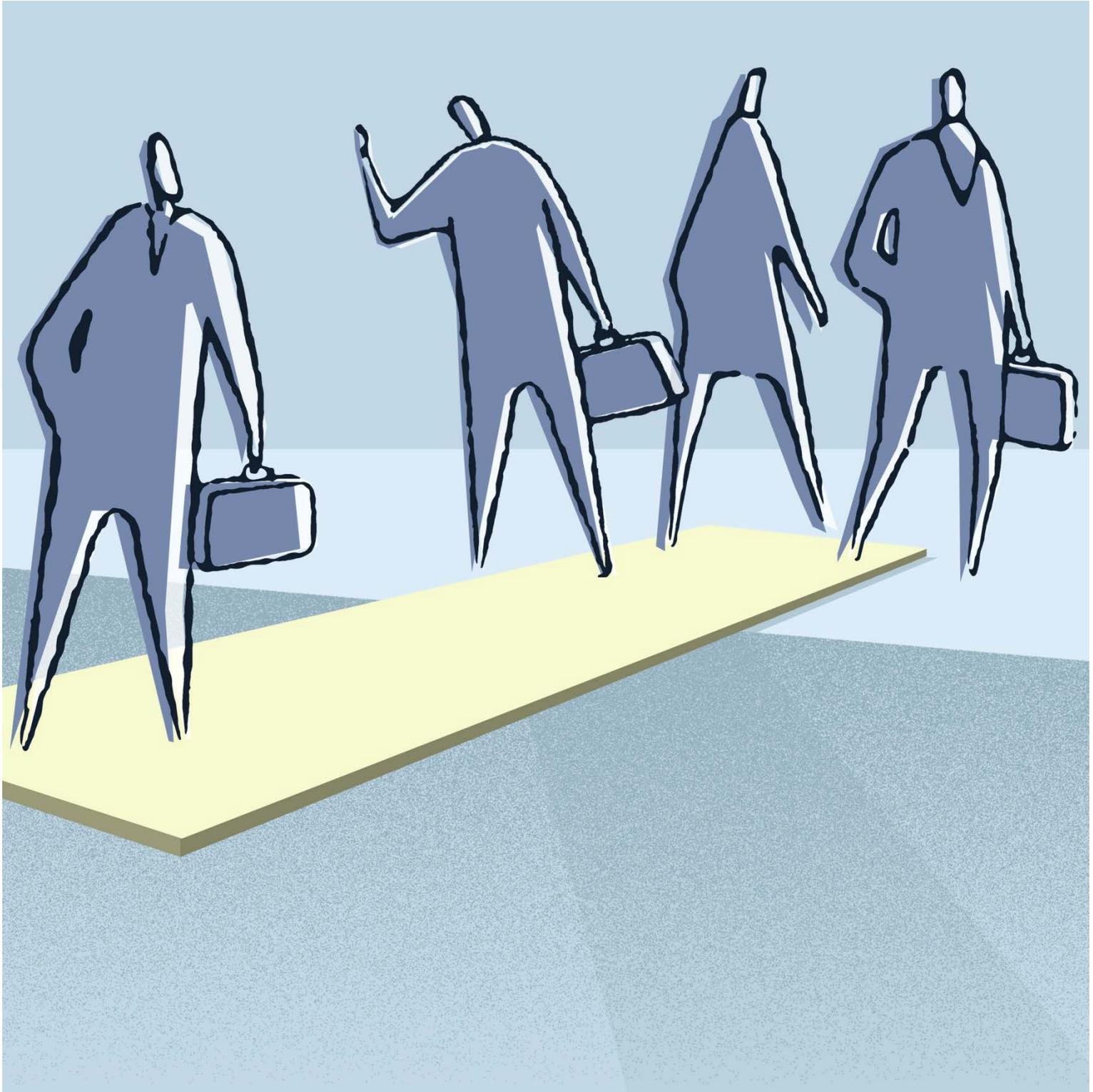


# Work Apparel Uniform And Non-Uniform

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## Workwear Overview

Workwear can be classified into non-uniform and uniform. The non-uniform segment encompasses apparel worn in typical modern offices. While there is no precise set of clothing constituting workwear, there is generally an accepted code of dressing broadly consisting of business formals and business casuals.

