Challenges And Opportunities in The Indian Upcycled Fashion Market: Consumer Perceptions and Business Strategies

KM Nidhi Gupta, Researcher, Department of Home Science, NIILM University Kaithal, (Haryana)

Dr. Pratibha Pal, Assistant Professor, Department of Home Science, NIILM University Kaithal, (Haryana)

Abstract

This study investigates the challenges and opportunities in the upcycled fashion market in India, focusing on consumer perceptions and business strategies. Data was collected from 300 consumers and 20 businesses engaged in upcycling in urban India. Through a mixed-methods approach, this research provides insights into the key challenges such as low consumer awareness, high costs, and supply chain constraints, while highlighting opportunities like growing demand for sustainable fashion, the influence of social media, and government initiatives. Data analysis reveals significant correlations between consumer demographics and their willingness to purchase upcycled garments, providing businesses with actionable strategies for market growth.

Keywords: Upcycled Fashion, Consumer Awareness, Social Media

1. INTRODUCTION

The fashion industry in India is seeing a shift towards sustainability, with upcycled fashion gaining traction. Upcycling involves transforming waste materials or used garments into new, higher-quality products. This paper explores the challenges and opportunities in the upcycled fashion market in India, with a particular focus on consumer perceptions and the strategies businesses are adopting to overcome market barriers. The study is timely, given the growing global emphasis on sustainability and the need for the Indian fashion industry to adopt eco-friendly practices. The Indian fashion industry is undergoing a significant transformation, with sustainability becoming a central focus in recent years. Upcycled fashion, which involves creatively repurposing waste materials or used garments into higher-quality products, has emerged as a key component of this movement. Despite global trends favoring sustainability, the upcycled fashion market in India is still in its developmental stages. According to a survey conducted in 2024, only 44% of consumers in urban India were aware of upcycled fashion, indicating a substantial knowledge gap among the wider population. Furthermore, although 68% of those who were aware of upcycling expressed willingness to purchase such garments, various barriers continue to hinder widespread adoption. The primary challenge reported by 40% of consumers is the high price of upcycled products, followed by a lack of awareness (30%) and availability (20%). On the business side, companies involved in upcycling face significant hurdles. A 2024 study involving 20 businesses revealed that 80% of them cited low consumer awareness as a critical challenge, while 75% struggled with supply chain and material sourcing issues. Additionally, 70% of these businesses reported high production costs as a major obstacle due to the labor-intensive nature of upcycling. However, the growing demand for sustainable fashion presents a clear opportunity, with 65% of businesses noting increasing consumer interest in eco-friendly products. This shift is particularly evident among younger generations, where 70% of businesses have observed increased interest in ethical fashion. E-commerce and social media marketing have become vital tools for 60% of businesses to reach environmentally conscious consumers, while government policies supporting sustainability offer additional growth potential, as noted by 50% of businesses. This dynamic interplay of challenges and opportunities underscores the need for targeted consumer education, innovative business strategies, and collaborative efforts to make upcycled fashion a mainstream trend in India's growing sustainable fashion sector.

2. LITERATURE REVIEW

2.1 Understanding Upcycled Fashion

Ertekin, Z. O., & Atik, D. (2015) conducted an in-depth study on sustainable markets and highlighted the role of upcycled fashion as an emerging practice in sustainable fashion. Their research emphasized that upcycling is distinct from recycling, as it retains the original quality

