

IMAGES

BUSINESS OF FASHION

June 2016

6

Issue No.

Volume XVII // No. 6 // ₹ 100



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The Shirts Special

Market Research
Industry Talk
Experts' Speak
Top Brands
Top Fabric Companies

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Made To Measure
Shirts

Milano Unica
FW 2017-18:
Trends

Massimo Dutti
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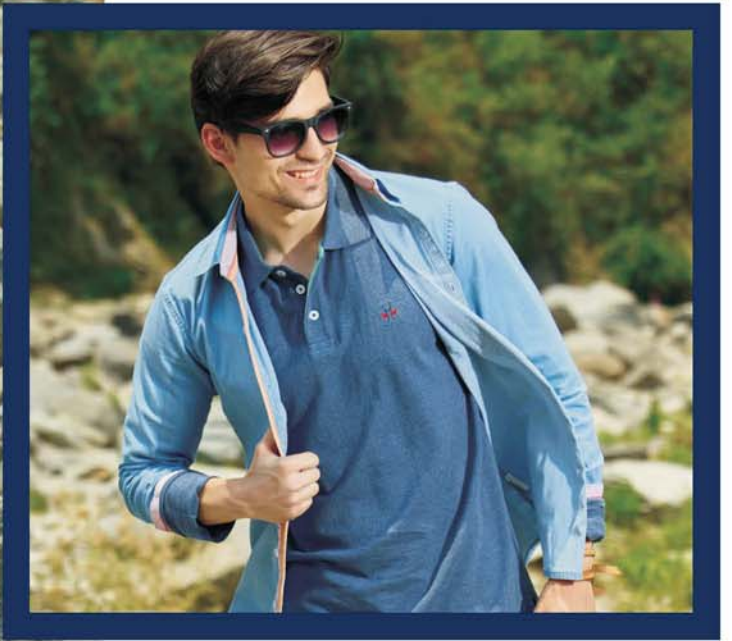


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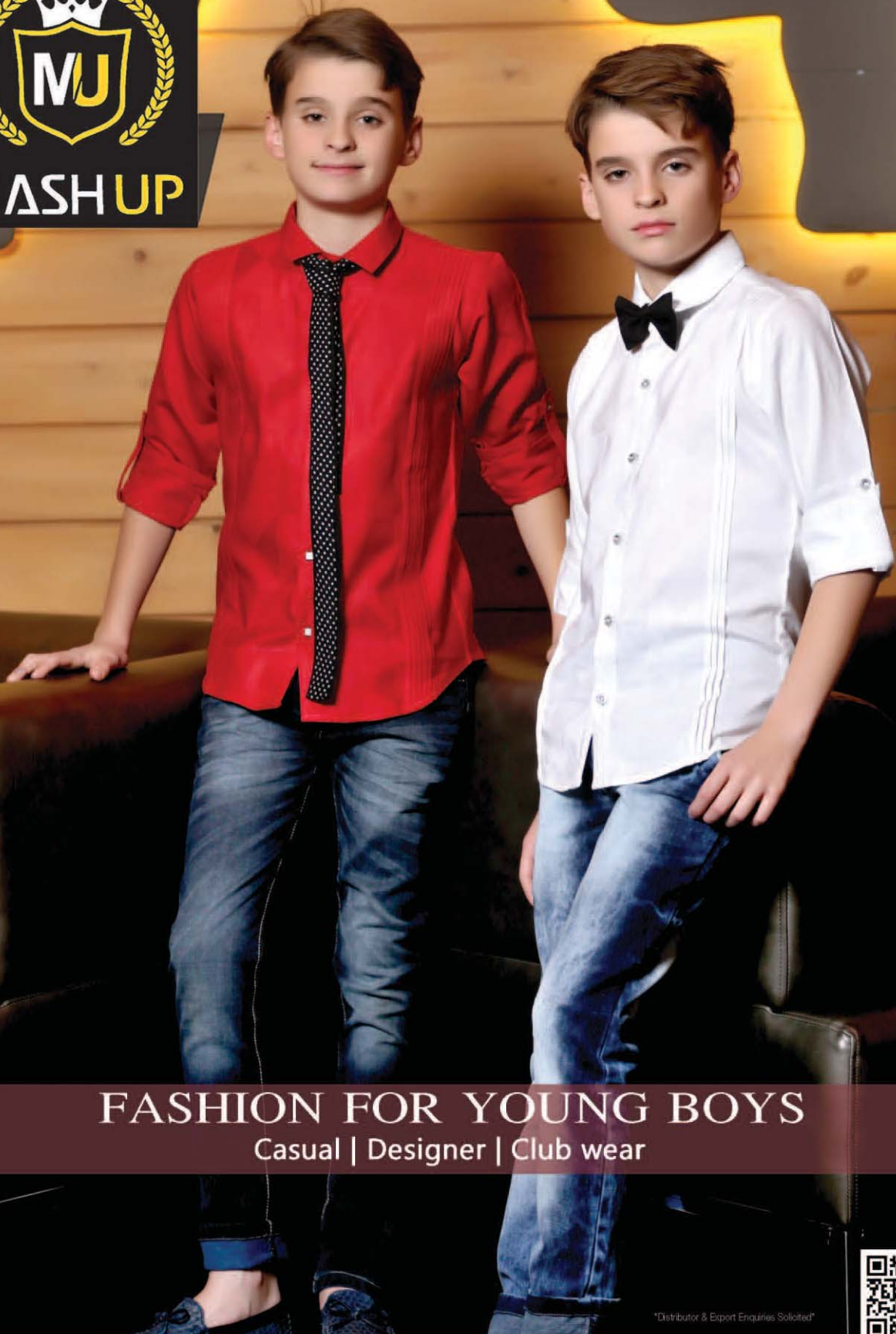
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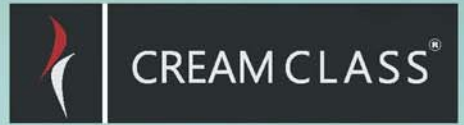
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Dear Readers,

We, in India, spend our entire school lives in them, and then when we graduate to the work world, the first thing we are dictated is to “dress the part”, of which The Shirt is invariably the point of focus. Even those of us who do not harbour any particular affinity for dress shirts didn't have much options but to oblige. With evolving times, preferences of consumers underwent massive change. Indian consumers today are embracing the idea of fashion as a means of self-expression, and not merely as a functional purchase. The new generation is now at greater liberty from the traditionalist's sartorial template. And shirts have evolved. Shirts continue to be the largest men's apparel category, and are now also one of the fastest growing categories in women's wear. Understand the emerging consumer base and staying ahead therefore has become a big challenge for almost all brands in India.

In this, the June Shirts Special, issue of Images BoF we size the shirts market in India across its varied segments and study top trends in it. Apart from elaborately discussing the shirts market in India, BoF's shirt special issue covers the pressing subjects of the shirt industry. Raymond's Brand Director Sumeet Soni discussing the nuances involved in establishing a ready to wear shirt brand, seasoned brand strategist Nischal

Puri details the nascent stage and the untapped potential of the women's shirt segment. Also, the fact that made to measure is the new buzzword of the country that hesitated to accept readymade garments till the late 80's stands as a testimonial to the ever evolving preferences of the Indian consumer. We study, as well as present, the top corporates that have ventured into this domain. We have top designers accentuating on the imperative need of innovation in men's shirt. In addition, the issue also features detailed accounts on the evolving preferences and innovations of shirting fabrics that are fast changing the face of the industry. Iconic shirt ads, Bollywood's romance with shirts. Lots more shirt facts in the issue.

This edition indeed makes a powerful attempt at analyzing the trends and consumption behaviour of the Indian shirt's market to aid upcoming as well as existing brands establish a strong brand equity. We also present Milano Unica's Fall Winter 17-18 trends, report on one year of Liva's association with the ever fashionable Kangana Ranaut, and showcase the iconic Massimo Dutti brand that has just entered India.

Happy Reading !



Amitabh Taneja

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LETTERS TO THE EDITOR

It was very interesting to read about the history of knitwear in May, 2016 issue of Images BoF. The facts and all details were brought up in a very impressive manner. I look forward to reading such articles in IMAGES Business of Fashion

- **Satyavrat Chaturvedi, Consultant, Mumbai**

The study on the 'Growing Knitwear Market in India' was very informative for my business. It gave me an overview of the preferences of various users, market trends, and also about new advancements being made in the sector.

- **Chetan Bhalla, Knitwear Manufacturer, Ludhiana**

Glimpse of the India Fashion Forum 2016 Exhibition published in the May, 2016 issue of IMAGES Business of Fashion was very impressive. It highlighted trends for the future showcased by various participants. We have been regular visitors and marvel this platform for connecting with the industry stalwarts and showcasing our products.

- **Daljeet Singh Dhillon, Delhi**

I enjoyed reading about the domestic knitwear market. It was very well put up and gives lot of information about the brands and their new ventures.

- **Roma Arora, Designer, Chandigarh**

I am a professor of Fashion Design and every issue of IMAGES Business of Fashion brings in a new study and deeper analysis of every category the magazine covers. It's really insightful. Keep up the good work, team IMAGES.

- **Chander Srivastav, Academician, Allahabad**

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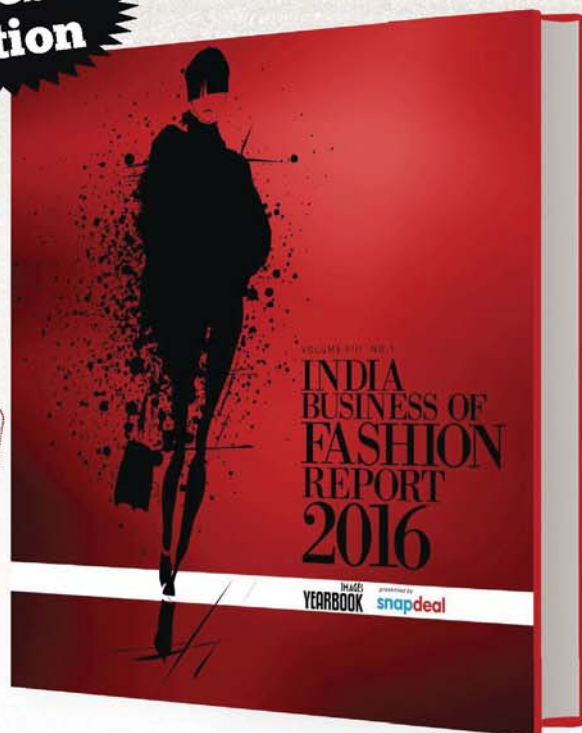
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INDIA BUSINESS OF FASHION REPORT enjoys a large patronage. Copies of the past editions were ordered from possibly every corner of the world, reiterating the strength and wholesomeness of the India story across borders. With a minimum shelf life of 12 months, the book is sure to remain on the desks and book shelves fall prominent fashion and retail interest organisations.

THE HIGHLIGHTS THIS YEAR

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- **Raymond Ready-to-Wear**

My Thoughts:

- **Darpan Kapoor, Kapsons**



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Q&A

One Up for LIVA

Images BoF speaks to Manohar Samuel, President - Marketing & Business Development, Birla Cellulose, Grasim Industries Ltd., as the company completes one year of brand Liva and its association with its brand ambassador Kangana Ranaut.

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MY THOUGHTS

INDIAN RETAIL AND THE ROAD AHEAD

Darpan Kapoor, Vice Chairman, Kapsons Group, discusses the present retail market in India and emphasizes that both - online and offline should invest in each other's territories to create an integrated platform to engage customers.

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CONCEPT
RENTING AS A BUSINESS MODEL

Accessibility, convenience and affordability are fuelling the burgeoning online rental business. Sahyujyah Shrinivas delineates how it has emerged as a win-win situation for all.

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LAUNCH

MASSIMO DUTTI ENTERS INDIA

Massimo Dutti enters India after years of wait due to regulatory hurdles. The brand opened its first store at Delhi's Select Citywalk. Images BoF takes a look.

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BRAND EXCELLENCE

Raymond Ready-To-Wear A Cult for Men

Images BoF speaks with Sumeet Soni, Brand Director, Raymond (Ready-To-Wear) on what sets them apart from the rest.

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COLLECTION

LOVEWEAR, THE NEW SUMMER COLLECTION BY MONTE CARLO

Monte Carlo's 'Lovewear' offers an exquisite range of clothes for men, women and 'tweens'.

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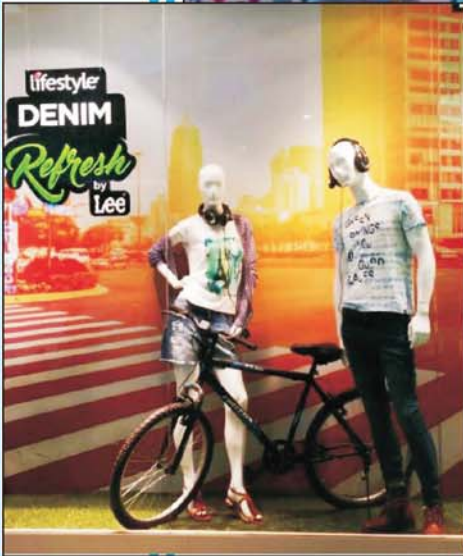
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Asics, Pune



Asics, Hyderabad



ASICS

BRAND: ASICS

PROMOTER: ASICS India

LOCATION: Jubilee Hills, Hyderabad
Phoenix Market City, Pune

SIZE OF THE STORE: 936 sq.ft. (Hyderabad)
871 sq.ft. (Pune)

COLLECTION: The store offers sports apparel, footwear and accessories including its latest spring/ summer 2016 collection.

