

Bespoke Clothing in India

The history of *Bespoke* probably dates back to the advent of clothing and tailoring, when mankind started appreciating the use of clothing as a look differentiator as against its functional use of only covering the body.

Bespoke or **Made to Order** or **Made to measure** has been in India since generations, especially in the clothing market. Till the late twentieth century, clothing as a consumer product in India was a 'tailor delivered outfit'. So the wearers were buying fabrics and getting it stitched at tailoring shops, generally one of their favourite tailoring shops that would deliver the desired fit and content. To some extent, it still continues to be so.

Then came the readymade garments which were manufactured with defined specifications on input material, with defined process parameters that promised to give consistent quality – the industrial quality. Over a period of time, as the quantity maturity increased, the factories leveraged their economies of scale, better sourcing, product engineering and process engineering to deliver a wide range of apparel choices at a relatively lower cost. With the rising middle class and increasing disposable incomes more people started buying branded clothes of graded sizes that best fitted them. Well, most of them!

To a few discerning, the product expectations were still undelivered. Their attire had to be better than industrial quality, with better than the tailor's fit, and with the best of input materials and service quality. This expectation spurred the need for an organised *Bespoke* market for those who could afford it. *Bespoke* services evolved in high-street retail outlets at Delhi, Bangalore and Mumbai. The retailers used to source and show-case the best fabrics from the best mills globally and convert them into shirts, trousers and jackets for their '*Bespoke*' customers. Obviously these fabrics and the tailoring came at a premium for quality and exclusivity. The *Bespoke* customer got access to his choicest fabrics and fit, and a feeling of differentiation and exclusivity. However, the quality of the garment was not able to tickle the taste buds to its fullest.

Most of the *Bespoke* customers also fell in the category of globetrotters on leisure and business. They were able to find the right mix of quality, fit and fabrics at international high street destinations and luxury stores. With time, they also carried with them the awareness of best fabrics, quality international brands and companies offering impeccable *Bespoke* products and a higher detail of product understanding. This was probably instrumental in setting the stage for the entry of some of these players to India, including Brioni and Ermenezildo Zegna. Few Indian players also entered into the market with organised manufacturing setups, thoroughly researched service understanding and exhaustive fabric range. Today, the India *Bespoke* market has takers for the shirts, trousers and suits made from fabrics of Dormeuil, Zegna, Sic Tess, Atelier Romantino, Loro Peana, canilini and Alumo to name a few in materials as fine as 300/2 ply cotton to a blend of cashmere, cotton and silk! Obviously, a price tag of Rs. 20,000 to 1,00,000 for a shirt does not come as surprise to these customers, who are willing to shell out this money for 'what they exactly want'.

Bespoke clothing is getting more and more organised with the growth of luxury market. The idea of buying 'what I exactly want to buy' is the driver of this service category. This requires sourcing of lower meterage of fabric per design, elaborate product development generally for each customer and then the application of high-end manufacturing technology and process to create every single garment. A luxury market customer is willing to pay that extra premium over his expensive purchase. It may cost him a say a 25% more than a usual product. So, a shirt from one of these luxury brands may cost Rs. 20,000 off the shelf and another 5000 if customised. It is just 25% more. But if the development cost of say Rs. 1500 is loaded to a Rs. 1500 shirt, the price doubles! This makes *Bespoke* an extension of Luxury market only.

Today, with the middle class becoming more affluent, *Bespoke* services are seeing higher demands. Customized services account for 15% of the \$250 Million, or about Rs. 1,300 Crore, luxury apparel and accessories market in the country (Technopak Analysis).

Broad customer profiling of *Bespoke* apparels brings us to three specific set of shoppers and one category of potential shopper:

- Total Market Size of Luxury Market in India (2009) – USD 4.8 Bn
- Total Market Size of Luxury Market in India (2010) – USD 5.8 Bn
- Luxury Apparel Market Size in India (2010) – 0.8 Bn (14% of total)

1. An affluent customer, who does not want to be seen shopping. So, he prefers that a *Bespoke* consultant visits him with a range (a swatch box of fabrics and electronic, pictorial or sample of styling combinations *such as collar and cuff designs*) and he selects his choice that is delivered to him in desired fit. It is okay for them to pay the extra price and then wait for two to six weeks to see his apparel get the physical shape and fit.

2. An affluent customer, who is undersized or oversized and is not able to get his apparel within the sizes available in the market. His ideal shirt could be one with 47 size collar, 50 chest and a sleeve size that would be available with 39 size shirt and the length of a 40 size shirt.
3. An affluent customer, who is okay with his 40 size branded shirt, but wants it in finest cashmere-cotton fabric, a more innovative collar and cuff, and initials of his name on the cuff or the pocket!
4. A potential shopper, who could be anyone of the three above. He is currently an aspirant and is willing to pay a little extra that he would consider reasonable. He is a typical upper middle class aspirational shopper who values the offering but is just waiting for the prices to fall in his range.

As more and more Indian players get into *Bespoke* offerings, it is likely that the scale of industry will increase and cost will decrease. It could move into the range of 'affordable' luxury when premium Indian fabrics started finding their way into these garments. A combination of relative affordability and quality is likely to create a market within the upper middle class for this nature of products and services. The migration of aspirational shopper to a real shopper, if it happens, can herald a new era of *Bespoke* industry and can potentially scale it up many notches during the span of months or years when category demand and supply adjust to each other over a maturity model.

Currently, the highest penetration of *Bespoke* services is in Men's apparel. Hong Kong based Ascot Chang is one of the largest *Bespoke* service provider along with Italy based Brioni, Borelli, Zegna, Fray etc. Brionei and Zegna are also present in India.. Many Indian High Street retailers do offer *Bespoke* services to elite clientele. However, while they offer the best raw materials (finest fabrics, shell buttons, exclusive packaging), they fail to match up to the international product specifications. *Bespoke* in women's apparel, still remains largely unorganized

Luxury is becoming more and more synonymous with *Bespoke*. It can be as high as more than 50% of total luxury menswear apparel market. At the same time, there is a potential for exponential development of *Bespoke* services in upper mid-market 'affordable luxury category'. It could be around the corner or may be a matter of time!

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