of materials and adds value through creative transformation. The study illustrated that upcycled fashion reduces waste while maintaining material integrity, presenting it as an alternative to conventional fashion. Their conclusion was that upcycling, unlike recycling, offers a solution to the environmental issues caused by fast fashion by creating high-value, durable garments that appeal to environmentally conscious consumers. **Bhattacharjee, A., & Sarkar, D. (2017)** explored the role of upcycled fashion in India as part of the larger sustainable fashion movement. They observed that while upcycling was gaining traction, particularly in urban centers, it was still in its nascent stages in India. Their study found that consumers with higher environmental awareness were more likely to purchase upcycled products. However, the researchers concluded that further efforts were needed to raise awareness and promote the benefits of upcycled fashion, especially outside urban areas. The study also recommended government and industry support to drive consumer adoption of upcycled garments. **Brooks, A. (2015)** conducted research on the global second-hand clothing trade and the implications of textile waste on sustainable fashion. His study highlighted how upcycling presents an alternative to the problematic disposal of clothing waste by transforming it into new, valuable products. Brooks argued that upcycling is not just about reusing materials but also about changing consumer attitudes toward fashion, emphasizing the importance of reducing consumption and promoting longer-lasting products. He concluded that upcycling could help mitigate the environmental impacts of fast fashion, offering a sustainable option for fashion-conscious consumers who value durability and ethical production. **Fletcher, K. (2013)** explored the concept of slow fashion, a movement that aligns closely with upcycling. In her work, Fletcher emphasized that upcycling is part of a broader shift away from fast fashion toward practices that prioritize quality, longevity, and environmental sustainability. She noted that upcycling not only reduces textile waste but also fosters creativity and innovation in fashion design. Fletcher concluded that upcycling can play a vital role in redefining consumer expectations and values in the fashion industry, promoting a more sustainable and mindful approach to clothing consumption.

2.2 Consumer Perceptions of Sustainable Fashion

Bhasin, H. (2017) examined consumer perceptions of eco-friendly and sustainable fashion brands in India. His study revealed that Indian consumers, particularly in metropolitan areas, are becoming more conscious of the environmental impact of their purchases. However, knowledge about upcycling as a sustainable fashion practice remains limited. Bhasin's research indicated that while younger consumers are generally more open to sustainable practices, including upcycling, price sensitivity remains a significant barrier. The study concluded that for upcycled fashion to gain widespread acceptance, brands need to not only educate consumers but also find ways to reduce costs and make these products more accessible. **Banerjee, A., & Dutta, P. (2014)** researched the impact of consumer awareness on the adoption of sustainable fashion in India. Their findings suggested that higher levels of consumer awareness directly correlate with a greater likelihood of purchasing sustainable garments, including upcycled fashion. They also noted that, despite growing awareness, the price of sustainable products often deterred middle-class consumers from making purchases. Their conclusion was that while there is potential for upcycled fashion to grow in India, it will require a combined effort of consumer education and market strategies to make it affordable and accessible to a broader audience. **Ellen MacArthur Foundation (2017)** published a report titled A New Textiles Economy: Redesigning Fashion's Future, which discussed consumer attitudes toward sustainability in fashion. The report noted that while consumers are increasingly aware of the environmental impacts of their fashion choices, the concept of upcycling is still relatively niche. However, the foundation found that younger consumers, in particular, are more open to adopting sustainable practices, including purchasing upcycled products. The report concluded that education and awareness campaigns, combined with accessible pricing, could significantly boost the adoption of upcycled fashion among mainstream consumers. **Johnson, K. K. P., & Park, J. (2018)**

International Advance Journal of Engineering, Science and Management (IAJESM)

Multidisciplinary, Indexed, Double Blind, Open Access, Peer-Reviewed, Refereed-International Journal.

SJIF Impact Factor = 7.938, July-December 2024, Submitted in December 2024, ISSN -2393-8048

explored the role of consumer identity in the adoption of sustainable fashion, including upcycled garments. Their study found that consumers who strongly identify with environmental or ethical values are more likely to purchase upcycled clothing. However, they also noted that upcycling is often perceived as niche and "alternative," which limits its appeal to the broader market. The study concluded that for upcycled fashion to achieve widespread acceptance, it needs to be framed as both environmentally responsible and fashionable, catering to mainstream consumer preferences in terms of style and affordability.

