

IMAGES Business of Fashion™

JULY 2015 | VOL. XVI | NO. 7 | ₹100



THE EVOLUTION OF WORK WEAR IN INDIA

Allen Solly ←
Park Avenue ←
Work Wear Majors ←
Trendin ←

WINNING ONLINE
WITHOUT DISCOUNTING

INTERNATIONAL
TRADE SHOWS

InFashion
+
**SPORTSWEAR
INTERNATIONAL**
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Dear Readers

We can sense that business sentiments are up and the coming season promises to be good for fashion retail. All global consulting and rating agencies are also reporting brightening prospects and better rankings for India. India's retail market is expected to reach US \$ 1 trillion by 2020 and some agencies have also recently substantially upped this figure. The Prime Minister's ambition of bringing India within the top 50 list on the 'ease on doing business' factor may well be the broad defining philosophy that sees this through. These reports do say a lot of other nice things. One, that all fashion entrepreneurs would have enjoyed reading, is that in 10 years from now, the number of Ultra-High Net Worth Individuals in India will double (UHNWI is a person with assets of \$30 million or more i.e. ₹180+ crores). A great first step on the path would be a successful fall-winter season. The business reports from the garment trade fairs that have been, and the confirmed participation at those about to be held, are all very positive this year.

In this, the July issue of Images BoF we take a look at the wear to work segment in India. This can be broadly broken into two parts—uniform and non-uniform. The uniform part can be further broken into protective regimented and non-protective regimented. The non-uniform wear to work also can be seen as having the formal and non-formal categories. Each of the four parts are witnessing unprecedented development and the entry of international brands will substantially influence the future.

We map the wear to work category and talk to various leaders across its segments both national and international. The cover feature by Technopak presents an overview of work wear in India, its key trends and drivers, and operating formats of organisations, etc. We study the impact of the iconic Friday Dressing campaign that revolutionised Indian work wear, and the significant role played by leading brands like Park Avenue. On the fabrics side, we talk to Indian majors like Mafatlals. We also look at international uniform leaders like Dickies and Lindström who have entered India now. As a case for fashion at work, we also present our pick of the most stylish airline uniforms in the world.

Skinny jeans are now established as a key product in jeanswear. We present a feature on the future prospects of skinny jeans in the world of fashion. The issue also studies Trendin, the online shopping portal of Madura F&L, as the fashion giants look towards e-commerce. This and lots more in the issue. Hope you enjoy it.

Amitabh Taneja

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Swan Press of Lahore, B-71, Naraina Industrial Area, Phase – 2, New Delhi 110028 and published by S P Taneja from S- 21 Okhla Industrial Area Phase – 2, New Delhi. 110020 Editor : Amitabh Taneja

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COVER COURTESY: TOMMY HILFIGER

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Sooraj Bhat, COO, Allen Solly reminisces upon the journey of the brand which introduced the Friday Dressing concept and by it redefined the very wardrobe of the Indian urban working man.

BRAND TALK

64 Innovations that Work in Style
Since its inception in 1986, Park Avenue, which looks at itself as a young, fashion forward, workplace apparel-and-accessories brand, has striven towards making the work life of its consumers easy by offering winning functional innovations. Images BoF talks to Hetal Kotak, Brand Director, Park Avenue on the wear to work fashion category in India.

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WORLD WATCH

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With 239 stores in 20 countries across the globe, American Apparel is one of the few clothing companies which exports 'Made in the USA' goods globally. A truly vertically integrated company, they are manufacturers, distributors and retailers of branded fashion apparel. Images Business of Fashion takes a look at the unique success mantras of American Apparel Inc.



COVER STORY

THE WORKWEAR MARKET IN INDIA

While rapid industrial and service sector growth is increasing the size of the Indian work force, the growing awareness amongst corporates on the benefits of well-planned and organised work wear is driving its growing acceptance. Amit Gugnani (Sr. Vice President, Fashion) and Anant Jangwal (Consultant, Fashion-Textile & Apparel), Technopak present an overview of work wear in India, its key trends and drivers, and operating formats of organisations that are doing business in the work wear space.

