

THE DENIM BIBLE

INDIA
VOL.2

POWERED BY

spykar 

spykar.com

A Word About IMAGES

IMAGES
GROUP.IN

Established in 1992, IMAGES Group is India's most prolific and influential disseminator of retail intelligence. Recognised by Indian and international retail communities through its B2B Magazines, Conferences, Exhibitions, Research Reports and Web Portals, the IMAGES Group is the largest retail intelligence organisation in South Asia and the Middle East, whose multiple products and services function as catalysts for the profitable growth of modern retail through knowledge platform leadership. The Group's knowledge platforms include print and online reportage, research studies, and major annual business events with Conferences, Masterclasses and Workshops serving multiple verticals/segments/operations of retail. The Group's mega industry events include: Phygital Retail Convention, India Food Forum, India Fashion Forum, Shopping Centres Next, Internet Commerce Summit, India D2C Summit, Middle East Retail Forum and Saudi Retail Forum.

PREFACE



IMAGES
GROUP.IN

Dear Readers,

Denim has journeyed far beyond its origins as a wardrobe essential to emerge as one of the most versatile, resilient, and commercially influential categories in Indian fashion retail. Seamlessly adapting to shifting lifestyles, evolving price-value expectations, and ever-changing style sensibilities, denim today moves effortlessly – from everyday comfort to fashion-forward expression. Denim Bible Vol 2, IMAGES Group's second deep dive into the subject, studies denim's rare ability to balance mass appeal with aspiration and understands how it has cemented its place as a powerful and enduring growth engine for brands and retailers across the country.

Timeless yet endlessly adaptable, denim has travelled a remarkable path—from its rugged beginnings as durable workwear conceived by Levi Strauss over a century ago to its present-day status as a global fashion essential. Along this journey, it has transcended trends and generations, earning a place in the portfolio of virtually every fashion brand and retailer, and reaffirming its unique ability to evolve while remaining unmistakably iconic.

From global mass icons to luxury fashion houses, no label today can afford to overlook denim's enduring power or its constant demand for reinvention. Season after season, brands across the spectrum continue to reinterpret denim through fresh silhouettes, finishes, and innovations, reaffirming its unmatched ability to stay relevant in an ever-evolving fashion landscape.

In India, denim retail is charting a distinctive path—one that mirrors global sophistication while responding to uniquely local sensibilities. As developed markets refine denim through premiumisation, sustainability, and tech-driven innovation, India is matching pace with its own scale-driven ingenuity, blending value, fashion, and accessibility. Indian brands and retailers are experimenting with faster trend cycles, inclusive sizing, omnichannel formats, and sharper price-quality equations, while catering to a young, aspirational consumer base that wears denim across occasions.

The result is a denim market that is not merely following global cues, but increasingly shaping its own retail narratives alongside the world's most evolved fashion ecosystems.

PREFACE

According to an exclusive study for Denim Bible Vol 2, by The Knowledge Company, the total Indian denim jeans market is valued at approximately USD 2.2 to USD 2.4 billion in 2024-2025, with projections indicating a robust Compound Annual Growth Rate (CAGR) of 8.1% to 9.83% through 2032. This impressive growth is fueled by a fundamental market immaturity, as India's per capita consumption of just 0.5 pairs of jeans annually signifies a colossal untapped potential of nearly 700 million additional pairs needed to reach a modest one-pair-per-person benchmark.

Looking ahead, India's denim retail opportunity lies in moving from scale to strategy. Brands must deepen consumer insight to drive sharper segmentation, invest in design and fit innovation tailored to Indian body types and climates, and build stronger storytelling around versatility, comfort, and value. But as the business of denim evolves, performance and growth can no longer be pursued in isolation from responsibility. Herein comes sustainability—an unavoidable conversation in the denim industry, which globally remains one of the most resource-intensive segments in fashion—marked by high water consumption, chemical-heavy processing, and significant waste.

As awareness and regulation increase, brands are being pushed to rethink how denim is designed, finished, and retailed, making cleaner technologies, responsible sourcing, and circular practices central to the future credibility and growth of the category.

Equally critical is accelerating the adoption of technology—across demand forecasting, inventory optimisation, and omnichannel retail—to reduce inefficiencies and improve speed to market. By balancing innovation with affordability and embedding sustainability as a business imperative rather than a pilot, India can elevate denim from a volume-driven category to a globally respected, future-ready retail proposition.

Signing off, I can only say, as a new generation steps into denim—seeking freedom, fluidity, and feeling as much as fashion—the fabric must learn to move to a younger rhythm, and as India's Gen Z re-imagines style through comfort, conscience, and creativity, denim too must find its place in their unfolding story.



