



## The State of Denim





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**EVERY  
BODY**

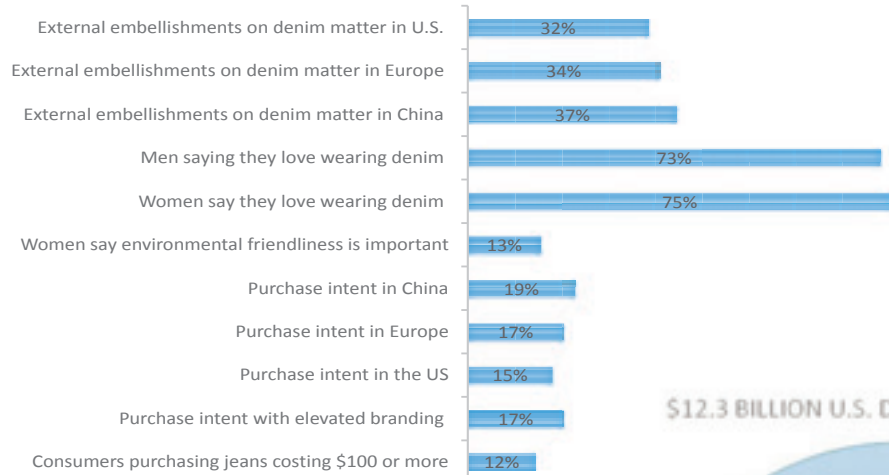
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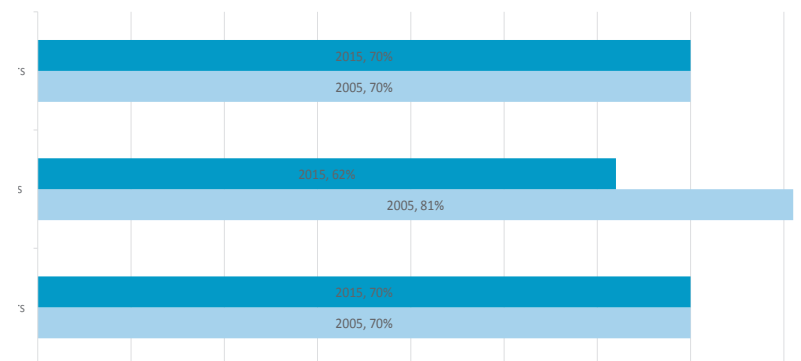


## Denim By the Numbers

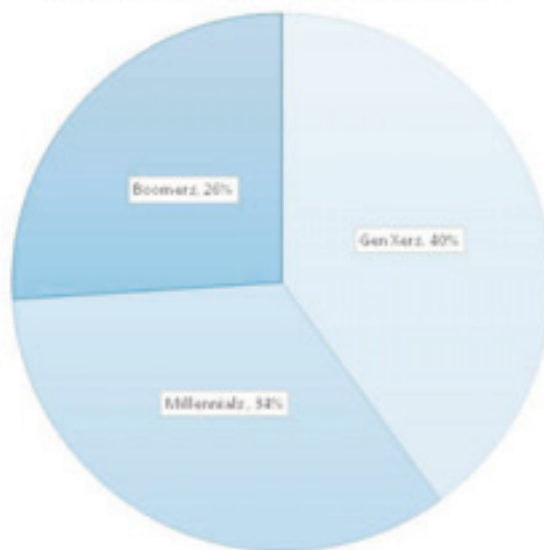
### GLOBAL DENIM STATS



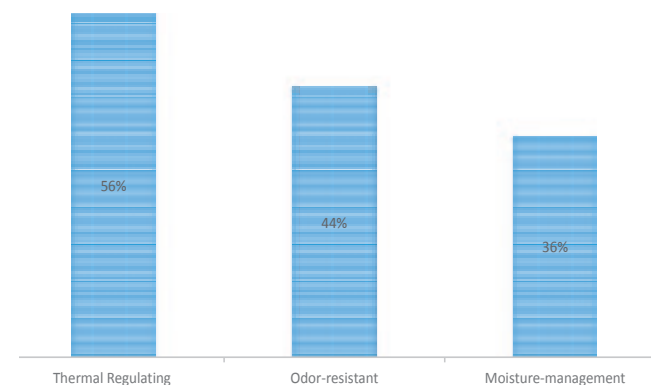
### DENIM AFFINITY 2005 vs. 2015



### \$12.3 BILLION U.S. DENIM JEANS MARKET

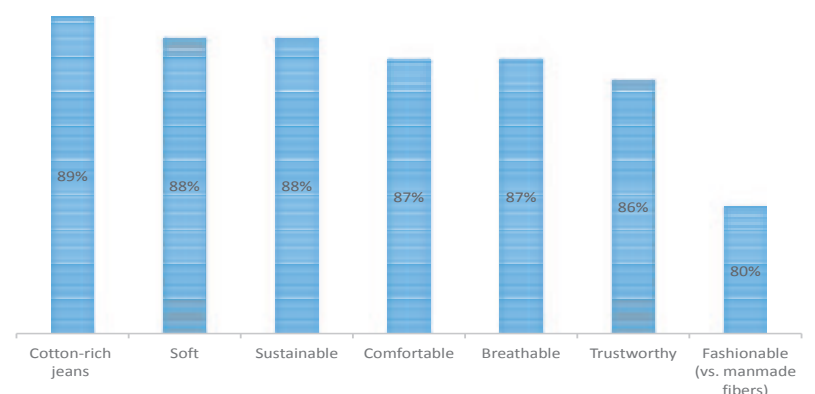


### CONSUMERS PLANNING TO PURCHASE NEW JEANS IN THE COMING YEAR



- 12 percent of consumers say they have purchased a pair of jeans that cost \$100 or more.
- The global jeans market is set to top \$122 billion in 2016.
- More denim is owned per person in the United States than in China and Europe combined.
- Fit, brand, and price are the key decision criteria when purchasing jeans.
- The top five greatest pain points when buying a pair of jeans are: fit, out of stock, inconsistent sizing, poor quality such as shrinkage, fading, and fraying, and finding the right jean for the budget.

