



# A Review On The Growth Of Clothing Market And Role Of Private Label Brands in Punecity of Maharashtra state.

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## Abstract

Retailing in India is one of the mainstays of its economy and records for 14 to 15 percent of its GDP. In the Indian retail industry, apparel is the second-largest category. Every year, it is expected to rise by 12 to 15%. Major retail improvements will be visible in all Tier-II and Tier-III cities across the country by the end of 2023. International retail behemoths are vying for a foothold in the country. In the next five years, Marks & Spencer plans to open roughly 30 new stores. Global retailers are finally paying attention to India.

We shall review the characteristics and effects of private labeled brands and national brands in Pune city and review the growth trends.

Keywords: Apparel Clothing Market ,Growth Private label, National label brands.

## 1. Introduction

The apparel business is one of the most important sectors of the global economy in terms of investment, revenue, trade, and job creation. The garment industry's importance is solely based on its contribution to industrial production and employment. After agriculture, the apparel sector contributes to the country's GDP and consequently plays a significant part in its expansion. The apparel sector encompasses all businesses that are primarily involved in the production of various types of garments. Kid's clothing, men's clothing, and women's apparel are among the garments produced. Fashion, climate, geography, culture, and fiscal issues have all contributed to the diversification of India's garment sector. The industrial sector in India and abroad is witnessing rapid expansion and development in the Indian textile industry. There have been significant changes in the general retailing industry in recent years, particularly in garment retailing, which used to be primarily a made-to-order market for clothing but has now evolved into a ready-to-wear sector.

**Private Label:**

A private label is defined as "a consumer product produced by, or on behalf of, retailers and marketed under the retailers' own brand or trademark through their own channels," according to study.

Originally, private label products were created by retailers as a low-cost alternative to national or manufacturer-branded products. The main goal was to attract low-income and price-conscious customers. Private label brands arose as a result of using pricing as a main strategy and began competing with a few of the most well-known leading brands. Private Labels are introduced when major National Brands have a large market share, and the results confirm the positive impact of total category sales as well as the positive impact of advertising vs. total sales ratio on the probability of introducing Private Label, as stated in one of the studies. The quality difference between private label and national brand items has closed, and the quality of private label products is much greater and more consistent than ever before, especially in creative product categories.

Private labels can be classified into four categories, according to Kumar k (2007)<sup>1</sup>: generics, copycats, premium store brands, and value innovators.

***Private Generic Brand***

Paper towels, soft beverages, pet food, ordinary canned meals, and other basic functional (low involvement) product categories are frequently covered by generic private labels. They don't have the manufacturer's or retailer's name on them, and they're usually priced as low as possible. Generic private labels are low-cost, undifferentiated products that are typically only available in one size and one variety, are less visible on store shelves, and are rarely promoted. Furthermore, their packaging is frequently made up of black text on a white background. These are available to consumers that are on a tight budget. Because the product is already at the lowest price rung, retailers do not use price promotion strategies.

***Copycat Brand***

A copycat brand, according to a European patent and trade mark attorney, "is a brand that replicates, mimics, or is created purposely similar to an established brand in the marketplace." Parasitic brands are another term for copycat brands. Copycats have a quality level that is comparable to the original.

Branded manufacturer's products are frequently sold at a discount of 5% to 25% compared to the brand leader. Copycat brands are frequently created with the purpose of being as close to their branded counterparts as possible (even in packaging), which can lead to customer confusion. As a result, copycat stores are perceived as freeloaders on the manufacturer's inventions, research, product development, and image-building efforts. Marketing expenses are also kept to a minimum. Retailers create a product that is comparable to the branded goods but is less expensive, sending the message to the buyer that it is of good quality but is less expensive. The benefit of having a copycat brand is that it allows the merchant to bargain with the national brand because they can market their own brand.

### ***Premium Store Brand***

Customers benefit from premium store brands because they offer value to their shopping experience. Typically, their marketing mix is designed to reinforce the superior brand image, such as by charging a greater price than other branded products, advertising the product but rarely granting price discounts, and displaying the product in prominent shelf places, among other things. Retailers had to introduce high-quality products with competitive packaging and present them under a new product line aimed at competing with the range's top national brands. There are two sorts of premium store brands: premium private label, which is exclusive, more expensive, and of higher quality than competing national brands; and premium lite store brand, which is touted as being of equal or better quality than competing national brands but is less expensive.