STORE THEME: In creation of the stores, the design concept has evolved according to six key criteria- longevity, ease of use, premium finish, sustainability, flexibility and an ongoing commitment to reduce production cost.

STORE INTERIOR: White is used as the main colour scheme for the retail design. ASICS products are known for their unique colours and technology. White helps to accentuate the display and highlight these features. A splash of true blue is used in the core design, which represents the brand's energetic spirit to the consumers. The detailing in furniture and dynamic design approach also shows active spirit. The design team at ASICS works on providing the below to each of their stores - sleek, organic, sound, high- tech, etc.

STORE DESIGNER: The stores have been designed by the design team of ASICS Corporation.





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LIFESTYLE

BRAND: Lifestyle

PROMOTER: Landmark Group

LOCATION: Rangoli Mall, Belur (Kolkata)

SIZE OF THE STORE: 28,000 sq.ft.

COLLECTION: Bringing under one roof – apparel, footwear, bags, children’s wear, beauty and accessories, Lifestyle is the absolute one stop fashion destination. Customers can choose from hundreds of leading national and international brands including Louis Philippe, Van Heusen, Arrow, Code, US Polo, UCB, Allen Solly, Levi’s, Kappa, Bossini, UCLA, Biba, Melange, Juniors, Baggit, Puma, Red Tape, Catwalk and many more.

STORE THEME: Lifestyle stores are renowned for their on-trend fashion offering, international shopping experience and exceptional product portfolio categorized into concepts. Each

Lifestyle brings together multiple concepts under one roof - apparel, footwear, children’s wear, beauty and accessories - offering a convenient one-stop and a choice of leading national and international brands.

STORE INTERIOR: Customer friendly layouts, chic and comfortable ambience and attractive window and merchandise display are highlights of the new store. Convenient signage and navigation, attractive colour schemes, flooring and fixtures distinct to each category escalate the convenience and ensure a delightful shopping experience.



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Manohar Samuel,
President-Marketing & Business Development,
Birla Cellulose, Grasim Industries Ltd.

“India is a very huge market. For the next 2-3 years our larger focus will be to strengthen more on the domestic market than talking about Liva in the global arena. Having said that it is also critical to get the Liva Accredited Partner Forum ready as this is the base where the fabric is coming out in an innovative way.”

ONE UP FOR LIVA

Images BoF speaks to **Manohar Samuel, President - Marketing & Business Development, Birla Cellulose, Grasim Industries Ltd.** as the company completes one year with uberly flamboyant brand Liva and its association with the style diva and brand ambassador Kangana Ranaut. Samuel also shares the efforts put around the year to establish Liva; its investments and outcome, the challenges faced and its future expansion plans.

By Gurbir Singh Gulati

Liva has completed one successful year in the market. The garment industry in India has taken a fancy to this new age fiber that promises natural fluid fashion. Created from our natural cellulosic fibres, it transforms the way you wear garments, giving them the most liquid and soft drape. Liva gives your garment a superior flow and fall. Liva aims to create a ‘distinct value’ for consumers, by giving them clothing that is fashionable as well as comfortable, truly a rare combination and the ultimate in consumer experience.

Aditya Birla Group created Liva with a vision which was, “To create an aspirational brand that will provide consumers the freedom to move effortlessly, confidently and naturally through garments that celebrate natural fluid fashion with Liva fabrics. Also in the process create more value for the company as well as the whole Liva Eco-system.”

EXCERPTS FROM THE INTERVIEW

Liva has completed a year. How has been the response and journey of the brand?

Manohar Samuel (MS): The journey of Liva has been very exciting. Our focus was to have a brand with the consumer. And the consumer researched by us has given important insights which have helped us to develop Liva.

We thought on clear value propositions based on fluidity, being natural and fashionable which has appealed to everybody. Good news is that lot of mainstream industry brands have aligned with us. If you name the women’s wear brands across categories then we are

working with 36 of them and out of this 23 have tagged Liva. When we started in the shelf space we had 13,00,000 tags and now we have reached more than 71,00,000 tags just within a year. We have clocked from the start with 1,000 stores to 2,000 stores today wherein we are only listing the Exclusive Brand Outlets (EBO) and Large Format Stores (LFS). And if you look at Multi Brand outlets (MBOs) we are present in 500-600 of them.

We as a business firmly believe in consumer research. There is host of research going on about our ad campaign. It reflected some areas which need changes and we have improvised on them.



What have been the investments with the brand with its turnaround?

MS: Investments, for us, are seen in a broad sense. Today, we have invested largely on research and development. Then, the next investments are on creating an organisation for business development, which is spread throughout 9 other cities. Then, we invest in nurturing the brand and its co-partners. This, all put together, would be an investment of about ₹150 crore for every year. It's a big investment from our point of view. The dividends we get from those are also considered. In the first part, it's the consumer connect which increases the brand equity of Liva.

Today, consumers are aware where he would get a fluid product like Liva which they would like. Its 7 million plus garments but it will keep on increasing as we proceed further. The most important of all investments is the creation of Liva Accredited Partner Forum, which is the best in class and the top amongst them are even competing against players in Korea or China. Counting everything together, our sales volumes have shown an increase.

What are the innovations which are being planned looking ahead at the winter season?

MS: One of our major focuses is on the winter wear segment. We are targeting sharply on the knitwear segment where we have good blends in Modal-fibre available, such as Modal-cotton, Modal-polyester, Modal-linen, which are a part of our collection. There have also been dyed-yarn flat-knits which are 100 percent viscose. These are new in the collection and as per the direction of trends and forecast products coming out and we have aligned our autumn/ winter collection based on these forecast.

In men's wear, we have developed a unique poly-viscose blend which



We have recently released our new ad campaign.

The other research is about our retail positioning. We have placed ourselves in 2,000 stores where we have covered 25 percent of them with direct research. The studies not only give us insights about the retailers and their view point but also talk of what the consumer is saying about Liva. It is about the retailers' experience, our creation and the training we give to the retail staff. This season, we have trained around 950 stores and their retail staff.

Tell us about the brands which have associated with and are using Liva.

MS: The most prominent brands in our list are Biba and Global Desi. We have large format stores like Pantaloon, which has launched 'Izabel London', an exclusive brand which is mostly Liva and it is doing extremely well within the store profile. Then, we have Van Heusen and Louis Philippe and also Shoppers Stop. FBB has

done really good numbers as they went into value engineering concept with us, which has been very unique.

We have done innovations with Liva Accredited Partner Forum (LAPF), which has 140 process houses. They are able to give excellent quality and have innovated quite a lot with 90 percent of their production as Liva. It's all about collaborating for the consumer so that he gets delighted with new products.

We have tied up with 23 brands, and the number will go up to 34 by the next season. In total, today we are working with 53 brands and retailers put together.

How has been the demand for Liva tagged garments?

MS: According to our studies, Liva tagged garments are selling 10 percent more than the regular ones.



looks and feels light. We have used differentiated fibre and yarn and it's called the Tweed Collection. We have also gone in the sweater category where the play is with the denier of fibre.

Winter wear has traditionally been small in India. It is more inclined towards the Northern part. We have many more products coming in for the typical winter climate.

Tell us about the technology and techniques which has been used for the production of the Liva fabric?

MS: We have a very robust system of Liva Accredited Partner Forum. The first point is the technology deployed wherein our partners have invested in technology which are going to give superior performance particularly in dyeing and finishing. Equipments like relaxed dryers have come in. The partners have put more machinery on compacting and singeing. Lot of air dyeing machines is coming in. Newer printing machines have also been used.

Looking at ten years from now, there will be a huge shift to air jet weaving, most of which is being used to produce 100 percent viscose and modal.

Technology upgradation has been quite upfront with the industry and we, as Liva, have played its own role in collaboration with technology equipped partners.

How has been Liva's association with Kangana? Would you develop a signature series keeping her in mind?

MS: Our association with Kangana has been very good. She is a brand ambassador who is liking and talking about the product. As we move forward we will talk more on categories with her.

We have really not thought on the lines of creating a signature lines with Kangana as whatever is coming through our partners is exclusive which has been customized with their designers.

We have also tied up with FDCI where Liva will be a part of their designer's collection.

What are your future expansion plans?

MS: For us, the most important element is to get the fabric aligned with a particular brand's profile. We are in touch with the top kidswear retailers and the top men's wear retailers across the chain. Products

have been engineered and developed with them in both cases specific to their brand profile as well as to the category. So that's already done. Now, the challenge is how to get Liva on the faces of these products. We have debated around this and by next season, we will be launching our newer premium version of Liva. Thereafter, you can see us going into men's wear and kidswear. Already, we have tied up with a few but they are not tagged. Liva is an ingredient brand and we have to ensure that the whole chain is ready before it sets pace in its own innovative way and we get greater products for the consumer.

Our first step has always been with the LAPF as we took two years with them before we launched Liva last year. Now, the next country is Indonesia where we have launched Liva Accredited Partner Forum. Indonesia is a big market for our company as we have been present there for nearly 40 years now. It's a big viscose market where people love them in their traditional wear as well as western outfits. The next move will be to get the consumer insights from Indonesia and then spreading across.

Bangladesh is another country where we are focusing on international merchandise for supplies from LAPF. There will be no tagging to the products with Liva but the sourcing will only happen through the channel of accredited partners which are mostly from India and some 5 fabricators from Bangladesh.

Is there anything which I haven't asked and which you would like to share?

MS: The international exports are growing by 7-8 percent. Viscose category has grown by 37 percent, where all supplies are happening from Liva Accredited Partner Forum (LAPF). Last year, we were at 198 tons per day and today we are at 230 tons per day only at the garment stage. So this shows that Make In India concept is getting picked up with our LAPF. The journey is long ahead and we are not seeing what we want to be.





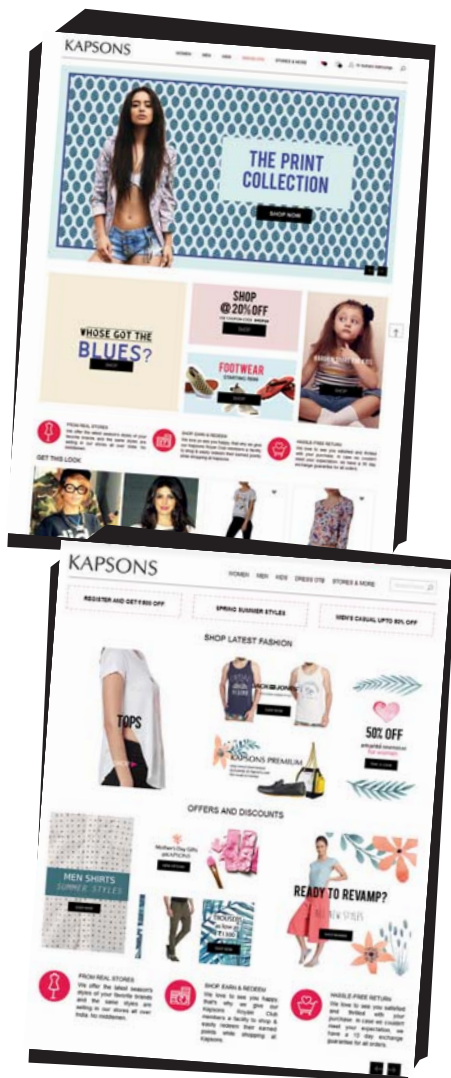
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INDIAN RETAIL AND THE ROAD AHEAD

Although, e-commerce is the title-holder in today's retail scenario, traditional retail also holds its ground, unlike predicted. It's the same customer who's providing impetus to both the retail modes. Darpan Kapoor, Vice Chairman, Kapsons Group, discusses the present retail market in India and emphasises that retailers from both the varieties should invest in each other's territories to create an integrated platform to engage customers.

E-commerce is that super-power which entered the market as an underdog but has today conquered the world of Indian retail market by storm. Online shopping portals identified all the gaps that pertained in the offline retail structure, like inventory management issues, higher pricing, long wait times, etc., and used these drawbacks to carve out their niche within the sector. Several offline retailers who underestimated the power of online market were proven wrong with a large segment of e-retailers going online using high-end technology and creative marketing plans. The inclination towards online was obvious as international fashion brigade members like USA, China, England had already moved leaps and bounds in the field of e-commerce.

The online sale portals soon topped the favorite list of all, since its inception till date, and keeping in mind the predictions of the market gurus, the decline of the traditional offline retail market is largely proven wrong. Offline retail sector still stands tall and is stoutly taking on the e-commerce newbie bulls by its horns. Offline retail also wins



the number game with an overall market share of 98 percent of the domestic market and is sure to cross the mark of more than \$1.244 billion in sales by the year 2018. In comparison, the online market expects a growth of about \$10 million in this fiscal year.

The online market in India has some major obstacles to cross. The infrastructure is in a dire need of improvement, as the internet penetration in India is just 1.1 percent right now. Other hiccups that crop up in case of online retailing are at the delivery level.

Presently, shipping to a tier II town in a rural region is difficult and a major part of these purchases are paid through cash on delivery as debit/credit cards are still a luxury for people in these regions.

To cope up with all this, the e-commerce market is gearing up with several ways to lure the customers, in which they have been successful too. The choice that is available in e-retail space is vast and incredible.

Several brands that are not available in the brick-mortar stores even in the metro cities have an endless variety to showcase and sell on the e-commerce portals. Shipping is on the go. Discounts are galore. Returns are smooth and easy, thereby making the complete service an amazing one.