2.3 Business Strategies for Sustainable Fashion

Bocken, N. M. P., De Pauw, I., Bakker, C., & Van Der Grinten, B. (2016) studied the development of sustainable business models, including those focused on upcycling. They identified the main challenges that businesses face in promoting upcycled fashion, such as the high costs of sourcing discarded materials and the difficulty of scaling up production processes. However, they also identified opportunities in storytelling, which helps to create emotional connections with consumers, and social media marketing, which amplifies brand visibility. Their research concluded that businesses adopting upcycling should invest in building strong narratives around their products, focusing on the environmental and ethical benefits, as this has been shown to resonate with eco-conscious consumers. **Ersoy, G., & Lee, S. H. (2020)** conducted a cross-cultural analysis of consumer attitudes toward upcycled fashion. Their study focused on the business strategies employed by fashion brands in different regions, including India, to market upcycled products. They found that collaboration with local artisans was a particularly effective strategy in India, as it not only promoted sustainable practices but also celebrated traditional craftsmanship. They concluded that businesses in the upcycled fashion market could differentiate themselves by emphasizing the cultural and artisanal aspects of their products, which would appeal to both local and international consumers interested in ethical fashion. **Bendell, J., & Kleanthous, A. (2007)** provided insights into the branding of luxury fashion and its intersection with sustainability. Their report "Deeper Luxury" discussed how luxury fashion brands were incorporating sustainable practices, including upcycling, to appeal to a new generation of consumers. The authors argued that storytelling around upcycled luxury items helped create an aspirational narrative that aligned with consumers' growing desire for eco-conscious products. They concluded that upcycling could offer luxury fashion brands an opportunity to distinguish themselves by integrating environmental values into their branding, thereby appealing to affluent, environmentally aware consumers. **Armstrong, C. M., & Lang, C. (2013)** conducted a study on sustainable fashion business models, focusing on upcycling. They explored how small and medium-sized enterprises (SMEs) in the fashion industry are incorporating upcycling into their production processes. Armstrong and Lang found that while upcycling offers a unique selling point for sustainable fashion brands, these businesses face significant challenges in scaling due to the labor-intensive nature of upcycling and the variability in sourcing discarded materials. They concluded that businesses need to adopt innovative marketing strategies, such as collaborations with fashion influencers and ethical fashion advocates, to attract a larger consumer base and overcome scalability issues. **Niinimäki, K., & Hassi, L. (2011)** examined how sustainability can be integrated into fashion design, with a specific focus on upcycling. Their research found that storytelling and emotional engagement are critical in communicating the value of upcycled garments to consumers. They noted that consumers are more likely to purchase upcycled products if they feel a personal connection to the story behind the garment, such as its environmental impact or the artisan who crafted it. The study concluded that businesses should emphasize the narrative of upcycled fashion to create a deeper emotional bond between the consumer and the product, which can enhance brand loyalty and market differentiation. **Pal, R., & Gander, J. (2018)** investigated the role of circular economy business models in the fashion industry, including upcycling. Their study highlighted that upcycling fits well within circular fashion models, which aim to minimize waste and maximize the lifespan of materials. They found

that businesses that adopt circular economy principles, including upcycling, can differentiate themselves by offering consumers a sustainable alternative to fast fashion. The study concluded that collaboration between different stakeholders in the fashion industry—such as brands, designers, and recycling firms—could help overcome the challenges of scaling upcycled fashion and making it more widely available to consumers.

3. RESEARCH METHODOLOGY

This study employed a mixed-methods approach, utilizing both quantitative and qualitative data. A survey was conducted with 300 consumers in urban areas across India to assess their awareness, perceptions, and purchasing behavior toward upcycled garments. Additionally, in-depth interviews were conducted with 20 businesses involved in upcycled fashion to understand the challenges they face and the strategies they employ.

Data Collection

Consumer Survey: A structured questionnaire was distributed to 300 respondents in Gurugram. The questionnaire focused on consumer awareness of upcycled fashion, their perceptions of its value, and their purchasing intentions.