### TREND TOWARDS AUTHENTIC, COTTON DENIM



Sources: Avery Dennison, Cotton Incorporated, the NPD Group

### On the Record With the NPD Group's Marshal Cohen



Marshal Cohen

**M**arshal Cohen is a retail market-research analyst for the NPD Group. If you want to know about denim sales, he's the one to ask. And, as he sits in a knowledge tree high above the industry, his vantage point makes him not mince words. Some of the particulars he shares might cause grimaces in the denim market, but, alas, the truth often hurts. We put a few questions to Cohen and he gave us the truth as seen by in-depth market research and consumer trends and analysis.

#### How's the denim market looking from your point of view?

Denim is starting to show signs of life even with the hiatus it took when athleisure took over. Stores that have made a commitment to denim, buying classic cuts, have done the best. The younger segments are the healthiest, but Boomer denim spending is healthier than all of them. The denim industry focuses on the Millennial, which

ended up kicking the denim industry in the seat of the pants and shrunk the core denim business when it didn't do as well as athleisure.

#### How are premium-denim sales doing?

Consumers are realizing that they can wear less-expensive clothing and still look good. The consumer has yet to understand that so much of the denim they buy is from the same mill, etc., but they do know that mid- and lower price points still look good.

#### Are more and more people buying their denim online?

Online is outperforming bricks-and-mortar stores, but though it's growing it's not substantially more.

#### How about male and female denim purchases?

The growth rate for men's denim is a bit higher, but, as there are more females purchasing, overall female sales are healthier.

#### What are the main issues that the denim industry faces?

The denim industry is suffering from an absence of a full range of styles and no innovations. What the industry says are innovations the consumer does not see as innovative, sustainability included.



Danielle Scott



Anna Boyer



Micaela O'Connor



Jake Hooper

## Buy the Way

*All hail the purchase power of the Millennial*

*By Mara Elise Koval*

Millennials constitute the largest portion of jeans sales, valuing quality over quantity, opting for premium-denim brands over their less expensive counterparts. Many Millennials also look for jeans that will stand out in a sea of denim, driving sales with their preference for uniqueness. Denim brands have been forced to innovate on the longstanding fashion mainstay by incorporating more stretch into their jeans to combat the popularity of yoga pants and joggers, introducing trendy new styles like ombré and distressed denim, and keeping the stores stocked with a large range of cuts to appeal to a generation with diverse tastes. However, the instability of the denim market has left us to question whether these sales tactics are actually reaching the coveted Millennial market. In order to answer that very question, we interviewed 12 fashion-forward Millennials to hear their denim preferences and buying habits.

**Name:** Danielle Scott

**Age:** 16

**Owns:** Ten pairs.

**Focuses on:** Comfort.

**Favorite:** Flying Monkey in a light-wash denim with rips on both legs.

**Spends:** \$100 if it's a great pair.

**Wears:** To school, on a date, or to dinner.

**Styles with:** A plain, loose white tee and really fun heels.

**Go-to cut:** High waisted.

**Name:** Anna Boyer

**Age:** 21

**Owns:** I have 25 pairs of pants currently in my closet and, of them, about 13 are jeans.

**Focuses on:** Something different. I have a pair of white Rag & Bone skinny jeans that fade to a charcoal ombré at the bottom that I love.

**Favorite:** My blue Joe's Jeans Icon Ankle. Joe's is definitely one of my favorite brands because they fit me well and the denim isn't stiff.

**Spends:** Up to \$200.

**Wears:** Everywhere and all the time.

**Styles with:** My favorite thing to do is pair a super-casual pair like ripped jeans or boyfriend jeans with heels and a nice top.

**Go-to cut:** Skinny jeans.

**Name:** Micaela O'Connor

**Age:** 20

**Owns:** Ten with five in current rotation.

**Focuses on:** A comfy, snug fit, so I look for jeans with a slight stretch to them.

**Favorite:** I could wear my black flared Hudsons every day. I'm also really into 3x1 jeans right now.

**Spends:** No more than \$100 on a good pair.

**Wears:** Every day.

**Styles with:** A T-shirt that hits slightly above where the jeans hit my hips or a T-shirt that I can knot on the bottom.

**Go-to cut:** A low-rise, ankle-grazing style or a relaxed boyfriend fit.

**Name:** Jake Hooper

**Age:** 18

**Owns:** One trusted pair.

**Focuses on:** The wash. I prefer a darker wash that complements the rest of my wardrobe. I also look at details like color of stitching and appearance of back pockets as I have found that they greatly affect the overall look.

**Favorite:** My favorite is a pair of Lucky Brand selvedge denim jeans. I love how soft and comfortable the material is.

**Spends:** I will spend up to \$100 on a really good pair of jeans.

**Wears:** I wear jeans almost every day and in most situations.

**Styles with:** I typically wear my jeans with a T-shirt, sweater, button-down, or some combination of the three.

**Go-to cut:** Slim straight.

**Name:** Alex Bass

**Age:** 20

**Owns:** 30 pairs, circulating among five. I'm thinking of re-doing/cutting some of my old jeans to wear them again in an updated way.

**Focuses on:** Basics like a skinny jean or something new and trendy.

**Favorite:** Rag & Bone jeans. They stretch but never lose their shape and don't go out of style.

**Spends:** No more than \$200. Jeans are meant to be something you wear every day, not a luxury item.

**Wears:** Most days of the week except for when I'm feel-



Alex Bass



Megan Marlatt



Michelle Robbins



Chris Ehling



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Raina Wong



Courtney Kates



Tracy Keyser (yellow jacket)



Garrett Stewart

## Buy the Way

ing lazy and then it's a pair of stylish sweatpants or athletic wear.