### ***Value Innovators***

The purpose of value innovators is to provide clients with the best performance-price ratio deals possible. The majority of these brands are well-balanced and based on rational decision-making; while some innovations are introduced to customers, cost efficiency remains the primary goal of value innovators. There is a trend toward private label evolution: whereas generic private labels and imitation brands dominated the market from 1980 to 1990, value innovators and premium store brands are now more prevalent. The important characteristics that shop in this category should follow include having a restricted number of products, low marketing and production costs, and good quality products at affordable pricing.

### **National Brand:**

The expressions "national brand" or "nation mark" have been instituted to allude to the impression of a nation in different nations. A national brand helps other people comprehend what a nation is, making it more clear for different crowds. It gives a field of reference to encircling news reports and making accounts, and influences all divisions of the national economy. There is across the board accord that if national brand can work, it needs to compare to the inherent reality of the nation and include emotional components that make it open to target crowds. The main completely secure way to accomplish a decent national brand is that a nation turns into a reasonable, prosperous, all around represented and fruitful.

When Keller (2004)<sup>2</sup> considered brands in current everyday circumstances, he discovered that "National Brands" were most likely to spring to mind. A list of today's most well-known brands, from Coca-Cola to Disney to Marlboro, would all fall under the criteria of a manufacturer brand. These types of trademarks are distinguished by the fact that they are established by producers and bear their own brand name.

### **Major National Brand Players**

Madura garments (Louis Philippe, Van Heusen, Allen Solly, Peter England, Byford), Arvind Mills (Arrow, Newport, Lee, Wrangler, Flying Machine, Ruggeres, Excalibur, Ruf and Tuf), Zodiac, Raymond (Raymond, Park Avenue, Parks), and Colour Plus are among the players in this category. These are

primarily domestic brands that have established themselves firmly in the market and created significant customer recognition, including strategic partnerships and licensing agreements with overseas brands. A vast number of multinational players, including Lee, Benetton, Levi's, Lacoste, Nike, Reebok, Adidas, Mango, Lee Cooper, and John Player, are already functioning in India through licensing.

## 2. Reviews on Literature

**Gielens, Katrijn & Ma, Yu & Namin, Aidin & Sethuraman, Raj & Smith, Ronn & Bachtel, Robert & Jervis, Suzanne (2021)**<sup>3</sup> Store brands (SB) or private labels (PL), which are now commonly referred to as private brands, are brands that are generally owned and marketed by stores. They have been in market for around 70 years. Over time, these brands have progressed from generic, low-cost, low-quality economy or budget private labels to value or standard private labels that are less expensive than national brands but of acceptable quality.

**Priyank Sinha and Dr. Sainy (2021)**<sup>4</sup> In India, fast fashion trends have resulted in a massive proliferation of indigenous brands. The proliferation of brands has also resulted in an over-choice effect among Indian consumers, who are becoming increasingly dissatisfied with their apparel purchases. These factors have put a lot of pressure on small fashion retailers (SFR), who today account for around 80% of retailing in India. Prior to COVID, SFR's practised overstocking several brands to get the largest market share, then heavily discounting the goods at the end of the season to clear the inventory. After the COVID-19 interruption, this method was rendered ineffectual. SFRs must now optimise their brand portfolio to reduce over-choice and increase inventory turnover ratios. To that end, we offer an effective fuzzy probability-based brand portfolio optimization model that uses primary data analysis to categorise brands into alternative groups. The portfolio must comprise brands with the highest market share in each segment.

**Pritha Ghosh, Subrata Saha, Shamindra Nath Sanyal, and Swati Mukherjee (2021)**<sup>5</sup> Apart from price competition, the article claims that additional fundamental variables distinguish buyers' perceptions of national brand (NB) and private label brand (PLB) (PLB). Respondents choose NBs for their reputation, supply adequacy, and sizes above PLBs' pricing benefits, according to data collected across several brands. The maximum one-to-one connection exists between the brand's reputation, the fabric quality, and the information quality for a product with each brand, regardless of the brand type, according to rough set theory analysis.

**Ritesh Dwivedi (2021)**<sup>6</sup> The Indian textiles industry is now the most promising market in the economy, accounting for 14% of the country's exports. Increased foreign direct investment has aided the industry's growth and development. Furthermore, the federal government intends to implement rules and adjustments that are estimated to result in US\$ 300 billion in textile exports by 2024-25, as well as the creation of an additional 35 million employment in various segments involved with the industry. To drive textile exports, this research paper emphasizes favourable trade policies and superior quality products. From USD67 billion in 2014, India's domestic textile and apparel sector is expected to grow to USD141 billion by 2021 and USD100 billion by 2017. In addition, this research study looks at how the Indian textile industry is

changing, as well as the prospects for trade (export and import) of manufactured items produced in the industry.