Amitabh Taneja
Editor-in-Chief, IMAGES Group

Publisher:
S P Taneja

Project Advisory:
Amitabh Taneja
R S Roy
Anjali Sondhi
Bhavesh Pitroda
Nikhil Behl

Editor-in-Charge:
Surabhi Khosla

Associate Editor
Sandeep Kumar

Creatives:
Pawan Kumar Verma

Design Team:
Deepak Verma
Prakash Jha

Production:
Manish Kadam

Images Multimedia Pvt. Ltd.
(CIN: - U22122DL2003PTC120097)

Registered Office: S-61 A, Okhla Industrial Area
Phase 2, New Delhi 110 020
T: +91 11 40525000 | F: +91 11 40525001
E: info@imagesgroup.in | URL: www.imagesgroup.in

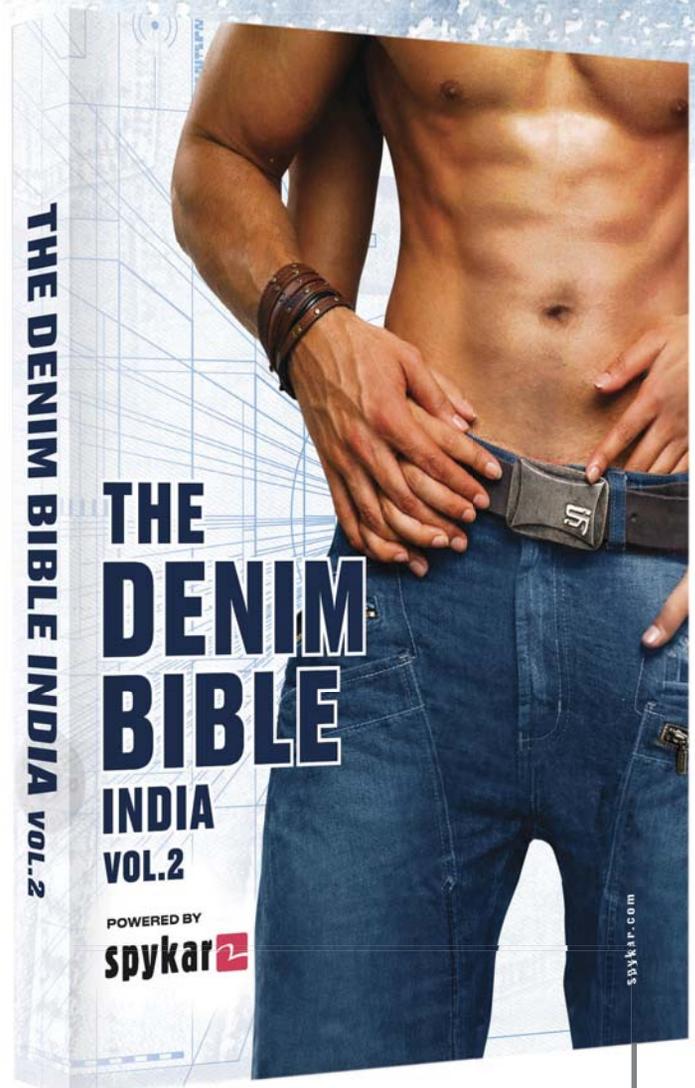
Mumbai: E 519, Floral Deck Plaza, Central MIDC
Road, Opp SEEPZ, Andheri East, Mumbai 400 093
T: +91 22 28398000

All material printed in this publication is the sole property of Images Multimedia Pvt. Ltd. All printed matter contained in the magazine is based on the information provided by the writers/authors. The views, ideas, comments and opinions expressed are solely of the writers/authors or those featured in the articles and the Editor and Printer & Publisher do not necessarily subscribe to the same.

Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Modest Print Pack (P) Ltd. C-52, D.D.A. Shed Okhla Industrial Area Phase -1, New Delhi - 110 020 and published by S P Taneja from S - 61A Okhla Industrial Area Phase - 2, New Delhi 110 020

In relation to any advertisements appearing in this publication, readers are recommended to make appropriate enquiries before entering into any commitments. Images Multimedia Pvt. Ltd. does not vouch for any claims made by the advertisers of products and services. The Printer, Publisher and Editor-in-Chief of the publication shall not be held for any consequences in the event of such claims not being honored by the advertisers.

Copyright Images Multimedia Pvt. Ltd. All rights reserved. Reproduction in any manner is prohibited. All disputes are subject to the jurisdiction of competent courts and forums in Delhi/New Delhi only. Images Retail does not accept responsibility for returning unsolicited manuscripts and photographs.



An
IMAGES
GROUP.IN
Research

Cover Price
₹5000 | US\$ 150

To order your copy, contact:

