



AUTUMN / WINTER 2026

Men's Polo Shirts

Category Intelligence Report



POWERED BY FYND CREATE

What's Inside

01 Executive Summary

Top 10 takeaways, strategic priority matrix, trend strength by market

02 Category Context

Polo shirt positioning in India, occasion shift, market sizing

03 Silhouette & Construction

Knit vs piqué, long-sleeve vs short-sleeve, fit direction, collar innovations

04 Fabric & Material Direction

Cotton piqué as volume base, merino and cashmere knits, performance blends, climate-fit ranking

05 Color & Print

Four color palettes, pattern hierarchy from solid to jacquard, seasonal accent strategy

06 Design Details & Trim

Tipping, placket treatments, collar types, button and zip closures, texture-as-pattern

07 India Market & Translation

Runway-to-India translation, price tiers, occasion calendar, consumer insight, designer reference cards

08 Competitive Benchmarking

Global + Indian retailers, white-space at Rs 1,500-2,500 for knit polos

09 Actionable Design Directions

Five capsule concepts with evidence bases, palettes, and market sizing

10 Appendix

Methodology, evidence legend, glossary, full source list

SECTION 01

Executive Summary

The polo shirt is splitting in two. On one side, India's mass market runs tens of thousands of cotton pique polos on Myntra alone, dominated by slim fits, solid colors, and steep discounting. On the other, luxury runways from Zegna to Cucinelli have replaced pique with fine-gauge knit, turned collars into architectural statements, and repositioned the polo as a blazer-layer dress-shirt alternative.

This report maps that divergence through three tiers of evidence: 12 AW25 designer runway collections, live retail data from Myntra to Zara to COS, trade forecasts from WGSN and McKinsey, and billions of TikTok views driving the Old Money aesthetic revival. The gap is the opportunity. Indian brands that scale textured knit polos, long-sleeve AW silhouettes, and Johnny collar constructions at the Rs. 1,500-2,500 sweet spot will capture a segment where domestic competition remains thin and fragmented.

HOW TO READ THIS REPORT, EVIDENCE TAGS

Every trend call in this report is tagged with its evidence source. Tags appear as colored pills inline:

RUNWAY	Seen on AW25 runways, designer + season cited	RETAIL	In assortment or bestseller at named retailers
SEARCH	Google Trends / Pinterest search volume signal	SOCIAL	TikTok, Instagram virality, influencer adoption
TRADE	Cited in GQ, Vogue, Esquire, Fashionista, or equivalent trade press	FORECAST	WGSN, Coloro, Pantone forward projection
MULTI	Supported by 3+ evidence types (strongest signal)		

MARKET SEGMENTS USED IN THIS REPORT

Metro Tier 1

Mumbai, Delhi, Bangalore, brand-literate consumers exposed to global fashion via Instagram and GQ India, willing to pay Rs 2,000-5,000 for the right polo

Tier 2 & Online

Pune, Jaipur, Lucknow, Kochi + Myntra/Ajio/Amazon shoppers, value-to-mid tier, familiar branding (U.S. Polo Assn., Allen Solly), volume-driven

Premium D2C

Design-conscious, responsive to storytelling ("merino-blend knit, Indian-milled"), resistant to visible logos, Rs 2,000-5,000+ comfort

Top 10 Design Takeaways

- 01 The knit polo has displaced piqué as the trend-forward form. Ten-plus luxury AW25 collections showed fine-gauge merino and cashmere polos, Zara has pivoted its entire polo offer to knit, and GQ, Valet, Esquire, Fashionista, and Vogue all ran dedicated features.

RUNWAY **RETAIL** **TRADE** **SOCIAL**

- 02 Preppy is no longer retro cosplay. Gen Z reframed it as "Old Money," and #OldMoneyAesthetic has reached 8.6 billion TikTok views. The polo shirt sits at the center of this aesthetic, driving demand for contrast tipping, logo embroidery, and rugby stripes.

SOCIAL **TRADE**

- 03** The long-sleeve knit polo is AW26's hero piece globally, featured at Hermès, Cucinelli, Loro Piana, and Zegna. Not a single long-sleeve polo appears in Myntra's top 30 bestsellers, a gap that amounts to a wide-open runway.
- RUNWAY** **RETAIL**
-
- 04** Post-pandemic casualization has settled into a new normal where the polo is the default smart-casual office top. Multiple workplace style guides now endorse polos for business casual, and Amazon India already markets them as "Office, Party & Everyday."
- TRADE** **RETAIL** **SOCIAL**
-
- 05** Zara's full pivot to knit polos (ribbed, textured, linen-blend at Rs 3,990-6,390) signals the commercial tipping point. When the world's largest fast-fashion retailer commits this hard, the trend is no longer directional.
- RETAIL**
-
- 06** Camel and vicuna tones are AW26's signature neutrals, anchored by Zegna and Loro Piana on the runway and validated by Pantone's Mocha Mousse (17-1230) as 2025 Color of the Year. This warm brown family extends through tobacco, mocha, and terracotta.
- RUNWAY** **FORECAST**
-
- 07** The Johnny collar (buttonless placket) earned a dedicated GQ feature in April 2026 and a Ralph Lauren launch at \$150. Clean, modern, and rarely seen in India's mass market, this is a differentiation opportunity hiding in plain sight.
- RETAIL** **TRADE**
-
- 08** Performance-casual crossover is accelerating as the golf apparel market grows from \$8.5B to \$12.3B by 2032. Polo/golf shirts hold 31% revenue share, and Uniqlo's DRY-EX and AIRism platforms prove consumers want technical fabrics in familiar silhouettes.
- TRADE** **RETAIL**
-
- 09** India's polo market has a pricing gap at Rs 1,500-2,500 for textured knit polos. Zara starts at Rs 4,000+, COS at Rs 7,000+, and few Indian brands fill the space below them. The first mover at mid-tier pricing owns this segment.
- RETAIL** **TRADE**
-
- 10** Cotton piqué remains India's volume driver: 75% of Myntra's top 30 bestsellers are solid piqué polos, overwhelmingly in slim fit. The Indian consumer still wants classic piqué at Rs 700-1,100 post-discount, and any range plan must respect this commercial reality.
- RETAIL** **SEARCH**

Strategic Priority Matrix

ACT NOW

Fine-Gauge Knit Polo

Multi-signal validated across runway, retail, and editorial. Merino or cotton-blend knit in camel, navy, burgundy. India gap at Rs 1,500-2,500.

MULTI

ACT NOW

Long-Sleeve Polo

AW hero globally, underrepresented in India bestsellers. Long-sleeve merino or interlock for office layering and cooler months.

RUNWAY **RETAIL**

ACT NOW

Contrast-Tipped Piqué

Proven seller with heritage DNA. Refresh with seasonal colors (burgundy/forest green tipping on cream or navy base).

RETAIL **SOCIAL**

WATCH

Zip / Half-Zip Polo

Runway signal from Fendi and Prada. Commercial at Hugo Boss and COS. Not yet tested in Indian market.

RUNWAY **RETAIL**

WATCH

Johnny Collar Buttonless

GQ dedicated feature Apr 2026. Ralph Lauren launch at \$150. Clean aesthetic, rarely seen in India mass market. Test in limited drops.

RETAIL **TRADE**

WAIT

Oversized / Dropped Shoulder

Trending at Gucci and Loewe globally, but India's market remains firmly slim-fit. No oversized polos in Myntra's top 30. Premature for core range.

RUNWAY

Trend Strength x Market

TREND	METRO	TIER 2	D2C	SIGNAL
Knit Polo	5	3	5	MULTI
Long-Sleeve	4	2	5	RUNWAY RETAIL
Classic Piqué	5	5	3	RETAIL SEARCH
Performance Blend	4	3	4	TRADE RETAIL
Contrast Tipping	4	4	3	RETAIL SOCIAL
Rugby Stripe	3	4	2	RUNWAY SOCIAL
Zip Polo	3	2	4	RUNWAY
Oversized Fit	2	1	3	RUNWAY

Metro/Tier 2/D2C scores (1-5) derived from Myntra bestseller analysis (top 30 by popularity), Google Trends search volume for polo-related queries by city tier, and retailer price tier positioning. Score 5 = strongest signal for this segment.

SECTION 02

Category Context

2.1 The Polo in India – 2026 Snapshot

The polo shirt is India's most commercially dense menswear category. Myntra lists approximately 82,000 polos (as of April 2026), with Louis Philippe commanding 40% of the top 30 by popularity. U.S. Polo Assn. has grown into a Rs. 2,000 crore brand with 450 stores, making India its largest global market. ABFRL's trio of Louis Philippe, Allen Solly, and Van Heusen collectively controls the mid-tier. The bestseller sweet spot sits at Rs. 700-1,100 post-discount, with MRP clustering at Rs. 999-1,999. Pure cotton pique is the dominant fabric, slim fit is the default silhouette, and 75% of top sellers are solid colors.

RETAIL

"We've arrived at knit polo season. The knit polo is no longer a niche alternative, it is a full-on staple."

– Valet Magazine, April 2026

The commercial density masks a creative gap. None of these formats, textured knit, long-sleeve, Johnny collar, zip placket, appear in Myntra's top 30 bestsellers. Brands like Rare Rabbit and select D2C players stock some of these styles, but they have not broken into mainstream bestseller rankings. The mass market is selling volume in a format that global fashion has already moved past.

RETAIL

TRADE

2.2 Occasion Shift – India Context

The polo's occasion map is expanding. Once confined to weekend casual, polos now register across four distinct Indian occasions: smart-casual office (post-pandemic dress code relaxation, with multiple workplace guides endorsing polos for business casual), active-leisure (golf apparel market growing from \$8.5B to \$12.3B globally, with polo/golf shirts holding 31% revenue share), weekend social (the #OldMoneyAesthetic uniform), and festive layering (polo under blazer for Diwali brunches and winter weddings). Amazon India already markets polos as "Office, Party & Everyday," confirming the occasion blur.

RETAIL

TRADE

Occasion share estimated from Myntra category tagging, Amazon India occasion filters, trade press workplace coverage, and golf apparel market reports (Mordor Intelligence). Figures are directional estimates.

The broader market context is favorable. McKinsey's "State of Fashion 2026" identifies India as a growth market with continued casualization driving menswear. The India menswear market is projected at \$21.9B (2025) growing to \$42.4B by 2034 at 7.24% CAGR (IMARC Group). The global polo shirt market stands at \$5.8-6.1B, growing 2.3-2.7% annually. Polos are a stable, growing category, not a trend-dependent bet.









TRADE

Next: silhouette and construction, where the global-India divergence is sharpest and the design opportunity is largest.

AW26 POLO SHIRT LINE SHEET

PREMIUM MENSWEAR COLLECTION

TIMELESS STYLES. REFINED FABRICS. MODERN FUNCTION.