**Balaji, K., and Maheswari, R. (2021)<sup>7</sup>** The Indian retail industry is undergoing a shift from disorganized to organized. Retailers face considerable hurdles in the changing and vibrant retail market in order to stay competitive and organise their businesses. This study investigates the organized supermarket store appearance aspects and their impact on shoppers' perceptions. This study examines the impact of store image features on shoppers' attitudes in order to predict their in-store behaviour in a retail setting. Through a thorough literature review, the researcher attempts to develop a model by linking the mentioned factors.

**Sanjeev Kumar and Vikas Kumar (2021)<sup>8</sup>** In 2020, the covid-19 epidemic is the first and most serious human calamity. Covid-19's impact on India has been largely disruptive in terms of economic activities as well as human lives lost. Almost every industry has suffered a setback. The textile industry is one of the most important contributors to India's export earnings, accounting for almost 11.4 percent of total export earnings for the fiscal year ending 2018-19, totaling nearly USD 37.5 billion (INR 2,596 billion) and expanding at a CAGR of seven percent since 2004-05. The COVID-19 global pandemic has comparable and distinct impacts on all 7.8 billion people. We're dealing with escalating COVID-19-related death rates, shattered health systems, famine and starvation, joblessness, varied degrees of lockdown, and a shadow pandemic of force, and this could be only the beginning. The fashion business has suffered a setback.

**SanjeevniGangwani, Meenu Mathur, and Sana Shahab (2020)<sup>8</sup>** In India, the rise of private label brands is paralleled by the rise of organized retailing. A structural equation modelling approach was used to investigate consumer views of retail department store private label apparel brands. Consumer views of private label familiarity, affective perception, perceived quality, perceived value, and perceived risk perceptions, including functional risk, financial risk, and social risk perceptions, all have an impact on store loyalty, as shown in the model. The study discovered that positive consumer evaluations of retail department store apparel private label brands have a significant impact on customer loyalty. It means that retailers who want to increase store loyalty should develop proper private label brand strategies to encourage positive opinions of their store's private label items.

**Mishra, Sita & Malhotra, Gunjan & Saxena, Garima (2020)<sup>9</sup>** The goal of this study is to see how effective in-store private label marketing is at changing people's minds about private label brands (PLBs) by influencing people's perceptions of quality differences between PLBs and national brands. This research focuses on how retailers might impact consumers' perceptions of quality variances by providing them with in-store marketing cues. In New Delhi, India, data was acquired using the mall intercept approach. AMOS 25 and the PROCESS SPSS macro were used to analyse the data. This study examines the impact of in-store private label marketing on consumers' perceptions of PLB quality in comparison to national brands, resulting in a favourable attitude toward PLBs. Furthermore, the attitude toward national brand promotions is observed to mitigate the association between private label marketing and PLB attitudes. However, it has a beneficial influence on this relationship, contrary to the authors' assumptions. The study discovered that

price knowledge has a negligible influence on moderation. The relevance of in-store private label marketing in influencing consumers' views toward PLBs is demonstrated in this study, which adds to the current literature on "Cue utilisation theory."

**Anjali Chaudhary, (2020)<sup>10</sup>** In a changing retail market, merchants have understood that strategically creating private labels is the most crucial engine for driving both growth and profitability. The research looks into the elements that influence consumers' purchasing intentions for apparel private label businesses (PLB).

**Pankaj Dixit, (2019)<sup>11</sup>** The textile industry has served as a symbol of India's cultural legacy, bringing people together and playing a vital part in their economic interests. At the unorganized level, this sector is primarily separated into numerous specialties, and it has established itself as a cottage industry in every state of India. In this study, the textile industry is discussed in terms of inclusive development and social responsibilities. The major goal of this study is to determine how the textile industry contributes to inclusive growth. Both primary and secondary data were studied in qualitative analysis to achieve the conclusions. The findings of this study show that while textiles contribute to job creation and inclusion, they do not play a beneficial role in terms of social responsibility due to their disorganized structure.