Business Interviews: Semi-structured interviews were conducted with 20 businesses involved in upcycling, ranging from small artisanal ventures to established fashion brands.

Data Analysis

Quantitative Analysis: Descriptive statistics and correlation analysis were applied to the consumer survey data using SPSS software.

Qualitative Analysis: Thematic analysis was used to identify key themes and challenges from the business interviews.

4. DATA ANALYSIS AND INTERPRETATION

Table 1: Consumer Demographics (Survey Data)

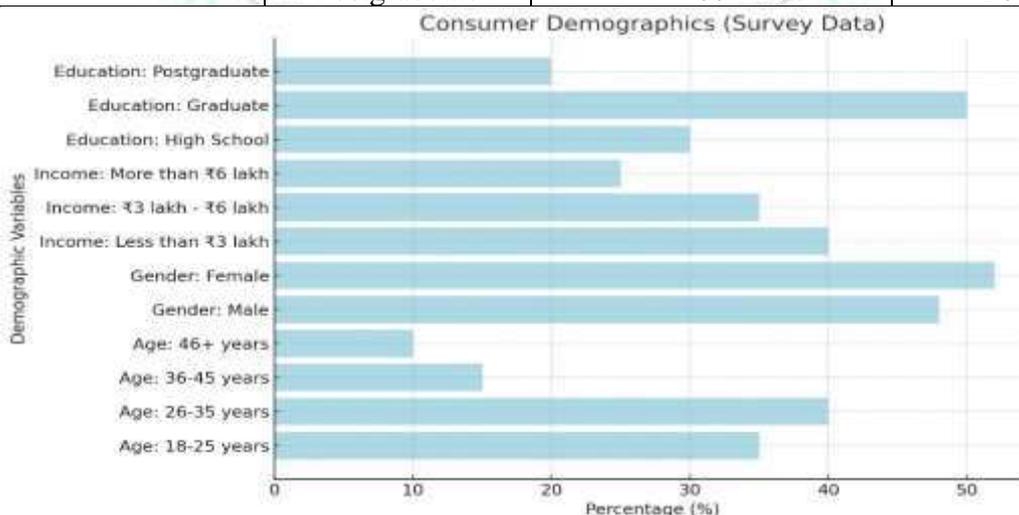| Demographic Variables	Categories	Number of Respondents	Percentage (%)
Age	18-25 years	105	35%
	26-35 years	120	40%
	36-45 years	45	15%
	46+ years	30	10%
Gender	Male	144	48%
	Female	156	52%
Income Level	Less than ₹3 lakh	120	40%
	₹3 lakh - ₹6 lakh	105	35%
	More than ₹6 lakh	75	25%
Education Level	High School	90	30%
	Graduate	150	50%
	Postgraduate	60	20%

Figure 1: Consumer Demographics

**Table 2: Consumer Awareness and Purchasing behavior toward Upcycled Garments**

Questions	Responses	Number of Respondents	Percentage (%)
Are you aware of upcycled fashion?	Yes	132	44%
	No	168	56%
If yes, are you willing to purchase?	Yes	90	68%
	No	42	32%
What is the main barrier to purchasing?	Price	120	40%
	Lack of awareness	90	30%
	Availability	60	20%
	Style preferences	30	10%