**Styles with:** Something simple.

**Go-to cut:** Cropped for the summer and boyfriend jeans. In the winter, a skinny leg to tuck into boots.

**Name:** Megan Marlatt

**Age:** 29

**Owns:** 20 plus.

**Focuses on:** Wash and feel, but it's all about fit.

**Favorite:** BDG black.

**Spends:** More than I'm willing to admit.

**Wears:** Everywhere.

**Styles with:** Simple shirt and a printed heel, maybe a textured jacket or a hooded sweatshirt, and leopard slip-ons.

**Go-to cut:** Skinnies, but rigid denim is what I'm looking for, still in a slim fit. And a mid-rise is ideal.

**Name:** Michelle Robbins

**Age:** 23

**Owns:** About six pairs.

**Focuses on:** Fit, comfort, and style that allow me to wear them with as many looks as possible.

**Favorite:** Topshop high-waisted, distressed black jeans.

**Spends:** \$150.

**Wears:** Every day and everywhere.

**Styles with:** I either wear them casual with a loose-fitting tee tucked in the front or I'll wear a cute top and heels with them.

**Go-to cut:** Skinny high waisted or regular distressed. I also like boyfriend jeans.

**Name:** Chris Ehling

**Age:** 30

**Owns:** Six pairs: one maroon, one light blue, one gray, and three that are various shades of dark blue.

**Focuses on:** I look for a color that stands out to me first,

something I don't have yet and I think would make a few nice outfits. Fit is also important. Even if the color and style are great, I won't buy jeans that are uncomfortable.

**Favorite:** Levi's.

**Spends:** \$50.

**Wears:** They're my go-to pants.

**Styles with:** A T-shirt, polo, button-up, or sweater.

**Go-to cut:** Slim straight.

**Name:** Raina Wong

**Age:** 18

**Owns:** 15 pairs.

**Focuses on:** Versatile, well-cut investment pieces.

**Favorite:** The Kooples, Rag & Bone, and Frame Denim.

**Spends:** If I find a perfect pair, I'm willing to splurge, knowing I'll get a lot of use out of them.

**Wears:** Part of the charm of a solid pair of jeans is their versatility, so I tend to wear them as more of a casual, everyday piece.

**Styles with:** Lately I've been pairing minimalist ribbed bodysuits with mid- or high-rise denim.

**Go-to cut:** Mid-rise, cropped cigarette jeans.

**Name:** Courtney Kates

**Age:** 36

**Owns:** Twelve pairs plus one pair of overalls. Only four are on constant repeat.

**Focuses on:** Fit and fabric quality.

**Favorite:** Acne.

**Spends:** In the \$300 range for a good pair.

**Wears:** Everywhere. If it's a nicer setting, I'll wear black denim with a silk blouse and heels.

**Styles with:** Some denim I roll at the bottom and with others I tuck in my shirt. My favorite thing to wear with my denim is a great T-shirt.

**Go-to cut:** Vintage boyfriend fit.

**Name:** Tracy Keyser

**Age:** 38

**Owns:** Having come from the fashion world and selling denim for LF Stores for years, I used to have over 23 pairs. Now I have 14.

**Focuses on:** J Brand, because of the fit. I could sleep in them. But for a cheap and cheerful version, I run to the Gap for the 1969 style.

**Favorite:** Higher-waisted jeans and skinny legs because I feel thinner. Tie-dye from Rag & Bone at Barneys.

**Spends:** Up to \$300.

**Wears:** Literally almost every day.

**Styles with:** A tight tank and business jacket in a bold color with sexy heels. I also rock the sandals/denim/blouse look often.

**Go-to cut:** J Brand skinny jean in a tie with Gap 1969.

**Name:** Garrett Stewart

**Age:** 19

**Owns:** Six or seven pairs. They're all black.

**Focuses on:** Well-made denim can last forever.

**Favorite:** I've been possessed by a pair of Saint Laurent D02 jeans since I bought them. They have a rad zipper detail on both front pockets that make them stand out. I think they're my favorite brand as well since their jeans are skinny without being skintight and fit me well as narrow as I am.

**Spends:** It's worth it to spend whatever they cost. It pays off in the long run. I'd rather have a few pairs of nice jeans than 10 pairs of cheaply made ones.

**Wears:** I always wear jeans, even if it means combating the California heat. I'm not too keen on shorts.

**Styles with:** I think jeans go best with boots, but that might just be a personal preference since I always wear boots. I like the slim look of that combination.

