

# Thermals

## Winter cosy becomes light and stylized

Thermal wear is emerging strong among various winterwear categories. Primarily an innerwear, the category has undergone many changes with new blends, fabrics and colours making inroads. Business of course is linked to the vagaries of winter which keeps changing every year, says **Ajanta Ganguly** and **Ajay Goswami**

As a clothing item that serves as a necessity during the winter season, especially in North India, thermal wear has been popular for a long time due to its comfort and warmth. Unlike other winter wear categories, the popularity of thermals is not dependent on fashion elements rather it's about comfort and durability. Primarily worn as innerwear, this category has only recently come into its own by being upgraded with aesthetically appealing design options. This enables thermals to be used as normal clothing and standalone winter wear. To some extent, thermals are replacing traditional winter wear like sweaters and woollens and young people are sometimes wearing a thermal just as vest or tee under jackets and starting a new trend.

Thermals blend fashion, comfort and warmth Thermal wear market in India is showing immense potential with customers preferring quality products with stylish comfort, even if it is worn as innerwear under clothes. Woollens cannot be worn under clothing without appearing bulky but the USP of thermals is that it can retain warmth and fashion all together. Brands are now expanding their basic range to include a premium range of aesthetically designed thermal wear for maximum comfort during peak winter season. Currently, the men's thermal wear forms around 41 per cent of the total market in value, while women's share is 59 per cent. Indian consumers spend on innerwear products is significantly lower than other Asian peers. The innerwear market in India is under penetrated with per capita spend 90 per cent approximately below Thailand and China. This suggests that there is significant room for growth driven by rising per capita spending on such products.

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**Comfort and durability score more than fashion**

**Men's thermal wear is around 41 per cent, with women and kids making up the rest**

**A wide variety of natural and synthetic fabrics used**

**Thermals comprise 8-10 per cent of the total winter wear segment**

**Fashion products such as gym vests, neck covers, ladies blouses, camisoles and under jackets becoming popular**

**Basic lightweight thermals in black, brown, white and grey sell well**

**Profits totally dependent on the duration and intensity of the winter spell**



**Vinod Gupta**  
MD, Dollar

“Changes in climate and region give variation in selection of winter wear products. So do different income groups. Therefore, manufacturers stress on region specific products. For example, in Northern region chilly climate woolly cot are more helpful than light weight thermals. Being a necessity item of clothing, thermal wear segment does not have much provision for innovation. But certainly the product has evolved with time.”



**Kuntal Raj Jain**  
Director, Duke Fashions

“Our thermals are designed and crafted as per the latest market trends using quality tested fabric. These thermals are recognized for perfect stitching, softness, colourfastness, skin friendliness and durability thereby wider demanded in the market.”

woollen garments are not meant for frequent washing, the colour preference is dark, like black, brown, stone and maroon. Being a necessity item of clothing, thermal wear segment does not have much provision for innovation. But certainly the product has evolved with time,” points out Vinod Gupta, MD, Dollar, a brand known for its thermal line for men and women.

“We have both fashion and basic winter wear collection. Our fashion thermal wear is known as Ultra thermal and Ultra Premium Thermal for men, women and children and this range is extra smooth, thin and light weight thermal with a snug fit. The basic range is labelled as Dollar Wintercare and its thick and soft fabric provides warmth and comfort without itching and irritation. We are currently extending our thermal range as per growing demand and our winter wear range consists of ladies blouses, thermal camisoles and thermal vests for men. We are also introducing thermal leggings for women,” he informs.

Price sensitivity is a prevailing factor of this segment as thermals are a seasonal product. Unlike other apparel categories, it is not an impulse buy and most people own just a few to tide over short winter spells or when they travel to colder climates. However, as per Indian consumer’s purchasing pattern, the middle and premium segment has high growth potential. As in most winter wear categories, men’s segment is the highest contributor, although there is growth in

**Rakesh Grover**  
MD, Groversons Apparel

“Innovation and styling is driving the winter wear segment and within a span of five years, 4 to 5 different blends of fabrics with different knits have been introduced and more innovations are being worked out. This is in particular for thermal wear product line, for other products also a lot of innovative products are being introduced. Thermal wear market is growing and will grow further.”



## Aditya Marwaha

MD, Kanvin, KA Exports

“The fabrics used are of premium quality, treated with special enzyme washes to enhance softness. With creativity and experience, an attractive collection of apparel is presented each season. We have one of the widest range of styles for women thermals in India.”

women's and kids segments too. In spite of the challenges like being only a seasonal product in unpredictable winter spells, many domestic brands are branching into thermal wear market. Viewing the growth potential, many small manufacturers are offering new products and gradually securing the future of this segment.

## Innovation in fabrics and design trending now

Indian winter wear market is also clearly segmented as branded and unbranded with the unbranded segment commanding a good share of the market. Players in the branded segment are trying hard to claim a greater share by innovating and offering new products. A wide variety of natural and synthetic fabrics are used for thermal innerwear. The natural fibers include fine (merino) wool, cotton, hemp, bamboo and silk. The synthetics include acrylics, polyester, nylon, polypropylene and spandex. Thermals have a specified 45 days time period for retailing of thermals as compared to the two or three months of winter.

To get rid of its inventory stocks sometimes proves to be a challenge for the segment. However, with specifically designed consumer lines and growing fashion consciousness, brands do not face too much problems if they do not over produce. “The fabrics used are of premium quality, treated with special enzyme washes to enhance softness. With creativity and experience, an attractive collection of apparel is presented each season. We have one of the widest range of styles for women thermals in India.