Priti Kapil

Asst. General Manager – Consumer Connect
& Subscription

S-61 A, Okhla Industrial Area Phase 2,
New Delhi 110 020

T: +91 11 40525000 | F: +91 11 40525001

Mobile: +91 9868801869

E-mail: pritikapil@imagesgroup.in

CONTENTS

SECTION 1: RESEARCH & ANALYSIS	14
1.1 The Indian Denim Market 2025: A Strategic Analysis of Growth, Competition, and Transformation	18
<i>By Madhulika Tiwari & Parmesh Chopra, The Knowledge Company</i>	
1.2 The Future of Denim in India	36
<i>By Ashish Dhir, Ambuj Gupta, Kashish Gupta & Vandana Pushpadharan, 1Lattice</i>	
SECTION 2: IN FOCUS: TRENDS	46
2.1 The Denim Decade: From Skinny Staples to Sustainable Icons	48
<i>By Puneet Dudeja, WGSN</i>	
2.2 Silver-Haired, Blue-Jeanned: India Growing Older & Wiser in Denim	54
<i>By Dr. Kaustav SenGupta, VisioNxt Insights Lab</i>	
2.3 Denim at a Crossroads: Innovation, Responsibility and the Future of Blue	62
<i>By Sharmila Gupta, AGS Group</i>	
2.4 The Story of Denim — From Indigo Roots to Global Icon	66
<i>By Surabhi Khosla, IMAGES Group</i>	
SECTION 3: FABRIC & YARN	76
3.1 How Reliance is Redefining Denim for a New Generation and Climate: An Intelligence Briefing	78
<i>By Rakesh Bali, Reliance Industries Ltd.</i>	
3.2 The Evolution of Denim Fabric Over the Years.....	84
<i>By Suketu Shah, Vishal Fabrics Ltd.</i>	
3.3 Waterless Denim: Driving Smarter, Low-Water Manufacturing Practices	92
<i>By Satish B R, UGO Tech</i>	
SECTION 4: THE DENIM PLAYBOOK	98
4.1 How Homegrown Label Spykar is Redefining ‘Made in India’ Denim	100
<i>By Sanjay Vakharia, Spykar Lifestyles Pvt. Ltd.</i>	
4.2 From Mills to Modern Hubs: RSWM’s Role in India’s Denim Evolution	106
<i>By Rajeev Gupta, RSWM Ltd.</i>	
4.3 Denim 2.0: How Technology, Youth Culture and New Silhouettes Are Shaping India’s Denim Future	112
<i>By Amitabh Suri, U.S. Polo Assn.</i>	
4.4 Duke India: Six Decades of Leadership and Lifestyle Excellence	118
<i>By Komal Kumar Jain, Duke India Ltd.</i>	
Contributors	122

SECTION **ONE**

RESEARCH & ANALYSIS



The Indian Denim Market 2025: A Strategic Analysis of Growth, Competition, and Transformation

By **Madhulika Tiwari**, Partner & **Parmesh Chopra**, Head Content Writer, The Knowledge Company

The Indian denim market is valued at ~USD 2.4 billion in 2024-2025, with The Knowledge Company's projections indicating a robust CAGR of 8.1% to 9.83% through 2032...

T

he Indian denim market stands at a pivotal juncture in 2025, presenting a landscape of dynamic contradiction and immense opportunity. It is a market defined by the powerful friction between modernising, supercharged consumer demand and a vast, often inefficient, traditional supply chain.

The industry's future trajectory will be determined by the ability of its stakeholders to bridge this gap through strategic investments in technology, supply chain agility, and sustainable practices. This report provides an exhaustive, data-driven analysis of the market's current state and strategic outlook, intended to guide corporate strategists, investors, and market participants.

The total Indian denim jeans market is valued at approximately USD 2.2 to USD 2.4 billion in 2024-2025, with The Knowledge Company's projections indicating a robust Compound Annual Growth Rate (CAGR) of 8.1% to 9.83% through 2032. This impressive growth is fueled by a fundamental market maturity.

India's per capita consumption of just 0.5 pairs of jeans annually signifies a colossal untapped potential of nearly 700 million additional pairs needed to reach a modest one-pair-per-person benchmark.

The Indian denim market's growth is firing on two cylinders: the fast-expanding women's wear segment and the aspirational, digitally-connected consumers





The Future of Denim in India

By **Ashish Dhir**, Senior Director; **Ambuj Gupta**, Associate Director; **Kashish Gupta**, Associate Manager & **Vandana Pushpadharan**, Business Analyst, 1Lattice

According to an analysis by 1Lattice, ~65% of shoppers purchase denim for everyday needs such as office wear, travel, and comfortable seasonal outfits, while ~55% buy it for family occasions and festivals, highlighting its growing acceptance beyond casual settings...



The denimwear market in India has evolved from a functional wardrobe staple to a fashion-driven, multi-occasion category, shaped by rising urbanisation, global fashion exposure, and digital influence. With consumers embracing versatile, comfort-led, and expressive dressing, denim now plays a central role across men's, women's, and youth wardrobes.

The Indian denimwear market stands at ₹ 73,800 crore in FY25E and is projected to nearly double to ₹1,42,200 crore by FY30P, growing at a solid 14% CAGR. Menswear continues to lead overall volumes, while womenswear is growing rapidly driven by fashion experimentation. As the market matures, upcoming shifts will be shaped by phygital shopping behaviour, evolving fits and finishes, fusion-led outfits, youth and gender-fluid styling, and sustainability- and tech-led innovation - all of which are redefining how denim is designed, purchased, and worn in India.



Indian Denimwear Market Size
(INR Cr, FY25E-30P)