01	02	03	04	05	06	07	08
CLASSIC COTTON PIQUÉ POLO	FINE-GAUGE MERINO KNIT POLO	TEXTURED WAFFLE-KNIT POLO	LONG-SLEEVE KNIT POLO	ZIP-FRONT POLO	RUGBY POLO WITH CONTRAST COLLAR	JOHNNY COLLAR BUTTONLESS POLO	PERFORMANCE STRETCH POLO
							
A wardrobe staple. Breathable cotton piqué with a clean, timeless fit.	Luxuriously soft merino with a refined drape and natural comfort.	Subtle texture meets modern structure in a versatile everyday knit.	Elevated layering piece in a soft, mid-weight knit for cooler days.	Contemporary edge with a zip neckline for a clean, modern look.	Bold heritage stripe with a contrast collar for a timeless statement.	Relaxed sophistication with a buttonless placket and open collar.	Performance meets polish with 4-way stretch, moisture-wicking fabric.
NAVY	CAMEL	BURGUNDY	OATMEAL	CHARCOAL	FOREST GREEN / CREAM	SAGE	SLATE GREY

COLOR PALETTE



NAVY CAMEL BURGUNDY OATMEAL CHARCOAL FOREST GREEN SAGE SLATE GREY

FABRIC & TEXTURE CLOSE-UPS



SECTION 03

Silhouette & Construction

3.1 Silhouette Hierarchy

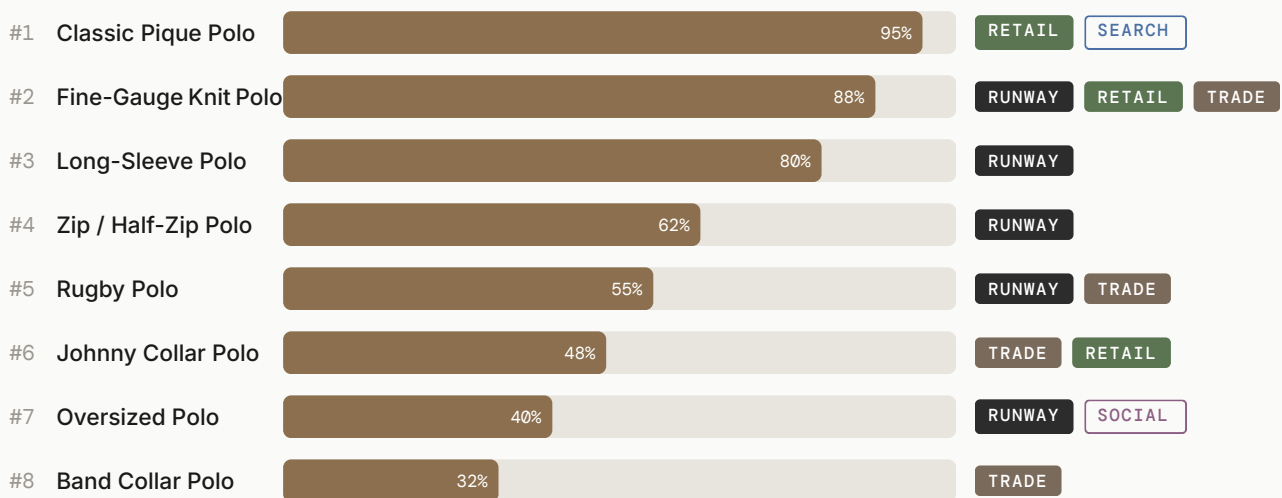
The knit polo has won the luxury runway. Ten or more AW25 collections, Zegna, Brunello Cucinelli, Loro Piana, Prada, Hermès, Bottega Veneta, Fendi, Loewe, Gucci, and Ralph Lauren, showed fine-gauge knit polos as the primary polo form. Not pique. Knit. The distinction matters: knit polos drape differently, layer better under blazers, and read as elevated rather than sporty. Fashionista declared "knit polos ruled recent runways," Esquire ran a dedicated "10 Best Knit Polos" feature, and GQ's February 2026 polo guide led with John Smedley's jersey polo at \$280. For Indian design teams, the commercial translation is a textured knit polo at Rs. 1,500-2,500, a price point where domestic competition is thin and no brand has established dominance.

RUNWAY **RETAIL**

Classic pique remains the volume anchor, and it should. India's Rs. 700-1,100 bestseller tier runs on cotton pique, and Myntra's polo category confirms the format's commercial gravity. The play is not to abandon pique but to build a second tier above it: knit for elevation, pique for volume. The zip-polo hybrid (Fendi, Prada) is the emerging third silhouette, blurring the line between polo and half-zip pullover. It reads modern-sporty, appeals to the performance-casual consumer, and has limited commercial traction in India despite some brands stocking the format. File this as test-and-react.

RUNWAY

Silhouette Ranking, India Market Relevance



Silhouette Lifecycle

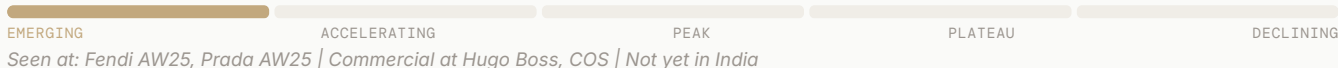
Knit Polo ' Rising



Classic Piqué ' Stable



Zip / Half-Zip ' Rising



Oversized Polo ' Rising



3.3 Fit Direction

India's polo market is slim-fit dominant. Every polo in Myntra's top 30 bestsellers is slim or regular-slim. Globally, the direction is moving toward relaxed: Gucci and Loewe showed oversized polos with dropped shoulders, Lacoste reintroduced oversized heritage pique. The India opportunity is measured relaxation, not boxy streetwear oversized, but a slightly roomier chest and shortened sleeve that reads contemporary without alienating the slim-fit-trained Indian consumer. The long-sleeve polo is the AW silhouette with the widest gap between global runway signal and Indian bestseller performance. Hermès, Cucinelli, Loro Piana, and Zegna all prioritized long-sleeve versions for AW25. Long-sleeve polos exist in India (brands like Rare Rabbit and international players stock them), but none appear in Myntra's top 30 bestsellers, suggesting the format is underperforming its potential. For October-February in Delhi, Chandigarh, and Jaipur, this is a significant growth opportunity.

RETAIL

3.4 Collar & Placket

The collar is the polo's most active design surface in AW26. Five distinct collar directions emerged from runway and retail. Ribbed contrast tipping (Cucinelli, Fred Perry's M3600 with twin tipping in 20+ colorways, Dolce & Gabbana) is the most commercially proven detail in polo history. The Johnny/buttonless collar (Ralph Lauren's \$150 Johnny Collar Pique, featured in a dedicated GQ piece, April 2026) eliminates the placket entirely for a seamless knit surface. Zip placket hybrids (Fendi's FF-monogram zip polo, Prada's layered zip-collar construction) blur polo and half-zip pullover. The classic ribbed collar remains the heritage anchor for pique. The mandarin/band collar (COS, minimal aesthetic) is the most niche option but registers with the same consumer buying COS and Uniqlo.

TRADE

For India, contrast tipping is the lowest-risk entry point: it adds perceived value at minimal production cost and reads premium on e-commerce thumbnails. Johnny collar is the trend-forward play for D2C and premium retail. Zip plackets are the test-and-react opportunity, likely to convert in metro Tier 1 and with the golf/active-leisure consumer.

3.5 Construction Signatures

Four knit constructions define the AW26 polo landscape. Cotton pique (petit pique, 180-220 GSM) remains the commercial foundation: durable, wash-friendly, cost-efficient, and carrying the "Pure Cotton" label that drives click-through on Myntra. Interlock knit delivers a smoother hand-feel than pique and drapes better under blazers, making it the smart-casual office pick. It is Zara's current knit polo fabric of choice, retailing at Rs. 3,990-6,390 in India. Jersey knit (single jersey, 150-180 GSM) is the lightweight option for layering and transitional weather. Waffle/textured knit (Loewe's bouclé, Fendi's jacquard, Bottega Veneta's intrecciato texture) is the directional signal, commanding premium pricing and signaling design intent. Ottoman knit, a flat-rib construction with horizontal ridges, sits between interlock and waffle as a mid-weight texture option that photographs well and drapes cleanly under blazers.

RUNWAY

RETAIL

Cable knit deserves a separate mention. Ralph Lauren showed cable-knit polo sweaters for AW25, and the cable pattern applied to a polo collar and body creates visual texture that photographs well for e-commerce listings. For the D2C segment at Rs. 2,500-4,000, a cotton cable-knit polo is a hero product waiting to happen. Indian mills can produce all these constructions. The constraint is not capability but commercial ambition.

RUNWAY

3.6 Fit x Occasion Matrix

Which fit-construction combinations map to which Indian occasions, derived from runway translation and Myntra bestseller analysis.

SILHOUETTE	OFFICE	WEEKEND	GOLF/CLUB	FESTIVE	EVENING
Classic Pique	4	5	5	3	2
Knit Polo	5	4	3	4	5
Long-Sleeve	5	3	2	5	4
Zip Polo	2	4	5	2	3
Rugby	1	5	3	2	1
Johnny Collar	4	3	2	3	5

Scores (1-5) based on runway appearance frequency (AW25 designer reviews), Myntra bestseller fit distribution, and occasion-filter analysis across Amazon India, Myntra, and AJIO.

Silhouette sets the shape. Fabric determines how it feels in Indian heat, how it washes after Mumbai humidity, and whether it justifies the price tag. Section 4 covers the material story.

SECTION 04

Fabric & Material Direction

4.1 Fabric Macro Story

Cotton pique is the anchor. It accounts for the vast majority of India's polo market, and "Pure Cotton" is a key selling label on Myntra. But the elevation play is merino and silk-blend knit. Zegna showed cashmere-silk knit polos as dress-shirt replacements. Cucinelli built entire looks around cashmere knit polos with contrast tipping. Loro Piana used ultra-fine merino and baby camel hair. The Indian translation is not cashmere (too expensive, wrong climate) but fine-gauge merino wool, cotton-silk blends, and Supima cotton, fabrics that deliver the knit polo's elevated drape at Rs. 1,500-3,500 instead of Rs. 15,000+.

RETAIL

TRADE

"The classic polo shirt is getting a rethink. Designers are elevating the humble polo through fabrication, moving from sporty piqué to refined knits."

