establishment. At the same time, India was seeing the middle class revolution and its fight against socialism. While the country was evolving, a brand was growing.
- In the same decade, Bal Mundkur had started a creative hot shop called Ulka Advertising. A formidable alliance between Ulka and Zodiac resulted in an advertising strategy that would set standards for men's wear in India – **The Zodiac Man** – Taking a page out of the success story of the Hathaway man with his eye patch.
- It was decided that a model should be chosen to reflect the brand values of Zodiac – contemporary, fashionable and international. A bold decision was taken – the model should sport a beard. He should not just be anti-establishment since that was totally unheard of!
- Ulka Advertising's then Creative Director, Dhanji Rana, was chosen to personify Zodiac. Tall, well built, fair and bearded – the Zodiac man was launched as the face of the brand.
- The ad campaign very quickly established the desired brand values for Zodiac, while establishing the Zodiac man as a style icon for India.
- Meanwhile, brand Zodiac became clearly established as the "First Name & The Last Word" in men's accessories.
- Renowned journalist Khushwant Singh once wrote an article on how three icons of Indian advertising were The Air India Maharaja, The Amul Girl & The Zodiac Man !

...And the rest as you say is history...



MY Noorani started his business on August 11, 1954 as a partnership firm in the trading business. His first consignment was glass juicers made of glass imported from Yugoslavia which arrived completely broken, and he lost all his capital. Undeterred, he bounced back and slowly built the business successfully. In the late '50s, he imported fabric for a firm in Bombay, investing all his capital. Unfortunately the buyer changed his mind and cancelled the order, leaving MY Noorani saddled with fabric. With entrepreneurship in his blood, he converted them to ties which he went about selling to stores in Bombay. To his pleasant surprise not only did they sell well, but the customers wanted more. Before he knew it, he was in the neck tie business and the Zodiac brand was launched. From Ties he moved into other accessories which finally culminated in the launch of shirts in the '60s. Hard work and integrity, coupled with an eye for design and unflinching quality led the House of Zodiac from success to success, eventually resulting in the company getting listed in 1994.



Shirts & The Art of Power Dressing

By **Manjula Tiwari**, CEO, Future Style Lab

Today, there are various types of shirts to choose from for power suits, ranging from the clean lines of plain shirts to shirts with intricate detail such as embellishments and lace to give them a feminine touch...



▲ CURATO NOO NOO NNU204



▲ NARENDRA KUMAR



▲ AKSHAT BANSAL BLONI



▲ Arjun Khanna

The Fashionable Shirt Story

By **Meher Castelino**, Fashion Writer

The shirt has turned into the ideal garment for men who want to make a sartorial impact with a personal fashion statement. So, from a simple long sleeved one-pocket, 2-piece collar shirt this masculine garment has evolved into a fashionable stylish offering...

Shirt it Like a Bollywood Star

By **Aarti Kapur Singh**, Independent Writer

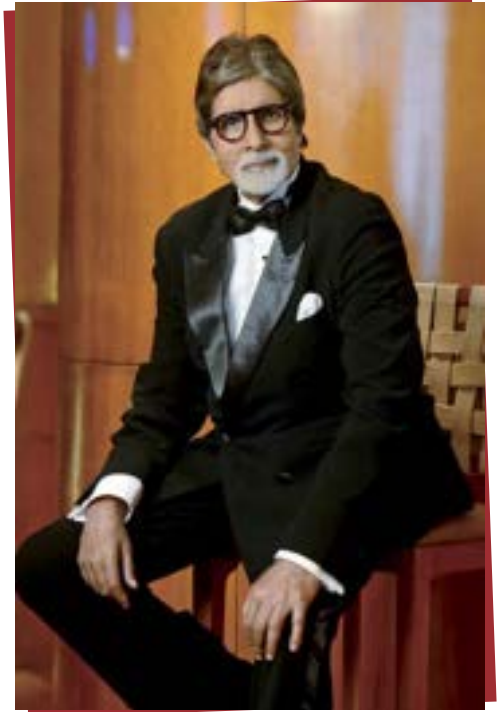
While a celebrity's personal stylist and shopper play a major role as they are the ones who are always on the lookout for something new and unique, the famous ones come with their own quirks, own demands and own specifications – especially when it comes to buying shirts...



