



**THE  
DENIM  
BIBLE INDIA**



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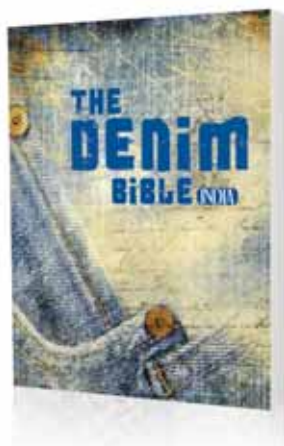
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# FOREWORD



Denim. A statement of attitude and relaxed fashion confidence. Timeless and fantastically mutable, given its graduation from rough workwear as envisioned by Levi Strauss a century ago to its current status as a fashion must-have, denim has featured in the portfolio of almost every fashion brand and retailer over the past several decades. From Levi's to Armani, there is no fashion label that can today afford to miss the opportunity to present denim in an altogether new style or innovation every season.

I believe that the primary reason for denim's enduring status as a pillar of fashion, is its continuing affinity with all that is young, and its 'comfort fashion' tag. Whether you wear your jeans as anti-fits or as curve-huggers, whatever the fit, the treatment/ wash or that tiny brand tag on the back pocket, denim jeans now make powerful statements of individual style.

Sadly, I find that in India, denim is nowhere near the mind-blowing, statement-making denim fashion products I see in many parts of the world, including in smaller markets such as Turkey and Portugal, let alone in Italy or USA. If the fashion business in India is scratching their collective heads about why consumption is not picking up, maybe they should transfer some attention from the flowcharts and balance sheets to the design studio. India has not even scratched the surface, when it comes to creating incredible, eye-popping denim fashion that is retailed in equally amazing environments. Every time I am in a G-Star or a Salsa store overseas, I am literally blown away by these brands' unbelievable fashion innovation. For any brand that caters to youthwear in India today, there can be no future unless it is prepared to continuously embed excitement and original innovation in denim.

# FOREWORD

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As a fabric category, denim is so ubiquitous in the global fashion landscape that it has acquired for itself the status of a personality statement maker. And with India's population age profile getting younger every year (although by no means is denim's appeal restricted to only the young), this stylish but sturdy fabric's spread can only get wider.

India's denim apparel market is estimated to be worth Rs. 10,980 crore and is projected to grow at a CAGR of 14 percent to reach Rs. 21,250 crore by 2018, as per the findings of Technopak presented in this publication. The key driver of this growth will be, as indicated above, the core consuming age group of 15-39 years, which is projected to widen to 566 million from the present 499 million over the next decade, the report says. Mass market brands and small-time labels, as expected, accounted for over 70 per cent of India's denim market in 2013, and this is where the opportunity lies for brands to convert buyers into loyal customers.

Denim has at numerous times in its long history been referred to as the 'uniform of the young'. And that is true for India's youth as well; denim's versatility in being designed and worn both as high-fashion as well as resilient casual wear, has led the young to consider fashion items made from it as a core apparel category.

Indian fashion is also getting 'cooler', meaning consumers are increasingly favouring a relaxed-but-stylish approach to everyday fashion. Denim jeans match this fashion aspiration more than adequately. What's more, like sarees and shirts, denim products are also available as per customer segmentation – with mass to premium and even luxury brands now populating the denim shelves across the country.

This first-ever Denim Bible India from the IMAGES Group, traces the history, appeal and many avatars of this wondrous, timeless fabric, through insightful research, expert analyses and industry opinions on the manufacturing, marketing and retailing of arguably, the most iconic and versatile fashion fabric of all time. We hope you will enjoy, leafing through the amazing insights contained in this ode to denim.

A handwritten signature in black ink, appearing to read 'RS Roy'.

**R S Roy**  
Editorial Director, Images Group



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THVM SPRING/SUMMER 2014



CLOSED SPRING/SUMMER 2014



PAIGE DENIM SPRING/SUMMER 2014

### INDIGO-BLOCKING

Patchwork remains a main detail for the skinny jean with tonal indigo-blocking offering a modern take on the look. Keep the look contemporary with simple cut-and-sew techniques and subtle shadow patches.