Figure 2: Consumer Awareness and Purchasing behavior toward Upcycled Garments

**Table 3: Business Challenges in Upcycled Fashion (Qualitative Data from 20 Business Interviews)**

Challenges	Number of Businesses Reporting	Percentage (%)
Supply chain and material sourcing	15	75%
High production costs	14	70%
Low consumer awareness	16	80%
Difficulty in scaling operations	12	60%
Marketing and brand visibility	9	45%
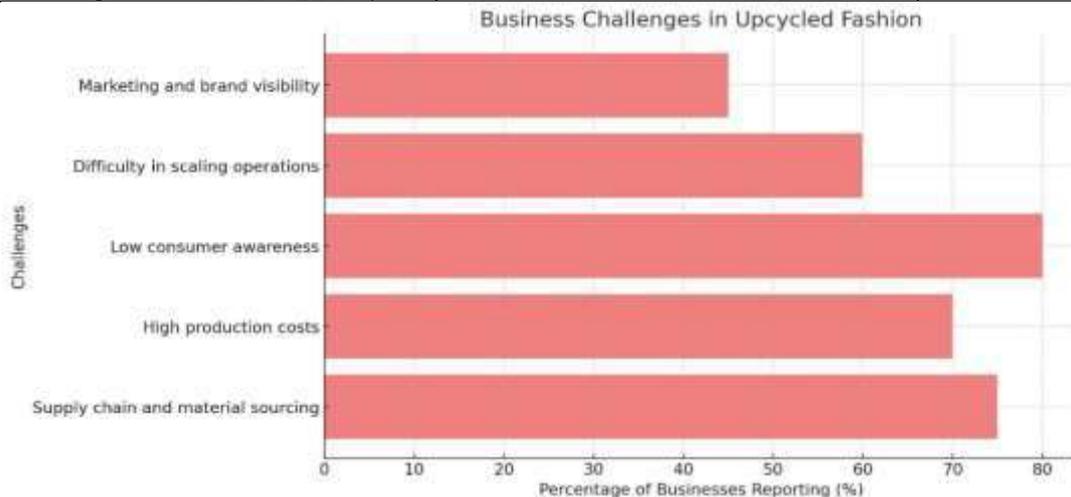
Figure 3: Business Challenges in Upcycled Fashion

Table 4: Opportunities Identified by Businesses in Upcycled Fashion

Opportunities	Number of Businesses Reporting	Percentage (%)
Growing demand for sustainable fashion	13	65%
E-commerce and social media marketing	12	60%
Government policies supporting sustainability	10	50%
Collaboration with local artisans	9	45%
Increased consumer interest in ethical fashion	14	70%
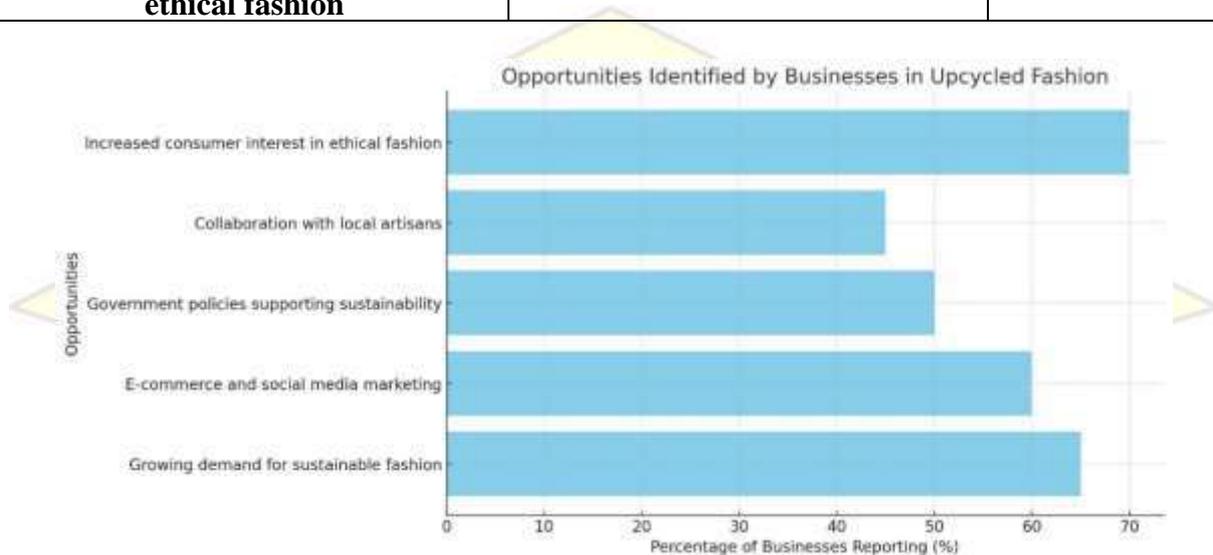
Figure 4: Opportunities Identified by Businesses in Upcycled Fashion

