Apparel Sector Trends in India.

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Abstract:
Fashion is serious business, everywhere. Admittedly, India was a latecomer in the scene, but the pace now is scintillating. This is testified through the escalating figures of the garment market as also by the growing tally of fashion brands and retailers who have occupied substantial share of the country’s retail space. Truly, the clock cannot be turned back now.

Over the past year, the garment industry has been building up on its capacities at various levels, expanding its product base, incorporating innovative technology, and engineering newer avenues of business. This sector, being one of the largest industrial sectors of the country, is a major propellant of the economy’s growth. Inherent issues and challenges dominate the industry. With the changing dynamics of doing business in a rapidly-changing global economic scenario, the sector needs to identify scopes for potential business ideas and overcome challenges by converting them into fresh opportunities.

Salient feature of India Apparel Sector

- Maximum employment with minimum investment.
- High percentage of women employment –35 %
- 95% production in small-scale sector
- 3% share in global apparel exports
- Cluster based growth –concentrated primarily in 8 clusters, i.e Tirupur, Ludhiana, Bangalore, Delhi /Noida /Gurgaon, Mumbai, Kolkatta, Jaipur and Indore
- Contributes around 8% to India’s overall exports and 48% to textile exports
Production in Apparel Sector

The apparel sector is expected to record a CAGR of nearly 15% in quantity terms and 20% in value terms in 11th plan period. By 2001-12, production is expected to reach 19 bn pcs, amounting to rs 299300 crs, 32% of this population is expected to be generated by the export sector. In value terms, 51% of the population is expected to be contributed by exports. The accent is on the value added growth – both for domestic and export market.

India in recent years has been the focal point of continuous growth and development making it one of the fastest growing economies of the world. It is the 4th largest economy in terms of Purchasing Power Parity, after USA, China & Japan, and is rated among the top 10 FDI destinations.

The Indian consumer is evolving and driving retail growth due to increased consumption. Private consumption growth contributes to more than half of the GDP growth and is growing in double digit figures. Several businesses are reacting to this evolution positively, both through pull and push phenomenon.

Following a similar trend, the Indian textile and apparel industry is also experiencing rapid changes and growth. Apparel today has the largest share of the modern organized retail in India i.e. 20% of the current market of Rs. 56,000 crore and this is expected to grow at a constant rate of 20% over the next 4 years.

These are few recent trends pertaining to the garment industry:

**Trend 1**

Indian consumers are converting from stitched apparel to ready-to-wear causing a surge in discount retailing.

Factory outlets have become distinct and important shopping destinations.

Retailers are increasingly accepting the widely agreed fact that consumers love a bargain and always look forward to buying brands at low prices. Factory outlets have become distinct shopping destinations with distinct audiences. Apparel companies are focusing on this market to cash in on...
consumers converting from stitched apparel to ready-to-wear, further graduating to branded apparel. India is thus seeing a surge in discount

Retailers offering year round discounts, ranging anywhere between 30% to 70%.

**Trend 2**

**Consumers now desire branded products in all aspects of their life**

Traditionally brands that offered formal wear are now extending into casual wear, accessories, footwear etc. With most brands turning lifestyle brands, they are opening larger Exclusive Brand Outlets (EBO’s) to showcase their complete range of merchandise and give an international feel. The past few months has seen brands opening up very large format stores in India.

**Trend 3**

**Designers realize the huge opportunities in ready-to-wear market and are introducing prêt lines**

Another trend visible in the Indian designer wear market is corporatisation i.e. strategic tie-ups with large corporate in related industries to provide the necessary financial support and expertise in operational management. The designer wear industry lacks the processes, systems, people and financial resources to rapidly scale up their operations. The direct advantage of this would accrue to the designers who would be able to concentrate on the design and aesthetics rather than on business planning.

Genesis Colors Pvt Ltd., is the forerunner in the corporatisation of the Indian designer industry. It is the parent company behind the labels Satya Paul, Deepika Gehani, Tie Bar and Samsaara. These designers enjoy a wide distribution network throughout India and abroad of standalone/franchisee stores and premier fashion boutiques.

**Trend 4**

**Indian companies see a huge opportunity in partnering with luxury brands wishing to enter India**
The Indian consumer desires to possess international luxury brands as an inspirational product. Additionally, no Indian retail brand actually qualifies to be categorized as a luxury brand. This readiness for luxury as an organized market, has been recognized throughout the world and international luxury brands are exploring possible avenues and tie-ups to enter the Indian retail market.