The uniform segment by definition enforces employees to wear a specified set of clothes for work and comprises basic and protective workwear. Basic workwear includes traditional workwear typically worn across industries such as the industrial sector, healthcare, hospitality, defense and police etc. Protective workwear includes protective garments used for their functionality such as fire retardant, bacterial resistant and bullet proof apparel. They are largely used in pharmaceutical, defense, engineering, steel, mining, fire services etc.



## Growing Workwear Requirement in India

There is increased workwear demand in India resulting from fast-growing manufacturing sector, emergence of new employment opportunities, and growth in the services market. As the organized market share in India grows, so will the need for uniform and non-uniform workwear. This growth in the organized manufacturing and services market is further fuelled by entry and expansion of MNC's which see the country as a high potential market. Industries that are particularly contributing to increasing uniform workwear in India are retail, food, pharmaceuticals, healthcare, automobiles, security, FMCG etc.

This increased demand is a result of growing awareness amongst corporates regarding the benefits of workwear. Indian hospitals for instance have understood that when adopted, uniforms not only assist patients in identifying the hospital staff, but also create an atmosphere of professionalism and team-like feeling amongst staff. Other sectors are now realizing these benefits and will do so even more in the future. Workers in manufacturing and allied sectors such as automobile and oil and gas are becoming aware of occupational hazards, and hence companies are enforcing a safer work environment. Vendor companies that have tie ups with MNCs are often required to comply with

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international safety standards; furthermore having workwear assists in creating a better corporate identity. These drivers are fuelling growth in the workwear market of the country.

However, gaps in the uniform workwear market pertaining to the supply side exist as well. Lack of value added products to choose from, low focus on branding and lacking distribution, and absence of quality service and a one-stop-shop solution for all workwear requirements are key issues. Once these are addressed from the workwear supplier's side, further growth in the segment can be expected.

## Key Supply Side Gaps In The Current Indian Uniform Workwear Market

<b>1. VALUE ADDED PRODUCTS</b>		
<ul style="list-style-type: none"><li>• Gaps in product innovation, and in understanding specific demographic needs of the buyer's workforce (e.g. age, gender etc.)</li><li>• Weather conditions and other sensitive factors usually not taken into account</li><li>• Available budget of the buyer usually not taken into account</li></ul>		
<b>2. DISTRIBUTION</b>	<b>3. BRANDING</b>	<b>4. PRICE</b>
<ul style="list-style-type: none"><li>• Needs to be more efficient and widespread</li><li>• Currently low lead-times</li></ul>	<ul style="list-style-type: none"><li>• Better promotional material needed at service centers, online, email etc.</li><li>• Need for strategic brand positioning</li></ul>	<ul style="list-style-type: none"><li>• Usually excessive focus on price in purchase decision; difficult to change focus to value</li></ul>
<b>5. SERVICE</b>		<b>6. ONE-STOP-SHOP</b>
<ul style="list-style-type: none"><li>• Quality of service for maintenance of workwear lacking, response to customer queries etc. also lacking</li></ul>		<ul style="list-style-type: none"><li>• Need to provide a wide range of workwear garments and PPE such as helmets, protective glasses, gloves etc. under one roof</li></ul>

Source: Technopak Analysis

## Work Apparel Fashion Trends

### Acceptance of Business Casual in Corporate Offices

While business formal wear makes up a majority of the workwear in corporate offices and provides employees with the least flexible dress code, business casual wear on Fridays or in some cases on all work days has become a trend amongst small and big organizations particularly in metros and mini metros. According to this dress code, workers are allowed to wear jeans, t-shirts, casual shirts and trousers, casual shoes etc. However, any clothing that has words/pictures and ragged clothes are not encouraged.