HOUSE OF HOLLAND LACE-DETAILED JEANS



ISABEL MARANT JEANS



7 FOR ALL MANKIND SPRING/SUMMER 2014

### FLORAL EMBROIDERY

All-over floral embroideries create a luxe, richly textured feel for surfaces, while placement inserts are a cheeky alternative.

Editor's Pick  
International fashion designers share how they are experimenting on denim for their upcoming summer collections.

Source: Sportswear International#261

# CATCH ME IF YOU CAN

WHICH DENIM KEY PIECE WILL YOU MAKE ATTRACTIVE FOR YOUR CUSTOMER IN SUMMER 2015? HERE THE DESIGNERS GIVE US A SNEAK PREVIEW OF THEIR FAVORITES.

Umbero Vendramin, Nine in the morning "One of the most important trends for denim concerning the cut is a denim in '80s style, it's a revised edition of the boyfriend but much more feminine."



CURRENT/ELLIOTT



OBJECT

## Boyfriend



KHUJO

Josy Liebrau, H.I.S. "Denim shirts in light and dyed washings are one of the key trends for summer 2015."

DR. DENIM

## Shirt

BROADWAY



M.O.D

5PREVIEW



## Jogger



MISS SELFRIDGE

## Skinny

TIMEZONE



Pepe Jeans, design team "The jean has a super high elastic content which will suck in the body with zero growth. The trend continues with a slimmer silhouette and especially tapered fits with a shorter inseam."

Edwin de Rooij, PME Legend

"We see a growing trend in jog denim both in jeans, denim jackets and denim shirts. Jog denim is the most obvious example of a trend for comfort in clothes in general and also in denim."





# CHETAN SHAH

## MAN WITH A PHENOMENAL VISION



“From his start in 1989 working with Pepe Jeans International in London to his opportune move in India in 1991, Chetan Shah’s drive and ambition for the Pepe Brand was unshakable,” said Carlos Ortega, CEO, Pepe Jeans Group Worldwide. He adds, “With work and perseverance, Shah drove the Pepe Jeans to the pinnacle of success and recognition in the Indian market place where Pepe Jeans proudly occupies the primary position in premium jeans wear. It is impossible to recount every aspect of his 23 years of contribution, but ultimately it was a lifetime dedication.”

Shah passed away in a tragic scuba diving accident in Maldives on November 12, 2012.

Managing Director, Pepe Jeans India, Chetan Shah was the youngest ever Pepe employee to head the overseas business of the brand— at the young age of 29. With his ambitious nature, enduring loyalty and exemplary management style, he took the London-based fashion brand to new heights of success in India and made it one of the most aspire youth brand in the country.

Born and raised up in Nairobi, Kenya, Shah dreamt to be a broadcast journalist capturing images of natural calamities, terrorist strikes and

wars. He spent 19 years in Kenya and completed his A levels. Further, Shah went to the US for the university education. He attained a bachelors in finance with minor in political science degree from Illinois State University and completed his masters in International Management from the American Graduate School of International Management.

His first job was with a consultancy where he worked closely with the Wall Street firms. After two years, he moved to the United Kingdom and joined the international business division of Pepe Jeans at their global headquarters in London during 1989. Shah was responsible for business development in Eastern Europe, South America, Asia, Middle East and Africa.


Chetan Shah was a man with phenomenal vision, dedication and leadership qualities that inspired many whose life he touched personally and professionally. A grounded personality, he radiated throughout his life optimism, generosity and compassion that were unmistakable. Shah’s foresight and insightful strategy has enabled Pepe Jeans to become the market leader in the premium jeans and casual wear segment. He had received many awards in his career for his contribution to the retail industry in

India. His sense of humour, creativity and fundamental belief in people and work were treasured by all who knew him.

