

FEATURE DENIM

CLOCKWISE, FROM TOP LEFT: MONARCHY, AG ADRIANO GOLDSCHMIED, CITIZENS OF HUMANITY, LEE, 7 FOR ALL MANKIND, LEVI'S.



USA CANADA

Denim heritage: The birthplace of the riveted blue jean (patented by Levi Strauss and Jacob Davis in California in 1873), the US has enjoyed a long and rich history as a jeans producer and now boasts hundreds of denim labels in its midst. The NPD Group, a market research group, reports that in the year ended March 2007, annual US jeans sales topped more than \$11 billion, with women's models accounting for \$7.41 billion and men's at \$4.52 billion. Several of the world's best known denim designers, such as Italy's Adriano Goldschmied and France's Christian Audigier, now work in the US and have found great success as denim kingpins. In addition to its world-famous heritage brands such as Levi's, Lee and Wrangler, the country was also the birthplace of designer jeans, such as Calvin Klein, Gloria Vanderbilt and Paul Guez's Sasson in the late 1970s/early 1980s. More recently, the country, and Los Angeles in particular, also spawned the so-called premium denim movement, spearheaded by such brands as Earl Jeans, 7 for All Mankind, Paper Denim and Cloth and True Religion. Today, L.A., boosted by the success of brands such as Monarchy, Bread and William Rast, is again a key denim center that generates \$400 million a year in business.

Key brands (heritage): Levi's (1853), Lee (1889), Wrangler (1947)

Key brands (old-school designer): Calvin Klein Jeans (1978), Jordache (1979)

Key brands: 7 for All Mankind, True Religion, AG, Stitches, Rock & Republic, Antik, Citizens of Humanity, J Brand, Rich & Skinny, Paige Premium Denim, Habitual, Earnest Sewn, 1921, Silver Jeans, Drive Jeans, Kunna, Hilfiger Denim, Blue Cult, Guess, Buckler, Hudson, Lucky Brand Jeans, Monarchy

Hot new brands: The Cast, a young NYC-based brand with a rock 'n' roll edge; Blank, a new line of low-cost jeans; and Anlo, which is in between basic and trendy.

Key denim trade fairs: Project, Blue, Coterie, Designers & Agents

Pricing: Cotton Incorporated reports that the average price of a pair of jeans in the US is \$22.91, but prices can soar into the thousands.

Outlook: With the dollar declining worldwide and a glut of premium denim in the market, the US denim industry may be in for "correction" in the year ahead. However, a recent NPD Group report showed that sales of jeans over \$100 a pair were rising with both US men and women, even though sales of women's jeans were down for the first time in five years. However, according to a Cotton Incorporated study, each American still owns, on average, nine pairs of jeans, making US citizens the world's biggest denim fanatics. As Eric Kim, president of Monarchy, says of the industry there: "It is next to impossible to generalize on the state and style of denim as the US denim market is so very massive. There are hundreds of premium denim companies with new ones popping up monthly. We have the staple mid-priced brands like Levi's, and the moderate mass-market brands like the Gap and Old Navy that produces denim. We are a denim-driven nation." (CB)



BRAZIL

Denim heritage: Brazil is the second largest jeans market in the world. In 1956 Hungarian immigrant Johann Gordon arrived in São Paulo from Morocco and created his factory, called Staroup, and soon introduced jeans to Brazilian workers who wore them as a uniform. Jeans as fashion pieces didn't catch on until the start of the '70s with the brand US.Top. Today Brazilian-cut jeans are considered some of the world's best styles. Several important international brands also currently buy denim from Brazil.

Key brands: Ellus, Iodice, Opera Rock, DTA, M. Offici

Hot new brands: Hotel Denim with a Brazilian cut and finishes.

Key denim trade fairs:

Pricing: Everything from Workers in the lower end imports can be as much as clothes in Brazil and

Outlook: Brazil is on and last year it produced jeans. Quality and price interesting at the moment. Sweden. This trade quality. "South American view, because, with Danilo Guimarães like Hotel Denim