**Bindu Basini Sekar & Shakila M K (2017)<sup>12</sup>** This study investigates the penetration of private label brands into customers' thoughts and their impact on the improvement of store loyalty. The study's major goal is to investigate the relationship between private label brands and store loyalty, as well as to discover essential elements for improving store loyalty, particularly in private label brands. The data is made up of 200 samples taken throughout Chennai. The samples were chosen using a convenient sampling procedure. The research is descriptive in nature. The three private label labels chosen for data collection are MAX, RELIANCE Trends, and Big Bazaar.

**Saima Khan and Bilal Khan (2017)<sup>13</sup>** Many international fashion labels have entered India as a result of globalisation, high disposable income, economic development, and an increased demand for Western wear. Every year, internationally renowned companies join the Indian fashion business, expanding the range of products available to the modern Indian customer and increasing market rivalry. The purpose of this research is to evaluate the consumer-based brand equity (CBBE) of multinational fashion apparels and determine their importance in the Indian market. For this study, the top five global fashion brands (as evaluated by Interbrand (2012)) were chosen, and over 500 respondents aged 18 to 39 years old from six Indian metropolises completed a structured questionnaire. For confirmatory factor analysis (CFA) and path analysis, 448 questionnaires were confirmed to be acceptable. Brand equity is influenced more by brand awareness and brand loyalty than by brand associations and perceived quality, according to the findings.

**Mohd Usman and Sumbul Shakeel (2017)<sup>14</sup>** The Indian textile industry is one of the country's largest and most effective industries in terms of output, foreign exchange profits, and job creation. According to the Ministry of Textiles, the Indian textile industry contributed 14 percent to industrial production, 4 percent to GDP, and 27 percent to total export earnings in 2015. According to The Cotton Textiles Export Promotion

Council (Texprocil), the textile industry earned US\$ 41.4 billion in export revenues in 2016, up 5.4 percent on an annual basis. Textiles are a labor-intensive industry that employs over 45 million people directly, making it the second largest employer after agriculture. Despite its significant contribution to India's economy and continued increase in export revenues, the textile sector faces a number of obstacles, including tariff imposition and the collapse of important markets such as the United States, which has resulted in a downturn in India's apparel industry. Textile mills are closing, and job growth isn't predicted because exports aren't increasing.

### 3. PROFILE OF PUNE CITY

Pune is Maharashtra's second-largest city, after Mumbai, and a significant city in terms of economic and industrial development. Pune's rich and magnificent past has made it the cultural capital of Maharashtra. Pune (formerly Poona) has experienced fast expansion and profound transformations.

Pune's economy is one of India's most powerful human capital and economic growth engines. Pune boasts thousands of textile businesses that are both directly and indirectly related to the city's apparel and garment industries. Textile Info media provides a list of all main textile markets in Pune, so you may contact all major textile manufacturers and suppliers through our Textile Directory.

Pune has a market that is a growing hub for ready-to-wear clothing. Pune is Maharashtra's fashion hub, with students accounting for the majority of the population. The latest designer textiles may always be found on the streets of Pune at reasonable prices. Pune residents have developed more than 200 manufacturing units and enterprises in order to acquire self-reliance and self-sufficiency. Because it is located roughly halfway between Mumbai and Karnataka, the market is currently a bustling center for merchandise from both cities. The products are usually in the small to medium price range and are a popular hangout for young people since they can acquire the latest and most fashionable printed outfits, while others can receive traditional and cultural Maharashtrian wear. The lack of aboriginal and local enterprises has created a big opportunity for other new and current textile ventures to conduct business in Pune, making the textile market in Pune a huge buyer's market.

### 4. Growth Trends

The Clothing Manufacturers Association Of India (CMAI) is the pioneer and most representative Association of the Indian apparel industry for over five decades. It has a membership base of over 20,000 companies, including Readymade Garment Manufacturers, Exporters, Retailers and Ancillary Industry. With its headquarter in Mumbai, CMAI also has branches in New Delhi, Bangalore and Pune.

As per the reports of CMAI during the Covid19 lockdowns, Despite the slowdown, Indian apparel market is expected to grow annually at 13-15% to cross the \$125 billion (Rs 675,000 crore) mark by 2020, a survey by Clothing Manufacturers Association of India (CMAI) has found. At present, India's apparel market is estimated to be around \$50 billion (Rs 270,000 crore)

Meanwhile, founder of Future Group, Kishor Biyani said that there's immense opportunity for growth in the apparel industry.