**Go-to cut:** I like to wear low-rise skinny jeans. They sit low on the hips and make tucked-in looks more edgy.

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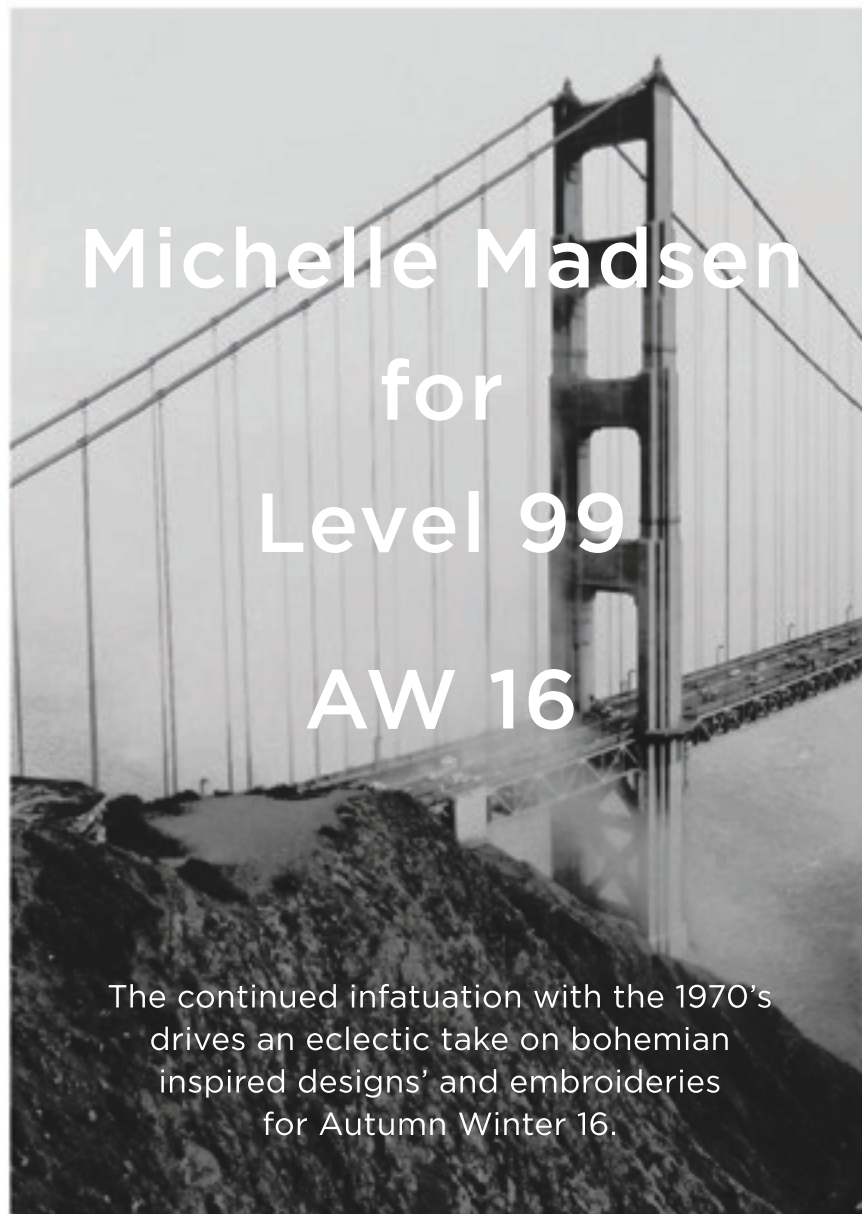
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# LEVEL 99



## Autumn/Winter 16 Preview:







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**Michael Silver**



**Ersin Akarlilar**



**Andrew Olah**



**Jason Denham**



**Jimmy Taverniti**

## Where Is Denim Heading?

*Denim has had rough patches before and lived to tell the story.  
What's next for the tenacious blue jean?*

By Rebecca Cringean

The good news is that the denim industry tailspin seems to have leveled off. The bad news, however, is that things aren't necessarily picking up with gusto. Denim has seen bad days before and the ever-stubborn blue jean has still survived. Does denim's future rest with innovation or a return to the jean's rebellious roots? Is stretch here to stay or is high-end fashion design the next wave? What is the consumer really looking for? We asked leaders in the denim market to share their thoughts on where the denim industry is headed. Their answers are insightful, thought-provoking, and, fortunately, quite optimistic.

### **Peter Kim, Hudson Jeans CEO**

Our Takeaway: *Denim needs to be less preoccupied with innovation and more in tune with its true revolutionary spirit.*

"Denim is a commodity. Premium denim used to be considered high fashion, but, the reality is, premium is a commodity, too. In any other area of fashion, no one would be talking so much about innovation. At Saint Laurent do they talk about innovation? We're not an athletic category. I have no idea why everyone is so focused on innovation. Denim is denim. A yoga pant is a yoga pant. We don't desire to be anything but denim. After all, denim is the most badass piece of clothing you can own, and, at Hudson, our jeans are a reflection of the culture of our company, a delivery system for our message. We are a denim brand unlike all these other companies that started calling themselves sportswear or a contemporary collection. They're not rebellious enough to make denim."

### **Michael Silver, Silver Jeans CEO**

Our Takeaway: *The athleisure market has pushed denim to be its best and not rest on its laurels.*

"If I knew where denim was headed, I'd share. It's been a 40-year guessing game for me, and it's always had its peaks and valleys. Everybody points to the athletic market, but we were a stale market with dark, simple jeans and the level of technology did not catch up to athletics. But the level of technology has changed, and the average customer can have comfort now. In fact, what we call comfortable has changed, too. Thirty years ago, Levi's that you had to wear for a week to break in was considered comfortable. Now comfort means four-way stretch. With a denim market that requires and delivers performance, we can stem the tide of black leggings. When everyone looks the same, and with leggings becoming so mainstream, fashion leaders will break off. Denim will come back and look more fashionable than athleisure, as those two worlds collide. Ripped and torn and boyfriend jeans have been helpful from a trend perspective. Plus, we'll lighten up the colors for a more vintage feel. And there's optimism in the men's market. After all, in middle America, men aren't wearing yoga pants or cuffed-bottom knit pants. These guys are just warming up to stretch in men's denim and embracing that feel. And though fast fashion breaks trends before they develop, there's a ray of hope because cheap and cheerful aren't coming up with new looks in denim, and the consumer will start to see that a \$29 jean wears out. We need to wait it out. The consumer will begin to embrace the value. Part of being successful is merely surviving."

### **Ersin Akarlilar, Mavi Jeans President**

Our Takeaway: *It's all about performance and continued innovation.*

"The premium-denim market continues to grow, and we are experiencing increased sales because the right product sells. Mavi's sales are up Y/Y by 20 percent, and we expect this momentum to continue, specifically with the introduction of our performance-denim collections. Consumers are asking for products that have the aesthetic of denim but perform better, and we have responded. We are designing products that offer the look of denim combined with great stretch and comfort, strong recovery, and that maintain their shape. The future of denim has always been reliant on a constant evolution in innovation and technology to meet the changing demands of the consumer. Brands and mills are working together to collaborate on fabrics that offer this level of performance while maintaining the look and feel of true denim. Product development

is key. Through the latest advances in fabric and wash technology we are creating products that offer the consumer a stylish, premium look they desire combined with comfort and performance qualities."