## Vartul Duggal

Marketing General Manager Vartul

“The market is not that favourable but still we are optimistic about the thermal wear category. We are into 100 per cent organic cotton, not only in thermal but the entire range. We try to keep it simple, subtle and basic because our target audience prefers that. But we always experiment with styles and this year we experimented on colours.”

This includes string, camisole, sleeveless, sleeveless extra-long with slits, short sleeve, long sleeve, long sleeve extra long with slits, short vest, long pant, semi-long pant and short pant, in off-white, skin and black colors. They are usually in the price range of Rs 395 to Rs 645,” says Aditya Marwaha, Marketing Director, Kanvin, a leading brand of thermals for men, women and kids from K A Exports.

“For men, we have thermals made from a blend of fine fibres with CPS technology. Polyfill yarn is filled in two layers of extra soft fibres, to provide the best thermal innerwear experience. Trims are added with elastane for improved fit. They come in sleeveless, short sleeve, long sleeve and long pant, in white, black and grey melange colors and are priced at Rs 495 to Rs 545. We have also introduced a new ‘P’ knit thermal range for men which has cotton modal on both sides and polyfill filling which makes it extremely soft, thin, light weight and warm. Kanvin thermals for kids are made from a blend of fine fibres, washed in eco-friendly enzymes and softened to caress soft skin,” he adds.

Experts feel innerwear has graduated from being just a functional category to a category that offers additional fashion quotient. It is shifting from a price sensitive category to a brand sensitive category. The growth of thermal wear is about 15-20 per cent as a whole specially in the mid premium segment. Along with variety in colours and style, it provides comfort and warmth and is a sure hit in mid-winter across most of India.

Kuntal Raj Jain, Director, Duke Fashions, well known for Duke brand of thermals opines, “Our thermal wears are present



in standard sizes, pattern and finish. Our collection is lightweight, designed not only to keep you warm but also to keep you cool and stop excessive sweating, should the temperature change. The other idea is to use unique 'Quilted Thermal Insulation Technology (QTIT)' and special hollow fiber which helps you retain body temperature and keeps you warm even in freezing condition."

Duke's body warm thermal is an ever growing category. Duke revamps its body warm range of thermals which made from light, extremely durable and fast drying fabric that can retain its feel and lustre after numerous washes. "Our thermals are designed and crafted as per the latest market trends using quality tested fabric. These thermals are recognized for perfect stitching, softness, colourfastness, skin friendliness and durability thereby wider demanded in the market."

**Innovation in organic and fashion thermals**

Brands in the thermal wear space have now started playing with colours with big brands such as Jockey are now experimenting with colours. However, being an innerwear category, brands cannot play too much with colour and even styling aspect is restricted to round and v-neck, sleeveless and full-sleeve. While the basic colours remain white, black, grey, blue and many other brighter colours in kids' and ladies segment are now being introduced.

"The market is not that favourable but still we are optimistic about the thermal wear category. In our case, the range starts from Rs 249 and goes up to Rs 549 for upper thermal and for the complete set it goes up to Rs 849. We are into 100 per cent organic cotton, not only in thermal but the entire range. We try to keep it simple, subtle and



basic because our target audience prefers that. But we always experiment with styles and this year we experimented on colours," points out Vartul Duggal, General Manager (Marketing), brand Vartul.

Duggal points out that in India the use of organic clothing is still limited to upper class who understand the importance of organic clothes and the benefits derived from them. In thermal wear industry, organic is yet to make inroads however, Virtual is seeing a good growth every year.

"It would be difficult to put growth in figures but if the thermal market is about Rs 200 crores, our business would be close to 5 per cent of the total market," he avers. Light weight fine counts thermals are popular as they give the feeling of keeping warm even in extreme cold without having to wear anything bulky inside.

With mild winters, demand for light weight moderately warm thermal products has grown. And since it's a warm innerwear not too many changes have come about in trends and style. There are three constant categories available in the India. These include the expensive top end or niche products which are very light weight with thin fabrics are wool or polyester based. Second, the mid segment cotton polyfill cotton sandwiched fabric products. Third, is the mass selling thick fabric with very high GSM with heavy brushed effect for two wheeler riders and extreme cold conditions. Rakesh Grover, MD, Groversons Apparel

says "Innovation and styling is driving the winter wear segment and within a span of five years, 4 to 5 different blends of fabrics with different knits have been introduced and more innovations are being worked out. This is in particular for thermal wear product line, for other products also a lot of innovative products are being introduced. Thermal wear market is growing and will grow further. We see growth in non traditional markets like South and Central India also.

In traditional thermal markets more fashion products will get prominence like gym vest, neck covers, ladies blouses, etc. We expect to introduce new fabrics which are thin with lower GSM and light weight with better warmth. We have introduced one new fabric blend this year with brushed effect inside the garment."

Experts say thermal wear comprise nearly 8-10 per cent of the total winter wear segment. However, with the inclusion of fashion accessories in some elements of thermal such as gym vests, neck covers, ladies blouses, camisoles and under jackets, this segment will grow further over the next seasons. It is shifting from a price sensitive category to a brand sensitive category with fashion innovations. Besides the usual retail strategies of EBOs, MBOs and LFS thermal brands are making headway on e-commerce platforms as well. But as a category totally dependent on the duration and intensity of Indian winters which remain highly unpredictable, judging its true market potential remains a tough task indeed for experts.