— Vogue, July 2025



COTTON PIQUE



MERINO WOOL



WAFFLE KNIT



INTERLOCK JERSEY



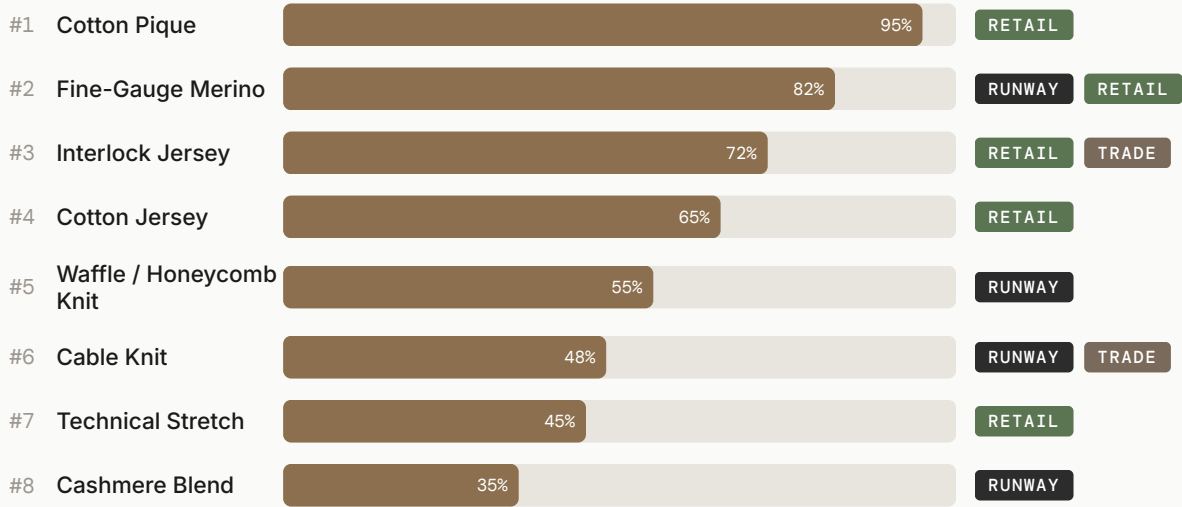
CABLE KNIT



TECH STRETCH

Key fabrics for AW26, from cotton pique to fine-gauge merino, each selected for Indian market viability

Fabric Ranking, India Market Relevance



4.4 Fabric x Occasion Guide

Recommended fabric-occasion pairings calibrated for Indian climate and professional expectations.

FABRIC	OFFICE	WEEKEND	GOLF	FESTIVE	WINTER
Cotton Pique	4	5	5	3	2
Merino	5	3	2	5	5
Interlock	5	4	3	4	3
Jersey	3	4	4	2	2
Waffle	3	3	2	3	4
Cable	2	3	1	4	5
Tech Stretch	3	3	5	1	2

Scores reflect climate suitability (breathability, moisture management), occasion formality expectations in Indian workplaces, and observed retail stocking patterns across Myntra, Zara India, and Uniqlo India.

4.5 Fabric x Climate Pairing

India's climate demands fabric intelligence. October-February (the AW selling window) varies from 8°C Delhi winters to 28°C Mumbai "winters." Cotton pique works year-round in western and southern India. Merino and interlock knits are viable only in the northern belt (Delhi, Chandigarh, Jaipur) from November through February. For pan-India AW collections, the solution is cotton-blend knits (cotton-modal, cotton-silk) that deliver the knit aesthetic with warm-weather wearability. Long-sleeve polos are a northern-tier play, unlikely to move in Chennai or Bangalore.

RETAIL

4.6 Technical & Performance Fabrics

Performance fabrics are the quiet growth story. Uniqlo's DRY-EX and AIRism platforms (Rs. 1,490-1,990 in India) have normalized moisture-wicking polos. Google Trends shows "moisture-wicking polos" search interest growing from 31.2 to 40.9 between February and May 2025. Puma, Skechers, and Adidas are cross-pollinating athletic and casual polo markets. For Indian brands, a cotton-face with polyester-back construction delivers performance without sacrificing the "pure cotton" hand-feel that Indian consumers expect.

RETAIL

The golf-to-office crossover is real: India's golf culture may be small, but the performance-casual aesthetic resonates with the 25-40 metro male who cycles, runs, or gyms before work. The golf apparel market is growing from \$8.5B to \$12.3B by 2032, with polo/golf shirts holding 31% revenue share (Mordor Intelligence). Performance polos with stretch, UV protection, and anti-odor properties are standard in that market. The Indian opportunity is to bring those properties into a casual-styled polo that does not look like athletic wear.

TRADE

4.7 Sustainable Material Signals

Sustainability in polos is moving from marketing to specification. Fred Perry's M3600 uses BCI (Better Cotton Initiative) cotton. H&M India offers organic cotton polos at Rs. 799-1,299. The cost delta between conventional and organic cotton has narrowed to 5-10%, making sustainability a no-premium upgrade for Indian manufacturers. For the mid-tier (Rs. 1,500-2,500), BCI or organic cotton certification adds a PDP selling point without impacting margin. GOTS-certified organic cotton is the premium play for D2C brands building conscious-consumer loyalty. Recycled polyester in performance blends is emerging globally but has limited consumer awareness in India. Lead with cotton-based sustainability claims, they resonate more with the Indian consumer who already values "Pure Cotton."

TRADE

4.8 India Sourcing Advantage

India is the world's largest cotton producer, and Indian mills have deep expertise in pique knitting. The opportunity is to leverage that base for knit polo production: interlock, jersey, and textured knits all run on the same circular knitting machines used for pique. Tirupur, Ludhiana, and Kolkata hosiery clusters can produce knit polos at globally competitive costs. The constraint is not manufacturing capability but design ambition and buyer willingness to spec beyond default pique. For merino-blend knits, India imports raw merino from Australia and New Zealand, but spinning and knitting can happen domestically. Cotton-merino blends (70/30 or 60/40) reduce import dependence while delivering the knit polo hand-feel at Indian price points.

TRADE

Fabric and construction are invisible to the consumer scrolling Myntra. Color is the first filter they tap. Section 5 maps the AW26 palette.

SECTION 05

Color & Print

5.1 Color Macro Story

AW26 polo color is a story of warm earth tones displacing the cold neutrals that have dominated for five years. Camel, tobacco, terracotta, and burgundy appeared across Zegna, Cucinelli, Loro Piana, Fendi, and Hermès. Pantone's 2025 Color of the Year, Mocha Mousse (#A47149), validates the warm-brown direction. WGSN's AW25/26 forecast emphasizes "digital detox" earth tones, deep blues, muted greens, and rich reds/burgundy. Coloro x WGSN's 2026 picks, Apricot Crush (#E8956D) and Future Dusk (#71617D), add warmth and moody softness to the palette. The Indian consumer already gravitates toward warm neutrals (brown is Myntra's seventh-largest polo color at 3,343 listings, growing), making this a trend that requires acceleration, not introduction.

FORECAST

RUNWAY

"Prep revival is no longer a micro-trend, it is settled fact. The polo shirt sits at its center."

— GQ, April 2026



AW26 Color Direction, 17 key colors from runway to retail, filtered for India polo market relevance

5.2 Core Commercial Colors

Core Neutrals

The commercial backbone. Navy is Myntra's top-selling polo color (9,575 listings), and black runs a close second. These five tones should compose 60-65% of any AW26 range because they sell year-round and layer with everything.

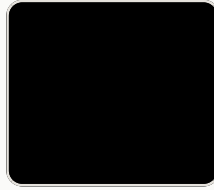
RETAIL RUNWAY



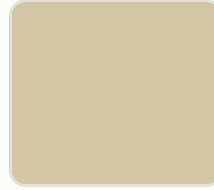
Navy
#1B1F3B
CORE



Charcoal
#708090
CORE



Black
#000000
CORE



Oatmeal
#D2C6A5
CORE



Cream
#FFFDD0
CORE

Warm Earth

The season's mood-setting palette. Camel and vicuna led at Zegna and Loro Piana, Pantone's Mocha Mousse validated the entire warm-brown family, and tobacco showed up at Fendi. These tones read expensive and photograph well, exactly the formula for D2C hero imagery.

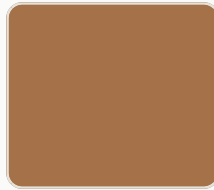
RUNWAY FORECAST



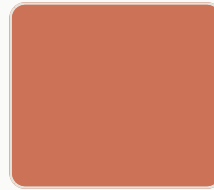
Camel
#C19A6B
~ Pantone 16-1334
EMERGING



Tobacco
#6F4E37
~ Pantone 17-1230
(Mocha Mousse)
EMERGING



Mocha
#A47149
CORE

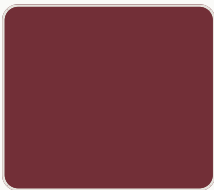


Terracotta
#CC7357
DIRECTIONAL

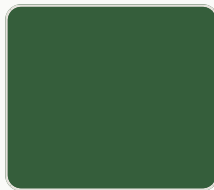
Deep Jewel

AW's perennial richness, grounded in research. Burgundy appeared at Cucinelli and Ralph Lauren, forest green at Hermès and Ralph Lauren, deep plum at Bottega Veneta. These tones move units in Indian festive season and elevate the knit polo into evening territory.

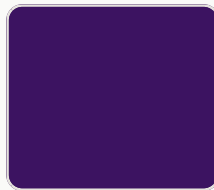
RUNWAY RETAIL



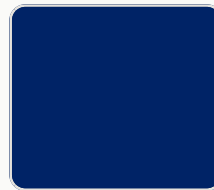
Burgundy
#722F37
CORE



Forest Green
#355E3B
CORE



Deep Plum
#3C1361
DIRECTIONAL



Royal Blue
#002366
EMERGING

Seasonal Accents

The accent layer, small in volume but high in storytelling. Sage appeared at Loewe and Prada, dusty blue at Prada, Coloro x WGSN named Apricot Crush for 2026, and Fendi showed butter yellow. Use these in capsule drops and limited editions.

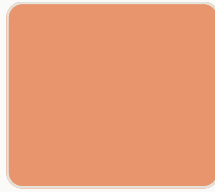
FORECAST RUNWAY



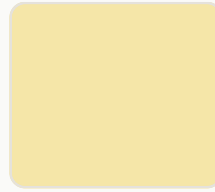
Sage
#B2AC88
EMERGING



Dusty Blue
#6B8BA4
EMERGING



Apricot Crush
#E8956D
~ Coloro x WGSN 2026
DIRECTIONAL



Butter Yellow
#F5E6A8
DIRECTIONAL

5.3 Directional Colors

Camel and burgundy are the AW26 hero color pair. Camel (#C19A6B) appeared at Zegna, Cucinelli, and Loro Piana, anchoring the "quiet luxury" uniform. Burgundy (#722F37) ran through Cucinelli, Ralph Lauren, and Dolce & Gabbana as the warm alternative to navy and black. Together, they define the season's tonal identity: warm, grounded, sophisticated. For Indian AW collections, camel is the statement neutral (pair with navy trousers for office, with denim for weekend), and burgundy is the festive-ready accent that works from Diwali parties to winter weddings.

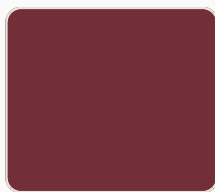
RUNWAY

The secondary directional colors are forest/hunter green (#355E3B, Hermès and Ralph Lauren AW25) and deep plum (#3C1361, Bottega Veneta AW25). Forest green has strong Indian festive resonance. Plum is the risk-forward play for D2C brands seeking differentiation from the navy-black-grey default. Sage (#B2AC88, Loewe AW25) and dusty blue (#6B8BA4, Prada AW25) are accent tones best deployed in collar tipping or limited-run colorways rather than core range.