### **Andrew Olah, Kingpins Founder**

Our Takeaway: *Change is coming. You're either on board or you're drowning.*

"We are in what I consider a normal state of affairs in the 'new economy,' which means fast fashion is giving attentive shoppers lots of opportunity for cool stuff, while online shopping offers a whole other array of goods for smart shoppers, and conventional retail outlets try to keep up. The onus on brands is to sell to the right retail outlets, to get in touch—seriously in touch—with their clients on both social media and through their online offerings. This, of course, assumes brands have the right merchandise. The dip is caused—and everyone has their own valid point of view—primarily because products being made are not compelling and the same product is found elsewhere at lower and lower prices. Compelling products drive business. I think the industry is doing fine. The issue is only who is getting the business and who is losing the business. The dollars are not gone, they are merely redistributed. Innovation or creativity is absolutely the driving and most important element of success. Consumers have indicated they care about price and fashion. But there is a small and growing segment of consumers who are online and probing brands' ethics and behavior. Change forces new ways of thinking and acting. The only answer to our industry is to create amazing products and do it without harming the planet. We are headed towards implosion for all those companies that believe their historic large retail outlets will be here in 10 years. The way consumers will buy their products in the future is being totally altered."

### **Jason Denham, Denham Jeans Founder**

Our Takeaway: *Denim's design elements will prove it fashionable once again.*

"We are in a good place. Denim is firmly back on trend. This is mainly influenced by two drivers. One is the spotlight on denim by the luxury brands. Denim is a key focus category on all the runways this season. The second is the advanced technology in denim manufacturing by the mills. The Italians are leading this and Candiani is at the forefront in technical performance and sustainability. In both Europe and Asia we are seeing demand for design, although the iconic five-pocket jean will outlive all of us. We see our customers looking for new, innovative design, new silhouettes, new concepts, and improved technical performance in their denim. It's something that we support and actively put in our collections every season."

### **Jimmy Taverniti, Siwy Jeans Creative Director**

Our Takeaway: *It's about innovation and sustainability, and we're nowhere near there yet.*

The denim industry faces two challenges. The digital revolution has had a decisive impact on the crisis in the sector of clothing in general, leading changes in consumer spending. The changes have had an impact on the cost and on access to information, but it has also changed buyer thinking, the distribution of products, and the way to communicate. With digital, everything must go immediately, and mass industry has not yet found an adequate response. One may recall the slogan 'see now, buy now.' Fast retailing has become the trend. Now, the denim industry, beyond these technological fabric developments, will have to transform these processes to consider sustainability. The generations to come are very receptive. However, the industry is struggling to turn because the consumer of today is not educated. New ecological processes will result in a new generation of jeans because it stimulates the creators that we are in new directions. It has not happened yet. Then and only then the industry will adopt the new green technology. I experimented with Siwy washes without any chemical products and met with very positive interest from our customers. Lately, innovations in stretch fabrics carry the denim industry, but that is not enough.



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Denim & Soul Boutique



Standard & Strange



Sunset Clothing



The Denim Lounge Chicago

## Denim's Rise

*Retailers get real on denim sales—what's working, what's not.*

*by Risk Castinado*

First the bad news: It is not the dawn of a denim renaissance. The good news? Denim is in it for the long haul, and retailers are adapting, showcasing denim as a wardrobe staple or a luxury good, and using it as a catalyst for further sales.

Four denim retailers across the country were recently asked about the zeitgeist in their stores. On some topics they agreed, on others they varied; each had strong opinions about how to approach this changing, challenging marketplace.

David Shelist, owner of the Denim Lounge in Chicago, has more than 20 years' experience in the business. "I'm not a hundred percent convinced that being known as a denim store is the best idea right now in this economy and with the way the denim industry is. I almost think our name could hurt us, unfortunately."

Juan Plasencia, owner of Sunset Clothing Co. in Miami Beach, has been in the denim industry since 1980. "It's all been done," he notes. "Sometimes I think it's too creative; how much can you do with two arms and two legs?"

Amanda Womack manages Denim & Soul's Dallas location, one of five stores that were recently purchased and re-branded by Marcus Lemonis as part of the TV reality show "The Profit." "It's actually a really exciting time for us," says Womack. "All our stores have been remodeled." Previously denim was about 80 percent of the stock; now it is half the merchandise.

Neil Berrett and Jeremy Smith cofounded Standard & Strange in 2012. The Oakland, California, store offers higher-priced specialty and niche raw denim. "Most guys come in expecting a selvedge denim jean," Berrett explains. "Which we learned when we tried to get in really high-quality non-selvedge jeans just to bring the price down and no one wanted them," he notes. "We tried to explain why it was still good denim, but they weren't interested."

Plasencia notes that athletic wear took "a huge bite out of denim," which impels stores like Denim & Soul to offer "really great patented fabrics that don't stretch out on you, that feel really comfortable, that don't squeeze you and make you feel fat," says Womack, who reports customers are "blown away by how comfortable denim is now."

"We are still selling tons of the new, very stretchy, almost yoga-type of jeans," concurs Shelist. "Personally I think the trend is coming back to a heavyweight, less-stretch fabric. I think this is gonna turn back to the way denim should feel."

For Standard & Strange, one answer is cut. "We recently

started stocking a medium-high-rise cut with a roomy thigh but tapered at the knees. It's for the CrossFit guy who wants a slim jean but can't fit his thigh into it," Berrett notes with a chuckle. Another option is organic Zimbabwe cotton, the choice of many of the store's brands. The longer-staple cotton "gets a lot nicer hand. It also stretches a lot more," Berrett explains.

Regarding marketing, the retailers are unanimous: word of mouth. Berrett's selective email lists "are worth every ounce of effort that we put into it and then some," and Womack notes that Denim & Soul's employees "are constantly calling and emailing—not in an annoying way—our customers love hearing from us. It's just us always staying on top of it and letting people know when new stuff is in the store."

Social-media accounts are omnipresent but produce moderate results. And except for the rare ad in a local weekly, none of the retailers currently pay for advertising. So what works?

"Alcohol helps," notes Shelist, who counts after-hours parties including the Denim Lounge's full bar as "probably 30 percent of our business." Shoppers are given 10 percent off, and the Denim Lounge donates 10 percent back to the school, church, or social group. "The women sell each other. We're just assisting," he notes. "That's big business for us."