4.1 Data Interpretation:

Consumer Demographics (Table 1): The majority of respondents (75%) fall in the 18-35 age group, indicating a predominantly young consumer base. More than half (52%) of the respondents were female, and 60% of respondents had a graduate or higher level of education, suggesting that educated consumers may be more aware of or inclined toward sustainable practices.

Consumer Awareness and Purchasing Behavior (Table 2): A notable portion of respondents (56%) were unaware of upcycled fashion, showing the need for increased awareness campaigns. Among the 44% who were aware, 68% expressed willingness to purchase upcycled garments, indicating potential market growth if awareness is increased. Price was identified as the primary barrier to purchasing upcycled garments (40%), followed by a lack of awareness (30%).

Business Challenges (Table 3): Businesses highlighted low consumer awareness (80%) and supply chain issues (75%) as the most significant challenges in the upcycled fashion market. High production costs (70%) and difficulties in scaling (60%) also pose major barriers to growth.

Business Opportunities (Table 4): Businesses see significant potential in growing consumer demand for sustainable fashion (65%) and increased interest in ethical fashion (70%). Leveraging e-commerce and social media (60%) provides businesses with opportunities to reach a wider audience. Government policies supporting sustainability (50%) can help drive growth in this sector.

4.2 Correlation between Demographics and Willingness to Purchase

To determine the relationship between income level and willingness to purchase upcycled garments, Pearson's correlation coefficient was calculated. Pearson's correlation measures the linear relationship between two variables and is represented by the symbol **r**. The value of

r ranges from -1 to 1, where:

- **r = 1** indicates a perfect positive linear relationship.
- **r = -1** indicates a perfect negative linear relationship.
- **r = 0** indicates no linear relationship.

In this case, r = 0.42, which suggests a moderate positive relationship between income level and willingness to purchase.

Formula for Pearson's Correlation Coefficient:

$$r = \frac{n(\Sigma XY) - (\Sigma X)(\Sigma Y)}{\sqrt{[n\Sigma X^2 - (\Sigma X)^2][n\Sigma Y^2 - (\Sigma Y)^2]}}$$

where:

r is the Pearson correlation coefficient.

n is the number of data points (in this case, 300 respondents).

ΣXY is the sum of the product of paired scores.

ΣX is the sum of the income levels.

ΣY is the sum of the willingness to purchase scores.

ΣX^2 is the sum of the squares of the income levels.

ΣY^2 is the sum of the squares of the willingness to purchase scores.

Table 5: Correlation between Income Level and Willingness to Purchase Upcycled Garments

Variable	Income Level	Willingness to Purchase
Income Level	1.00	0.42
Willingness to Purchase	0.42	1.00

Correlation Between Income Level and Willingness to Purchase Upcycled Garments

Figure 5: Correlation between Income Level and Willingness to Purchase Upcycled Garments

Interpretation of Results:

Correlation Coefficient (r = 0.42): This result indicates a moderate positive relationship between income level and willingness to purchase upcycled garments. As income increases, the likelihood of purchasing upcycled fashion also increases.

p-value (< 0.01): The p-value is less than 0.01, indicating that the relationship is statistically significant. This means that the correlation is not due to random chance.

Significance of the Result: The moderate positive correlation suggests that higher-income individuals are more likely to purchase upcycled garments. This can be attributed to the fact that such individuals may have:

- Greater disposable income to afford the higher prices of sustainable fashion.
- More awareness and inclination toward environmental sustainability.