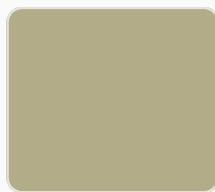
RUNWAY FORECAST



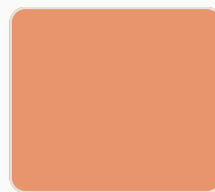
Camel
#C19A6B
EMERGING



Burgundy
#722F37
CORE



Sage
#B2AC88
EMERGING



Apricot
#E8956D
DIRECTIONAL

5.4 Neutrals

Navy is displacing black as the primary dark neutral. Myntra data confirms blue as the largest polo color family (9,575 listings vs. black's 9,198), and the runway reinforced navy's dominance: Zegna's midnight blue, Hermès' navy, Ralph Lauren's Annapolis Blue all positioned navy as the default dark. Black remains commercially essential but increasingly reads utilitarian rather than intentional. The design move: lead with navy in core range, reserve black for performance

and minimalist capsules, and introduce charcoal/slate (#708090, per Prada and Cucinelli) as the sophisticated third neutral.

RETAIL

5.5 Pattern Landscape

Solids dominate, and they should. 75% of India's bestselling polos are solid colors. The remaining 25% splits across three pattern types: self-design textures (tonal jacquard, pique texture variation), color-blocking (Snitch, WROGN, a younger consumer play), and stripe tipping (collar and cuff stripes per Fred Perry's heritage formula). Runway pattern signals for AW26 are subtle: Fendi's FF-monogram jacquard, Gucci's Web-stripe collar detailing, and Loewe's surface texture experiments. The India translation is texture-as-pattern, using waffle, cable, or ribbed knit surfaces to create visual interest without printed graphics.

RUNWAY

RETAIL

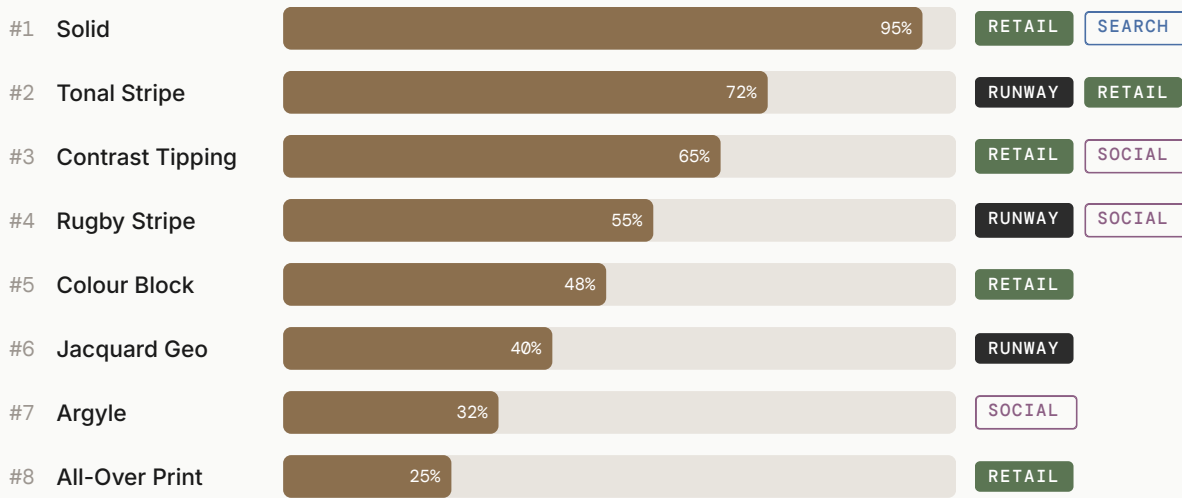
The rugby stripe is the heritage pattern worth reviving for AW. Ralph Lauren showed long-sleeve rugby polos with horizontal banding. For India, rugby stripes in camel/navy or burgundy/cream read "prep revival" without requiring the consumer to understand the reference. Limited to 2-3 hero styles, not core range.

RUNWAY



AW26 Pattern Direction, from tonal stripe to rugby banding, the key pattern stories for men's polos

Print Type Hierarchy

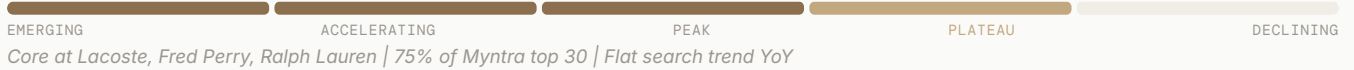


Print Trend Lifecycle

Knit Polo ' Rising



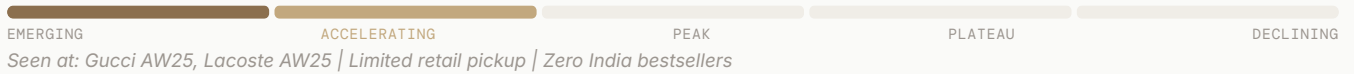
Classic Piqué ' Stable



Zip / Half-Zip ' Rising



Oversized Polo ' Rising



5.7 Solid vs Pattern Ratio

Derived from Myntra bestseller analysis and global retailer assortment composition. India runs approximately 75% solid, 25% patterned (inclusive of self-design textures, color-blocking, and stripe tipping). Globally, the ratio is closer to 65% solid, 35% patterned. The recommendation for Indian AW26 collections is to nudge toward 70/30 by introducing textured knit surfaces that register as "solid at a distance, patterned up close," satisfying both the Indian preference for clean solids and the global shift toward surface interest.

RETAIL

India Polo Market

75% Solid / 25% Print



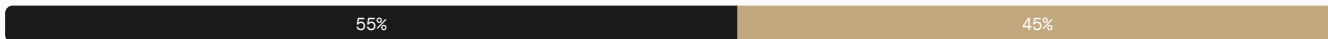
India Festive/Wedding Season

60% Solid / 40% Print



Global Premium (Zara, COS)

55% Solid / 45% Print



Color gets them to click. Details, the collar treatment, the placket finish, the logo placement, are what close the sale and drive repeat purchase. Section 6 covers the trim story.

SECTION 06

Design Details & Trim

6.1 Detail Direction

Three detail trends define AW26. Collar tipping (contrast color on collar and cuff ribs) is the most commercially validated: Fred Perry's entire identity is built on it, Cucinelli and Dolce & Gabbana showed it on runway, and it adds perceived value at minimal production cost. Zip plackets (Fendi, Prada, Zara) blur the polo-pullover boundary and read modern-sporty. Logo placement is shifting: heritage brands maintain left-chest embroidery (Ralph Lauren's pony, Lacoste's croc), but the trend-forward move is tonal, same-color-on-same-color embroidery that signals brand without shouting. For Indian brands competing against U.S. Polo Assn.'s visible branding, tonal logo is a differentiation play.

RUNWAY



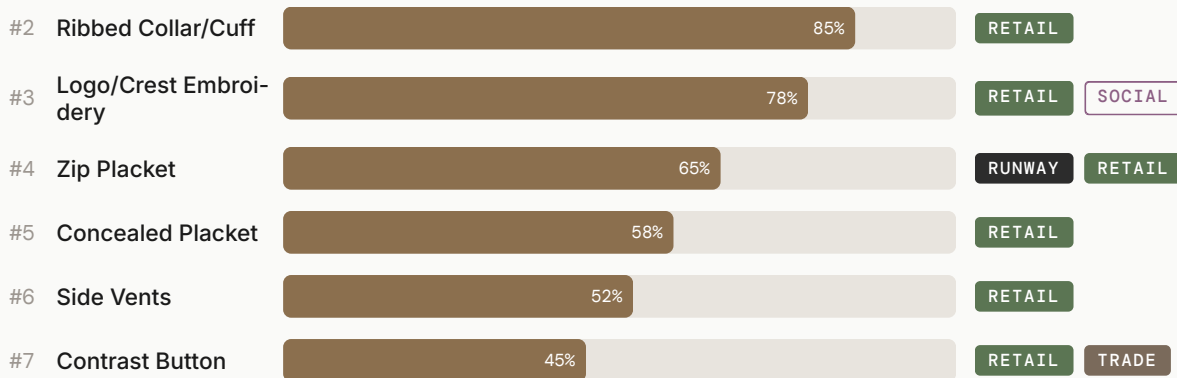
Construction details, from contrast tipping to zip plackets, the details that elevate a polo from basic to premium

Detail Ranking

#1 Contrast Tipping



RETAIL RUNWAY



Collar Direction Lifecycle

Standard Ribbed ' Stable



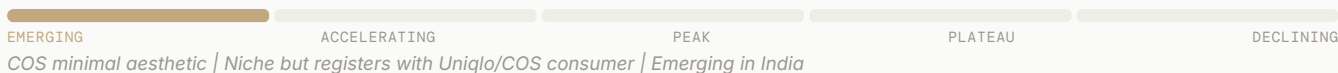
Contrast Tipped ' Rising



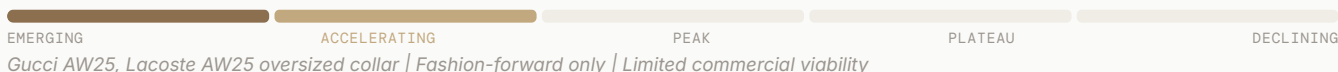
Johnny / Buttonless ' Rising



Band / Mandarin ' Rising



Oversized Statement ' Rising



6.3 India-Specific Details

Embroidered crests and motifs have particular resonance in India, where embroidery craftsmanship is a heritage strength. Tonal crest embroidery (matching thread on matching fabric) bridges the gap between Indian craft tradition and global quiet-luxury aesthetics. Woven labels at the hem or side seam add a premium touch at minimal cost. For the festive-layering occasion (polo under blazer for Diwali, winter weddings), subtle metallic thread in collar tipping or crest embroidery elevates without overstating. Contrast collar tipping in the Indian tricolor palette (saffron/white/green) or in festive gold works for Republic Day and Diwali capsules. This is a low-cost detail that signals occasion-awareness without requiring a full festive redesign.

RETAIL TRADE

6.4 Cuff & Hem

Ribbed cuffs on short-sleeve polos are standard, but width and tension matter: narrower, tighter ribs (1x1 rib, 2cm width) read modern, while wider, looser ribs (2x2 rib, 3-4cm) read heritage/sporty. Hem options split by silhouette: the

classic curved "tennis tail" hem (slightly longer at back) remains the default, while straight hems are emerging for the relaxed-fit, untucked look. Side vents at the hem add movement ease and a subtle design detail. For long-sleeve AW polos, ribbed cuffs matching collar rib create a unified design language.

RETAIL

Sleeve length calibration for India: standard Indian polo sleeves run 1-2cm shorter than US/UK pattern blocks. For the AW long-sleeve polo, Indian grading should target wrist-bone length (not over-hand), with ribbed cuffs that hold shape through repeat washing. For short-sleeve, the mid-bicep length that dominates Myntra's bestsellers works for slim fit, while a slightly dropped shoulder seam accommodates the contemporary-relaxed fit without looking oversized.