Under Shah’s supervision Pepe Jeans took off as a jeans brand in India during 90s. The brand extended its product offerings and grew into a complete denim wear brand with denim jackets, shirts, etc. along with the jeans range. Gradually, Pepe Jeans also introduced an array of knits, wovens, denim bottoms, fashion denims, non-denim and accessories. Pepe Jeans is a robust casual wear brand and sells everything one would associate with casual wear like casual cotton shirts, denim shirts, light-weight jeans, t-shirts, shirts, jackets cotton casual pants and accessories such as bags, caps, belts, wallets, wrist bands etc.

Shah’s pioneering efforts have led Pepe Jeans to become one of the most successful international brand in India to offer complete casual wear solutions for men and women. Pepe Jeans offers its customers entire wardrobe with ‘Denims and Beyond’. Shah was the man behind the brand had transcended it from a jeans brand to a complete lifestyle brand. ●●●

# ON THE DEATH OF ALBERT SEFRANEK



The founder of Mustang Jeans, Albert Sefranek, was a legendary entrepreneur, a visionary and a pioneer who was a singular figure in the jeans industry. He will never be forgotten. Sefranek was the man who brought the blue jeans miracle to Europe. He was the initiator of the legendary Inter-Jeans in Cologne, which began in 1975 with 52 exhibitors—a courageous step at that point in time. Without his entrepreneurial flair the success of the Mustang label would have been unimaginable. Sefranek spurred the Mustang stallion onward at full gallop. He held the reins in his hand to the end—even if he was not actively involved in day-to-day business operations—and always closely and critically followed the development of the company. Anyone who knew him was fascinated by this dynamic man who always preferred wearing casual jeans even in old age. Mr. Jeans influenced the Mustang label in both human and business terms.

Albert Sefranek and Mustang—that is the intimate story of a family from Künzelsau. Born near Nuremberg in 1920, he actually wanted to study engineering but things were to take a different turn. When he returned home from the war to his fiancée Erika in Künzelsau in 1945, he was expected

to help establish the work clothing factory “L. Hermann,” founded by his mother-in-law Luise. The adventure story of German jeans began when he started working for the company. While searching for a new top seller in 1948, he exchanged six bottles of home-distilled Hohenloher schnaps with a GI in Frankfurt for six original “Ami pants.” These served as the pattern for the first jeans made in Germany. Sefranek believed in the jeans and, behind the back of his strict mother-in-law, ordered 36,000 meters of denim from the US for more than 100,000 German marks. And he was successful: In 1949 the first 300 blue jeans from outside America were produced, in 1953 the first corduroy and flat woven jeans and in 1961 finally the first stretch jeans. The Mustang label was registered as a trademark in 1958. From then on the triumphant success of the German jeans label took its course. “When you are learning the business you are not the boss,” was his motto when his son Heiner began working for the family business starting in November 1974. He was dominant and direct as a father. But he could let go and in March 1990 he handed over the management of the business to Heiner and in May 1995, on his 75th birthday, he withdrew entirely from the management of the company.

Sefranek was one of Germany’s most outstanding business figures. He volunteered his time for many sports, cultural and business projects in southern Germany and received numerous honors for this.

It was possible to philosophize for hours with Sefranek about the denim economic miracle. The man knew simply everything about jeans—he was essentially a walking jeans encyclopedia. He knew the denim world like no other and was always willing to share many a humorous anecdote. His special charm, his unpretentious and direct manner meant that the jeans veteran was always interesting to talk to. He used plain words, got to the essence of things and could sometimes correct us journalists in a domineering way if we dared to argue with the blue jeans wonder. As company chairman he was like the Mustang label—a wild horse and no rundown coach nag. After a very active career, he relaxed and enjoyed his well-earned retirement. But even as a pensioner he was always in a state of “constant stress,” attending concerts and events and kept physically fit until a very advanced age. He died on March 2, 2014 at age 93 in Künzelsau. He will always remain a jeans legend. (LD) ●●●



# A

Acid-wash | Adda | Amrikan | Anti-fit | Anti-twist | Authentic |

## ACID-WASH

This washing technique is representative of the 1980s. The abrasive power of pumice stones soaked with chlorine bleaches jeans in sharp contrast. Patented by Italy-based Candida Laundry in 1986, this technique was launched via the Italian brand



Rifle at Inter-Jeans, the same year. The runway success of this product led to myriad variations, though few escaped the woes related to oxidation, which yellows jeans over time.