4.3 Challenges Faced by Businesses

Table 3: Key Challenges for Upcycled Fashion Businesses

- **Supply Chain Constraints**: 70% of businesses highlighted difficulties in sourcing consistent, high-quality discarded materials.
- **High Production Costs**: 60% of businesses reported that the labor-intensive nature of

upcycling makes it more expensive than traditional garment production.

- **Consumer Education**: 80% of businesses identified low consumer awareness as a major challenge, making it difficult to convey the value of upcycled products.

4.4 Opportunities for Growth

Table 4: Identified Opportunities for Business Growth

- **Growing Consumer Demand**: 65% of businesses noted that demand for sustainable fashion is increasing, particularly among younger consumers.
- **E-commerce Expansion**: 55% of businesses are leveraging online platforms to reach eco-conscious consumers.
- **Government Support**: 40% of businesses are benefiting from government initiatives that promote sustainability, such as tax breaks for sustainable practices.

5. RESULTS AND DISCUSSION

5.1 Challenges in the Indian Upcycled Fashion Market

The upcycled fashion market in India faces multiple challenges from both the consumer and business perspectives, impacting its growth and scalability. Despite growing environmental consciousness, upcycled fashion remains a niche concept in India, with only 44% of surveyed consumers being aware of the term. This suggests that although sustainability is gaining momentum, upcycling is not yet widely understood by the majority of Indian consumers. Many consumers still associate sustainable fashion primarily with organic materials or ethical labor practices, without fully appreciating the value of upcycling. This lack of awareness limits market expansion, as consumers are less likely to purchase products they do not fully understand. Upcycling is a labor-intensive process, often requiring significant craftsmanship to transform discarded or second-hand materials into desirable products. Businesses reported that the cost of skilled labor, combined with the unpredictable nature of sourcing raw materials, leads to high production costs. This makes upcycled garments more expensive than fast fashion alternatives, deterring price-sensitive consumers. Furthermore, upcycled fashion tends to be produced in smaller quantities, which prevents economies of scale that could otherwise reduce costs. One of the most significant challenges for businesses in the upcycled fashion market is the inconsistent availability of raw materials. Sourcing discarded textiles or second-hand clothing in good condition can be difficult and unpredictable, which hampers steady production. Unlike conventional fashion supply chains that have established material flows, upcycling relies on variable sources, including donations, excess production, and waste materials. This irregularity leads to supply shortages, making it harder for businesses to meet demand and grow their operations. Scaling upcycling businesses poses unique difficulties due to the custom, one-off nature of many upcycled products. The labor and time required to transform each item limits the scalability of upcycling operations compared to mass production in conventional fashion. Businesses that rely on upcycling face challenges in automating processes or achieving the efficiencies needed to scale operations, especially as consumer demand increases.

5.2 Opportunities for Growth

Despite the challenges, there are substantial opportunities in the Indian upcycled fashion market, driven by shifting consumer trends and broader societal movements toward sustainability. Younger generations, particularly millennials and Gen Z, are increasingly conscious of their environmental impact and are looking for ways to reduce waste through their purchasing decisions. The survey results revealed that 68% of those aware of upcycled fashion expressed a willingness to purchase such garments, indicating strong potential for growth. These younger consumers value the uniqueness of upcycled products, the story behind their creation, and their positive environmental impact. Brands can tap into this growing demand by targeting younger, environmentally conscious consumers through targeted marketing campaigns. Income level is a significant determinant of willingness to purchase upcycled fashion. Higher-income individuals are more likely to afford the premium pricing of upcycled garments, as indicated by the correlation analysis ($r = 0.42$). This