6.5 Closure

Three closure formats serve three consumer mindsets. The traditional two-button placket (mother-of-pearl buttons at Hermès, branded buttons at Lacoste) is the heritage anchor and the default Indian consumer expectation. The three-button placket remains standard at the value tier but reads dated against the two-button clean line that dominates premium. The zip placket (quarter-zip or half-zip, per Fendi and Zara) appeals to the modern-sporty consumer and offers functional temperature regulation for Indian winters. It converts the polo into a layering piece, with the zipper serving as both closure and design detail. The buttonless Johnny collar (Ralph Lauren, GQ-endorsed) is the cleanest, most minimal option, eliminating the placket entirely for a seamless knit surface.

RETAIL

Indian brands should stock all three: buttons for core (80% of range), zip for directional (10-15%), Johnny for premium (5-10%). Button material matters at the premium tier: branded resin buttons read mass-market, while corozo (tagua nut) or mother-of-pearl buttons justify Rs. 500+ of perceived uplift in price.

RETAIL**TRADE**

6.6 Layering Compatibility

The polo-under-blazer is AW26's signature styling move. Design teams must engineer for it: collar must sit flat under a jacket lapel (no popping), shoulder seams must align cleanly, body length must be long enough to stay tucked but short enough for untucked wear. Fabric weight matters, a 150 GSM jersey disappears under a blazer (good for layering), while a 220 GSM pique creates bulk (bad for layering). The interlock knit at 180 GSM hits the sweet spot for layering versatility.

RUNWAY**RETAIL**

Global trends are useful only when they survive contact with Indian consumers, Indian prices, and Indian weather. Section 7 translates runway to reality.

SECTION 07

India Market & Translation

Not every Milan knit polo belongs on a Myntra listing. Zegna's cashmere-silk at \$800 is a design reference, not a price reference. This section translates runway signals into Indian commercial reality and maps the market opportunity. A Cucinelli cashmere polo translates to a cotton-merino blend. A Loewe bouclé experiment translates to a waffle-knit texture. A Gucci dropped-shoulder oversized fit does not translate to India's slim-fit market at all. The India menswear market is projected to grow from \$21.9B (2025) to \$42.4B by 2034. The consumer is ready for elevation: Myntra bestsellers carry 4.2-4.6 star ratings with 20,000-41,000+ reviews, confirming this is a high-repeat-purchase, brand-loyal category. The supply side has not caught up.

VALUE (Rs 799-1,499)

Cotton pique, slim fit, solid colors, branded buttons. Volume driver. Myntra, Ajo, Amazon India. Post-discount Rs 399-999.

RETAIL**MID (Rs 1,500-2,999)**

Knit construction, alternative collars, warm earth tones, contrast tipping. Cotton-merino blend. D2C brands, Nykaa Fashion.

RETAIL**TRADE****PREMIUM (Rs 3,000+)**

Merino-blend knit, long-sleeve, cable/textured surface, tonal embroidery. Premium D2C, multi-brand retail.

RUNWAY**RETAIL**



The defining tones of AW26, camel and burgundy. Both translate directly for Indian design teams.

What Translates Directly

Knit polo elevation

Fine-gauge merino and textured knits replace pique for smart-casual. Direct translation to cotton-merino blends at Rs 1,500-2,500.

Source: Zegna, Cucinelli, Loro Piana, Hermes AW25

RUNWAY

RETAIL

Contrast tipping and heritage details

Twin tipping, crests, and rugby stripes are proven sellers with strong Indian cultural resonance for prep aspirational aesthetic.

Source: Fred Perry M3600, Cucinelli, Dolce & Gabbana AW25

RETAIL

SOCIAL

Warm earth palette

Camel, burgundy, and forest green align with Indian festive-season color appetite. Pantone Mocha Mousse validates the warm-brown family.

Source: Zegna, Loro Piana, Hermes AW25; Pantone COTY

RUNWAY

FORECAST

Long-sleeve layering

AW hero globally, low India bestseller penetration. Merino or interlock long-sleeve for Delhi/North winters from October through February.

Source: Hermes, Cucinelli, Loro Piana, Zegna AW25

RUNWAY

What Needs Adaptation

Oversized fit

India is firmly slim-fit. Introduce "measured relaxation," a slightly roomier chest and shortened sleeve, not boxy streetwear oversized.

Source: Gucci AW25, Loewe AW25, Lacoste AW25

RUNWAY

Cashmere / luxury fabrics

Too expensive and wrong climate for most of India. Adapt to cotton-merino blends (70/30) and cotton-silk that deliver the knit hand-feel at Indian price points.

Source: Zegna, Cucinelli, Loro Piana AW25

RUNWAY

Zip polo hybrid

Not yet tested in Indian market. Commercial at Hugo Boss and COS globally. Start with half-zip in performance capsule, test at Rs 1,800-3,000.

Source: Fendi AW25, Prada AW25

RUNWAY

RETAIL

Cable knit weight

Full cable knit too heavy for most of India. Adapt to lightweight cotton cable in Northern India AW collection. D2C capsule at Rs 2,500-4,000.

Source: Ralph Lauren AW25 cable-knit polo sweaters

RUNWAY

What Doesn't Transfer

Boucle / heavy textures for India summer

Climate inappropriate for most of India. Boucle and heavy knit polo treatments are Northern-winter-only at best. Skip for core range.

RUNWAY

Full monogram / logo coverage

Fendi FF-monogram jacquard is a runway statement. Indian quiet-luxury consumer rejects visible branding. Use tonal texture instead.

RUNWAY

Runway-level pricing

Zegna cashmere-silk at \$800, Hermes at \$1,200+. These are design references, not price references. Indian translation must hit Rs 1,500-5,000.

RUNWAY

7.1 Indian Occasion Calendar

India's AW fashion calendar compresses differently than the West. October through February is the peak selling window, driven by Navratri, Dussehra, Diwali (October-November), the wedding season (November-February), Christmas and New Year (December-January), and Republic Day (January). For polo design teams, this means: festive-ready colors (burgundy, deep green, gold-accent tipping) for the October-December drop, layering-friendly long-sleeves and heavier knits for the December-February drop, and transitional cotton-blend knits for the September "new season" launch. The monsoon lull (July-September) is production time, not selling time.

TRADE

RETAIL

The polo-under-blazer layering play is AW's strongest styling signal for Indian occasions. Eight to ten AW25 runway collections showed the polo layered under unstructured sport coats. For Indian men attending winter weddings, Diwali dinners, and corporate events, this combination replaces the shirt-and-tie default with something more relaxed but equally polished. A merino knit polo in burgundy or forest green under a navy blazer is the Indian man's AW26 uniform.

RUNWAY

TRADE

7.2 Consumer Insight

The Indian polo consumer is not one person. Metro Tier 1 men (Mumbai, Delhi, Bangalore) are brand-literate, exposed to global fashion via Instagram and GQ India, and willing to pay Rs. 2,000-5,000 for the right polo. They respond to the knit polo, the Johnny collar, the tonal embroidery. Tier 2 and online shoppers (Pune, Jaipur, Lucknow, Kochi) prioritize value, familiar branding (U.S. Polo Assn., Allen Solly), and safe colors (navy, black, white). Premium D2C buyers sit in between: design-conscious, responsive to storytelling ("merino-blend knit, Indian-milled"), and resistant to visible logos.

TRADE

SOCIAL

The social signal is clear and measurable. Gen Z has reframed "preppy" as "Old Money," making the polo shirt aspirational rather than dad-coded. The hashtag #OldMoneyAesthetic has accumulated 8.6 billion TikTok views. On Instagram, #OldMoney and #OldMoneyAesthetic together exceed 1.3 million posts. Indian YouTube creators are producing polo styling content with WhatsApp commerce links, a grassroots purchase funnel that bypasses traditional retail entirely. Pinterest saves for "knitted polo shirt outfits for men" and "Old Money look" polo styling are trending upward. The consumer under 30 wants the polo, they just want it in knit, in camel, and without a visible logo.

SOCIAL

SEARCH

India: Solid vs Pattern

75% Solid / 25% Print

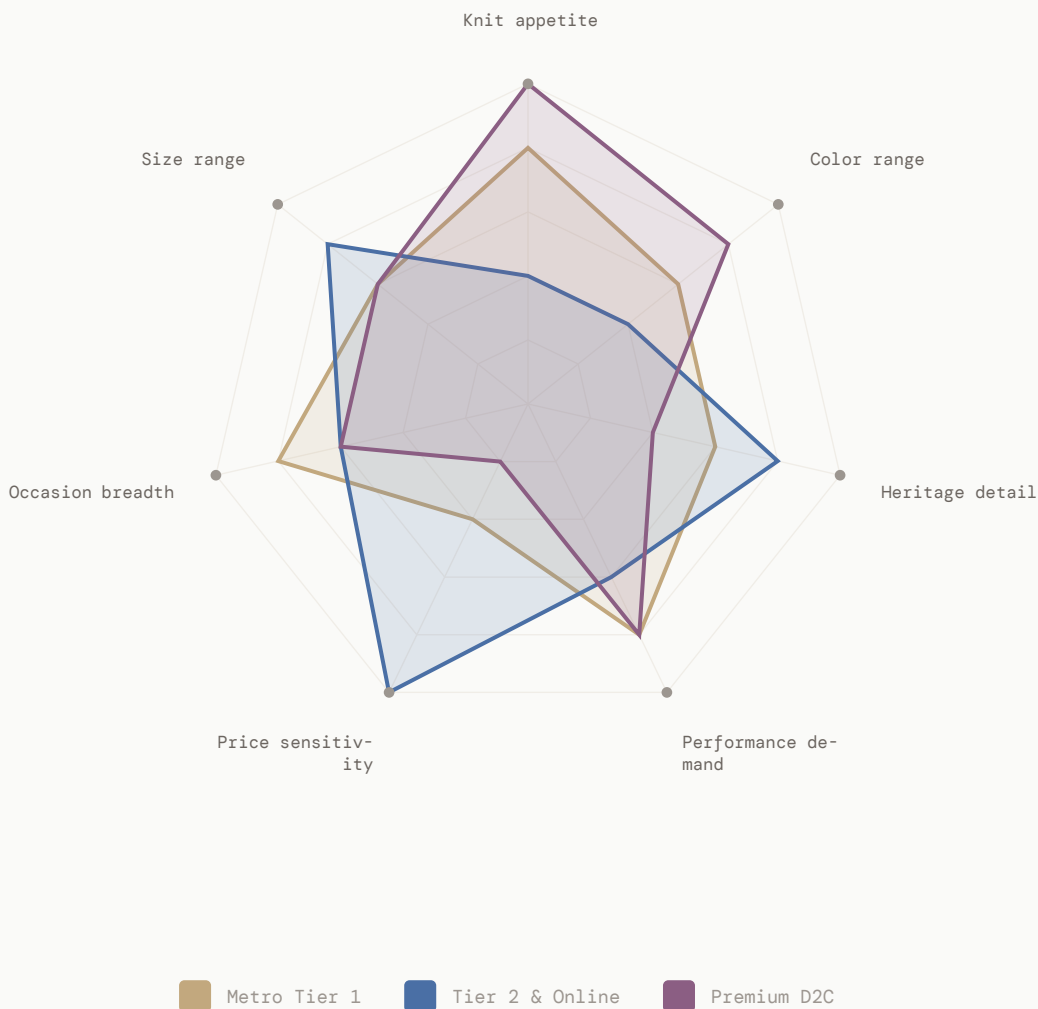


India: Festive Season Shift

60% Solid / 40% Print



Sub-Market Comparison



Runway Reference Cards



Zegna AW25 RUNWAY

Fine-gauge cashmere-silk knit polo, "one-gesture dressing"

Attributes: Knit polo, long-sleeve, camel/slate/navy, soft-shouldered, dress-shirt alternative

India play: India: Direct translation. Fine-gauge cotton-cashmere knit at Rs 2,000-3,500. Camel and navy lead. Position as office-to-evening hero.