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82 Creating the E-commerce Ethos for Madura F&L (ABFRL)

Trendin is not any run-of-the-mill fashion e-commerce portal but a platform which is the custodian of an incredible fashion heritage. Forged from the belief in offering endless style options for the customers, with added on consumer customization options, we are looking at a potential winner. Shivanandan Pare, Head-Trendin explains what gives Trendin an edge over other existing fashion e-commerce portals.



PICTURE COURTESY: DICKIES

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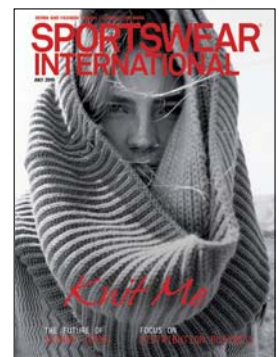


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B S Nagesh, Founder, TRRAIN pens his thoughts on the role of the frontline fashion assistant and how empowering him/her can be the game changer for fashion retail businesses.



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HOW **FRIDAY DRESSING** REVOLUTIONISED INDIAN WORK WEAR

SOORAJ BHAT, COO, ALLEN SOLLY PENS THE JOURNEY OF THE BRAND WHICH NOT ONLY INTRODUCED THE FRIDAY DRESSING CONCEPT BUT ALSO REDEFINED THE VERY PERSONALITY AS WELL AS THE WARDROBE OF THE URBAN INDIAN WORKING MAN.

 In the history of brands and communication, there are times, when a brand, its positioning and communication create magic. Allen Solly, did exactly this with its 'Friday Dressing' campaign.

The market for men's western wear in India picked up in the early nineties. The launch of Louis Philippe in 1989 was followed very quickly by that of Van Heusen. This was a market where Arrow, Zodiac, Park Avenue and a few others were the key players. The market, defined by occasion, was split broadly into formals at one side and denim on the other. Denim in fact stood for casuals. By 1993, the liberalisation that the Rajiv Gandhi government had launched had started making some fundamental changes in the Indian consumer's world as well. A generation, which was being brought up in a more liberalised country was seeing matters in a different light. Several new-age industries boomed, one of which was advertising. While there was a streak of rebellion in the air, the mood could broadly be termed as upbeat and full of optimism.

It is at the same time that Madura Fashion and Lifestyle decided to launch their fourth brand – Allen Solly. In a classical marketing case of trying to create a new market based on a latent need, Allen Solly positioned itself as relaxed formals. The launch advertising which was conceptualized by the creative agency – Ogilvy and Mather (Bangalore) epitomised Allen Solly's spirit of non-conformism. The personality portrayed was extremely confident, yet relaxed and not aggressive. The protagonists wore clothes that would be considered unconventional – for example a formal trouser and an indigo shirt teamed with a bright patterned tie. The message exhorted consumers to do things their own different ways.

The brand head of Allen Solly at that time was Fazle Naqvi and the President for Madura



LAUNCH OF A NEW BRAND—INDIANINK BY SUDITI INDUSTRIES

AJAY NIHALANI, CEO, INDIANINK SHARES THE BRAND'S LAUNCH PLANS IN AN EXCLUSIVE INTERVIEW. HE SHARES, "THE INDIAN ETHNIC APPAREL MARKET IS A PORTRAYAL OF CONTEMPORARY WOMEN AND WE MAKE AN EFFORT TO CONTRIBUTE TO THIS GROWING RETAIL SECTOR IN INDIA. WITH THE ENTRANCE OF INDIANINK, THE CONSUMERS CAN CHOOSE FROM THE ENTIRE RANGE OF ETHNIC TO FUSION LINE AND FROM MIX-MATCHES TO A SUIT COLLECTION ALL AT ONE HUB." BY GURBIR SINGH GULATI

Women today like to express themselves through the clothes they wear. And they wear what defines their personality, brings a spark of flamboyance and is something they feel confident in. Catering to the needs of this new age woman, Suditi Industries Limited, a BSE listed company, has now forayed into yet another retail venture Indianink for ethnic- and fusion-wear.

Indianink is a brand for the women of today, and it is all set to define styles on how to go chic while retaining a conventional look while dressing.

Launching soon in the mid of second quarter of 2015, the brand is looking forward to conveying a new appeal to the Indian audience. Starting its launch operations from the northern part of the country, it is eyeing to bridge the gap between westernwear and ethnicwear that complete a new gen-Indian woman's look.