Every now and then these online players take up new initiatives for the users to turn to their applications across different platforms and lure them with easy buying options, thereby aiming at enhancing conversions on their sites. The online retailers have, to a very large extent, traversed beyond prime shopping hours to buying anytime-anywhere phenomenon with increasing number of customers shopping on the go.

If we talk about customer, they have always wanted a seamless access to both offline and online channels. Betting on this shopping behavior of the customers several retailers are all set to go omni-channel. The experts acknowledge the fact that the upcoming major investment that the Indian retail sector is implementing is a unified offline and online channel.

What makes omni-channel the first choice? A report states that around

77 percent of the customers browse across brick-mortar stores before purchasing any good online and on the other hand, 55 percent of the shoppers have an on-the-go mobile analysis before making any offline purchase.

The 21st century's beginning saw rapid growth in the mall culture. The crowd abandoned the ages old traditional marketplaces in droves to peep into the fancy windows of the outlets with unpronounceable names and merchandise that was scarcely recognizable in air-conditioned comfort.

The shoppers and the retailers both took a while to fall in love with this new way of shopping. Soon after a decade, the mall became yesterday's thing and e-shopping has become India's new way of shopping, till something new creeps in.

I believe that the narrative of click versus brick is flawed. The customer base across both the channels is the same. The same segment of consumers that are driving an exponential sale across the e-commerce portals are also the driving force behind

>



Retailers regardless of the channels they serve in have started moving towards omni-channel services like Virtual aisles and Click & Collect.

While virtual aisles are about extending the merchandise already pitched to the customers in the brick stores, the latter allows a retailer to take an e-shopper to a physical space.

the traffic across the major offline retail outlets across the nation. For those among us who think that offline retail is dying, a quick traffic count across any of the major shopping malls across the top cities of India will reassure that there is no dearth of visitors. The cash registers may have been depleted as more and more shoppers are diverted towards the cheaper prices across the e-marketplaces that make us flush down our funds into the discounts

that they make us habitual of. Without going deep down to compare the merits of this strategy, we all know that it will have to end someday. The question that ponders is that, what then?

Clearly, as the shopping scenario is changing so are the retailers. The customer has decided to go the smart way by combining the goodness of the brick and click approaches to shopping. They check out the products offline and shop for them online or vice-versa- just not with the same retailers. The challenge faced by the retailers today - both online and offline channel is to create an integrated platform to engage the customer and make them shopper and seeing through the whole decision-making process. **A platform which helps the retailer to be a part of the conversation as an early bird in the consumers' decision-making process, take them through the shopping excursion and allow them to shop wherever and whenever they are ready.**

This whole process requires the retailers from both the varieties to invest in each other's territory, the substantial brick-

and-mortar outlets to invest in virtual brand stores but also require the most diverse e-commerce portals to create physical retail presence.

Retailers regardless of the channels they serve in have started moving towards omni-channel services like Virtual aisles and Click & Collect. While virtual aisles are about extending the merchandise already pitched to the customers in the brick stores, the latter allows a retailer to take an e-shopper to a physical space.

This new retail movement may be an enticing and customer-friendly one but being an online-cum-offline maestro is not everyone's cup of tea. Retailers should take cautious steps and take help from experts in the field to come out with a global platform.

Summing up in a conclusion, it's the customer who is the king - the future belongs to the retailers who understands what every customer wants, why they want it and how to attract and engage him till they shop for it.

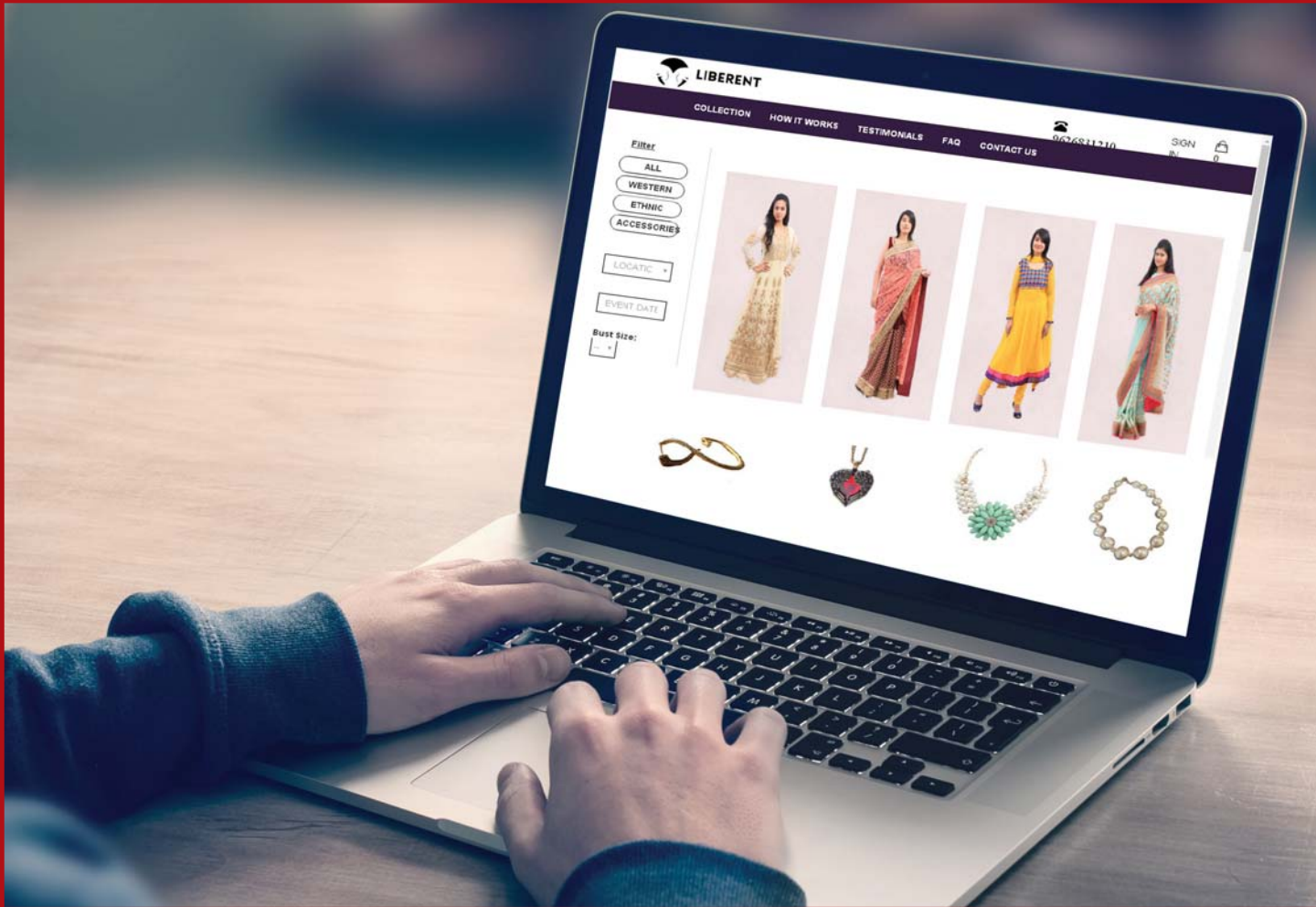


ABOUT DARPAN KAPOOR

Darpan Kapoor is the force behind the leading fashion retail house of North India - Kapsons. In 1989, when people could only imagine shopping for different colors and different styles under one roof, he had the vision of bringing different international brands under that same roof and build a successful multi brand store which the people of Chandigarh fell in love with. Today, Kapsons has more than 34 Multi brand outlets and an e-commerce portal by the name of Kapsons.com that offers fashion from across the globe to kids, youngsters, mothers and fathers - alike.



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RENTING AS A **BUSINESS MODEL**

Accessibility, convenience and affordability are fuelling the burgeoning online rental business. Sahyujah Shrinivas delineates how it has emerged as a win-win situation for both companies that work on this model as well as buyers and has the potential to be the next big business model in the near future.

One are the days when moving to a new destination for a few years meant shifting lock, stock and barrel or spending a bomb to find the right furniture and other home appliances to settle down comfortably. Now, one can relocate with ease with the help of myriad online rental platforms satisfying the demands of consumers at affordable prices. The rental business is growing exponentially to include everything from furniture to clothes, vehicles, toys and your favourite accessories, too. However, the concept of renting is not new to us; it has always existed in one form or the other since ages. Renting books, video cassettes, two-and four-wheelers and of course, accommodation, are all quite commonplace. It's just that today, the scope of renting has expanded tremendously to encompass items such as designer wear collections, jewellery, home appliances and even pets.

From a consumer's perspective, all these services on rent are as much about saving money as they are about convenience. It makes much more sense to rent a service or an item, if it is for a short-term purpose. Consequently, one business model that is growing by leaps and bounds is the rental clothing segment. Hiring designer dresses or party attires has come as a rescue for all those who love to pick up a new dress on every occasion without making a dent in the wallet. With most of the startups

offering as-good-as-new clothes, dry-cleaned and altered to fit perfectly against a fixed daily rental and a refundable security deposit along with doorstep drop-and-pick up services, hiring clothes is no longer deemed as an inconvenience. It's no surprise that the thought of renting is becoming acceptable and popular with each passing day. More and more people are getting attracted towards rental shopping as they can now experiment with new styles and indulge themselves with high-end designer wear, all without shelling out extra money.

Accessibility, convenience and affordability are the key factors driving this business model. The renting business has emerged as a win-win situation for both, companies that work on this model as well as buyers. Rental businesses can earn more returns on investment when they rent out a particular item. They have gross margins of up to 50 percent which increase with scale and improved efficiencies by virtue of data and technology. Investors too have started to back startups in the rental business, as they have a huge market potential to scale up. The turnover in this business is directly proportional to the usability of the product, which does come with a limit. But if sellers can optimise their processes, then they can earn much larger returns than traditional selling.

While online rental is picking up pace at an impressive rate, it still needs to expand to smaller pockets and towns in India, where the concept is still nascent.

The scope of renting also has to be fully explored and the areas where it may not be the most feasible option need to be carefully considered. For instance, renting an item that is needed on a regular basis may not be advisable. School uniforms or sports uniforms should preferably be bought. In many similar cases, subscription will be a better option than renting for consumers, as they can select the products and dates beforehand. This will help avoid hassles during times when demand for rented apparel may be more than supply. If the event is too close, then renting can pose a problem in case the delivery is not done on time. Therefore, it is a good idea to only rely on segment-leaders which offer assurance of impeccable and timely logistics and rented clothing that comes in as immaculate a state as possible.

Since the whole point of renting is trying out new outfits every day, customers who are style conscious as well as financially savvy, are fast seeing the merits of renting. They are able to flaunt 30 dresses at the cost of five and have the freedom to express themselves beautifully each time. Renting eliminates that feeling of boredom and the statement every style-conscious person dreads: "I have nothing to wear." Also, renting requires no maintenance, no fighting with the tailor, and no spending money on laundry and most importantly, no more worrying about storage space, which means less impact on the environment and no wastage. It truly is a business model of the future with only benefits and lots of fun for all those involved!



ABOUT SAHYUJYAH SRINIVAS

Sahyujyah Srinivas, Founder & CEO, LibeRent, as the founder of a start-up, wears multiple hats and handles a vast spectrum of responsibilities like strategy, team building and partnerships. It is her passion for what Srinivas does and her belief that the pay-per-use model is the only logical way ahead for fulfilling one's fashion needs that keep her going. She is a Bachelor of Engineering in Metallurgy from PSG College of Technology, Coimbatore. She has worked as an operations manager in Tata Steel, Jamshedpur and Odisha before embracing the entrepreneurial life.



MASSIMO DUTTI

ENTERS INDIA

Spanish premium fashion brand Massimo Dutti entered India with a bang, after years of wait due to regulatory hurdles. The brand opened its first store at Delhi's premier mall, Select Citywalk. The global concept store covers an area of 5,027 sq.ft. in the mall. Team Images BoF takes a look at Massimo Dutti and Inditex Group.

By Tanya Krishna



L to R: Fabrice Alain Pruvost with Team Massimo Dutti, India, at the store launch

The upmarket brand from the house of Inditex, famed as being the biggest fashion group in the world, offers women's wear, men's wear, footwear, accessories and personal tailoring. Inditex also owns Zara, which is making great business in India since its launch in 2010. Zara and Massimo Dutti entered India in a joint venture, Inditex Trent Retail India Pvt. Ltd.

Massimo Dutti was created in 1985 in Spain, and was acquired by Inditex in 1991. The brand was originally limited to men's wear. In 1995, it launched its first women's wear collection, with a variety of styles from casual to sophisticated and timeless.

Globally, the Spanish fashion brand operates over 832 stores across 73 countries between Europe, America and Asia. The recent ones also include a sizeable 7,432 sq.ft. store launched in Vancouver's Pacific Centre.



THE COMPLEXITIES ON THE WAY

Entering into the Indian markets was not an easy task for Massimo Dutti.

The Foreign Investment Promotion Board (FIPB) had, in 2012, rejected the proposal for Massimo Dutti citing violation of a rule framed by the Department of Industrial Policy & Promotion (DIPP) that says an investor must own the brand it is proposing to bring to India.

The group again furnished an application after an year. In September 2013, India approved the proposal by Inditex to sell its Massimo Dutti line of clothing, apparel, footwear and other products. The FIPB cleared the proposal as part of a go-ahead to 15 foreign direct investment plans worth USD 330.3 million.

The Massimo Dutti store concept is based on a progressive evolution of the original boutique style. The finishing of the store, including the shape of the installations, aimed to give the consumer a feeling of warmth, while exuding a smart, contemporary aura.