Brunello Cucinelli AW25 RUNWAY

Cashmere knit polo with contrast tipping under unlined blazer

Attributes: Knit polo, oatmeal/taupe/burgundy, relaxed collar, contrast tipping, layering

India play: India: The layering formula. Cotton-merino blend knit polo under unstructured blazer. Tipping detail at Rs 1,500-2,500. Premium D2C positioning.



Loro Piana AW25 RUNWAY

Ultra-fine merino "Sartorial Sport" long-sleeve polo in baby camel hair

Attributes: Long-sleeve, merino/camel hair, vicuna tan/forest green/midnight blue, refined

India play: India: Long-sleeve merino polo for AW is the hero gap. Adapt to cotton-merino at Rs 2,000-4,000. Lead in camel tones for D2C brands.



Fendi AW25 RUNWAY

FF-monogram jacquard knit polo with zip closure

Attributes: Zip-polo hybrid, jacquard, tobacco/cement/butter yellow, logo treatment

India play: India: Test zip-polo format at Rs 1,800-3,000. Jacquard pattern for festive capsule drops. Avoid heavy branding, use tonal texture instead.



Hermès AW25 RUNWAY

Fine-gauge cashmere polo with mother-of-pearl buttons, long-sleeve

Attributes: Long-sleeve, cashmere, orange/hunter green/navy/brick red, mother-of-pearl buttons

India play: India: Button detail as premium signifier. Mother-of-pearl or horn buttons on knit polos at Rs 2,500+. Hunter green and brick red for AW seasonal color.


Loewe AW25 RUNWAY

Experimental crochet and bouclé polo treatments

Attributes: Bouclé, crochet, waffle-knit, sage/washed clay/off-white, textured surface

India play: India: Fashion-forward capsule only. Bouclé and crochet polo for D2C limited drops at Rs 3,500+. Content-driven storytelling piece.


Ralph Lauren AW25 RUNWAY

Heritage piqué in autumnal shades, cable-knit polo sweaters, rugby polos

Attributes: Classic fit, cable-knit, rugby stripe, hunter green/burgundy/cream/navy

India play: India: Heritage prep capsule anchor. Rugby stripe polo at Rs 1,500-2,500. Cable-knit polo sweater for metro AW layering at Rs 2,500-4,000.


Bottega Veneta AW25 RUNWAY

Intrecciato-textured knit polo collar, muted palette

Attributes: Textured knit, stone/faded olive/deep plum, intrecciato reference, understated

India play: India: Texture-as-pattern play. Ottoman or waffle knit polo in stone/olive for D2C. Texture replaces print for the quiet-luxury consumer.

SECTION 08

Competitive Benchmarking

8.1 Global Retailer Signals

Zara India

RETAIL

Full pivot to knit polos (ribbed, textured, linen-blend at Rs 3,990-6,390). Zero classic pique. Signals the commercial tipping point for knit.

Ralph Lauren

RETAIL

Heritage pique anchor (\$118 mesh polo). AW25 cable-knit polo sweaters, rugby polos, Johnny collar at \$150. Defines the prep-revival tier.

Lacoste

RETAIL

L1212 classic pique (Rs 5,000-10,000+ in India). 20+ colorways. Twin tipping heritage. The benchmark for polo as identity piece.

COS

RETAIL

Merino/silk knit polos at \$80-150+. Minimal aesthetic, band collar variants. Targets the quiet-luxury consumer.

8.2 Indian Retail Landscape

Myntra

RETAIL

Approximately 82,000 polo listings. Dominated by ABFRL (Louis Philippe 40% of top 30). Bestseller sweet spot Rs 700-1,100 post-discount. 75% solid pique, slim fit.

Ajio (Reliance)

RETAIL

Growing marketplace. Mix of ABFRL brands and international options. Polo category expanding with colour-block and rugby variants.

U.S. Polo Assn.

RETAIL

Rs 2,000 crore brand with 450 stores. India is its largest global market. Classic pique positioning. Defines the mid-tier anchor.

ABFRL (LP / Allen Solly / VH)

RETAIL

Louis Philippe, Allen Solly, Van Heusen collectively control mid-tier. Cotton pique in safe colors. Minimal knit innovation.

8.3 Retailer Evidence Grid

The India polo market clusters into three competitive tiers. The value tier (Rs. 500-1,500) is dominated by ABFRL brands (Louis Philippe, Allen Solly, Van Heusen) and mass-market players (Campus Sutra, Moda Rapido) competing on discount percentage and "Pure Cotton" labeling. The mid-tier (Rs. 1,500-3,500) is almost entirely held by U.S. Polo Assn., with

Nautica and WROGN as distant challengers. The premium tier (Rs. 3,500+) belongs to Lacoste, Ralph Lauren, and Zara, with COS entering at the upper end. The competitive opportunity sits in the mid-tier with elevated construction: few Indian brands offer knit-construction, textured-surface, or alternative-collar polos at Rs. 1,500-2,500, and none have scaled to bestseller status.

RETAIL

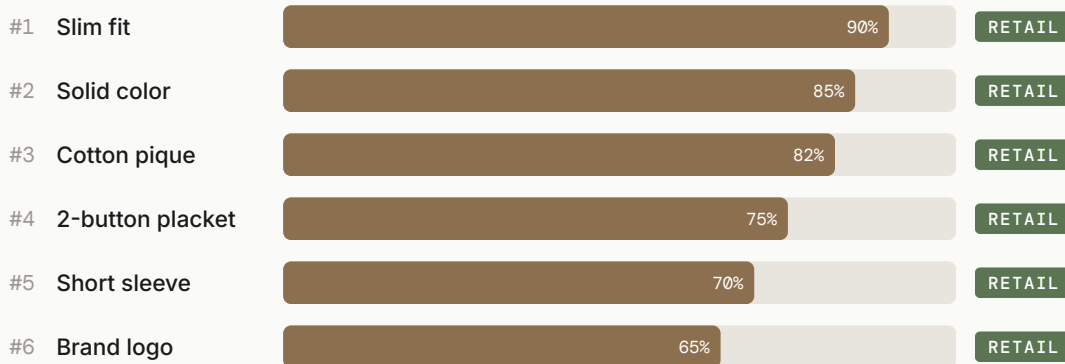
TREND	ZARA IN	H&M IN	UNIQLO	MYNTRA	AJIO	R. LAUREN	LACOSTE	FRED P.	COS	USPOLO
Knit polo	★	●	●	○	○	●	●	○	★	○
Long-sleeve	●	○	●	○	○	●	●	●	●	○
Classic piqué	●	●	●	★	★	★	★	★	●	★
Tipped polo	●	●	○	●	●	●	●	★	○	●
Zip polo	●	○	○	○	○	●	○	○	●	○
Rugby stripe	○	●	○	●	●	★	●	●	○	●
Performance	○	●	★	●	●	●	●	○	○	●
Colour block	●	●	●	●	●	●	●	●	○	●
Oversized	●	●	○	○	○	○	●	○	●	○
Johnny collar	○	○	○	○	○	●	○	○	○	○

○ In assortment ○ Not observed ★ Bestseller / Featured

8.4 Bestseller Attribute Frequency

Five gaps define the India polo opportunity. Knit/textured polo at mid-tier pricing (Zara at Rs. 4,000+, COS at Rs. 7,000+, limited Indian brand presence at Rs. 1,500-2,500). Long-sleeve polo (available at select brands like Rare Rabbit but absent from Myntra's top 30 bestsellers, indicating low commercial traction). Johnny/buttonless collar (GQ's 2026 polo trend, stocked by a few premium D2C brands but underrepresented in mass-market retail). Performance-casual crossover (limited Indian competition in moisture-wicking stretch polo space). Relaxed/contemporary fit (global trend, not yet adopted in India's slim-fit-dominant market).

RETAIL



8.5 White-Space Opportunities

-- Textured knit polo at Rs 1,500-2,500, limited Indian competition at scale in this format and price point

- Long-sleeve polo for AW, absent from Myntra's top 30 bestsellers despite strong global runway signal
- Johnny / buttonless collar, GQ's 2026 polo trend, rarely seen in Indian mass market
- Performance-casual crossover at mid-tier, limited Indian competition in moisture-wicking stretch polo space
- Oversized / relaxed fit for younger demographic, global trend not yet adopted in India's slim-fit-dominant market

SECTION 09

Actionable Design Directions

Five capsule concepts built from evidence, priced for India, and ready for development briefing. Each capsule targets a specific occasion-consumer-price intersection identified in this report. Every capsule concept is grounded in at least two evidence categories (runway, retail, social, trade, forecast).

CAPSULE 01

The Knit Polo Edit

Fine-gauge merino and textured knits, the polo shirt elevated beyond piqué

The commercial heart of AW26. Fine-gauge knit polos in merino, cotton-cashmere, and ribbed textures that replace the polo's workwear associations with quiet sophistication. Zegna called it "one-gesture dressing," Cucinelli built half a collection around it, and Zara's full pivot to knit confirms the commercial tipping point. India has almost no options at Rs 1,500-2,500, and whoever fills that gap first owns the category.

PALETTE



Camel

Burgundy

Oatmeal

Navy

Charcoal

Black

SILHOUETTES

Fine-gauge crew-collar polo, ribbed knit polo, textured knit polo, long-sleeve knit polo

FABRICS

Merino wool, cotton-cashmere blend, ribbed cotton, waffle knit, ottoman knit

KEY DETAILS

Relaxed collar, self-fabric tipping, mother-of-pearl buttons, rib cuffs, split hem

OCCASIONS

Smart-casual, office under blazer, evening, weekend elevated

METRO ●●● TIER 2 ●●● D2C ●●●

EVIDENCE BASE

- **Runway:** Zegna AW25 (cashmere-silk knit, "one-gesture dressing"), Cucinelli AW25 (cashmere with contrast tipping), Loro Piana AW25 (ultra-fine merino, "Sartorial Sport"), Hermès AW25 (fine-gauge cashmere, mother-of-pearl buttons)
- **Retail:** Zara full pivot to knit polos (Rs 3,990-6,390). COS merino/silk knit polos (\$80-150+). H&M textured-knit polos (Rs 799-1,999).
- **Trade:** GQ, Valet, Esquire, Fashionista, Vogue all ran dedicated knit polo features (2025-2026). Valet: "We've arrived at knit polo season."
- **India Fit:** Very few Indian brands offer textured knit polos at Rs 1,500-2,500 sweet spot. First mover advantage is real. Cotton-blend knits handle Indian shoulder-season temperatures.