“The opportunity for growth is immense. International players entering India will have to learn from the mistakes domestic players made for quicker growth,” said Kishore Biyani, founder and CEO, Future Group. (<https://cmai.in/>)



Fig 1 Make in India:: Ministry of TextileRef: <https://maitri.mahaonline.gov.in/PDF/Textile%20Sector.pdf>

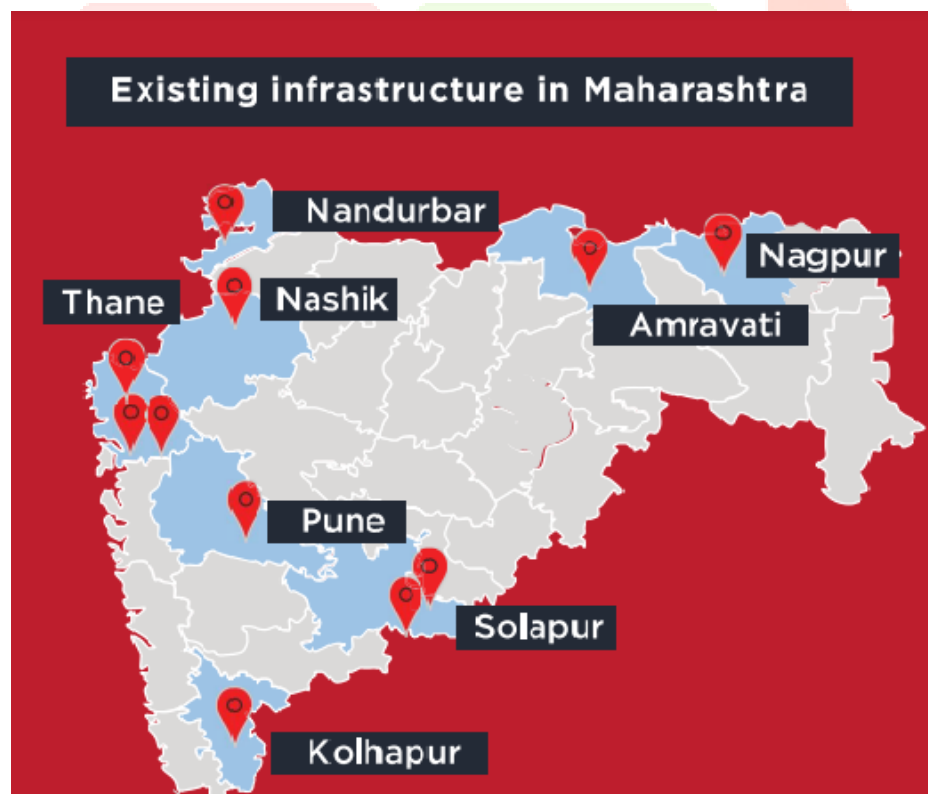


Fig 2: MIDC has developed 11 exclusive Textile Parks including city of Pune.

As per Ministry of Textile, Maharashtra the main key players adding to the growth of Textile industry are:



- |                             |                                     |
|-----------------------------|-------------------------------------|
| 1: Hanung(Toys & Textile)   | 13: KKCL                            |
| 2: Alok Industries Ltd      | 14: Roopam                          |
| 3: Indo Count Industries    | 15: Birla Cotsyn India Ltd.         |
| 4: Mandhana                 | 16: Soma Textiles & Industries Ltd. |
| 5: Siyaram                  | 17: KSL                             |
| 6: Aditya Birla Group       | 18: Zodiac                          |
| 7: Suryalakshmi             | 19: GTN Industries                  |
| 8: Bombay Dying             | 20: BRFL                            |
| 9: Morarji Textile Ltd.     | 21: Nagreeka Group                  |
| 10: Indo Fab Industries     | 22: Raymond and                     |
| 11: Spentex Industries Ltd. | 23: Sumangal                        |
| 12: Vimal                   |                                     |

Source: <https://maitri.mahaonline.gov.in/PDF/Textile%20Sector.pdf>



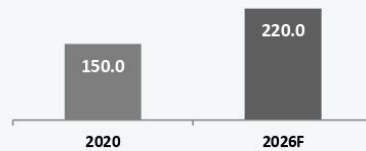


# TEXTILES AND APPAREL



## MARKET SIZE

Textiles and Apparel Industry (US\$ billion)



Key Facts as of FY20



Contributes 2% to India's GDP



Employs over 45 million people

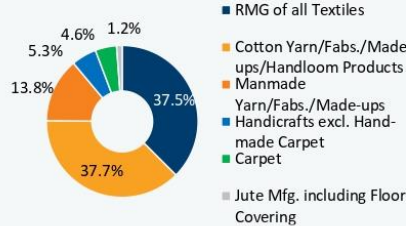


Contributes 12% to India's export earnings



## SECTOR COMPOSITION

Share of India's textile exports (Between April 2021 and October 2021)