Walnut wood, brass, leather and dark marble are the dominant materials in the new architectural design that blends modern lines and classic details – the signature of Massimo Dutti.

The stores target an upscale market, with higher quality fashion products for both men and women.

The collection is urban, contemporary, practical, elegant, up-to-date, without falling victim to the strict dictates of trends. Massimo Dutti is priced a notch higher than Zara. The move shows that the consumption continues unabated at the top end of the retail market.

“We have brought in most of our original collection from abroad into India and it has been reasonably priced for the Indian market. The average price range for the products in India is between ₹3,290- ₹4,290,” said Fabrice Alain Pruvost, Commercial Director (Asia Pacific/ India), Massimo Dutti.

“Our fastest moving category across the world is leather jackets. We have introduced 3,500 SKUs for women’s wear and 4,000 SKUs for men’s wear in India,” Pruvost added.

>



present in 73 markets with a network of more than 832 stores. Bershka, set up in 1998, has more than 1,000 stores in 69 markets. Stradivarius owns 950 stores in 60 different countries. Oysho, founded in 2001, is present in 44 countries with over 600 stores worldwide. Zara Home was created in 2003 and has more than 500 stores in 53 markets. And finally, Uterqüe was launched in 2008 and has 72 stores across 12 markets.

According to reports, Inditex had opened 330 stores in 56 markets in 2015 and the company's total revenue for FY'15 was €20.9 billion.

According to Reuters data, Inditex is one of the richest valued stocks in the apparel sector, trading at 28.3 times forward 12-month earnings, compared with 21.7 times for rival H&M, which is the world's No.2 fashion retailer.

Like H&M which recently opened its 4,000th store in India and is planning for further expansion, Massimo Dutti too has plans to open 4-5 more stores in Delhi-NCR, Mumbai and Bengaluru and has earmarked a budget of Rs. 10 crore for the same.

“This is the first store in India and the good thing is this market will be the booming for the next five years and will provide us a good scope of expansion, just like it happened in China. We entered there with five stores and now we operate 70 outlets in that country. And we think India will also be the same,” said Fabrice Alain Pruvost.



INDITEX GROUP: A LOOK

The chain belongs to the Inditex Group, which owns over 7,013 stores in 88 markets and has a 1,52,854 strong workforce from 90 nationalities, as on 31 January 2016. In addition to Massimo Dutti, Inditex owns seven other fashion chains: Zara, Pull&Bear, Bershka, Stradivarius, Oysho, Zara Home and Uterqüe. While Zara started functions in 1975 and has over 2,100 stores strategically located in leading cities across 88 countries; Pull&Bear, created in 1991, has over 900 stores on the busiest shopping streets and in the most important shopping centres across 68 countries. Massimo Dutti is



SPAIN - Palma de Mallorca, Paseo del Bornea



MEXICO - Antara Antara Polanco Mall



France - Paris, 18 - 20 Rue de la Paix



France - Paris, 18 - 20 Rue de la Paix



SPAIN - Palma de Mallorca, Paseo del Borne



SPAIN - Palma de Mallorca, Paseo del Borne



UNITED KINGDOM - London Oxford Street 315, 319

“Mumbai will be the next step after Delhi and slowly and slowly, we will enter more cities in India. We will be soon launching online operations in India as it is the future for any company. The brand will have an omni-channel presence,” he further added.

LEVERAGING TECHNOLOGY

Inditex apparently produces over 1 billion garments a year in its 50,000 factories. Organising such a large load can be a challenge for any company, which is why the Spanish group has developed a new project that uses Radio Frequency Identification (RFID) to identify every garment individually and they have real-time knowledge of their physical whereabouts.

The technology is up and running in about 1,542 stores across 64 markets. Inditex's RFID is recorded in chips embedded in the electronic article surveillance tags, which are added to the garments as soon as they arrive at the group's logistics centres. RFID also improves in-store workflow, and delivers enhanced security control. RFID

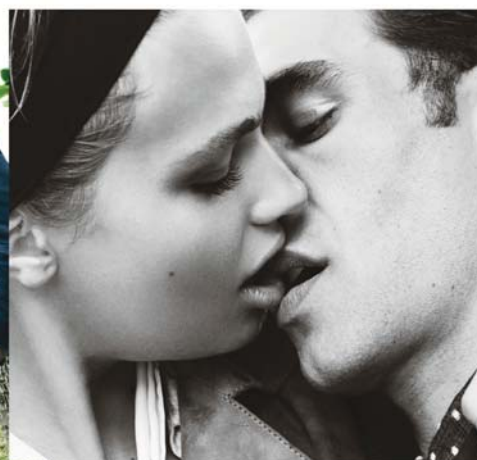
Inditex Group owns over 7,013 stores in 88 markets and has a 1,52,854 strong workforce from 90 nationalities, as on 31 January 2016.

also facilitates stock replenishment and inventory management, meaning staff can find a garment with a PDA more easily. The data embedded in the chip is deleted as soon as the alarm is deactivated upon purchase.

Although other retailers also use radio frequency waves, Inditex claims to be the first company to design a 100 percent reusable and recyclable system. The security alarms used were developed by Inditex and produced by Tyco.

Tyco Retail Solutions is a leading provider of retail performance and security solutions. Tyco owns a chain wide contract for RFID- based Inventory Intelligence, and is known for delivering significant value to the Inditex business. Tyco is also managing Inditex's tag recirculation program through a cost effective and environmentally sound approach that allows re-use of RFID/ AM tags. With this solution, Inditex is taking advantage of the benefits of RFID-based inventory visibility while controlling shrinkage with robust anti-shoplifting AM technology. Tyco's professional services team has been a collaborative partner in the successful deployment of these solutions to Inditex stores around the world.





Massimo Dutti



MASSIMO DUTTI: SPRING/SUMMER 2016

A new season captured by the lens of the great Mario Testino. On the other side of the camera, models Anna Mila and John Kortajarena. The result is a collection that is absolutely fresh and spontaneous, with a modest selection of unique wardrobe essentials.

Anna Mila is definitely one of the most revealing new models working today, with an intriguing face that is beguilingly casual and open, while out shopping with her mother. Her allure is undeniable. In turn, Jon Kortajarena seduces us once again in front of the camera. His elegance is innate. Together, they are the Massimo Dutti couple.

THE WOMEN'S COLLECTION

The starring features of the Women's collection are definitely colour and the new lines and silhouettes. Pieces with their own identity that convey the trends in a relaxed yet stylish manner. The chromatic range journeys from olive greens, to khakis and petrol blues to red tones and Ikkat prints, revealing a more ethnic flair. Details include front pockets on jackets and skinny trousers, which take on an important role. Unique key pieces: flowing shirts and extra-large blazers. For accessories, essentials include crafted pieces of adorned leather and fur, combined with esparto. Footwear also sports these trends, with impossible golden heels to everyday sandals.

THE MEN'S COLLECTION

In the men's collection, we find a broad variety of earth and neutral tones, broken up by splashes of fun and different colours, like red currant, indigo and earth orange, to transport us to the marvellous fifties in Cuba, the country used to inspire the SS'16 proposals for men. Structured cotton sweaters with leather details, ennobling the pieces and raising them above casual wear. Structured herringbone sport coats in natural colours, ethnic trends and a prominent use of linen, with ethnic and geometric print shirts, all influenced by a vintage air, which is sometimes mixed with sport accessories, such as sunglasses, backpacks and wallets.



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Sumeet Soni,
Brand Director, Raymond Ready-To-Wear

“Raymond Ready-To-Wear is present in almost 800 Raymond Shops. We have 12 standalone retail stores which could either be exclusive or with Raymond Made to Measure. Our exclusive stores are placed in 8 cities now. We are 3 stores in Bengaluru, and then we have stores in Surat, Vijayawada, Hyderabad, Chennai, Chandigarh and one in Thane. We have a very ambitious plan to be 150 Exclusive Brand Outlets (EBOs) in the next three years.”

RAYMOND READY-TO-WEAR: A CULT FOR MEN

Raymond Ready-To-Wear is a premium men’s wear brand that takes pride in delivering quality over quantity with its classy garments. Offering unforgettable options and experiences to its customer, the brand reflects the persona of a confident, discerning, classy and an intelligent man. A person, who is well educated, well traveled and above all is sensitive and caring.

Images BoF team recently sat down with Sumeet Soni, Brand Director, Raymond Ready-To-Wear to discuss what sets them apart from the rest. We discussed how this new age brand has made a viable transition in completing the wardrobe of the global Indian.

-By Gurbir Singh Gulati

EXCERPTS FROM THE INTERVIEW

Tell us about Raymond Ready-To-Wear and its progress so far. Tell us about the challenges you faced while establishing the brand and how did you overcome them.

Just to give you a context; Raymond Ready-To-Wear is a part of the brand Raymond. It has nothing which is different from the brand. The idea to set-up a ready to wear brand was in the lines to recognize the changing consumer preferences who likes to buy readymade over fabric and Raymond has largely been into fabric business. So it was very relevant for us to extend and be relevant to the consumer who wants ready-mades.

Raymond Ready-To-Wear, I would say is in its start up stages as it’s just been 3-4 years in business. Raymond was an already established fabric brand when **Raymond Ready-To-Wear** was launched. There are certain nuances in a way the consumer buys a particular fabric and gets it converted into a tailored garment. Whereas, if we look at ready to wear there are different ways in which the preferences change. If the consumer is buying a fabric he will first look at the quality whereas when he is buying ready to wear he looks at design, styling and its fit. This is how it was different.



Our challenge was first to find the architecture as to what it should be in Raymond Ready-To-Wear so that it is relevant for the consumer who is 'The Complete Man' of today.

The second challenge we identified is that in fabrics we were the leaders, and we were entering the ready to wear market which was already set-up. As Raymond Ready-To-Wear we had to establish an identity as to what we stand for in front of the consumer.

How differently is Raymond Ready-To-Wear profiled from your group brand Park Avenue?

It is positioned in a unique way in the group's portfolio in terms of consumer preference, usage and all the parameters in the market. Raymond Ready-To-Wear is being positioned as more classic contemporary whereas Park Avenue is contemporary.

What has been the main competitive advantage of Raymond Ready-To-Wear against international competitors in the market today?

The first is our equity which is strong. We are there from 90 years and have been a household name. So we don't need to create awareness as to what is Raymond. Whereas there are some international brands which, inspite of being well known, failed to be recognized in India.

Secondly we have a vast distribution network of our Raymond Shops which gives an edge of placement of product. Third is our in-house capability from yarn to garmenting. So these are the three main advantages that bring in clear difference and competitive advantage in the market.

Tell us about your complete product portfolio. What are your expansion plans?

Raymond Ready-To-Wear is very premium, approachable and a complete wardrobe brand. We have complete lines for every occasion and every need for men, like for boardroom, daily office wear, evening wear, for his travel, holiday, ceremonial, etc. This is from apparel to accessories. We will move into footwear very soon. We will also start small leather bags and goods.

Raymond Ready-To-Wear is an exclusive brand; we are premium at all price points. Our endeavor is that our products should feel surprisingly rich. Wherever the Raymond mark comes in, there is a guarantee that we will give you more than what you expect.

We need to sharply define what we have to be best known in certain categories. We want to give a number of options to the customers to choose from. Very soon we are launching a new product which is called a 'shacket' which is made of shirting fabric and is a light weight jacket. The brand has been known for innovations like we did with the wool shirt which feels like cotton but is 100 percent wool. There is something big we want to bring out in Autumn-Winter'16.

Our journey has been divided wherein we have to evolve within certain categories first before we get into other extensions.

What is the current market presence with each brand in terms of current standing in Raymond Shops, EBOs, MBOs and LFS? Tell us about your retail expansion plans.

Raymond Ready-To-Wear is present in almost 800 Raymond Shops. We have 12 standalone retail stores which could either be exclusive or with Raymond Made to Measure. Our exclusive stores are placed in 8 cities now. We are 3 stores in Bengaluru, and then we have stores in Surat, Vijayawada, Hyderabad, Chennai, Chandigarh and one in Thane. We have





We are present in the digital space with our own site called 'raymondselect.com'. We do not encourage or believe in the discounting business which is happening today. We believe that the online mechanism should be to build a reach and give convenience to the consumer where he could see the overall collection.

a very ambitious plan to be 150 Exclusive Brand Outlets (EBOs) in the next three years. Average size for our store is 2,500 sq.ft and today they are all company owned stores.

Our first endeavor is to ensure that our stores should be full service outlets for a consumer. There is one more pilot project that we are doing in Mall of India by DLF in Noida (NCR). The whole idea about the brand is to look at from the consumer point of view and how he wants to shop.

In the large format stores (LFS) we are present in Shoppers Stop and Central

and we wish to aggressively expand with Shopper Stop and then move on with Lifestyle.

We are present in some 200 multi brand outlets (MBOs) which are relevant to our brand.

Tell us about your presence in the overseas market and how is this growing.

Raymond Ready-To-Wear is available in the Middle East, Sri Lanka, Bangladesh, Pakistan and in SAARC countries. We have plans to aggressively expand in the international markets. That goes under the Raymond Shops expansion. As of now we will follow the Raymond Shops route for brand penetration. We have close to 50 plus Raymond Shops in the overseas market where Raymond Ready-To-Wear is present.

Share your percentage share of business coming through the retail formats.

The largest share comes from our Raymond Shops as we started from there. Eventually we will go up and retail in LFSs which will become 50-60 percent of our business. And 10-12 percent in the next 2-3 years will come from online.

What has been your progress online?