Casual wear is often associated with certain benefits such as:

- a) Improved morale – Employees feel gladder with the freedom and flexibility of deciding what to wear. Many believe that dressing casually results in better work attitude
- b) Business attractiveness – Potential employees see this as a positive offer by the company and are hence more eager to join a company with this dress code option
- c) Cost effectiveness – Employees save on costs as they do not have to purchase formals. They are likely to already own a business casual collection and thus do not incur additional expenditure
- d) Better interpersonal relations – Business casuals are known to bridge gaps between senior and junior employees as a result of equal freedom of clothing and team-like feeling

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However, there are also certain disadvantages associated with acceptance of business casuals such as rise in casual attitude and lack of office decorum and professionalism. Business clients may also feel employees are too casual to be trusted with serious work. These drawbacks however can be minimized if employers clearly communicate the difference between dressing in business casuals versus dressing untidily, and enforcing formal work wear if client expectations are such.

Another deviation is 'creative wear' which takes business casuals to the next level. If one is to deliver a task in the creative field such as in interior decoration, art and music etc., greater confidence can be exhibited if one dresses in a manner that displays creativity. This can be attained with edgy prints on shirts and t-shirts, unique color combinations such as olive green or dark pink jeans and tops, and accessories like a tote bag, flashy rings etc. There is caution to be exercised nevertheless, as while going overboard with creative dressing one runs the risk of not being taken seriously by clients and of one's style speaking louder than one's skills set.

## Style Matters

It is essential for employees to be compliant with their company's dress codes and dress similar to other employees. A good conservative rule to follow is to dress the way one's company's executives do. Another rule of thumb is that the more professional the services, the more professional and formal one's attire should be. Thus, people in fields like finance, consulting, law and accounting should wear business formals, while people in entertainment and advertising enjoy the advantage of dressing creatively and wear business casuals.

That being said, for both business formals and business casuals, modern employees today incorporate a 'statement piece' such as a unique pair of glasses or a necklace, and hence make workwear more interesting and diverse. Creative and different color combinations are other ways to bring style to a conservative look. Quality outfits and style are often viewed as a status symbols in the corporate world, and are thus of vital importance. Appearance in the workplace matters and is considered a reflection of one's personality and position. Stylish and better dressed employees are even known to be taken more seriously as compared to badly dressed employees.

## Comfort is Paramount

While style matters, what matters substantially today is also comfort and wearability. In fact, both comfort and style are rated as two most important parameters based on which employees decide what to include in their wardrobe. Proper fit and fabric ensure comfortable and wearable attire. Comfort is crucial not just for non-uniform workwear, but also for basic and protective workwear.

"Style without comfort is like matter without substance"

There was a time when a neatly pinned *sari* was common attire for women in the workforce; however this trend has changed particularly among modern and younger women in metros and mini metros. Most have moved to wearing western wear. This change is part due to globalization, exposure to western fashion trends that have aspirational values the new age resonates well with and penetration of western apparel brands, and part due to the comfort, convenience and ease of maintenance of western wear as compared to Indian ethnic. An Indian woman today looks more stylish and confident, and is equally importantly comfortable at work.

## Functional and Fashion Innovations in Uniform Workwear

Basic and protective workwear are becoming more technology driven offering innovations finishes such as crease resistant, water repellent, anti-static and anti-microbial in addition to flame retardant and high visibility finishes. This is apt application of modern advancements in technology to enable higher productivity amongst workers by improving their safety and comfort. Employees are less uncomfortable and distracted by clothes and instead remain

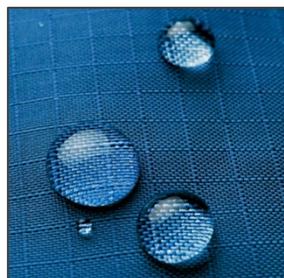
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focused on tasks assigned to them. Functional innovations are not just happening in isolation, but in tandem with comfort and fashion additions to workwear. Traditional coveralls for instance have given way to functional and fashionable jackets and trousers, and there are innovative designs like low cut trousers made from functional textiles in usage.