Today, consciousness about what one wears and how one wears has increased tremendously. With individuals getting inspired by the way celebrities dress, celebrities need to be more aware of their personal style.

With celebrities travelling extensively nowadays, there is homogeneity amongst them irrespective of geography and demography. They are all looking for well-made shirts, clothes, designs to perfectly fit their body, clothes which make sure they stand out from the crowd. While a celebrity's personal stylist and shopper play a major role as they are the ones who are always on the lookout for something new and unique, the famous ones come with their own quirks, own demands and own specifications – especially when it comes to buying shirts.

Here's looking at what the sartorial preferences of some of Bollywood's are, when it comes to shirts...



“When I wore those loud and bright shirts in Bombay to Goa, it was not just the prevailing fashion of those days, but it was part of establishing the character as being happy-go-lucky. The dog-collared shirts in Amar Akbar Anthony similarly established the loveable tapori. I have been told I started a fashion trend with that knotted shirt in Deewar. This, incidentally, was accidental because the tailor had stitched it too long and there was no time for alteration.

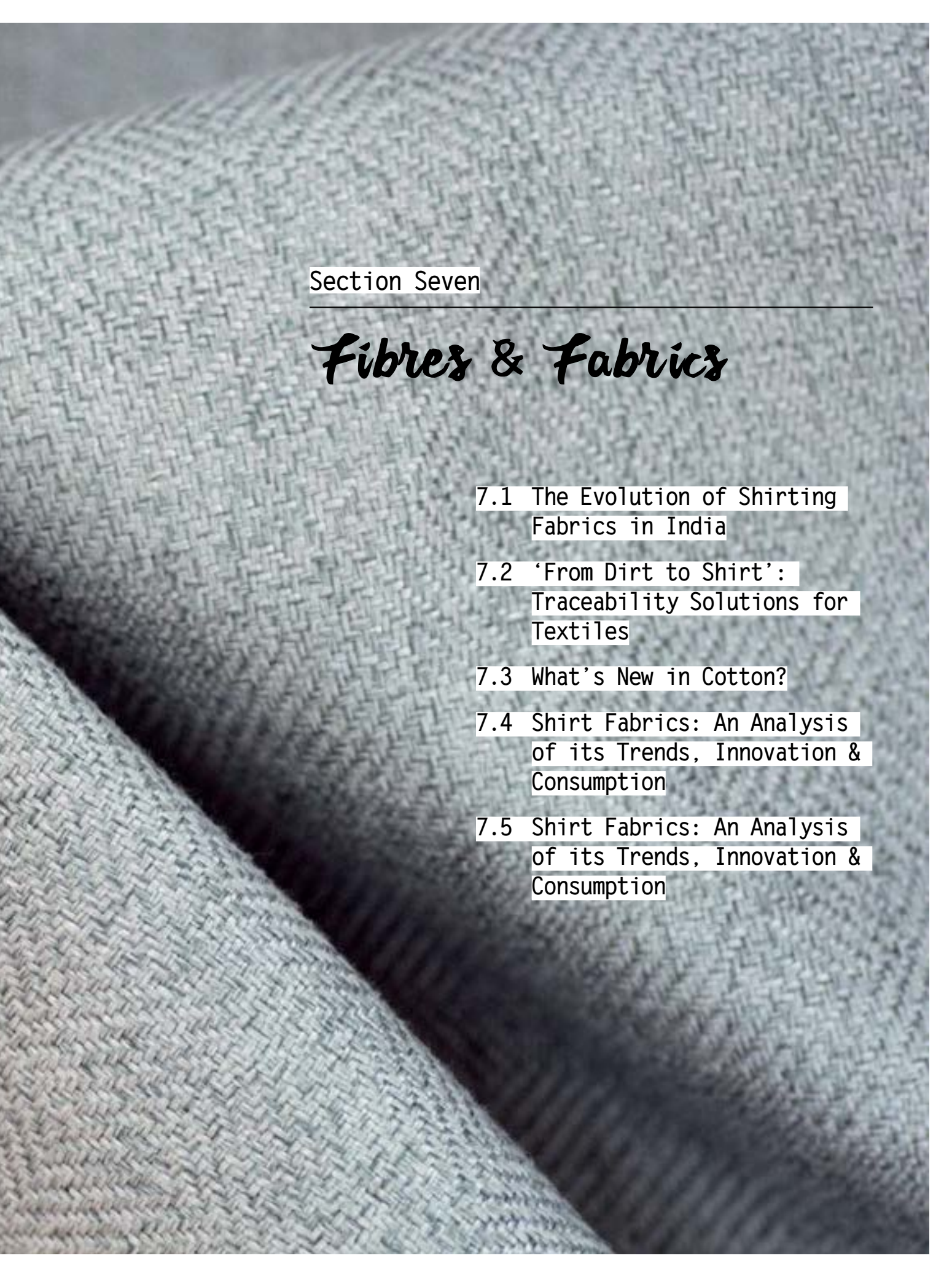
My shirts have always been custom-made because my arms are too long. I cannot wear shirts that are readymade. Personally, even if I choose colours and cuts that may look casual, I favour the dressier look. My shirts have to be sharp and smart. I guess I am old-world that way.”