We are present in the digital space with our own site called 'raymondselect.com'. We do not encourage or believe in the discounting business which is happening today. We believe that the online mechanism should be to build a reach and give convenience to the consumer where he could see the overall collection. We deliver it to you wherever you want. Our idea is clear that we wish to maintain similar price points across all channels.

Apart from this we are present on Amazon, Myntra, Jabong, Flipkart, Snapdeal, etc.

How have you modernized your retail touch points showcasing Raymond RTW?

When we started we realized that there are consumers who would prefer to shop in a very different environment. So this gave us an opportunity to re-discover our retail experience. When we are setting up Raymond Ready-To-Wear, we said that we have to create a retail destination with an experience which is unforgettable for a consumer. The challenge was that — there are a Raymond Shop and there are other brands which exist in the apparel space which were of competition. We worked on the ability to understand how to carve out a place for ourselves to give a memorable experience to the consumer.

The other challenge or opportunity which was coming on was the whole play on online which is digital. How do you create an experience which seamlessly integrate the physical and the digital space? With this idea in mind, we are able to bring out a ready to wear concept which has been widely accepted by the consumer. We carved out a different space for Raymond Ready-To-Wear in the Raymond Shop — which is class different and driven by technology. There are some new things which we have done like we don't have cash counters and you can check out wherever you are in the store where we come to you and complete the billing. We display only one piece per collection in a store which is more about the style and do not display all the sizes. Then we use technology to get your style in the trial room. The whole shopping experience is very luxurious which was our sole aim throughout. We want to make this a destination for men apart from their house and office.



All the brands in the Raymond Group portfolio had a separate loyalty program which now is getting merged into one program called the 'Raymond Rewards'. The idea is clear — customers can both earn and redeem points across all the brands that Raymond houses.

Tell us about the customer engagement with you brand. Do you have a loyalty program in place?

All the brands in the Raymond Group portfolio had a separate loyalty program which now is getting merged into one program called the 'Raymond Rewards'. The idea is clear — customers can both earn and redeem points across all the brands that Raymond houses.

Share specific details on Marketing/Promotions strategies. Tell us about what are lined up for the future.

At a group level we promote our brand with the "The Complete Man" advertising which builds the emotional connect of the brand. Then there are product advertising which is done by specific verticals. For example like suiting, we are doing linen, doing techno-smart at the suiting level, we did like the wool shirt. So these are opportunities where you are free to talk about your product at the brand level.

Out the line of events you have been associated with to promote the brand?

Any event which we do or associate should stand up to the imagery of the brand. It's all about how you engage a customer and be relevant to him.

Second level where we associate is with some our Golf sponsorships because we believe our consumers are there. So any event which is relevant and can draw mileage for us we will be happy to associate.

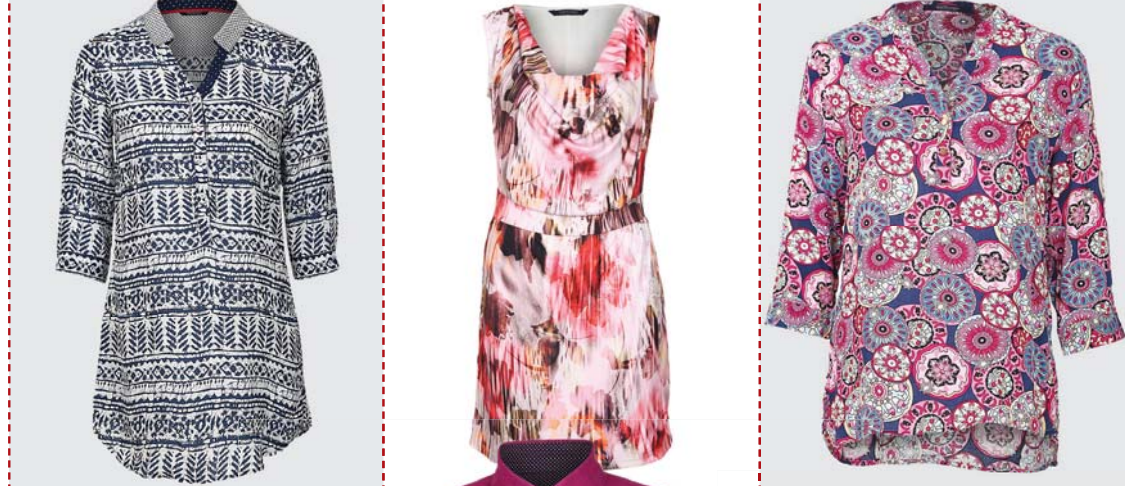
Raymond Ready-To-Wear has also been recognized for the Retail Design Institute's excellence in design and execution program as a Finalist in the A.R.E. Design Awards at Las Vegas. Tell us in detail about the same.

This is a concept which we introduced and the first store came up in Bengaluru at 100 feet road. This store speaks about the retail destination for men. This has been filed up by our architects who are from the United States. We applied for these awards and we are among the world's best retail formats over there. It is a great moment for us to be recognized as one of the gold award winners at the A.R.E Design awards.

What are your aspirations for the next 2-3 years?

What we are looking at is to become one of the largest men's apparel brand in the next 3 years.





LOVEWEAR, THE NEW SUMMER COLLECTION BY

MONTE CARLO

Monte Carlo's latest summer collection, 'lovewear' offers an exquisite range of clothes for men, women and 'tweens'.

Monte Carlo has launched its new summer collection, 'lovewear', and offers an array of vibrant colours, style and designs. The brand's new collection is hugely influenced by latest couture, designs and current trends. It has created a niche in the clothing market and is consistently winning the loyalty of new customers, riding on its wide range of new contemporary clotheslines.

Summer blazers, shrugs with crochet detailing, denim shirts, polo t-shirts, digital print kurtis, dresses, crop tops, shirts, tees and shorts are some of the attractive clothes offered by Monte Carlo's alpha collection for women.

The 'tweens collection' aimed at young boys and girls, is divided into several themes – the indigo ocean, the world traveler, the sporty rugby's, the cut & sew, and pattern prints incorporated in colours such as coral, sea blue, white, greens, lemon, peach, royal, orange, mustard and obviously dominating red and blue tones which are major trend setters of the season.

For men, the collection includes a variety of jeans, denim shirts, mercerized t-shirts, polo t-shirts, round neck & v-neck tees in prints as well as solid colours, cotton shirts in vibrant colours such as citron yellow, antique bronze, kiwi green, machine red, orange, neutrals like black, navy, white and off white. Also available, is a wide range of track suits, Nehru Jackets, lounge sets, bermuda sets, individual lowers and trousers.



FASHION

RETAIL

Shirts Market in India

Industry Talk
Women's Shirts
E-Commerce in Shirts

In Focus:
Made-to-Measure



FASHION RETAIL

INDUSTRY TALK

SHIRTS RULING THE ROOST SINCE AGES

Shirts are the basic wardrobe staple for men in India. Men are no longer restricted to the same old formal shirts for every occasion and have revolutionized their wardrobes with varieties of shirts for different purpose and functions, each overpowering the former.

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EXPERT SPEAK

WOMEN'S SHIRTS: THE UNCLAIMED SILHOUETTE

Despite the substantial size of the women's shirts market, the segment is phenomenally fragmented. Nischal Puri, Managing Director, Horizon Consulting India, discusses.

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E-RETAIL

E-COMMERCE IN MEN'S SHIRTS: EARLY STAGES

With shift in preferences and increased availability of choices offered by new entrants, the online luxury shirts market is expected to augment at a rapid pace, finds S.Ganesh, Co-Founder, thestiffcollar.com.

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DESIGNER TALK

THE NEED OF INNOVATION IN MEN'S SHIRTING

Designer Sagar Mehra discusses the design metamorphosis of shirts and the areas that still hold scope for more innovations.

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BRAND WATCH: LEADING SHIRT BRANDS



BEING HUMAN CLOTHING: 106
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COVERSTORY

SHIRT MARKET IN INDIA

Experts from Technopak map the Indian shirt market proving how it holds huge scope for brands and retailers, provided they manage to cater to the ever changing fashion requirements.

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CUSTOMIZATION

MADE-TO-MEASURE SHIRTS: CREATING INDIVIDUALISTIC STYLE STATEMENTS

As times change, and the market progresses, a proliferating disposition towards bespoke is being witnessed. Images BoF studies. Pg No. 130

MADE TO MEASURE BRANDS

RAYMOND MADE TO MEASURE CUSTOMIQUE
BOMBAY SHIRTING COMPANY
CREYATE
KACHINS
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CLASSICS Pg No. 150

ICONIC SHIRT CAMPAIGNS

BRANDING Pg No. 152-153

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SHIRT MARKET IN INDIA

Experts from Technopak map the Indian shirt market that holds huge scope for brands and retailers, provided they manage to cater to the ever changing fashion requirements of both formal and semi-formal shirts for men and women.

By Amit Gugnani, Senior VP - Fashion; and Sakshi Chhillar, Research Associate - Fashion & Textile, Technopak

The shirt market has evolved along with evolving apparel market throughout the world. With increasing disposable incomes, growing middle class, increasing penetration of e-tail and increasing acceptance for branded apparel the shirt market has expanded its consumer base in past decade.

Also, consumers are embracing the idea of fashion for its own sake, as a means of self-expression, and not merely as a functional purchase. Similar trend can be seen for shirts; they are no more category of functional buy but have become a part of self-statement.

MARKET SIZE & GROWTH

In 2015, the domestic shirt market in India was estimated to be worth ₹34,717 crores (USD 5.8 bn). This market is expected to grow at compound annual growth rate of 8 percent to reach ₹51,913 crores (USD 8.7 bn) by 2020.

Shirts accounts for 13 percent of the total apparel market. The market is dominated by men's segment accounting for 94 percent of the total market. The men's shirt market is expected to grow at a CAGR of 8 percent while the women's segment is expected to grow at a CAGR of 14 percent, owing to its current smaller base.

MEN'S SHIRT MARKET

The men's shirt category is the largest men's apparel category and accounts for 29 percent of the total men's apparel market of India. The market of shirts is under transition in last few years from limited colours and designs to distinct categories of formal and stylish shirts. With evolving consumer preference towards semi-formal and causal look, demand for stylish shirts is growing.

EXHIBIT 1: SHIRT MARKET 2015, INR Cr

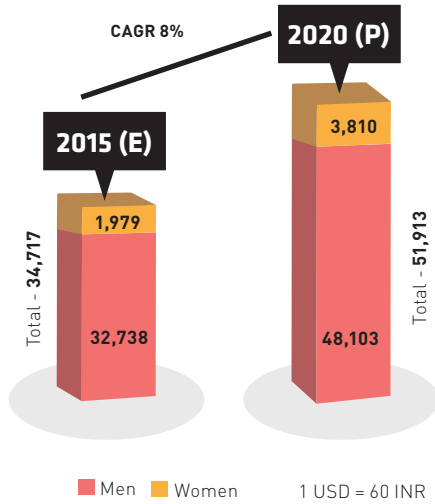
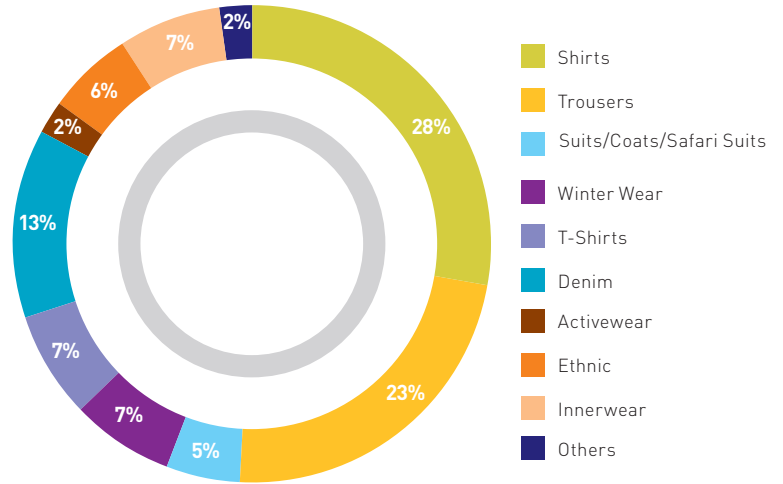


EXHIBIT 2: MENSWEAR MARKET SHARE, 2015



The women's shirts category contributes less than 2 percent to the total women apparel market as it is a relatively new segment with limited degree of penetration and acknowledgement.



The super-premium and premium brands of men's shirt are dominated by both national and international brands. Consumers in these segments tend to have high association with the brand image and seek exclusivity. Value brands and private labels are growing rapidly in these segments as the consumers' awareness of brands has increased substantially, at the same time the consumer is increasingly seeking value for money.

WOMEN SHIRT MARKET

The women's shirt category is a relatively small category in the overall women's apparel market which is dominated by ethnic wear. The women's shirts category contributes less than 2 percent to the total women apparel market as it is a relatively new segment with limited degree of penetration and acknowledgement. However, owing to increasing number of women workforce and growing desire for western attire among women, this segment has started showing promising growth opportunities in metros and mini metros and the effect is anticipated to trickle down to smaller cities as well.

SELECT TRENDS & GROWTH DRIVERS

The shirt market in India has witnessed several fashion trends and fashion fads in fabric, style and design. With

personalization emerging as a key concept in fashion retail, major shirt retailers are focussing on developing customized products to suit customer needs. The retailers have brought in various size segments like slim fits, skinny fits, etc., to cater various demographics.

In line with the global trend of casualization, the Indian shirt market is anticipated to witness higher growth for semi-formal shirts compared to formal shirts. Consequently, semi-formal look polo shirts have gained popularity, accounted to its combination of classic and causal look.