To reach the dressing rooms at the Denim Lounge, women have to walk through the men's department. "We always have sports on," Shelist explains, and "women say, 'I've got to bring my husband here.' We tell them, 'And we can give him a cold beer, too.'"

Standard & Strange often invites customers to meet vendors, and the store hosts one day of Denim Bruin, a local gathering of vintage and workwear enthusiasts. Sponsoring a thread on online forums for denim geeks connects buyers to "the day-to-day of the shop, but, more important, we're able to go deeper" into the topic of denim, says Berrett. "They really know their stuff, and they're fun to talk to."

"We will argue for pages, about thread," deadpans Smith.

Standard & Strange also sells online, accounting for 20 percent of its business. Womack notes that Denim & Soul "definitely plans to sell online again."

"Online is not as important to us as the in-store service," says Berrett. "We'd like to grow it, but online changes really fast. I mean, we have a hard enough time trying to understand what's changing with our bricks-and-mortar retail."

Shelist recalls that the Denim Lounge "used to do over \$600,000 online. Now we do zero. I had three full-time people dedicated to the website," Shelist explains. "And it was harder to have merchandise out that I could have sold in the store. I couldn't do both things as well as I wanted, so I decided to stick to my core, which is retail."

"Everyone says the Internet hurts us. Well, more than the Internet, it's the manufacturers opening up their own stores," says Plasencia. "They're giving the customer one product and either you fit that product or not. And the service that they give is not good. Period. Most of us are being squeezed out. Every day there's less of us."

Shelist considers price points "the most difficult thing for a retailer to manage right now. We've brought in two or three of those lower price-point companies, and we do well with them, but it's obviously taken away sales and space off my shelves from premium denim."

Denim & Soul "just started carrying a few brands at \$290," says Womack. "If the fit is amazing, they're willing to do that, but it's easier to load up on a jean that's around \$200."

"The denim industry right now is oversaturated; there are too many brands in the marketplace," says Shelist, who attributes half his sales to denim. He notes a consumer return "to brands they liked a few years ago; they are not really interested in the latest and greatest celebrity-endorsed jean," he says. "We're very, very cautious when we bring a new brand in."

Plasencia believes that "the denim retailer should accept and work around" the current dip in denim, so he allocates 65 percent of Sunset Clothing Co. to other clothing items and accessories. "If you're trying to make your numbers so that it's not just about denim, you have to carry other things that go with denim and put some thought into it," he advises. "The jeans are \$200, but so is the shirt."

"I think retail in general is headed toward either a high-convenience experience or a high-service experience," says Berrett, noting that people want "an emotional connection to what they're buying. And they're okay with spending more if they trust that it will be worth it to them in the long run."

That attachment a man or woman has to a favorite pair of jeans is one advantage retailers always have in their back pocket. As Smith puts it, "If you buy the one that fits and wear it, it's gonna treat you well. Sometimes that's what they want to hear."



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## Stretching the Point

*Innovation in the denim industry consists of stretch, performance, and more stretch*

*By Rebecca Cringean*

Despite what a jaded, fast-fashion culture might slur, a pair of jeans is not just a pair of jeans. In fact, the very storied history and evolution of denim is of cultural significance. When dry-goods salesman Levi Strauss was approached by tailor Jacob Davis in 1872, the two had no idea that their work-wear staple would mature into a rebel without a cause, or a high-waisted, bell-bottomed hippie protest statement, or a hustling disco diva, or a rhinestone-bedazzled costume for tabloid-favored heiresses and then, one day, some sort of six-way, stretchy sweatpants rival.

To Strauss and Davis, innovation in denim consisted merely of their 1873 patent for the metal rivet, referred to back then as an “improvement in fastening pocket openings.” Little did they realize their little cotton, breathable creation would lead a million different fashion lives. Strauss and Davis’s ingenious spirit of innovation started denim on a path through form and fit enhancements, ups and downs on the runway, and the rise and fall of not just the zipper but also retail sales. Innovation and progression of the look and feel of our little beloved jean have endeared denim to fashion and made it our most beloved closet essential.

Necessity being the mother of invention, leaner financial times now push mills to innovate feverishly. In fact, never before has denim been presented with such a nemesis. Chinos posed no particular threat. Corduroy was just a red-headed stepchild, easily defeated. But then, along came athleisure. The yoga pant that turned itself into a fashion darling brought extreme comfort and shape and signaled literal and figurative black times for the denim industry.

“Denim is a beautiful fabric,” says Simon Giuliani, marketing director of the Italian mill Candiani Denim. “Therefore, we love the faded vintage look of the original 100 percent cotton workwear jean, but the tightness of a rigid, 100 percent cotton jean is no longer what the majority of consumers are willing to wear today. They are simply not willing to renounce the comfort for the look. Instead, they want them both.”

To that end, Candiani has developed Sling technology combined with Shaper finishing to make superior stretch and dimensional stability. This brings what Giuliani calls “an authentic denim look but with added sophisticated performance and high comfort.”

Isko, too, is mixing its denim with sport, promising 360-degrees freedom of movement and four-way holding performance. Isko aims to make old-fashioned denim part of contemporary life. “We have to start from the axiom that

consumers love denim, the authentic indigo fabric that is woven with the history of fashion,” says Marco Lucietti, global marketing director of Sanko/Isko. “But they also need a fabric that can follow them through a busy day. For this reason, we need to combine the functions of the fabric, comfort, and a real denim look.”

Meanwhile, the people over at Invista are busily fixing some of the issues that come along with pushing more stretch into what was normally a cotton-only playing field. “If you look back even five years ago, the vast majority of denim fabrics were either 100 percent cotton or 98 percent cotton with 2 percent Lycra fiber,” says Jean Hegedus, global director for Invista’s denim business. “Then, as the super-stretch trend emerged, consumers and, subsequently, brands and retailers began to have issues with denim fabrics having high growth and shrinkage, resulting in jeans that felt great initially but didn’t keep their shape.”