Capsule 01: The Knit Polo Edit, Fine-gauge merino and textured knits in camel, burgundy, oatmeal, navy

CAPSULE 02

Heritage Prep

Tipped piqué, rugby stripes, and crests, prep codes reframed for Gen Z

The Old Money aesthetic has made heritage prep aspirational again. This capsule leans into the signals: Fred Perry's twin-tipped M3600, Ralph Lauren's cable-knit polo sweaters, and the rugby stripe's return. The twist is color. Swap expected navy/white for forest green, burgundy, and cream combinations that feel earned rather than inherited.

PALETTE



Forest Green

Navy

Cream

Burgundy

White

SILHOUETTES

Classic fit piqué, rugby polo, cable-knit polo sweater, contrast-collar polo

FABRICS

BCI cotton piqué, cable-knit cotton, brushed cotton jersey, cotton interlock

KEY DETAILS

Contrast twin tipping, embroidered crest, woven tape placket, ribbed collar and cuffs, rugby-stripe body

OCCASIONS

Weekend, club, casual Friday, social gatherings

METRO ●●● TIER 2 ●●● D2C ●●●●

EVIDENCE BASE

- **Social:** #OldMoneyAesthetic: 8.6B TikTok views. #OldMoney: ~1M Instagram posts. Gen Z reframed "preppy" as aspirational through polo-centric styling.
- **Runway:** Ralph Lauren AW25 (heritage piqué, cable-knit polo sweaters, rugby polos). Dolce & Gabbana AW25 (bold ribbed collars, logo embroidery). Gucci AW25 (web-stripe polo collars and cuffs).
- **Retail:** Fred Perry M3600 Twin Tipped (GBP 75, 20+ colorways). Lacoste L1212 classic (Rs 5,000-10,000+). Ralph Lauren mesh polo (\$118).
- **India Fit:** ABFRL brands (Louis Philippe, Allen Solly) already own piqué. Differentiate on heritage details like twin tipping and rugby stripes at Rs 1,200-2,000.



Capsule 02: Heritage Prep, Tipped pique, rugby stripes, and crests in forest green, navy, cream, burgundy

CAPSULE 03

Office Smart-Casual

Interlock, concealed placket, and merino long-sleeves, the polo as dress-shirt replacement

The post-pandemic office has settled: polos are in, ties are out. Multiple workplace guides endorse polos for business casual, McKinsey's "State of Fashion 2026" confirms casualization is permanent, and Amazon India already markets polos for "Office, Party & Everyday." The commercial play is a refined polo that reads professional without reading corporate. Interlock and merino fabrics, concealed plackets, and restrained colors do the work.

PALETTE



Charcoal

Slate

Dusty Blue

White

Navy

SILHOUETTES

Slim-fit interlock polo, long-sleeve merino polo, concealed-placket polo, mock-neck polo

FABRICS

Cotton interlock, merino wool, Supima cotton, piqué-jersey blend

KEY DETAILS

Concealed/hidden placket, three-button closure, structured collar that stays up, French-cuff option on LS, self-fabric collar bones

OCCASIONS

Office, client meetings, networking events, business travel

METRO ●●●● TIER 2 ●●●● D2C ●●●●

EVIDENCE BASE

- **Trade:** McKinsey "State of Fashion 2026": continued casualization. Multiple workplace guides (Apollo Technical, FashionABC) endorse polos for business casual.
- **Runway:** Zegna AW25 ("one-gesture dressing," knit polo as dress-shirt alternative). Prada AW25 (knit polo collars under tailored outerwear).
- **Retail:** Uniqlo Supima Cotton polo (Rs 1,490-1,990) already positioned for office. Louis Philippe dominates India's smart-casual polo tier.
- **India Fit:** India menswear market \$21.9B growing to \$42.4B by 2034, with office/smart-casual as the largest wearing occasion. Rs 1,500-3,000 price sweet spot.
- **Social:** Amazon India markets polos as "Office, Party & Everyday." Indian YouTube creators produce polo-to-work styling content.



Capsule 03: Office Smart-Casual, Interlock and merino long-sleeves in charcoal, slate, dusty blue, navy

CAPSULE 04

Performance Hybrid

Tech fabrics, zip closures, and stretch, the polo for the golf-to-office generation

Golf apparel is a \$8.5B market growing to \$12.3B, and polo/golf shirts hold 31% of revenue. Uniqlo's DRY-EX and AIRism platforms have proven that consumers want technical performance in familiar shapes. For India, this is doubly relevant: heat management and sweat-wicking are functional necessities, not premium luxuries. Zip-polo hybrids from Fendi and Prada runway signal that performance and fashion are converging.

PALETTE



Slate

Navy

Forest Green

Tobacco

Black

SILHOUETTES

Half-zip polo, quarter-zip performance polo, raglan-sleeve polo, slim-fit stretch polo

KEY DETAILS

Half-zip closure, mesh ventilation panels, raglan seaming, reflective logo hits, bonded hems, quick-dry finish

FABRICS

DRY-EX moisture-wicking polyester, stretch cotton-elastane, recycled polyester piqué, technical jersey

OCCASIONS

Golf, active weekends, travel, hybrid office-to-gym

METRO ●●● TIER 2 ●●● D2C ●●●

EVIDENCE BASE

- **Trade:** Golf apparel market: \$8.5B (2025) to \$12.3B (2032). Polo/golf shirts hold 31% revenue share. Source: Mordor Intelligence.
- **Runway:** Fendi AW25 (zip-polo hybrid). Prada AW25 (knit polo collar under outerwear, performance layering). Hugo Boss commercial zip-polos.
- **Retail:** Uniqlo DRY-EX and AIRism platforms (Rs 1,490-1,990). Puma and Skechers performance polos in Myntra best-sellers.
- **India Fit:** India's climate makes moisture-wicking a functional necessity. Limited Indian competition in performance-casual polo space. Rs 1,200-2,500 opportunity.
- **Search:** "Moisture-wicking polos" search interest grew from 31.2 to 40.9 (Feb-May 2025). Performance polo queries trending on Google India.



Capsule 04: Performance Hybrid, Tech fabrics and zip closures in slate, navy, forest green, tobacco

CAPSULE 05

The AW Statement

Bouclé, jacquard, cable, and oversized, the polo as fashion piece

This is the creative capsule, designed for brands with a fashion-forward customer. Loewe showed crochet and bouclé polo treatments, Bottega Veneta applied intrecciato textures to knit collars, Fendi ran FF-monogram jacquard. These are not volume plays. They are Instagram-first, capsule-drop pieces that generate editorial coverage and brand heat. Price them at Rs 3,000+ and limit quantities.

PALETTE



Deep Plum

Terracotta

Sage

Tobacco

Oatmeal

SILHOUETTES

Oversized dropped-shoulder polo, bouclé polo sweater, cable-knit polo, jacquard polo

FABRICS

Bouclé wool-blend, cable-knit cotton, jacquard-knit, crochet cotton, waffle knit

KEY DETAILS

Textured surface pattern, oversized collar, dropped shoulder seam, extended placket, novelty buttons, all-over jacquard motif

OCCASIONS

Evening out, fashion-forward casual, layering piece, content creation

METRO ●●●● TIER 2 ●●●● D2C ●●●●

EVIDENCE BASE

- **Runway:** Loewe AW25 (crochet/bouclé/waffle-knit polo treatments). Bottega Veneta AW25 (intrecciato-textured knit polo collars). Fendi AW25 (FF-monogram jacquard knit polos).
- **Runway:** Gucci AW25 (oversized with dropped shoulders). Lacoste AW25 (oversized heritage piqué, tonal color-blocking).
- **Social:** #OldMoneyAesthetic content drives demand for "investment" pieces. Fashion Instagram favors textured, editorial-ready knitwear.
- **India Fit:** Limited to metro D2C brands with fashion-forward customers. Rs 3,000+ positioning. Capsule drops, not core range. Festive-season layering opportunity.



Capsule 05: The AW Statement, Boucle, jacquard, cable, and oversized in deep plum, terracotta, sage, tobacco

9.1 Risk Classification

Not everything in this report carries equal confidence. Safe bets (knit polo introduction, camel/burgundy color expansion, contrast tipping details) are validated across 3+ evidence categories. Calculated risks (Johnny collar, long-sleeve polo, relaxed fit) have strong global signal with early retail uptake but no Indian bestseller validation. Test-and-react items (zip-polo hybrid, cable knit, plum colorway) are single-signal or runway-only, worth sampling for consumer response before committing to depth.

SAFE BET

Knit polo in merino/cotton blend

RUNWAY (10+ AW25 designers) + RETAIL (Zara full pivot, COS, H&M) + TRADE (GQ, Valet, Esquire, Fashionista features) + SOCIAL (#OldMoney 8.6B views)

Contrast-tipped pique polo

RETAIL (Fred Perry M3600 heritage, 20+ colorways) + RUNWAY (Cucinelli, Dolce & Gabbana AW25) + SOCIAL (prep revival #OldMoneyAesthetic)

Long-sleeve interlock/merino polo

RUNWAY (Hermes, Cucinelli, Loro Piana, Zegna AW25) + RETAIL (limited India bestseller presence) + TRADE (AW hero piece globally)

CALCULATED RISK

Zip / half-zip polo

RUNWAY (Fendi, Prada AW25) + RETAIL (Hugo Boss, COS commercial). Not yet tested in Indian market. Performance-casual crossover potential.

Johnny collar / buttonless polo

RETAIL (Ralph Lauren \$150 launch) + TRADE (GQ dedicated feature Apr 2026). Clean aesthetic, absent from India mass market.

Rugby polo with horizontal banding

RUNWAY (Ralph Lauren AW25) + SOCIAL (#OldMoneyAesthetic prep revival). Heritage format, limited India retail stocking.

TEST & REACT

Oversized / dropped-shoulder polo

RUNWAY only (Gucci, Loewe AW25). Zero India bestsellers. India market firmly slim-fit. Metro D2C test only.

Boucle / heavy texture polo

RUNWAY (Loewe AW25 boucle/crochet treatments). Climate inappropriate for most of India. D2C capsule drop at Rs 3,500+.

Full argyle / all-over jacquard

RUNWAY (Fendi FF-monogram jacquard AW25). Bold pattern, niche appeal. Test as festive limited edition.

9.2 Price Architecture

The India polo market operates on three price tiers. Value (Rs. 500-1,499, post-discount Rs. 399-999): cotton pique, slim fit, solid colors. Mid (Rs. 1,500-3,499, post-discount Rs. 999-2,499): knit construction, alternative collars, warm earth tones, contrast tipping. Premium (Rs. 3,500+, post-discount Rs. 2,500+): merino-blend knit, long-sleeve, cable/textured surface, tonal embroidery. The mid-tier is where this report's recommendations have the highest commercial impact and lowest competitive saturation.