Shirt market has witnessed diversification in terms of colour and fabrics. Retailers today provide customer with wide range of choices in colours, styles and patterns. There is also a growing market for linen shirts as the demand for linen shirts has grown in past few years.

With growing disposable income and rising middle class, the shirt market has experienced a major thrust. Further, growing urbanization and corporate culture are additional growth drivers for shirts retail market (for both in men's and women's category). Women's category being comparatively new and

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EXHIBIT 3: WOMENSWEAR MARKET SHARE, 2015

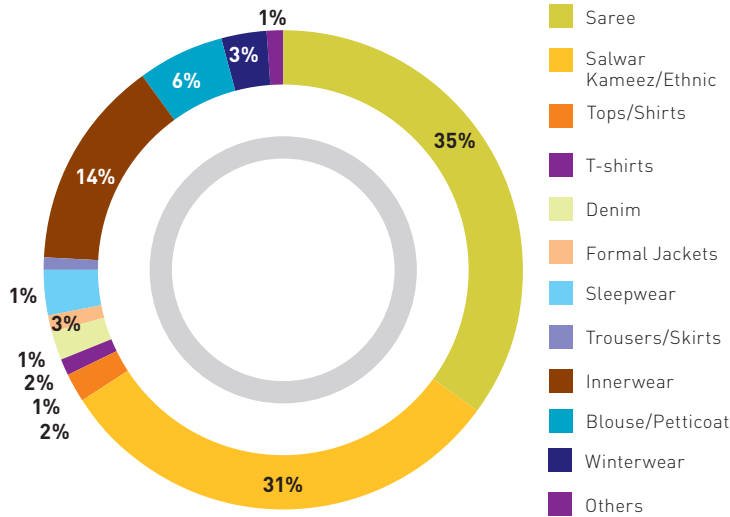


EXHIBIT 4: SWOT ANALYSIS OF THE INDIAN SHIRT MARKET

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Value and volume growth in metros and bigger cities. • Increasing penetration into smaller cities. • Comfort, easy-care properties, and affordability. • Option to customize style, prints, etc. 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Lower acceptance among women, especially in smaller cities. • Preferability of ethnicwear even in urban women.
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Increasing consciousness of fashion and trends • Increasing acceptability of semi-formal and causal shirts among youth • Increasing penetration into rural India. 	<p>THREATS</p> <ul style="list-style-type: none"> • Fragmented market with too many players • T-shirts emerging as acceptable casualwear in corporate culture.



smaller in base is expected to show higher growth rate.

The conventional trend of buying fabric and getting shirt stitched from tailor has lost its popularity. The Indian populace has shown high acceptability ready to wear shirts rather than going for fabric. Value brands and private labels catering to this segment have grown rapidly as the consumers' awareness of brands has increased substantially.

Increasing penetration of e-tailing in apparel has further led to expansion in consumer base for shirts. With increasing brick and mortar brand association with established E-tailers, the domestic market of shirts has been on growth trajectory.

CHALLENGES AND OPPORTUNITIES

Despite the number of rapidly flourishing brands, the penetration of the private labels and international labels is yet on the lower side. It is estimated that branded shirts are only able to drape a small percentage of Indian population. There is still a larger fraction of Indian population who still prefer local garment makers over branded apparel attributable to their cheaper cost.

Some private labels have modified their pricing strategy and are offering shirts in low to mid price range. The major organized players are trying to capture the market with efficient sourcing, low overheads and, above all, volumes.

Also, designing proper fits for women's formal shirts as per the Indian body type has been a challenge and many private labels and international retailers have failed to curtail this challenge. Fits catering to various body types of the Indian women need to be developed in order to target a larger consumer base.

In the coming years, the growth of shirt market will be driven by the young and aspiring youth working in corporate sector. At the same time, innovative designs and colour combinations in semi-formal shirt will continue to attract the fashion conscious consumer. Women's shirt market is also expected to witness a surge in demand due to increasing participation of women in workforce. The market will also witness new trends in terms of fabric design, finish application, introduction of wider colour choices and fitting.



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A man with dark hair and a beard, wearing a dark blue button-down shirt and a brown leather jacket over his shoulder. He is looking slightly to the side with a serious expression. The background is a textured, light-colored wall.

SHIRTS RULING THE ROOST SINCE AGES

Shirts are the basic wardrobe staple for men in India. Category of shirts is growing at the rate of 10- 15 percent year-on-year. Men are no longer restricted to the same old formal shirts for every occasion and have revolutionized their wardrobes with varieties of shirts for different purpose and functions, overpowering the former.

- Zanab S Kazi

From being strictly made to measure or in old parlance 'tailored', to being picked up off the racks and now trending as bespoke, a study on the journey encompassed by men's shirts in India bring before us the changing dynamics for shirting preference. Shirts were and will always remain the most preferred choice for workwear and with flamboyant prints and loud colors, shirts are also a choice for casual, evening and holiday wear for a lot many men in India.

Down the Memory Lane

A quick flashback into the journey of shirts in India will take us to a time when men would usually visit a store like Raymond, pick up a shirt piece of their choice, go to their tailor and get their made-to-measure shirt ready within a week. Made-to-measure back then would have been considered too fancy a term though. Just as today we see brand loyalty, back then it was being loyal to the Master Tailor who managed to give a great fitted shirt. With the acceptability of readymade shirts that began to make their presence felt in the country in the 1980s, things started changing. Not drastically though. Readymade shirts as a category in India has barely covered a journey of four decades but it is interesting to take note of the presence of national and international brands that we have before us.

The credit of dressing up men in India with readymade shirts to a large extent rests with Madura Garments and their brands - Van Heusen, Louis Philippe and Peter England to be precise. Raymond along with its brands too made a strong presence felt in this category and then we always had brands like Oxemberg, Cambridge, Charagh Din, Provogue etc. with their own base of fan following. The gradual acceptance and spread of readymade shirts led to the eventual

decline in the practice of tailored shirts but then as the saying goes - what goes round, comes around; the made-to-measure/ bespoke trend is again catching momentum.

Putting things in Perspective

Anand Goenka, Partner, Lalana, aptly sets the context of the story, "Shirts are the staple clothing of men in India. Indian markets are experiencing constantly higher growth in terms of shirts and men are no longer restricted to same formal shirts for all occasions. The wardrobe now comprises of many collections and varieties for men to wear for office, parties, shopping, morning and evening walk." Indeed. Shirts have been the staple clothing for men in India keeping in mind the rather delayed penetration of t-shirts in the country. But let us not forget to mention here that even in shirts it was 'tailored' shirts that was the only option for men in the country. Industry experts believe that the category of shirts is growing at the rate of 10-15 percent year-on-year and according to Usha Periasamy, Director - Brands and Operations, Classic Polo, this financial year could witness a robust growth. He shares, "Classic Polo estimates 40 percent growth of shirts market in India for year 2016-17."

The Formal and Casual Demarcation

In India we have our own way to categorize things and shirts are no exception. Where casual and formal shirts are understood internationally as well in India we have added another category being that of semi-formal shirts. As Vasanth Kumar, Executive Director, Lifestyle International - Max Retail Division points out, "The semi-formal category in shirts is an India creation. Internationally you will have either formal or outright casual."

Industry experts in India point out that the ratio of casual shirts is much higher than that of formal shirts. According to Bhushan Gupta, Assistant Vice President - Sales and Marketing, Callino, the ratio between casual and formal shirts stands



"Casual shirt has a signature, and a statement of the person wearing it. It shows his style and persona. Also, the same shirt can be worn in different ways. The very English attire is changing to more trendy and colourful textiles."

- Anand Goenka,
Partner, Lalana



"Casual shirts are capitalizing on shoppers who like the feel of a shirt but want vibrant, creativity in design as well. Casual shirts are exploring interesting designs and setting new trends nearly every day and this has created an impact among buyers."

- Praveen Mutha,
Managing Director, Cool Colors



“The typical Indian consumer now prefers to use casual wear interchangeably in different occasions. Formal stands at 40 percent and casual would be 60 percent.”

- Prakas Patrawari,
Managing Director, Roughells



“The casual wear market is growing rapidly in India, especially the men’s casual wear segment has a large share. 80 percent of the share is dominated by casual wear, 12 percent by semi-formal and 8 percent comprises of formal wear.”

- Usha Periasamy,
Director - Brands & Operations,
Classic Polo



“Each segment has its own territory, however, the market is undergoing a transition. As more and more work cultures are allowing a non-formal atmosphere, most men have started wearing casual shirts. We can see a steady growth in both the segments.”

- Rajesh Sunder Ghanshani,
Managing Director, Blue Tonic

at 65:35. Periasamy shares, “The casual wear market is growing rapidly in India, especially the men’s casual wear segment has a large share. 80 percent of the share is dominated by casual wear, 12 percent by semi-formal and 8 percent comprises of formal wear.” Gupta though quickly adds that it is not just ‘casual’, but rather smart casual that is taking over the category of shirts. He explains, “Smart casual is taking over formal as this extends more comfort and style and has a good combination of denim and non-denim shirts.” Periasamy attributes the rise in casual wear to the trend of opting for formal wear only for special occasions. He elaborates, “It is basically just a shift in consumer preference, which we are expecting to continue because we are finding that people are buying suits and other formal clothes mostly for celebratory occasions rather than for work.”

Goenka adds to the acceptance of casual shirts, “Casual shirt has a signature, and a statement of the person wearing it. It

shows his style and persona. Also, the same shirt can be worn in different ways. The very English attire is changing to more trendy and colourful textiles. The people are now adding casual shirts and t-shirts to their wardrobes because of the increasing trend.” To this, Prakas Patrawari, Managing Director, Roughells, shares, “The typical Indian consumer now prefers to use casual wear interchangeably in different occasions. Formal stands at 40 percent and casual would be 60 percent.” Patrawari strongly feels that casual shirts would see a much stronger growth than formal shirts in India. Summing up the rise of casual wear shirts in India, says, Praveen Mutha, Managing Director, Cool Colors, “Casual shirts enjoy a demand across a wide variety of shoppers. The shift in corporate culture has enabled a lot more people to embrace smart casuals as opposed to formal shirts. It is safe to say casual shirts enjoy a higher percentage than formal shirts.” Mutha talks about the rise in casual shirts stating, “Casual shirts are capitalizing on shoppers who like the feel of a shirt but want vibrant, creativity in design as well. Casual shirts are exploring interesting designs and setting new trends nearly every day and this has created an impact among buyers.”

According to Mutha, the easy availability of casual shirts has added to the acceptance of this category and is one of the prominent growth drivers. The other growth drivers, according to industry experts, for the rise in casual wear shirts would be the age of the population. According to Narendra Parekh, Head of Marketing, Turtle, “It is the strong shift of the market for the casual look, a more of a semi formal approach that is driving the casual wear demand for shirts.”

Highlighting the growing acceptance of formal wear as well, Rajesh Sunder Ghanshani, Managing Director, Blue Tonic, points out that the category shall see a better performance with corporatization gaining momentum in India. He sums up the topic under discussion (preference of casual to formal shirts) saying, “Each segment has its own territory, however, the market is undergoing a transition. As more and more work cultures are allowing a non-formal atmosphere, most men have started wearing casual shirts. We can see a steady growth in both the segments. But, I believe five years from now casual wear will have



major potential. Today a 40-45 year old man is wearing casual shirts. Otherwise the older generation would rather go for formal, it is because of the nature and ethos of people during that generation. But today you may find many 45 years olds wearing semi casual wear shirts."

Keeping the above points in mind, the question that comes forth is whether formal shirts can regain their position. To this, most industry experts seem to share a balanced view. Goenka shares, "Formal Shirts are being styled in a different way but they are no longer formal in the traditional manner."

To have a quick take on their views when it comes to international acceptance of formal vs. casual shirts, majority of the experts above vote for casual wear shirts witnessing a strong momentum internationally as well. Mutha shares, "Globally the lines remain the same, casual is clearly the preferred choice among the majority while CEOs and executives of large scale traditional corporations continue to prefer formal wear. Startup culture has played a significant role in the impact of casual." Periasamy adds, "Formal category has only 9 percent of white collar workers dressed in business formal attire, this type of style remains the preferred look for job interviews and daily use in conservative professions such as finance and engineering."

Popularizing Shirts – The Rise of Popular Shirts

Where premium/ high-end brands have created an in-road to the wardrobes of men in the metros and tier 1 cities and towns, the popular shirt category is making the transition for men who are switching over to readymade shirts from getting them tailored.

Tejpal Singh, Brand Manager, Urbana, talks about the popular shirt segment, says, "Popular Shirt segment is a huge market which is fiercely competitive. Madura has Peter England, Indus League has John Miller, Wills Lifestyle has John Players and Arvind has Excalibur in their portfolios. Yes, margins are low, however, volumes are high."

On the target market for popular shirts, Sanjeev Mukhija, Managing Director, Breakbounce Streetwear, shares, "The target market is wide in terms of age as well as demographics. People who want to adopt fashion and buy readymades, will start with popular shirts and will continue to evolve with their tastes and preferences. Income driving prices and psychographics play a big role in the definition of the target market for popular shirts." According to Singh, middle income group segment is the biggest consumer of Popular Shirts. Also, fresh college pass-outs in Tier II and Tier III towns looking for first job consume lot of these products.

Asif Memon, Director, Officer, adds, "This is actually a middle-class segment. About 60-70 percent of the population of the country falls in this segment. But having said that, let us also not forget that it is not that they have left tailors or tailor-made garments and shifted to ready-made completely." He further adds, "The 'popular shirt' is left to the mid-segment players. There are around 20-25 brands who are in this category. It is highly regional and sometimes, unorganized; but having said, that it is a huge market and it is growing."