AJAY NIHALANI, CEO AT INDIANINK



With over 23 years of experience across the entire gamut of business and marketing in the retail industry, Nihalani with a milieu of complex and challenging environment has brought matchless ideation and execution plans to the brand under his role as CEO at



InFashion

WELCOME TO THE **INFASHION** SECTION OF IMAGES BUSINESS OF FASHION. WE BRING TO YOU THE LATEST VISTAS AND INSIGHTS IN FASHION CREATION ACROSS FASHION DESIGN, TRENDS AND INGREDIENTS



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FALL WINTER COLLECTIONS

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For the blue collared, the uniform which they wear defines them, and gives a sense of belonging. IMAGES BoF talks to the top players to understand the key ingredient in uniform—the fabric.

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M B Raghunath, President – Sales and Marketing, Mafatlal Industries Ltd shares his perspective on the company's growing strengths in the uniform business.

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Lindström is looking at strong growth and leadership positioning in India. Anupam Chakrabarty, Managing Director, Lindström India shares key insights on the workwear segment and how his company views the business differently.

172 Dickies: An Iconic American Brand now sets itself to Conquer the Workwear Business in India

Karthikeya R Reddy, CEO & Director, ID Overseas Private limited, the exclusive Indian licensee of Williamson-Dickie Manufacturing company shares his perspective on the workwear market and how things have changed post their entry in the country.

LOOKS

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Smart, confident, and well dressed, the cabin crew staff of an airline not only represents the philosophy of the company but also set the glam-quotient. IMAGES Business of Fashion makes its pick of the most stylish uniforms in the air today, especially the ones that embody both look and grace.

TRENDS

182 She Wears the Pants

Bollywood heroines are carrying entire films on their shoulders - a very welcome change. And it's time that this sense of power was reflecting in their sartorial choices. We introduce you to the celebrities who are now carrying power dressing impeccably.

THE UNIFORM FABRIC INDUSTRY IN INDIA

OF THE 24 HOURS THAT WE HAVE IN A DAY, THE MAJORITY ARE SPENT AT WORK. FOR MOST OF THE WHITE COLLARED JOBS IT WOULD NOT MATTER MUCH BUT FOR THE BLUE COLLARED, THE UNIFORM WHICH THEY WEAR IS WHAT DEFINES THEM, AND GIVES THEM A SENSE OF BELONGING. THE SAME IS THE CASE WITH SCHOOL KIDS WHO TAKE UTMOST PRIDE IN THE UNIFORM THEY WEAR. THE IMPORTANCE OF THE UNIFORM AND WHAT GOES INTO CREATING IS CAUSE FOR GREAT ATTENTION ON THE UNIFORMS OR INSTITUTIONAL FABRIC MARKET IN INDIA. WE SPEAK WITH SOME OF THE TOP UNIFORM FABRIC PLAYERS TO UNDERSTAND THE CURRENT DYNAMICS OF THE INDUSTRY. BY ZAINAB S KAZI & MANISHA BAPNA

 Aptly setting the concept of the story, N Gangadhar, Vice President – Marketing, Siyaram Silk Mills shares the market number for uniforms in India, “The Indian uniform market is estimated around ₹10,000 crore for the school uniform segment and at ₹2,000 crore for the corporate or institutional uniform market.” This highlights the fact that in India, school uniform has a huge edge over work wear. According to Gangadhar the country is witnessing a change where corporates do prefer a consistency in the clothes that their employees wear. He elaborates on the first and immediate aspect, “In the corporate sector, with the increasing importance of corporate branding, companies have been increasingly exploring opportunities for creating an environment that best projects their brand. One of the main aspects of creating a brand image is an impressive corporate uniform.” This is reiterated by Nirmal Jain, CEO - Fabric Business, Mayur Suitings, when he says, “New age entities are asking their staff to be in uniforms in office, so it is creating a big market. Currently, the market is majorly dominated by small-scale players and unorganised sector.”

While there are companies like Siyaram’s, Digjam, Grasim, S Kumars, Mafatlals, Mayur Suitings, etc., into manufacturing of fabrics to be used for uniforms, the country also has a parallel and sizable unorganised sector that is also catering to this demand. Elaborating on this, Jain is rather reluctant to estimate the rupee market size and shares, “It is difficult to arrive at the actual size of the market as unorganised sector plays a major role in this market. For example, the powerloom and handloom sectors in Bhilwara, Bhiwandi, etc., have been manufacturing fabrics that are used for uniforms for ages but the organised data is not available, but in terms of consumption, I feel that the total fabric requirement of the uniform market would be around 500 million meter.”



DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

SPORTSWEAR INTERNATIONAL



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FASHION | DENIM

Skinny Dreams

Though some can hardly wait for the demise of skinny jeans, but it doesn't seem likely to happen. Skinny jeans are now established as a key product for jeans stores. So will they ever die out and which category will breach their fortress.

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FOCUS | DISTRIBUTION

Face to Face

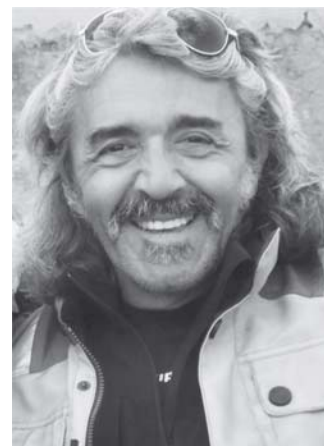
Everybody is talking about the hard times retail is going through but what about sales and distribution (S&D)? How is distribution contending with market changes?



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The Emperor's New Clothes



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FOCUS | DISTRIBUTION

Communication is a key

How does a distribution agency work today? We checked with Gruppo Flavio Massa in Milan.

Credits for India Capsule

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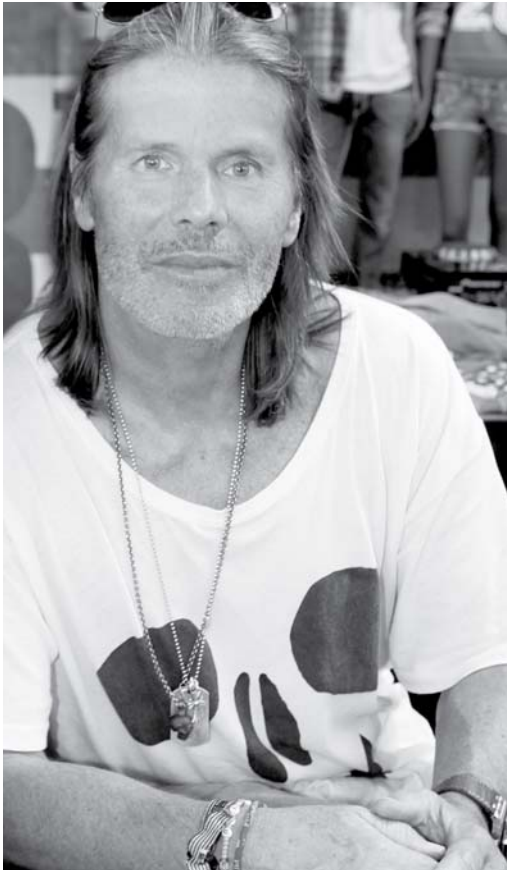
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SHOOTS

Knit me



THE EMPEROR'S NEW CLOTHES

REINHARD HAASE, MANAGING DIRECTOR OF UNIFA AND A VETERAN INDUSTRY INSIDER, TALKS ABOUT THE WHOLESALE BUSINESS AND HIS PRESENT AND FUTURE.

Interview **Maria Hunstig**

What does Unifa stand for today?

Actually, Unifa stands for what it has always stood for: We try to propel brands forward with our pioneering work, especially brands from the US. But our problem is that it doesn't work just now—because of the dollar exchange rate. For me this has brought about drastic changes over the past three months. We are unable to get the pricing we want at the moment. The entire market has become price-sensitive and because of the dollar's strength, we have to raise the retail prices for pants by €20 to €30 in some cases. However, it can't be done just now. With the highly price-sensitive conditions, the willingness of retailers to introduce new denim labels is not there anymore. Premium denim has hit a slump, which is more than obvious.

How are you dealing with it?

We will focus more firmly on Unifa. I will stop experimenting with denim brands as much as in the past 12 years—that no longer works. That's why I'm concentrating more on brands we currently distribute like Mother, J Brand, Genetic and Dr. Denim, and trying to establish them more strongly in the market. At the same time, I

INDIAN TERRAIN

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