Amitabh Bachchan



“I am of a broader built and I used to be overweight at one point of time. So, when it comes to shirts, I cannot wear something too loose and frumpy because it makes me look bulky. I prefer shirts in thick material – though I love linen, but it tends to make me look puffed up. If I have to wear jackets, I wear leather jackets or parkas.”

Arjun Kapoor



Section Seven

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- 7.2 'From Dirt to Shirt': Traceability Solutions for Textiles
- 7.3 What's New in Cotton?
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- 7.5 Shirt Fabrics: An Analysis of its Trends, Innovation & Consumption



Founded in 1973, Pepe Jeans is the brainchild of Shah brothers from Kenya; Nitin, Arun and Milan Shah who revolutionized London's fashion scenario by creating stylish and trendy jeans unlike the customary ordinary looking denim available in those days. In 1989, Pepe Jeans entered India and quickly captured the imagination of fashion forward consumers across the country. Pepe Jeans India manufactures a wide array of stylish casual wear for men, women and kids.

EBOs:
238

LFS) & MBOs:
1350 Multi Brand Outlets, 528 Department Store counters (Large Format Stores).

Online Presence:

Present on Amazon, Flipkart, Ajo, Myntra and Jabong.

Pepe Jeans



→ **Core Values & Mission:** Pepe Jeans London is always at the forefront of international denim-led fashion with its collection season on season.

→ **Key Factors That Helped The Brand Achieve Success**

- **Product Value:** It's not just about the price, but more importantly about the value the product has to offer. Pepe Jeans' pricing strategy is fundamentally based on the value they are offering their consumer.
- **Accessibility:** Pepe Jeans is highly accessible - present across 238 BBOs, 1350 MBOs, 528 LFS counters. It also retails on popular online platforms such as Myntra, Amazon, Jabong and Flipkart.
- **Innovation:** Pepe Jeans Custom Studio - Pepe Jeans is the first brand in the country to introduce a one-of-a-kind denim customization service that is capable of bringing basic denims to life by way of personalization.

→ **First to the Brand's Credit:**

Innovation and customization is at the heart of the Pepe Jeans business. The brand is known for its thought leadership in the denim industry. With the introduction of Custom Studio, they had the first mover advantage that helped them to reach out to a new set of audience. Pepe Jeans Custom Studio allows customers to step into the design seat and customize their denim in a few easy steps. This service can be availed at their flagship stores in Mumbai, Delhi, Gurgaon, Bangalore and Kolkata.

→ **Target Consumers:** Psychographics - Pepe Jeans is for the young at heart. The brand caters to the fashion forward. The consumer who wants stylish and trendy denims that fit well at an affordable price. The quality, fabric, fit, colour, wash, price, feel together influence the customer's purchase decision.

→ **Demographics:** The brand targets adults between the age groups of 18 to 25 years and kids between the ages of 4 to 16.



FABRIC *for all* SEASONS;
Fabric reasons.



MONZATM
STYLIZED COTTON