"Limited Edition is ultra formal. It has an exclusive niche market, which is untouched and not many players are in this segment. Rich fabrics with finishes enhances the ultimate look and feel of the garment. Trims, used, are of finest qualities."

- Narendra Parekh,
Head of Marketing, Turtle



"Shirt as a category caters to all the target audience. Even a customer who prefers tailored shirts is a buyer of readymade shirts because of the variety and easy availability. But the segmentation of customer today is more from the styling and fitting perspective."

- Raghav Mohan,
Managing Director, Surreal





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Director, Officer



When we look at the players operating in this category, either we shall see the market being dominated by unbranded players or we shall have regional heroes driving the market. Mazhar Khan, Head Designer, Success, shares, “The unbranded and regional players serve the popular shirt category for the masses primarily for people who shop on a budget. This is possible for them owing to lower overhead expenses and cheap manufacturing costs compared to bigger players.” He adds, “Corporates are not willing to venture into the popular shirt segment as of now, to remain afloat in today's scenario as they will have to compete with regional and unbranded players who are already catering to the segment with cheaper prices.” According to Khan, smaller players can capture this segment by aiming for sustainable methods of cheaper production costs and high output to meet the huge demand. Singh shares, “Unbranded and regional players will be formidable competition because of shorter lead times and agile supply chain. With very less inventory, these players play on replenishment and offer new styles every few days.”

Khan further goes on to explain in detail on the reason for unorganized market driving the popular shirt category. He explains, “The unorganized sector is motivated by the

huge demand for products in this price segment. Their prices are affordable as they don't have to worry about a lot of internal and external factors including marketing, advertising, expensive retail space, huge margins of distributors and retailers to name a few. This is the only category where they have no competition from bigger players.” Singh further adds, “Cost, distribution and margins are main factors which keep the corporates away from this segment. Having said that, early mover corporates have managed to acquire a huge chunk of this segment. John Miller and Peter England are two such brands coming from Future Group and Aditya Birla Group.”

Concluding on the market apt for this category, Karim Lalani, Director, Horizon, shares, “Metros and tier-I cities are being captured by the high-end and premium segment brands. It is small and remote towns and cities, who are not much brand conscious who fall for a popular shirts segment.”

Limited Edition

Considering the journey of readymade shirts in India is still evolving, finding



connoisseurs for limited edition is debatable. But having said that, the country is warming up to the same. Khan shares, "There is always a clientele who wants his shirts to look and feel different from regular formals and casuals. The market for this category is limited but very exclusive in comparison." Narendra Parekh from Turtle adds, "Limited Edition is ultra formal. It has an exclusive niche market, which is untouched and not many players are in this segment. Rich fabrics with finishes enhances the ultimate look and feel of the garment. Trims, used, are of finest qualities." On what has made this category a slow mover, Khan points out on the challenges being faced, "This category of shirts requires state of the art production methods, and very talented craftsmen which are difficult to procure. Other factors being - availability of exclusive fabrics and trims, high cost of advertising and branding." According to Parekh from Turtle, the forte for limited edition rests with national players rather than regional keeping the nuances in mind. On the growth of this category, he does not sound much optimistic. "The market area has shrunk, mainly due to shift from formal to semi-formal," he says.

Khan shares his advise to players wanting to enter this genre, "Retailers planning to venture into this category should choose a brick-and-mortar format over online for a start, unless they are a global

player with a 'brand status' legacy or nationally renowned brand. The main reason being the targeted consumer who is knowledgeable about choosing the right kind of shirt for his taste, with respect to look and feel of the fabric, exclusivity of design, fit and quality of the product before investing into it."

Linen Acceptance

Linen, the king of fabrics has an aspirational value attached to it but not too many men would like to stock up a collection of linen shirts in their wardrobe. Brands across have an offering in linen but due to poor consistency in the quality of linen, the trust factor takes a hit. Sanjay Oswal, Director, So Design, shares, "Linen has been fluctuating in trends. Peaks up seasonally. But acceptance is greater in higher age bracket. Limitation to offering casual product in linen base." According to him, cotton-linen with satin finish is the most preferred choice in linen.

Denim Dare

It is hard to imagine a wardrobe without a denim shirt. No man in his journey would have not had a denim shirt. Saurabh Singh, Head of Design - Men's Wear, Being Human Clothing, shares, "Denim shirts predominantly are part of casual and street wear segment but there have been some high-end designers and luxury brands, who have given it a formal avatar by creating tailored versions." According to him, "At the moment 90's is the biggest influence on denim, with oversized silhouettes and bleached light blue tones with acid wash. A good example of 90's trend is Justin Bieber's video of "sorry"." On what is currently trending, he further adds, "Washing has also seen a lot of experimentation with multiple variations of bleach wash effects to achieve newer results, eco-friendly techniques like laser effects and ozone wash to achieve laundered look. As far as styling is concerned, the classic western and vintage work wear style still works



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-Saurabh Singh,
Head of Design - Men's Wear, Being
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Director, So Design





“International shirt brands have a big potential in India and is now seeing more traction in the category, which is growing at 15- 20 percent year-on-year. By looking at Indian physique, made-to-measure service for shirts was introduced which clearly indicates that the market has grown.”

- Saleshe Grover,
Business Head, Corneliani



“Metros and tier-I cities are being captured by the high-end and premium segment brands. It is small and remote towns and cities, who are not much brand conscious who fall for a popular shirts segment.”

- Karim Lalani,
Director, Horizon

WHAT'S TRENDING

- Slim Fits are trending well
- Rather than just black and white, we see an influx of bright colours which also includes red. The trends of 70's and 80's are back with a bash
- Cufflinks are in fashion. They are treated as a style statement and piece of jewelry for men as cufflinks work both as a functional as well as ornamental
- Cotton is still the number one choice for fabric in shirts though linens and blends are growing at a rapid scale. However, cotton especially Pima and Giza are the rulers-In prints, it would be Geometric and Paisley and the other ones are Dobby weaves and Stripes
- Linen brings comfort to one's body so it will always exist as an important component in shirts
- The growth of women's shirts has shown impressive growth in the recent years
- Top 5 trends that will emerge in the future in shirts are-Fitted and Styled, Colorful and Textured, Polo Shirts, Military-type Shirts and Short Sleeve Dress Shirt

-Anand Goenka, Partner, Lalana

the best while looking fresh with use of new fabrics and washes. Apart from this, all kinds of new styling like sports, street or formal style elements are being used today.”

Road Ahead

The category for shirts in India though in its 40s, has seen a tremendous growth. Regional, national and international brands are existing in their own respective market and have their own market share. Saleshe Grover, Business Head, Corneliani, shares, “The business dynamics of Indian men's apparel industry has witnessed key changes due to the influx of international players. The increased competition has kept the brands on their toes to improve the consumer experience. Indian consumers have aspired to own international fashion brands, leading industry to take off exponentially. Brands are now making efforts to make deeper inroads into the psyche of Indian fashion consumers to keep up the pace like made-to-measure services for shirts were introduced later however it was restricted to suits and jackets earlier.”

He adds, “As Indian shoppers are becoming more and more brand conscious



it's no surprise there are countless number of brands, both domestic and international, who have seen a remarkable growth in sales, making shirts one of the fastest growing categories in the apparel segment. International shirt brands have a big potential in India and is now seeing more traction in the category, which is growing at 15 - 20 per cent year-on-year. By looking at Indian physique made-to-measure service for shirts was introduced which clearly indicates that the market has grown.”

To conclude, Raghav Mohan, Managing Director, Surreal, hits the nail right on the target explaining why the category of shirts is poised for growth. “Shirt as a category caters to all the target audience. Even a customer who prefers tailored shirts is a buyer of readymade shirts because of the variety and easy availability. But the segmentation of customer today is more from the styling and fitting perspective.”






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THE UNCLAIMED SILHOUETTE

INSIGHTS INTO THE WOMEN'S SHIRTS SEGMENT IN INDIA

The around ₹2,000 crore women's shirts market in India is huge by all standards. Despite the substantial size of the women's shirts market the segment is phenomenally fragmented; and by far, none of the brands seems to have garnered mentionable market share in the category. So for a product segment that's contemporary and seem to have great fitment with the consumer trends and desires what has been challenging its growth?

By Nischal Puri

The Indian woman has been an enigma from the fashion point of view. It's only in the last 10-15 years that the working woman segment emerged as a strong sub category. The marketers rushed to create brands and products that they thought she will need in her new avatar.

Indus League was one of the initial entrant in the branded women's wear segment in the country. In the year 2000, the company launched a women's range named Scullers Woman as an extension of its men's wear brand Scullers. Promoted as smart casuals for work and after, the Scullers women's range was launched in three basic lines, Essentials, Manhattan and Chromium.

Around that time many players began taking interest in the western women's wear segment in India. Arrow planned to enter into the women's western wear segment by early-2003. Around similar times, Raymond ventured into the western wear for women by its new venture Be:

In September 2002, Madura Garments launched a line of readymade women's western wear under the brand name Allen Solly Women's Wear. This was the first-ever nationwide exercise





by any company to offer readymade western wear for women in India on this large a scale.

By late-2002, many other brands, such as Benetton, Mango, Wills Sports and Blackberrys, had either launched (or were planning to launch) exclusive women's wear in the country. This rush to enter the segment was not difficult to understand, considering the fact that the market was almost completely in the hands of the unorganised sector and had very few branded players.

So for a category that gained attention almost 14 years back but still has eluded significant market share for any significant player is, in all standards, not normal.

We, at Horizon Consulting India, believe in mapping the consumer trends by research. While conducting FGD (focussed group discussion) across Delhi, Mumbai, Bangalore and Kolkata for an on going project we decided to extend the scope and added the women's shirt segment to our study as the FGD sample being identical with the ongoing project. The consumer base was 19-25 years, urban SEC A working woman.

The insights we garnered in the research has brought to surface many thoughts that can help brands fine-tune the way they address the consumer needs besides understanding the key segment drivers. Some of the pertinent insights has formed the base of this paper.

What are the leading brands in the women shirts category

The brand recall in the category is not consolidated still. Many brand names were mentioned but no complete unanimity could be established.

20 percent of the respondents mentioned Mango 20 percent of respondents

mentioned Zara. 60 percent of the respondents mentioned that brand name is not the prime factor that influences their purchase. They stress more on shopping in organised retail formats and online, and choose a product based on the aesthetic appeal and price factor.

INSIGHT: Top of the mind recall for a single brand is still not established in the category. No single brand emerged as the preferred brand in the segment, although the category started witnessing action almost 14 years back. Though most of the initial entrants were brand extensions of the respective men's range, the women's category was always a smaller portion in the portfolio and most brand building initiatives were undertaken more for awareness building and not for market share capturing.

What product features are most considered paramount while buying a shirt?

30 percent of the respondents mentioned that the styling is one of the most important determinant of the purchase.

45 percent of the respondents regard fabric type to be the most impactful feature for their decision.

25 percent of the respondents mentioned colour and the print type.

INSIGHT: Women shirts have evolved over the years. The styling has been one of the key variable for consumer delight and it still is.

The study also revealed the three products that are considered as 'must haves' in the women's shirt category. A white cotton long sleeve shirt, a black cotton long sleeve shirt and a cream colored silk long sleeve shirt.

The fabric used in the ladies shirts have been expressed as an area of improvement.

The Material Is Too Thin

As one of the respondent mentioned "Go through any women's clothes section and put your hand inside all the shirts and dresses and see if you can see it. About 50 percent of the time, you are going to get a pretty good view of your hand." Consumers have been baffled on this count. Why the fabric has to be so thin? Surely an insight to be considered by the brands.

Diaphanous Fabric

The respondents were unanimous on this factor "That means if a woman wears just that shirt, her inners will be visible; it violates workplace dress code. This necessitates the woman to wear a camisole inside, which is cumbersome. The solution is supposed to be layering, which has really caught on in the recent years. Stores also sell plenty of tank tops, camisoles and plain form-fitting T-shirts, sometimes dedicating entire sections to clothes specifically designed for use in layering

While the group was trying to search the reason why see through and sheer fabrics are used, a respondent in Mumbai had an interesting commercial insight. "They do this deliberately to make women buy more pieces of clothing. Once you found out that you could sell this concept to people, why wouldn't you? Someone who used to buy one shirt is now going to buy three from you. And you get to use less material," she said.



The use of sheer fabric and diaphanous material perhaps is fine in the western markets where the weather requires jackets and other layers, but is not a preferred option in tropical climates like India. On top of that, super-thin cloth isn't very durable as mentioned many respondents.

Are you satisfied with the fit and sizing of different brands? Which is the best fit as per you?

A majority of about 60 percent of respondents said the sizing across brands is arbitrary. Some mention sizes in XS- XL while others mention sizes in 2-22. "No 2 brands with the same small size has the same measurement," mentioned one agonised respondent. "There should be some uniformity in sizing, its so simple to buy men's clothes, 32 waist, 34 waist or 42 collar size and most brands have consistency, why can't there be uniformity in women's shirts too?"

INSIGHT: Women consumers struggle to find the best fit. In another study on lingerie, 65 percent of the respondents mentioned that they were not satisfied with the lingerie fit. Different brands have different cup sizes. Its another matter that the consumers have invented a formula on which type of styles they prefer in which brands. Thus, it seems sizing uniformity is a major concern across all categories in women's wear.