**Trend 5**

**Worldwide surge in demand for organic and eco-friendly products**

Organic cotton has been able to achieve maximum popularity amongst all eco-friendly fibers. Global retail sales of organic cotton products are projected to grow to $2.6 billion by the end of 2008, reflecting a 40% average annual growth rate. Hence, the demand for organic cotton fiber is expected to grow to 100,000 metric tons in 2008, an average annual growth rate of 47%.

**Trend 6**

**Kids and youth are influenced by icons & characters and desire to possess them in their everyday life.**

India has become an important market for character licensing specially in apparel. Today's consumer is greatly influenced by media and he exhibits a propensity to follow icons to the extent of bringing them into his everyday life. This growing trend amongst consumers is being tapped by apparel companies by taking up licensing of popular characters and icons to be used in their merchandise. This is especially true for the kids and youth market since they identify with these characters and icons more strongly. According to Cartoon Network, the business of license merchandising of animated characters is estimated at Rs. 360 crore in India.

**Trend 7**

**Companies are exploring new' locations to retail in order to increase visibility of their brand**

Apparel retailing is geared to take on customers at places other than the traditional locations like
neighborhood markets, high streets and malls. With increased need for convenience and visibility retailing, companies explore newer locations like airports, metro stations, restaurants, cafés & even beauty salons.

Retailing at such outlets typically follows two formats - the first is when space is sublet for retailing branded merchandise at airports, metro stations, etc. The second kind is when cafés, restaurants, fast food chains sell merchandise to promote their own brand through T-shirts, caps, bags, mugs, etc. While brand retailing at airports/metro stations is growing at a fast pace, brand building by cafés/restaurants through retailing of merchandise will also be an important trend mostly targeted at kids and youth.

**Trend 8**

*Textile companies are strengthening front and back end operations through mergers and acquisitions*

Companies are increasingly looking to acquire domestic and overseas companies which complement the value chain. However, it is the foreign acquisitions which have caught the attention of the industry and the world. Indian companies are taking on larger companies, integrating the Indian advantage of manpower & raw material with the acquired company's strategic location, technology and/or well established distribution channels.

**Indian Apparel industry with technology**

The Indian garment industry is characterized by constant change. What is in vogue today will be passé tomorrow. The size of India garment industry is has also been expanding and it is expected to drive exports worth US$ 25 billion by 2010. In order to meet this growth, Indian manufacturers would have to scale up their manufacturing capacity five-fold, despite an expansion of 30 percent planned by top players. The liberalization of world trade and abolition of the quota regime have opened up new opportunities for Indian manufacturers.
The challenges for Indian garment manufacturers are multifold:

- Keeping abreast of the market trends
- Material usage patterns
- Knowledge of resource points
- Being in a position to deliver high quality goods in shorter lead times at competitive rates.

The garment industry specializes in offering a plethora of products with multipart specifications catering to diverse customer needs across markets viz. culture, climate and seasonal variations. Customers and retailers are forcing manufacturers to deliver higher quality at lower costs in short delivery times. To survive in this cut-throat business, garment manufacturers need to out think and out perform competition. They have to meet all of the following quality standards:

- Dimensional stability
- Seam strength
- Abrasion resistance
- Seam slippage and other test descriptions.

Also, the regulatory concern for safeguarding the environment makes it necessary for manufacturers to strictly conform to ecological requirements.

The moot point for Indian Players will be volume-driven efficiencies combined with superior design capabilities, scalable and flexible manufacturing processes and a well integrated supply chain.

Automation of the various processes from raw fabric to finished garment (maintenance of inventory records, inventory planning, sales forecasting, distribution and transportation management) and smooth integration with the supply chain can be achieved in a cost-effective manner, using an efficient IT solution like ERP.

In order to adopt to play on the world stage, garment manufacturers have to adopt IT as a strategic option to scale up efficiencies and improve business performances.
In fact, according to National Knitwear Association of US, of 228 Apparel manufacturers:

**Types of CAD Systems**

**Textile Design Systems**

Woven textiles are used by designers and merchandisers for fabrics for home furnishing and to men-women-children wear. Most fabrics whether yarn dyes, plain weaves, jacquards or dobbies can be designed and infact are invariably used abroad using a CAD system for textiles. Similarly embroideries are also developed at CAD workstations.