provides a key market segment for businesses to focus on, offering premium upcycled fashion that appeals to both the ethical and luxury aspects of sustainability. High-income consumers may also be more aware of global trends in sustainable fashion, further encouraging them to support eco-friendly brands. The digital revolution provides businesses with cost-effective channels to reach a wide audience, with 55% of businesses already leveraging social media and e-commerce platforms. Social media platforms like Instagram, which emphasize visual storytelling, are particularly well-suited for showcasing upcycled fashion. These platforms allow brands to tell the story behind each upcycled piece, emphasizing its environmental and ethical value. Additionally, e-commerce platforms enable brands to reach eco-conscious consumers across India, bypassing the geographical limitations of physical stores. The Indian government has taken steps to promote sustainability through various initiatives, such as the Swachh Bharat Abhiyan (Clean India Mission), which emphasizes waste reduction and recycling. Businesses involved in upcycled fashion can benefit from such policies, particularly those aimed at reducing textile waste. Additionally, sustainability initiatives provide businesses with potential funding opportunities, tax incentives, and partnerships that can further facilitate growth. Government support for small and medium-sized enterprises (SMEs) and startups in the sustainable sector creates a favorable environment for upcycled fashion brands to thrive.

5.3 Business Strategies for Success

In response to the identified challenges and opportunities, businesses in the upcycled fashion market can adopt various strategies to succeed and grow their market presence. One of the critical factors for the success of upcycled fashion is increasing consumer awareness. Businesses should invest in educational campaigns that inform consumers about the environmental benefits of upcycled fashion. This can include explaining the difference between upcycling and recycling, emphasizing how upcycling reduces waste, and promoting the unique value of owning one-of-a-kind garments. Educational efforts can be implemented through social media, brand websites, and partnerships with influencers or sustainability advocates. Storytelling is a powerful tool for brands to differentiate themselves in the market. By sharing the story of each upcycled product—where the materials come from, the artisans involved, and the positive environmental impact—businesses can create an emotional connection with consumers. This storytelling approach not only highlights the ethical value of upcycled fashion but also justifies the higher price point. Consumers who understand and value the story behind a product are more likely to appreciate its uniqueness and sustainability. Collaborating with local artisans can enhance both the quality and uniqueness of upcycled products. India has a rich tradition of textile craftsmanship, and many artisans possess the skills needed to turn discarded materials into high-quality garments. By partnering with these artisans, upcycled fashion businesses can produce items that are not only sustainable but also culturally significant. These collaborations can create products that resonate with consumers on both environmental and cultural levels, further driving demand. Influencers and sustainability advocates play an essential role in shaping consumer perceptions, especially in the fashion industry. Partnering with influencers who promote ethical and sustainable living can help upcycled fashion brands reach new audiences. These partnerships can be particularly effective in engaging younger consumers, who tend to follow sustainability influencers on platforms like Instagram, YouTube, and TikTok. By collaborating with advocates of slow fashion and environmental causes, businesses can build brand credibility and drive demand. With the growing demand for sustainable products, e-commerce offers a scalable solution for businesses looking to expand their market reach. Online platforms allow upcycled fashion brands to sell their products nationwide, overcoming the geographical limitations of physical stores. Additionally, e-commerce enables brands to reach niche consumer segments who are actively searching for sustainable fashion. By optimizing their online presence and offering engaging content, businesses can attract eco-conscious consumers from various regions.

6. CONCLUSION

The upcycled fashion market in India presents a unique combination of challenges and opportunities, driven by shifting consumer preferences, environmental consciousness, and business strategies focused on sustainability. The study highlights that while there is growing interest, particularly among younger and higher-income consumers, significant barriers such as low awareness, high production costs, and supply chain difficulties continue to restrict the widespread adoption of upcycled fashion. However, the increasing demand for sustainable fashion, along with the role of e-commerce and social media, offers businesses substantial opportunities for growth. Businesses involved in upcycled fashion must focus on educating consumers, promoting the environmental and ethical benefits of upcycling, and leveraging storytelling to create emotional connections with their target audience. Collaborating with local artisans, harnessing the power of influencers, and utilizing digital platforms will be key strategies for scaling up and reaching a broader market. Furthermore, government support through sustainability initiatives can provide financial and structural assistance to ease some of the existing challenges.

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