Hegedus says it’s not so much stretch as recovery that consumers demand, along with cooling and warming properties, another Invista advance. “At Invista, we develop our innovations based on consumer insights,” she adds, referring specifically to Invista technology such as Lycra Hybrid, which adds the dimension of “a multifunctional garment that can go from the gym to the grocery store and still look fashionable and appropriate.”

Cone Denim boasts that its version of stretch, in the form of the S Gene, won’t leave baggy knees and has an unparalleled body-contouring effect, setting an industry standard for stretch fabric. “Our goal is to always preserve the integrity of what makes denim and jeans so special and the reason why consumers create that special bond with their favorite pair of jeans,” says Kara Nicholas, vice president of Cone’s product design and marketing. “We feel the fashion market will continue to embrace these types of performance technologies.”

In Turkey, over at Calik, there’s Elastech, which eliminates seam puckering by preshrinking the fabric before use. The company’s Curve “supports a slender figure with no signs of puckering, giving a push-up effect like a makeup concealer, covering flaws,” says Ebru Ozaydin, head of Calik’s sales and marketing. Meanwhile, the company’s T-Power overcomes elastane yarn breakage and promotes a soft feel rather than a polyester yarn hand. Lastly, Calik’s Circular Elastech gives multi-angular movement for natural flexibility.

The mills are making it their business to raise consumer awareness of the painstaking technology that goes into the creation of their products. “It is necessary to communicate

with consumers the importance of the ingredients,” Lucietti continues. “The effective expression of the technology that is behind our favorite brands creates powerful knowledge that can help consumers choose their denim and perceive the ‘premium-ness’ of the products.” After all, a lot goes into creating all this stretch and movement, and it seems a pity that the customer doesn’t appreciate it. But it’s not entirely apparent that the customer even cares. While men are getting more and more used to stretch in their jeans, women might become more and more jaded.

Maybe all this stretch is just becoming too much of a stretch? Which brings us full circle—to good old cotton, the heart of that stuff Strauss and Davis created back in the 1800s. Is all this stretch pushing out cotton? Mike Tyndall, Cotton Incorporated vice president of product development and implementation, says not necessarily. “Stretch is not new, but whether it is achieved mechanically using 100 percent cotton or through the addition of a synthetic percentage, it’s here to stay.” As for cotton, Tyndall touts the special properties of on-trend garment washes, laser technology, and the blending of cotton with silk, wool, and linen for a more sophisticated look.

Tyndall also forecasts, perhaps selfishly, a return to all cotton. “What we’re hearing is that consumers have been dissatisfied with the higher synthetic fiber percentages in recent denim offerings,” he says. “From a trend point of view, there seems to be a growing interest in authentic denim, not only the classic fabric but also more-classic silhouettes and cleaner looks.”

That prospect is not lost on the mills. Candiani, in fact, sees “denim going back to its roots, abandoning elasticity in favor of an original denim look,” says Giuliani, “especially for consumers who follow the rough romantic denim inspiration or the clean urban streetwear aesthetic.” Ozaydin at Calik agrees: “Millennials have just discovered the iconic ’90s look with open-teeth, grin-through, and marble looks and the ’70s’ beautiful blues, which reference their parents’ youth.”

Maybe all this demand for comfort and stretch on the part of the consumer is just another version of the McDonald’s conundrum. There, the consumer demands healthier choices but is then turned off by a salad at the place where they would normally order a Big Mac. When asked, the denim consumer might shrug and say they want comfort, like a pair of yoga pants. But a pair of jeans that is as comfy as a yoga pant doesn’t seem much like denim. The answer seems to evolve the jean but make certain it’s still a pair of jeans. Perhaps finally suffering again for beauty isn’t such a bad idea.



Candiani Denim



Cone Denim



Invista Lycra

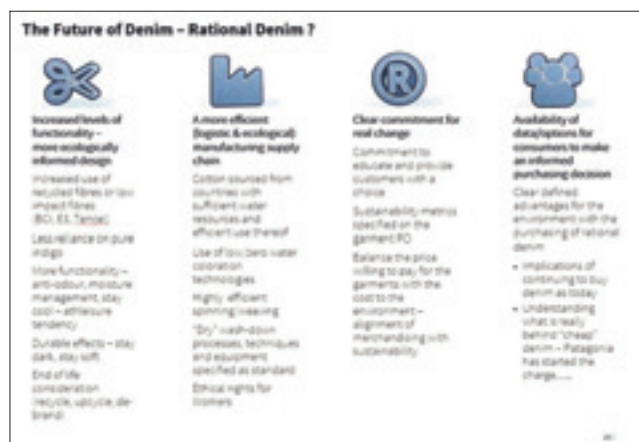




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## Can Blue Go Green?

*Producing a pair of jeans is murder on the environment.  
Can the industry really change, and does the consumer even care?*

By Rebecca Cringean

**Y**ou've been told that you look damn good in your jeans, but did you know that they're killing the planet? And, as long as your butt looks good, do you even really care?

Please allow Paul Cowell, global head of brand marketing at Archroma, the innovative color and specialty-chemicals company, to break it down for you.

"The coloration of yarn with indigo is a far from an optimal process," he says. "Indigo is an insoluble pigment that must be transformed into soluble form by the addition of strong chemicals called reducing agents. These reducing agents add large amounts of sulfites, sulfates, and other salts to the wastewater, which usually ends up in landfills. In addition, because oxygen is present in the atmosphere, the dye quickly re-oxidizes into the insoluble form, meaning a repeat of the reduction process. This means you literally have to paint the dye onto the surface of the cotton. This painting process involves dipping in reduced indigo and skying to oxidize, redipping and skying to build up the color on the yarn. In addition to this inefficient process, the final wash fastness and wet/dry rub fastness of the indigo-dyed denim is poor because all the dye is sat on the surface. Also, the usual process for brands is to create a dark denim fabric and then treat the denim to a multitude of washing processes and chemicals to achieve different styles. In many cases the laundry will take a deep-dyed denim fabric and wash almost all of the indigo back off to give an aggressive wash effect, wasting the time, cost, and resources spent on the original dyeing process."