**Knitted Fabrics**

Some systems specialize in knitwear production and final knitted design can be viewed on screen with indication of all stitch formation. For instance a CAD program will produce a pullover graph that will indicate information on amount of yarn needed by color for each piece. Another example of the new technology in the industries using a yarn scanner which is attached to the computer scans a thousand meters of yarn and then simulates a knitted/ woven fabric on-screen. This simulation will show how the fabric will look like if woven from that yarn.

**Printed Fabrics**

The process involves use of computers in design, development and manipulation of motif. The motif can then be resized, recoloured, rotated or multiplied depending on the designer’s goal. Textures and weave structures can be indicated so that printout either on paper or actual fabric looks very much the way the final product will look. The textile design system can show color ways in an instant rather than taking hours needed for hand painting. New systems are coming which have built-in software to match swatch color to screen color to printer color automatically i.e. what you see is what you get.

**Illustrations/ Sketch Pad Systems**

These are graphic programmes that allow the designer to use pen or stylus on electronic pad or tablet thereby creating freehand images which are then stored in the computer. The end product is no different from those sketches made on paper with pencil. They have additional advantage of improvement and manipulation. Different knit and weave simulations can be stored in a library and imposed over these sketches to show texture and dimensions
**Texture Mapping: 3D Draping Software**
This technology allows visualization of fabric on the body. Texture mapping is a process by which fabric can be draped over a form in a realistic way. The pattern of the cloth is contoured to match the form underneath it. The designer starts with an image of a model wearing a garment. Each section of the garment is outlined from seam line to seam line. Then a swatch of new fabric created in textile design system is laid over the area and the computer automatically fills in the area with new color or pattern. The result is the original silhouette worn by original model in a new fabric.

**Embroidery Systems**
The designs used for embroidery can be incorporated on the fabric for making garment. For this special computerized embroidery machines are used. Designers can create their embroidery designs or motifs straight on the computer or can work with scanned images of existing designs. All they need to do is assign color and stitch to different parts of the design. This data is then fed into an embroidery machine with one or multiple heads for stitching.

**Apparel Industry and Computers**

**Digitising Systems**
Digitisers put original patterns into the computer for use and storage. It can be done by defining the X, Y co-ordinates of series of selected points around the pattern. These basic patterns can be manipulated with the help of a computer, for example in case of trousers, darts can be moved, pleats can be created or flair can be introduced. This way new design can be created on screen from pre-existing patterns. Today large scanners are also used to input pattern shapes instead of tracing patterns on a digitizer.

**Grading Systems**
After a sample size pattern has been put, it has to be graded up and down in size. Certain points on the pattern are considered as "growth points" or places at which the pattern has to be increased or decreased to accommodate changing body size. At each growth point the operator indicates the grade rule to the computer. The system will then automatically produce the pattern shapes in all the pre-specified sizes. Say if we define pattern for size 30, it can be easily graded for size 32/34/36 and so on.
Marker Making Systems

Computerized marker making systems help in laying the pattern part together more economically than an operator could do with hands. This ensures minimal wastage of fabric. On plain fabric this is relatively simple but on striped fabric also automatic matching is done by the computer. The layout is then directed to big plotters which are overlaid on the stacked fabric prior to cutting.

Cutting Operations

Pattern generated by marker making systems can be directed to automated cutting machines which are operated without the help of human hands.

Marketing integration using Computer

Designer is in direct contact with the customer and also the manufacturer to be aware of the latest trends and also needs and demands of the customer.

Internet and Information Explosion

NIFT, Calcutta is linked to Internet with TCP/IP account and the students have continuous access to the sites of the top designers, trend forecasting agencies, fashion houses and fabric suppliers. This has helped both the institute and the students immensely keeping them updated with the latest trends.

BUDGETING IMPLICATIONS

Like other industries, garments sector also has its wish-list for consideration in the recent union budget. The wish – list segregated into segments viz.

a. Policy issue
b. Issues pertaining to domestic industry
c. Issue pertaining to the export industry
d. Procedural issues

Policy Issues

Removal of state and corporation Taxes on export of garments Export of garments are burdened with taxes and duties levied by :

a) Central government
b) State government
c) Municipal corporation

Appreciation of the rupee has further lowered earnings of Indian exporters, where as those of our Asian competitors have either appreciated less or even depreciated. As a result, prices of Indian garments have become uncompetitive against Asian competitors.