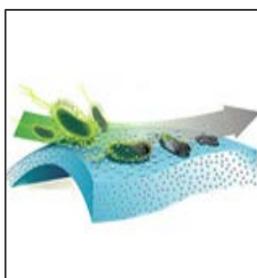
## Representative Functional Innovations in Workwear Finishes



Crease Resistant



Water Repellent



Anti-Microbial



Flame Retardant



High Visibility

## Innovative Business Models of Companies Providing Workwear

With the growing requirement of basic workwear uniforms in India across industries such as food, pharmaceuticals, healthcare, FMCG etc., organized players providing such uniforms to buyers are experiencing fast business growth. There are three models of operation through which workwear is provided, and buyers can choose what suits them best.

The first is 'rental/full service' model in which clients rent workwear for a fixed weekly cost per garment. Being a one-stop-shop, services such as laundry, repair, replacement, delivery, company logo embroidery etc. are provided. This offer gives the highest level of convenience to businesses and is more popular amongst organized companies, though as expected is the most expensive option.

The second and third options are 'lease' and 'direct purchase' of workwear respectively. Lease program is meant for buyers who wish to receive benefits such as mending and replacement, but prefer a lower cost structure by foregoing the scheduled laundering service. Direct purchase of workwear simply involves a one-time purchase of workwear garments without any services including laundry and maintenance. This is most suitable for clients who want lowest possible costs, and have an alternate arrangement for laundry and repairs.

### Criteria for Rent, Lease, or Purchase in the Indian Market – Buyer's Perspective

FACTORS	RENTAL/FULL SERVICE	LEASE	DIRECT PURCHASE
Garment Cleaning	Seller laundry	Wearer responsibility	Wearer responsibility
Garment Repairs	Available	Available	Not available
Average Employee Turnover	High	Moderate to High	Low
Program Administration	Low	Low	Moderate (depends on the employee role)
Financial Commitment	Moderate to high	Moderate	Low
Convenience	High	Moderate	Low
Employee Morale	High	Moderate (laundry is an added responsibility)	Moderate (laundry & maintenance is added resp.)
Location of Employees	Must be centralized	Must be centralized	NA

Rental/Full Service gives highest convenience to businesses. More price conscious, and specific companies such as in hospitality can lease or purchase instead as costs are lower

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Source: Technopak Analysis

## Conclusion

Workwear plays a key role in ensuring that employees are in a suitable environment to work and perform. Employees in oil and gas, construction etc. experience occupational hazards on a regular basis, and hence workwear has evolved to provide them with safety along with comfort with finishes such as fire retardant, high visibility etc. There are also innovative business models in existence to provide quality uniforms in a hassle-free manner to employees such as the rent/full service model.

Non-uniform workwear in the corporate world enables uniformity and professionalism at work, which has evolved to include an additional dress code of 'business casuals' that offers employees a sense of freedom and improves morale. Style and comfort play a vital role in what constitutes good work clothing and will continue to do so. The fast replacement of *sarees* to more comfortable and trendy western wear for Indian women is testimony to this trend. In future, work wear will be characterized by even greater focus on fashion and comfort/wearability elements, while business casuals are expected to play a mainstream role as companies in tier I and tier II cities also recognize the associated benefits. Application of functional innovations not just in uniform work wear, but also in business formals and business casuals such as anti-microbial and odor-free finishes is anticipated in the future. Furthermore, there will be emergence of additional distinct divisions of corporate wear to include categories such as boardroom attire, executive casual, mainstream casual, baseline casual etc. These will emerge as employees' fashion sense matures along with the growing consciousness amongst people as to what should be worn at work.