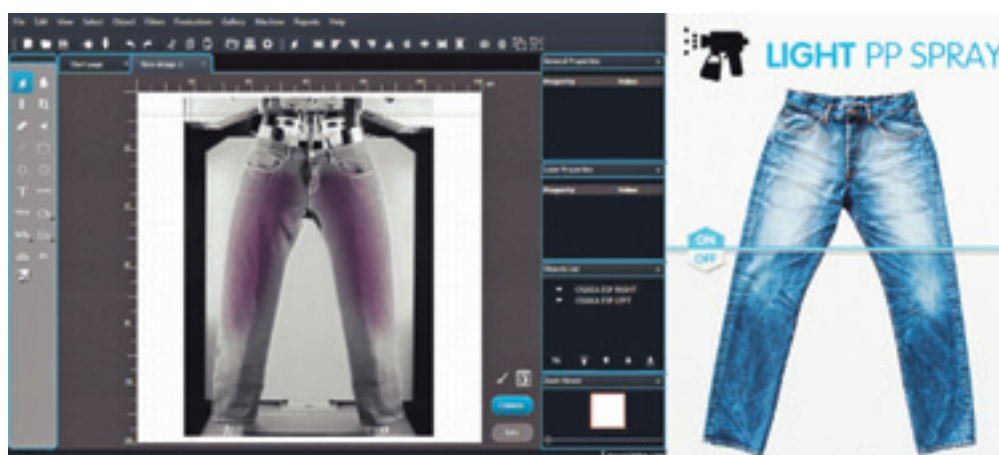
It's not a pretty picture, and, until quite recently, this sort of thing was a dark secret in the entire textile industry. But denim has been, by far, the biggest offender. In the premium-denim heyday, sustainability took a backseat to burgeoning brands, styles, and sales.

"We were in the creative phase and we were trying out all sorts of chemical combinations to create new and exciting looks," says Sheila Foreman, director of product development of continental colors at Garment Industry Laundry, a business she co-owned with her husband along with other prominent industry laundries. "We simply weren't paying attention to what we were putting down the drain. Today we finally are and we must."

There are a number of reasons for that "must," one being a greater global consciousness but the other being quite practical: We are going to run out of these resources and anyone who has any intention of keeping their business alive must change. This involves paving the way,

ironing out more green-manufacturing practices, dealing with the cost ratio, and deciding whether to force forward thinking onto the often blasé consumer or simply slip them more-sustainable goods in the guise of a nice pair of pants.

At the heart of the matter lies transparency. Jeanologia, a Spanish company specializing in sustainable textile finishing technologies, has numbers to back up its commitment to the environment. In fact, its combination of laser, ozone, and something they call G2 eFlow nano bubbles has reduced 90 percent of water and 50 percent of chemical and energy consumption in denim production. Impressive, though perhaps a mere start when one considers past abuses. The company even recently produced a trade show demonstration of a process it claims guarantees zero pollu-



Jeanologia

tion in the production of denim.

Other mills have reduced the number of indigo baths from seven to two, cutting down the usage of water by 33 percent and chemicals by 50 percent. There's all this, plus a focus on more-efficient cotton growing, using less water and pesticides. Ozone treatments, which used to be a somewhat smelly inferior alternative, let's admit it, are now rivaling traditional methods and winning converts along the way. And now, even embellishments can be mimicked in a more sustainable way. "We have heat transfers and woven fabrics, doing creative designs in a new way," says Helen Sahi, director of sustainability at Avery Dennison. "For instance, the bleached look used to be a chemical process, but now we can achieve the same thing with a heat transfer."

Just as meat eaters don't have to watch cows be slaughtered and can therefore better enjoy their steaks, all this sustainable technology seems like it would be expensive

and create resentment in an already tepid denim consumer. Sheila Foreman talks of a startup cost that "shouldn't be exorbitant" while, over at Avery Dennison, Sahi enthuses, "It's cost-neutral or even costs less." To her way of thinking, "the entire industry is changing, and every brand is asking for it, both high and low price points."

Archroma's Paul Cowell puts on his professor cap for us again to delve a bit deeper into the elusive denim industry pricing structure.

"Pricing is always a difficult topic to address, especially in terms of denim. Indigo is an exceptionally strong dye, and, being a bulk commodity, the price of this dye is low. These factors create issues when comparing directly the price per kilogram of indigo versus the price per kilogram of advanced denim dyes. However, when we take a holistic look at the total cost of production and incorporate the water, energy, and chemical savings, in addition to the reduction required for wastewater treatment and more 'on shade' production, we can quickly close the price difference."

"In reality," Cowell continues, "the cost of dye on a pair of jeans is about 0.40–0.60USD. The cost of advanced denim can be lower, equal to, or a little higher depending on the depth and final effect, but if we are talking about premium denim that retails above 60USD, then you can imagine if the cost of the dye is 0.50USD or 0.70USD it really isn't an issue. However, the fact that we can save more than 90 percent water, there is the true savings."

While Avery Dennison's Sahi says "consumers are looking for a conscious, trusted brand," Marshal Cohen of the

consumer market-research group NPD counters that research proves buyers simply do not care about sustainability. Take sales of Tesla Motors, for instance. Are car buyers trying to do the right thing by the environment or are they looking for a high-end status symbol and less spent at the gas pump?

With resources quickly being used up and costs eventually starting to level off, it's not certain that it really matters all that much if the consumer is on board with sustainability. Change seems an inevitability, but if the industry can get the consumer on board, all the better. Cowell says the younger the consumer the more informed they are and the more they care. He thinks it's in the hands of the brands, who need to give consumers a chance and a choice to do the right thing. "This is a big challenge," says Foreman. "We must be more informed about our footprint. The consumer hasn't been educated and they don't understand the difference. This is where we need to begin."





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