Exporters are attempting to reduce the hardship of RUPEE appreciation by quoting in other currencies but importers take advantage of dollar quotation by our competitors and insist on dollar quotations. Recent increase in drawback rates has to some extent but the major burden of the state and corporation levies continues to hinder exports. These collectively work out to 6 percent FOB. Further, introduction of vat was expected to reduce prices but since textiles have not been included in vat, garments units are not able to offset taxes and duties paid on inputs. Again, refund take a long time while payments are immediate, thus affecting adversely the cash flow positions of exporters and every budget brings with it fresh does of taxation in one form or the other.

So in the forthcoming budget, a provision should to be made to exempt exports from all direct taxes (rather than pay and later refund).

In case of indirect tax (including state and corporation levies) a find to be set up from out of the taxes paid by the industry to refund 6 percent FOB on all exports against realization of the exports against realization of the proceeds through normal banking channels. Since exports contribute only 25 percent of production, there is no fear of an outgo exceeding collection by govt. and corporation

**Import Duty of Garment Machinery**

Import duty on most garment machinery is 5 percent plus countervailing duty.

Indigenous machinery manufactures do not manufacture garments machinery of similar speeds and or stitches per minute and further, since countervailing is levied with the sole objective of the protecting the domestic industry, it is hoped that the budget proposals will remove countervailing duty from all garments machinery entitled to concessional duty.

**Labour Reforms**

Immediate reforms in labour laws to help improve production and productivity of garments are called for:
These include:

- Increase in working hours from 48 to 60 per week with suitable provision for rest period
- Female workers to be employed in the entire second shift
- In view of the second nature of the garment industry, contract labors be permitted on condition of a guaranteed employment 100 days in a year.

The sector did get some sops in the budget, these were:

**SEZ** - SEZ scheme is likely to continue, as per the assurance given by the Prime Minister. Six mega clusters are proposed to be developed in power looms, handlooms and handicrafts. Allocation of Rs.70 crore per cluster. With an immediate provision of Rs 100 crore this year has been envisaged.

**Textile Up gradation Fund (TUF)** - Allocation for textiles up gradation fund (TUF) has been increased from Rs. 911 crore to Rs 1090 crore. The budget has also maintained the provision for Scheme for Integrated Textile Parks (SITP) at Rs. 450 crore. However, the schemes would not provide immediate support to textiles sector, which is need of the hour. Increases in subsidy under the TUF scheme can hardly be considered a relief package looking to the outstanding claims pending with the banks. There are already Rs 600cr plus outstanding according to the banks.

**Reduction in Excise Duty** - The excise duty has been reduced from 16% to 14% under 2008-09 budget but the concession would prove to be highly elusive for apparel exporters as textile manufacturers, already struggling with stiff margins, may not be able to pass on the benefit down the line to exporters.

**Non Profit Corporations** - The FM has proposed to establish a non profit corporation with intention to garner Rs 15,000 crore as capital from government, the public and private sector and bilateral and multilateral sources for establishing training institutes including 300 additional ITI’s.

A noticeable thing in budget 2008-09 is its silence about how to arrest the slump in employment intensive industries like textile, garments, leather and handicrafts. Apparel exports promotion council estimates that if situation remains unchanged, the job losses this year would be six lakh.
OVERVIEW OF FASHION INDUSTRY ADVERTISING

Television

- 32% growth in TV ad volumes of fashion industry during 2007, over 2006.

- High advertising of fashion industry on hindi news channels in 2007

- Set Wet Zatak maintained its first rank in the top 10 brand list on TV across both 2006 & 2007.

- Hosiery and footwear category of fashion industry has been a drop in advertising volumes on TV during 2007, over 2006.

- Among all the categories of fashion industry, maximum advertising growth was registered in perfumes/deodorant category, followed by lifestyle and cosmetics categories, during 2007 as compared to 2006.

15 Images yearbook 2008

Set Wet Zatak, Raymond Suitings, and Reid & Taylor were in the top 10 list of brands across both 2006 & 2007.
Top Fashion Brands Advertised on TV

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<tr>
<th>Rank</th>
<th>2006</th>
<th>2007</th>
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<tr>
<td>1</td>
<td>Set Wet Zatak</td>
<td>Set Wet Zatak</td>
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<td>2</td>
<td>D'damas Gold Expressions</td>
<td>Forever Mark - DTC</td>
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<td>3</td>
<td>D'damas Collection G</td>
<td>set Wet Zatak Gold</td>
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<td>4</td>
<td>Reid &amp; Taylor</td>
<td>Raymond Suitings</td>
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<td>5</td>
<td>Koutons Readymades</td>
<td>Axe Deodorant</td>
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<td>6</td>
<td>Raymond Suitings</td>
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<td>7</td>
<td>Integriti Readymades</td>
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<td>8</td>
<td>Axe Click</td>
<td>Wild Stone</td>
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Source: AdEx India (A Division of team research)

The top 10 list of brands in 2007 was a mix of six brands of perfumes/deodorant and three of apparels.