Acid wash is also known as moon, fog, marble, ice and frosted.

## ADDA

(Indian) It is the roll of 400 to 500 pieces that goes to further processes of making denim such as cutting, stitching and bathing.

## AMRIKAN

(Indian) In several small towns of India jeans were called Amrikan, as local slang for a long period.

## ANTI-FIT

A loose, baggy style of jeans.

## ANTI-TWIST

A step in the finishing process before sanforisation that corrects denims natural tendency to twist in the direction of the diagonal twill weaves. This process is also known as skewing.

## AUTHENTIC

It describes the original jean quality as well as stone and enzyme wash optics. It became a marketing buzzword in the early 1990s, when the quest for original denim swept the European market. One of the characteristics of authentic jeans is traditional fabric weaves and styling details.

# CALVIN KLEIN

## Calvin Klein Jeans

Calvin Klein, Inc., a wholly owned subsidiary of PVH Corp., is one of the leading fashion design and marketing studios in the world. It designs and markets women's and men's designer collection apparel and a range of other products that are manufactured and marketed through an extensive network of licensing agreements and other arrangements worldwide.



► **Pages of History:** Born and raised in New York City's borough of the Bronx, Calvin Richard Klein decided he wanted to be a fashion designer at an early age. After graduating from the Fashion Institute of Technology in 1963, he worked for women's coat and suit manufacturers in Manhattan's garment district before opening his own business in 1968. A childhood friend, Barry Schwartz, loaned him US\$10,000 in start-up money and joined the firm a month later. Klein rented a dingy showroom to exhibit a small line of samples. His big break came when a Vice-President at Bonwit Teller stopped at the wrong floor of the building, liked what he saw, and invited Klein to bring his samples to the President's office. Klein wheeled the rack of clothes uptown personally and won an order of US\$50,000 (retail) on the spot. Bonwit's gave the merchandise impressive exposure, with window displays in its flagship Fifth Avenue store and full-page ads in the New York Times. Soon after, Calvin Klein was

besieged by orders. The fledgling company booked \$1 million worth of business in its first year, reaching sales volume of \$5 million by 1971. Klein mainly designed women's coats and two-piece suits until 1972, when he began concentrating on sporty sweaters, skirts, dresses, shirts, and pants that could be mixed and matched for a complete wardrobe.

Klein won a Coty American Fashion Critics Award-fashion's Oscar-in 1973. He received an unprecedented third consecutive Coty Award for women's wear in 1975 and, at age 32, was elected to the group's Hall of Fame. That fiscal year (ending June 30, 1975) the firm shipped US\$12 million worth of merchandise, including swimsuits and dresses.

Klein not only designed every item carrying his name but closely watched every step of the production process. Klein introduced his first menswear collection in 1978, telling the New York Times Magazine that he approached men's clothing "with

the same philosophy as the women's. They're for Americans who like simple, comfortable but stylish clothes-but with nothing overscale or extreme."

Calvin Klein jeans, by contrast, were to become the company's biggest hit. Klein's first attempt, in 1976, to capitalise on the designer-jeans craze-at US\$50 a pair-was a failure. Klein raised the groin in his jeans to accentuate the crotch and pulled the seam up between the buttocks to give the rear more shape. By 1979, Calvin Klein was second to Gloria Vanderbilt in designer-jeans sales, with one-fifth of the market. A company spokesman observed, "The tighter they are, the better they sell." The biggest lift to Calvin Klein's jeans was the television campaign directed by Richard Avedon that featured 15-year-old model and actress Brooke Shields provocatively posed in a skin-tight pair of Calvin Klein jeans. my closet, and if they could talk, I'd be ruined." He added a jeans-inspired collection that included shirts, skirts, and jackets, also licensed to



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