Fabric Production in FY20\*(million square metre)

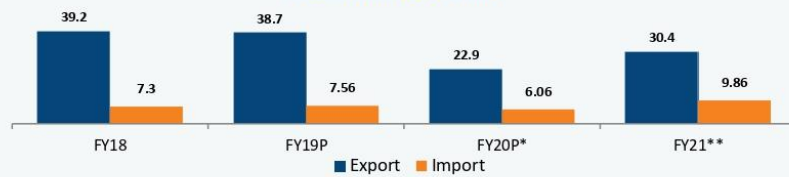


Note: \* - until January 2020



## KEY TRENDS

Textiles Trade (US\$ billion)



Note: \* - till November 2019; \*\*Export for FY21 and Imports until February 2021, imports include textile yarn fabric and made-up articles; Exports include RMG of all textiles, cotton yarn/fabs./made-ups/handloom products, man-made yarn/fabs./made-ups, handicrafts excl. handmade carpets, carpets, jute mfg. including floor coverings



## GOVERNMENT INITIATIVES



National Textile Policy



Khadi App Store



Pradhan Mantri Fasal Bima Yojana

Note: SAATHI - Sustainable and Accelerated Adoption of efficient Textile technologies to Help small Industries



## ADVANTAGE INDIA

- Robust demand:** Cotton production in India is projected to reach 7.2 million tonnes (~43 million bales of 170 kg each) by 2030, driven by increasing demand from consumers. Exports of cotton yarns/fabs./made-ups/handloom products stood at US\$ 8.6 billion between April 2021 and October 2021.
- Competitive advantage:** Abundant availability of raw materials such as cotton, wool, silk and jute.
- Policy support:** In October 2021, the government approved a scheme worth Rs. 4,445 crore (US\$ 594.26 million) to establish seven integrated mega textile parks and boost textile manufacturing in the country.
- Increasing Investments:** Huge funds in schemes such as Integrated Textile Parks (SITP) (US\$ 184.98 million) and Technology Upgradation Fund Scheme (US\$ 961.11 million) released by Government during 2015-16 to 2019-20 to encourage more private equity and provide employment.

Fig 3: India's Textile industry at one image:: Source: <https://www.ibef.org/industry/textiles/infographic>

The organized textile industry in India is characterized by the use of capital-intensive technology for the mass production of textile products and includes spinning, weaving, processing, and apparel manufacturing.

The domestic textiles and apparel industry stood at \$108.5 bn in 2019-20 of which \$75 bn was domestically consumed while the remaining portion worth \$28.4 bn was exported to the world market.

The highest contributors to FDI in the Textile sector of India (including dyed, printed) from April 2016 to March 2021 are Japan, Mauritius, Italy, and Belgium.

Source: <https://www.investindia.gov.in/sector/textiles-apparel>

### Summary

Europe and Canada were the first to witness the private label revolution. PLBs have long been seen as a critical component of merchandising strategy, serving as both a strategic tool for retailers and a unique source of competitiveness for manufacturers. Store brands, store sub-brands, and umbrella brands are the three types. They're also known as in-store or private labels. Private labels are products that are exclusive to a single retailer and fall into a variety of categories.

Private labels weren't always treated seriously; they were once thought of as low-cost, no-name replacements for "genuine" brands, both in terms of price and quality. They were mostly found in everyday items like soap and toilet paper, as well as basics like rice and sugar. Many customers bought store-owned brands, which were normally sold at a significant discount to national names, although they didn't always realize it. The private label was another opportunity for the shop to make a little extra money. Customers became more accepting as quality increased, and shops began to modify their attitudes.

India's retail industry has gone through several stages. In terms of retailing in the Indian context, it has been noticed that the Indian market has largely witnessed two types of retailing: organized retailing and disorganized retailing. The Indian market has seen a significant level of unorganized retailing. Unorganized retailing accounts for roughly 90 percent of the total retail market. From 1997 forward, organized retailing began to gain a share of the Indian market. Following the economic liberalisation era, several international investors have demonstrated a strong interest in the Indian market. India is without a doubt the world's second largest consumer market. In India, the amount and pattern of consumption have changed significantly. In terms of strategic dimensions, consumer behaviour is also considered to be one of the most essential segments.

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