In 2006, five apparel brands and two each under branded jewellery and perfumes/deodorant had made it to the top 10 brand list.

Among the news channels, maximum advertising by fashion industry was on Hindi news and English news, during 2007.

Among general entertainment channels, regional GEC leads-followed by Hindi GEC and English GEC.

Print
- 13% growth in advertising volumes of fashion industry on print during 2007, over 2006.
- Fashion industry used newspapers and magazines in an advertising ratio of 81:19 during 2007.
- Maximum advertising of fashion brands on general-interest newspapers and women-interest magazines.
- Koutons ready-mades maintained its first rank in the top 10 brand list in print across both 2006 & 2007.
The average ad per day by fashion industry has seen a rise of 27% in print during 2007.

Radio

- Fashion industry advertising saw a growth of 173% on radio during 2007, as compared to 2006.
- Radio advertising by fashion industry skewed towards Delhi & Mumbai.
- Pantaloons was the top name in the top 10 brand list on radio during 2007.
- Two-time rise in average ads aired per day by fashion brands on radio during 2007, over 2006.

SWOT ANALYSIS

Strengths

- **Abundant raw material availability**
  India is one of the leading producers of natural and man made fibers. The abundance of raw material allows industry to control cost and reduce over all lead time.
- **Low cost skilled labour**
  India has third lowest wage rate as compared to other key garment manufacturing companies. This provides industry with a distinct competitive advantage.
- **Presence across value chain**
  Indian industry has manufacturing capacity present across complete product range, that allows garment manufacturers to source raw material locally and thus reduces the lead time.
- **Growing domestic market**
  The Indian domestic market is extremely sensitive to fashion fads and this has resulted in development of very responsive garment industry.

Weaknesses

- **Fragmented industry**
  Global buyers prefer to source their requirements from two to three vendors and Indian garment manufacturers find it difficult to fulfill the capacity requirements.
- **Effect of historical government policies**
The industries continues to be affected by several historical regulations, for instance there is still an absence of viable exit options for industry players. These regulations resulted in complex industry structure, which is currently an obstacle. In the Pre 2000 era garmenting sector was reserved for the Small scale Sector, which has resulted in most units being set up with small capacities. Till now, knitted garment sector is reserved for the small scale sector. Though the historical regulations are relaxed now, they continue to be an impediment to global competitiveness.

- **Lower productivity & cost competitiveness**

Lower cost competitiveness has hampered ability to compete with lower cost global players because the labour force in India has a much lower productivity as compared to competing countries like China, Sri Lanka.

- **Technological obsolescence**

A large portion of the industry’s processing capacity is obsolete. This has resulted in low value addition in the industry and a need has risen for significant technology investments to achieve world class quality.

opportunities

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- Rising
- Disposable
- Income
- Fifth largest consumer
• **Liberalizing economy**

Opening up of Indian economy has presented the players with lots of opportunities; Indian companies are tying with global brands. They are leveraging the brand name of global brands.

• **Growing dual income**

With number of working women’s increasing the dual incomes are income thus income available at peoples discrete has also increased.

• **Rising Disposable Income**

According to McKinsey Global Institute (MGI), by 2035 over 23 million Indians will number among the country’s wealthiest citizens. Forecasts for India’s real GDP growth rate over the coming two decades generally range between 6 and 9% per year. MGI forecast real compound annual growth of 7.3% from 2005-2025. Average real household disposable income will grow from 113,744 Rs in 2005 to 318,896 Rs by 2005, a compound annual growth rate of 5.3%. This is significantly more rapid than the 3.6% annual growth of the last two decades.

• **Sizeable urban middle class**

As Indian incomes rise, the shape of the country’s income pyramid will also change dramatically. Apart from a substantial reduction in poverty, India will create a sizeable and largely urban middle class. Middle class comprises two economic segments - seekers with real
annual household disposable income of 200,000 to 500,000 Indian rupees and strivers at 500,000 to 1,000,000 Indian rupees. In 2005, the Indian middle class was still relatively small comprising approximately 5% of the population, however middle class is expected to reach 41% of population by 2025.