Rs 500-1,499 (VALUE)

Cotton pique, slim fit, solid colors, branded resin buttons. 1-2 colorways max. Machine wash essential. Post-discount Rs 399-999.

Reference: Myntra: Louis Philippe, Allen Solly, Campus Sutra, solid pique polos

Rs 1,500-3,499 (MID)

Knit construction, alternative collars (Johnny, contrast-tipped), warm earth tones, cotton-merino blend. 3-4 colorways. Contrast tipping detail.

Reference: Underserved segment: few Indian brands offer knit polos at scale here. First-mover opportunity.

Rs 3,500+ (PREMIUM)

Merino-blend knit, long-sleeve, cable/textured surface, tonal crest embroidery, mother-of-pearl/corozo buttons. Size-inclusive.

Reference: Zara India knit polos (Rs 3,990-6,390), COS merino (\$80-150+), Lacoste (Rs 5,000+)

9.6 Must-Stock Matrix

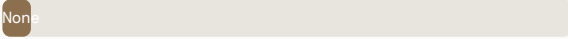

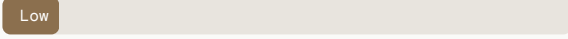

Which silhouette-fabric combinations are validated by multiple evidence sources. Star = must-stock (3+ evidence categories). Dot = recommended. Circle = low priority for AW26.

MULTI

	PIQUE	MERINO	INTERLOCK	JERSEY	TECH BLEND
Classic SS	★	○	●	●	●
Knit Polo	○	★	★	●	○
Long-Sleeve	●	★	★	○	○
Zip Polo	○	●	●	○	★
Rugby	★	○	○	●	○
Johnny	○	★	●	○	○

★ = Must-stock (3+ evidence categories validate this combination). ● = Recommended. ○ = Low priority for AW26.
 Methodology: Combinations appearing across runway, retail, and trade/social data rated as must-stock. Classic pique in SS (short-sleeve) is the volume anchor; knit and long-sleeve in merino/interlock are the elevation play.

9.7 Embellishment Intensity by Occasion

Office		Zero embellishment. Clean collar, tonal buttons.
Weekend		Contrast tipping, small tonal crest.
Golf/Active		Logo hit, reflective detail, contrast zip pull.
Festive Layer		Metallic tipping, embroidered crest, contrast buttons.

Value (Rs 500-1,499): none to minimal. Mid (Rs 1,500-3,499): tipping and tonal crest. Premium (Rs 3,500+): full embroidery and metallic accents.

9.8 Pattern Design Brief

Capsule 02: Heritage Prep

Pattern: Rugby stripe
 Scale: 30-50mm stripe width
 Method: Yarn-dyed knit (auto-stripe on circular knit)
 Colors: Camel + navy; burgundy + cream; forest green + cream
 Notes: Wide horizontal banding. Must read "heritage" not "nautical." Long-sleeve only.

Capsule 02: Heritage Prep

Pattern: Contrast collar/cuff tipping
 Scale: 3-5mm stripe width
 Method: Knitted-in contrast rib (1x1 rib construction)
 Colors: Navy + cream + burgundy; forest green + cream + navy; all tonal (camel + camel)
 Notes: Fred Perry M3600 is the reference standard. Twin tipping = two thin contrast stripes.

Capsule 05: AW Statement

Pattern: Tonal jacquard
 Scale: 15-30mm repeat motif
 Method: Jacquard knit (2-color intarsia)
 Colors: Tobacco + tobacco (tonal); deep plum + deep plum (tonal); sage + oatmeal
 Notes: Tonal-on-tonal is the key. Pattern should read "texture" not "print." Geometric micro-motif, not figurative.

Capsule O5: AW Statement

Pattern: Cable knit surface
Scale: Cable width 15-20mm
Method: Cable needle or electronic knit
Colors: Oatmeal, cream, sage (light tones show cable shadow best)
Notes: *Classic rope cable. Must photograph well for e-commerce. Light colors only, dark obscures the pattern.*

9.9 Size & Fit Recommendations

India's polo market defaults to slim fit, and any range plan must respect that. The shift is incremental: a slightly roomier chest (1-2cm ease) and a marginally dropped shoulder seam that reads "contemporary" without reading "oversized." For long-sleeve polos targeting the northern market, standard Indian arm length grading applies (wrist-bone, not over-hand). Size-inclusive ranges (up to 3XL) are a Myntra expectation, with the platform's top-rated polos attracting 20,000-41,000+ reviews across a broad size spread.

RETAIL

TRADE

SIZE RANGE BY CHANNEL

Metro Retail (Zara IN, H&M IN, Uniqlo): S-XXL (5 sizes)

Standard global grading with India fit adjustment (+1cm chest ease vs. EU)

Online Marketplace (Myntra, Ajio, Amazon): XS-3XL (7 sizes)

Extended range required; plus-size is the fastest-growing segment on Myntra

Premium D2C: S-XL (4 sizes)

Quality over range; detailed size guide with body measurements and fit photos

SECTION 10

Appendix

Methodology

This report was compiled through three tiers of research conducted in April 2026: (1) runway and forecast data from 12 AW25 designer collections, WGSN/Coloro/Pantone color forecasts, and trade press coverage; (2) retail and commercial data from Myntra (approximately 82,000 listings scraped), AJIO, Zara India, Uniqlo India, COS, Fred Perry, and Ralph Lauren, plus editorial coverage from GQ, Vogue, Esquire, Valet, and Fashionista; (3) consumer and cultural signals from TikTok (#OldMoneyAesthetic, 8.6B views), Instagram, Pinterest, Google Trends, and YouTube creator content.

All trend calls carry at least one evidence tag (RUNWAY, RETAIL, SEARCH, SOCIAL, TRADE, FORECAST, MULTI). Claims with single-source evidence are flagged as directional. Images are AI-generated for illustrative purposes and do not represent actual products.

Runway collections cited are AW25 shows (shown early 2025, for AW25 retail delivery), which serve as the closest available runway reference for AW26 design direction. Runway references are based on published show reviews and trade press photography; look-level details should be verified against official lookbook imagery before production briefing. Retail data was scraped live in April 2026. Social media metrics reflect cumulative counts as of April 2026. Market size figures sourced from IMARC Group, Mordor Intelligence, Global Growth Insights, and Valuates Reports.

Evidence Tag Legend

RUNWAY	Seen on AW25 runways, designer and season cited
RETAIL	Currently in assortment or bestseller at named retailers
SEARCH	Google Trends, Pinterest, or search volume signal with directional data
SOCIAL	TikTok, Instagram virality, influencer adoption with view/engagement counts
TRADE	Cited in GQ, Vogue, Esquire, Fashionista, Valet, or equivalent trade press
FORECAST	Forward projection from WGSN, Coloro, Pantone, or Heuritech
MULTI	Supported by 3+ evidence types, strongest signal confidence

Key Sources

Runway & Forecast

- * Vogue Runway, 12 individual AW25 RTW designer reviews (vogue.com/fashion-shows)
- * GQ, "The Best Polo Shirts for Men in 2026" (gq.com)
- * Esquire, "10 Best Knit Polos" (esquire.com)
- * Fashionista, "Knit polos ruled recent runways" (fashionista.com)
- * Valet Magazine, "Knit Polo Season" editorial (valetmag.com)
- * WGSN x Coloro, AW25/26 color forecast, earth tones and deep blues
- * Pantone, Color of the Year 2025: Mocha Mousse 17-1230 (pantone.com)

Retail & Commercial

- * Myntra, approximately 82,000 polo listings scraped, top 30 bestsellers analyzed (myntra.com)
- * Zara India, full knit polo pivot, Rs 3,990-6,390 range (zara.com/in)
- * COS, merino/silk knit polos, \$80-150+ (cos.com)

- * Fred Perry, M3600 Twin Tipped polo, GBP 75, 20+ colorways (fredperry.com)
- * Ralph Lauren, mesh polo \$118, Johnny Collar \$150 (ralphlauren.com)
- * Uniqlo India, DRY-EX and AIRism platforms, Rs 1,490-1,990 (uniqlo.com/in)
- * H&M India, textured-knit polos, Rs 799-1,999 (hm.com/in)

Trade Press & Consumer Data

- * McKinsey, "State of Fashion 2026" (mckinsey.com)
- * Mordor Intelligence, Golf Apparel Market Report, \$8.5B to \$12.3B by 2032
- * IMARC Group, India Menswear Market, \$21.9B to \$42.4B by 2034 at 7.24% CAGR
- * TikTok, #OldMoneyAesthetic (8.6B views), #OldMoney (~1M Instagram posts)
- * Google Trends, "moisture-wicking polos" 31.2 to 40.9 (Feb-May 2025)
- * Pinterest, "knitted polo shirt outfits for men" trending saves
- * GQ, "Johnny Collar Polo" dedicated feature, April 2026 (gq.com)
- * U.S. Polo Assn., Rs 2,000 crore brand, 450 stores, India largest global market

Glossary

Pique	A textured weave/knit with a distinctive waffle-like pattern (petit pique). The standard polo shirt fabric, typically 180-220 GSM in cotton.
Interlock	A double-knit jersey with identical front and back faces. Smoother hand-feel than pique, better drape under blazers. Zara's current knit polo fabric of choice.
Jersey	A single-knit fabric (150-180 GSM) with stretch and soft hand. Lightweight option for layering and transitional weather polos.
Merino	Fine wool fiber from Merino sheep, prized for softness, temperature regulation, and odor resistance. The luxury polo knit base for AW collections.
GSM	Grams per square meter, the standard measure of fabric weight. Lower GSM = lighter; higher GSM = heavier/warmer. Polo standard: 180-220 GSM.
Johnny collar	A polo collar without a button placket, creating a seamless V-neckline. GQ's highlighted polo trend for 2026. Also called "buttonless collar."
Tipping	Contrast color stripe on the collar and/or cuff rib of a polo. Fred Perry's M3600 twin tipping is the most recognized example.
Placket	The strip of fabric on the front of a polo where buttons or zippers are attached. Concealed, standard (2-button), or zip variants.
D2C	Direct-to-Consumer, brands selling through their own channels (website, app) rather than through marketplace intermediaries.
COTY	Color of the Year, annual color forecasts issued by Pantone, WGSN x Coloro, and other trend forecasting bodies.
MOQ	Minimum Order Quantity, the smallest production run a manufacturer will accept. Relevant for test-and-react polo capsule strategies.
Athleisure	The blurring of athletic and leisure/casual clothing. In polos, this manifests as performance fabrics (DRY-EX, moisture-wicking) in classic silhouettes.

Report generated April 2026 • Powered by Fynd Create



POWERED BY FYND CREATE



Men's Polo Shirts
Autumn / Winter 2026
India Category Intelligence Report

India Market , April 2026