- **Fifth largest consumer**

India will become the world’s fifth largest consumer market by 2025. The combination of rapidly rising household incomes and a robustly growing population will lead to a striking increase in overall consumer spending.

The aggregate consumption in India will grow in real terms from 17 trillion Indian rupees today to 34 trillion by 2015 and 70 trillion by 2025 a fourfold increase.

**Threats**

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State of Recession in the economy

Competition from global players

Fluctuation in rupee value

Ecological & Social Awareness
• **Fluctuation in rupee value**

The fluctuation in rupee value posses a big threat in front of importers and exporters. The exchange value of Rupee against UD Dollar has depreciated to Rs 50.03 which has resulted in huge losses for the importers. Thus there is always a great threat for players in international trade. But since it affects only international players thus it is not as big a threat as some of other threats.

**State of Recession in the economy**

The apparel industry gets severely hit during recession because of less liquidity in the market. This industry is an export-oriented industry which lies in doldrums during this stage.

• **Competition from global players**

The major exporters of garments from all over the world are giving tough competition to India as they are providing higher productivity with lower costs. Competition is not likely to remain just in the exports space, the industry is likely to face competition from cheaper imports as well. This is likely to effect the domestic market and may lead to increased consolidation.

**Ecological & Social Awareness** is likely to result in increase pressure on the industry to follow international labour and environmental laws.

**RECOMMENDATIONS**

After understanding the industrial and economic scenarios we would like to give following recommendations to Indian companies operating in garment industry:

• More emphasis should be given on the micro and macro level economic factors. These factors indirectly or sometimes directly affects each and every business in the economy, marketers should be proactive enough to foresee the future impact of these factors on their business.

• Look for co-branding: It involves merging two or more well known brands into a single
product. It is an effective way to leverage strong brands and helps in gaining synergy by having the best combination of unique strength each brand has. Co-branding can be based on innovation, ingredient, alliance, supply chain or any other.

- Find out new ways of communicating to customers, like sending information about new products, offers, stocks, etc through sms to cell phones.

- Industrialists shouldn’t consider the expenditure on R&D and technology as a cost, it should be considered as an investment because it pays rich dividend in future.

- Industrialists must emphasize on improving the standard of labors because garment manufacturing is a labor intensive industry. The productivity of industry directly depends upon the productivity of labor.

- Give priority to consumers’ opinion. Keep in touch with customers by creating loyalty clubs and online data bases and opinion leaders.

- Marketers are under estimating the importance of Visual merchandising, visual merchandisers not only makes the store look impressive but they also makes sure right wears are kept at the right place in the store.

- Blend up the bollywood, cricket and other entertainment mix with other areas such as product design, distribution channel, price, promotion activities. Using celebrity endorsement can prove effective provided the credibility and popularity of celebrity is taken into consideration.

- It has been seen in apparel retail stores that mostly In store advertisements to communicate various promotional offers, thus only that part of population is reached that is already visiting the stores. Thus using Outdoor advertising & promotional campaigns is quite important.

- Through research it was revealed that majority of customers prefer to buy with family members or with friends, and such partners also influence the purchase decisions of the buyer. Thus it’s necessary to have a strategy to impress these influencers. Having an associate loyalty card thus should always be a part of the loyalty program.

- For retails apparel stores its imperative to build their own Brand name they can’t just rely upon the brand names of the wears available in the stores.

**CONCLUSION**

The trends discussed above clearly show that the fashion business is exploring all aspects of expansion i.e. it is bound for a multilateral expansion rather than only unilateral expansion. Multi
lateral expansion is happening at every part of the value chain as well as for every consumer segment.

The Indian Garment Industry is taking cue from international standards as well as the burgeoning consumer appetite to create their own growth path. Fashion companies are taking a much larger perspective of this industry in India and consolidating their position to face it. On the other hand, the Indian consumer is at a preliminary stage of development and yet due to international exposure trying to keep pace with the international fashion scene creating unprecedented pressure on companies to perform.

This is a window of opportunity which the Indian Garment industry should make the most of before it reaches maturity which will signify slowdown.

**Companies need to react as well as participate through in-depth understanding of fashion, consumer demands & micro/macro level economic factors to take on this challenge.**

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