Arbitrary Clothing Sizes

Sizing in women shirts is indeed tricky, as mentioned by most respondents, there is indeed a surprising extent of disharmony



in the way the sizes are expressed, some brands follow S- XL while many others follow 6- 22 sizing leaving the consumer to struggle. This cue is perhaps very pertinent for the online players where the trial option is very limited. Brands need to educate the consumer on the sizing of their products in a more lucid and easy manner.

Most of the international brands follow these measurements and they vary with the fit (slim fit, tailored fit and many more). Its crucial for brands to develop a uniform measurement guide for better consumer understanding. About 45 percent of the respondents mentioned neck shape and neck depth as one of the area of major concern. Also, 60 percent of the respondents mentioned the gape being a point of concern.

There has to be three measurements that need to be perfected and communicated. First being the chest width, second being the waist width and third and most importantly the hip width. "Most of the images shown in portals are of perfect models. The consumers are normal women, not models. So clear transparent measurements showing the waist and

hip measurements of the garments are extremely important," mentioned one of the aware respondent who frequently uses shirts as office wear.

About 45 percent of respondents also mentioned improvements to be done about button openings from the middle. Dual buttons, we observed used by many brands, is a good solution.

Conclusion

The women's shirt market is witnessing a lot of action -- men's brands becoming unisex brands, exclusive women brands being launched, large format retailers developing their own private labels and the democratic brand making era unleashed by e commerce, all have ensured that the consumers are spoiled for choice like never before. Despite many players in the segment the status of a preferred brand is still vacant. The competition is steep and arduous and marketing as a tool to drive loyalty is still in its infancy. The consumer is expecting lot of attention and with so many choices to be made, the fight for the market share has perhaps just begun.



ABOUT NISCHAL PURI

Nischal Puri is the Managing Director of Horizon Consulting India. Nischal Puri is a veteran in the apparel and retail industry. He is also a successful entrepreneur, an established thought leader, brand strategist, a consultant and an author.



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E-COMMERCE IN MEN'S SHIRTS IN INDIA: EARLY STAGES

E-commerce has hitherto proliferated only in the discounted segment of men's shirts. But with shift in preferences and increased availability of choices offered by new entrants, the online luxury shirts market is expected to augment at a rapid pace.

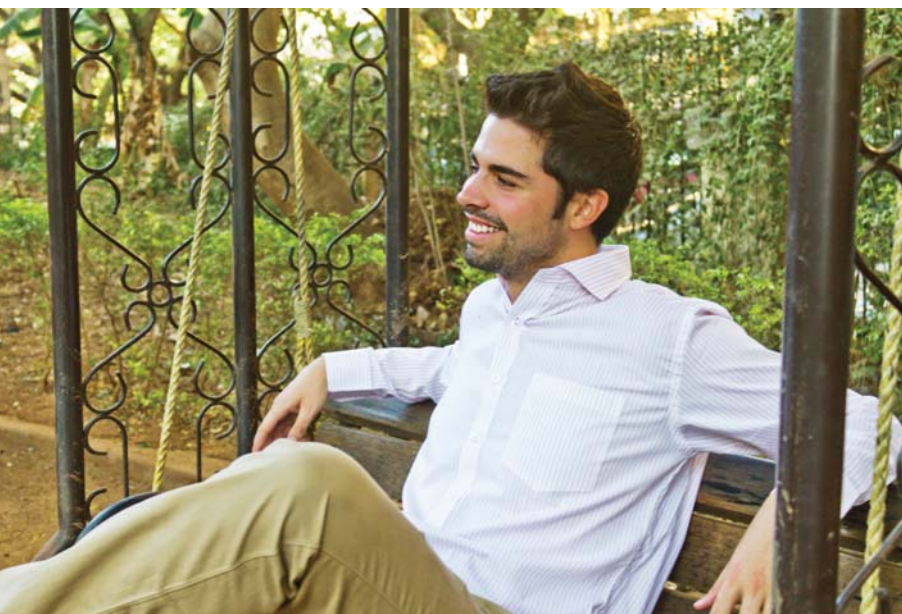
- By S. Ganesh

E-commerce in men's apparel has been slow to take off, but it will soon grow at a rapid pace. It can be recalled that the first wave of on-line buying was in highly utility and convenience items such as air and train ticketing where on line has become indispensable. Basically, bringing services to your doorstep. Online has penetrated gradually to other areas such as women's fashion and boutique products where mass merchandising is not possible. Also, to convenience areas such as electronics where products are standardized and touch and feel is not so important. And also with cinema and show bookings.

In areas such as men's apparel where touch and feel is still important and customer confidence takes time to build, e-commerce has been slow to penetrate. The fit and comfort is another factor. Only when a product is tried out can the customer be reassured that everything is in accordance to his choice. The first wave into e-buying has been the youth segment such as college students, quick to adapt to new technology, clued into social market places such as facebook. This has happened first in t-shirts which can be free sizes and unisex at relatively low prices. A neglected segment so far has been men's premium and luxury shirts. This is explained by a contradiction. Busy executives have the money to buy premium, but not the time to browse websites. Retailers, quite busy with brick and mortar, have been slow to come in. Hence a gap in e-commerce space for men's apparel.

Retailers also have sharply differentiated themselves. At the commodity end, t-shirts sold in corner stores are now selling big online. T-shirt brands that did well were able to offer trendy designs online.

Men's shirts online also came in and this was driven also by the entry of the giant market places such as Flipkart and Myntra. These were primarily in the discount segment and are not considered in the luxury or premium bracket. These shirts are basically polyester blends and not the pricier pure cottons. Big national brands such as Arrow and Zodiac in the premium shirts segment did not start and take online business seriously. The market was flooded with





I am of a firm opinion that recent technology developments will delay entry of premium brands in men's shirts. The reach of 3G and 4G has put android in the reach of the larger consumer. The urban and rural areas and app driven sales will drive the economy segment even at a much larger scale.

The next wave, which is a few years away, will see premium men's wear and shirts gaining sales online. The Aditya Birla Group is leading this push, with its fashion portal TrendIn.com, carrying the group's flagship brands. The group has recently introduced another fashion site called abof.com.

Brands like Zodiac are also increasingly active online. Smaller premium brands such as thestiffcollar.com have built up a solid brand presence online with their range of premium shirts and designer art shirts with their exclusive focus on cottons. In premium, custom made shirts using a hybrid onnline-offline method is taking root. E.g., Bombay Shirt Company, 16Stitches.com and Vitruvien.com are also in this group, offering premium fabrics and fine tailoring at higher end price ranges. It is believed that marketplace sellers such as Amazon.com are also trying to move up-market in men's apparel segment where its traffic and sales will automatically increase.

In short, men's shirts online will move to premium and fashion segment in the next phase of e-commerce. Drivers will be a shift in preference to the convenience of online buying and increased availability of choices offered by new entrants in premium space. The reduced cost of distribution will automatically be passed on to the consumer.

cheap products. Moreover, top national brands had spent decades building strong distribution and retail chains and were not in a hurry to dismantle this brick and mortar infrastructure created patiently over time.

In short, women's garments were moving into premium. But men's shirts, till recently, was restricted to the economy end, low priced products for students and deal seekers. Men's shirts online was subject to a ₹1,000 mark whereas good quality apparel above the ₹1,000 mark was not available. In contrast, online branding in western countries has become quite au courant. Top international shirt brands such as T.M. Lewin, Charles Tyrwhitt, Thomas Pink, are available online. They compete in popular segment with marketplaces such as Amazon, whereas their products can also be bought on their official websites.

In India, men's shirts is still to go premium in the online space. The oldest e-commerce companies in men's apparel dates back to some ten years. Earlier the companies forayed into the online space



with t-shirts targeting the youth segment. It was only gradually that the focus on shirts began. ZOVI entered in the men's shirts space in 2013 focussing mainly on shirts. It aquired Inkfruit, a reputed t-shirt platform and gradually moved into other products such as accessories. But ZOVI too has restricted itself to the economy segment for young buyers.



ABOUT S.GANESH

S.Ganesh is a Co-Founder and full time Director of thestiffcollar.com. He is also the founder of Interstrat Consultants, a market research firm. Ganesh is an IIT engineer, with prior experience in L&T and Exim Bank, before he got into start-ups. His hobby is farming.



THESTIFFCOLLAR.COM

MEN'S SHIRTS WITH A WHIFF OF FASHION

Stiff Collar was set up in early 2013 by a group of experienced professionals with varied skill sets. Aim has been leadership in the e-commerce space for men's shirts. While some sales are through marketplace affiliates such as Amazon, major sales are from visits to the brand web-site www.thestiffcollar.com.

In e-commerce men's upper wear are largely T shirts and shirts in economy segment. Buyers are trendy and young, driven by social media such as facebook. Stiff Collar has taken an entirely different route.

For one Stiff Collar is pure play e-commerce. The target buyer is typically young to middle age, office executive, and a professional. He could be self employed or a business executive. He has some 5-10 years experience, and has a good income. He can afford the best, even though he is value conscious. He has come up by hard work and does not wish to waste money. Now what goes into making a great shirt? What is special about Stiff Collar?

GREAT FABRICS

Fabrics are 100% cotton, custom made to Stiff Collar specifications. The process starts with choosing the right yarn.

Long staple fibre or giza cotton as the case may be, high count single strand, or 2 ply yarn. A range of weaves to choose from – poplin, oxford, houndstooth, herringbone, satin, twill. All adding up to a world class range of premium shirts you can wear to an awards ceremony.

GREAT TAILORING

There is more to a shirt than just styling. Many people may overlook the fine points. British techniques really. The collar has to be just right. Not too stiff, not limp. Stiff Collar has a complicated process involving imported fusing machines and two layer fusing. And the fish eye collar bone, a vanishing art in shirt making. With option for stainless steel collar stays.

And superb fit. Split yoke and pleats at the back so you can flex your shoulders. Extra long length and rounded bottom so the shirt stays secure as you get up from a chair. Side gussets to give that extra flex on the bulge.

GREAT DESIGNS

Product innovation is the heart of the matter. Stiff Collar pioneered the on line sale of outdoor shirts. This is a great functional product, with every imaginable feature – secret pockets, loops for phone cords, roomy pockets, elbow pads. Back ventilators and night reflectors. Right for outdoors or an evening out – and for long distance air travel. Rugged cotton, yet comfortable. An adaptation is the Stiff Collar Suncheater and Thanda Pack for sun protection during summer.

FASHION STATEMENT

If premium shirts and outdoor shirts have built the brand so have the designer shirts depicting art motifs. Outstanding here is the Indian Arts Series. An exuberance of Indian art used as trims in the formal range of Stiff Collar office wear shirts. You can wear ancient Indian arts on your sleeve, literally. Kalamkari, Ikkat, Ajrakh, Warli. These are genuine handicrafts using vegetable dyes and hand printing, not look alikes. If women can wear the best in Indian traditional textiles, we ask, why not men? Best sellers include the India shirt, an exquisite Nehru collar shirt in white satin, with delicate prints depicting Indian flag colours. It is worn to show the India colours.



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THE NEED OF INNOVATION IN *MEN'S* *SHIRTING*

From stitching styles to prints, fabrics, to collar designs, men's shirts have undergone massive innovation in the last few decades. Designer Saggar Mehra discusses the metamorphosis in details and the areas that still holds scope for more innovations.

The style of a man is defined by the kind of shirt he chooses. Shirts are one of the most accurate parameters to measure men's fashion. They are indeed one of the most sought after items in every man's wardrobe. Men's fashion has seen a dramatic evolution over the years. The shirt designs didn't fluctuate much in terms of prints, colours and cuts unlike the modern days.

Fortunately, past few decades have been quite high on innovation in terms of men's shirting. From change in stitching styles to prints; fabrics to collar designs, everything is witnessing a revolution. A well stitched clothier always boosts the confidence when worn. An urban man knows what he wants in terms of his personal style and wants to create a statement wherever he goes. Thus, the demands both at the workplace as well as afterhours have necessitated this change. Let's say, the collar designs. From traditional forward pointed to button down and more popular spreads, collar designs have come a long way. Similarly, the change and innovation in stitching style, pocket designs and et al is also visible. This segment is also witnessing an increase in the demand for differently coloured shirts. In addition to the regular colors, viz. black, blue, white and grey, Indian men have started experimenting with variant colors like red, orange, pink and the colors which were always considered feminine. As a matter of fact, every men's wear brand whether



Indian or international have started offering newer range of colours as well as variations in style. The rise in demand of such clothiers has made the sellers optimistic about their growth in the future.

With the fascination of staying updated with the latest fashion or technology, men have not stayed behind. Today, they are in a phase of transition as they no longer want to stick to wearing apparel of defined styles and silhouette and want to experiment with the look of the clothing. But the question arises-where to begin from? The answer is simple. Begin from the beginning that is, from the very basic element of the shirt – the fabric. Fabric plays a major role in designing a shirt because it is a canvas where the idea needs to be placed. Recently, some major steps have been taken to bring about a change in the quality of the fabrics. We, at Sunil Mehra, experiment with everything to strengthen the quality and longevity of

a product. From thread to spinning, to cut and designing we play with the elements till we achieve the satisfactory output.

Apart from fabric, the innovation can also be done in terms of designs and cuts. This can be achieved by giving unusual cuts, designs and silhouettes to the shirt. Play with the collars, pockets, hemlines, cuffs and every other possible element of the shirt. Some designers have now started taking the bold steps. **They are coming out with unusual shirt designs and weaving techniques and are even getting adulations for it. The change in technique can change the look of the entire shirt and bring out the required revolution in the world of men's fashion.**

We, at Sunil Mehra, have experimented with the prints and motifs to beautify the shirts to add that extra element of sensuality in them. We are not the first ones in this domain though. In-fact, it has become a need of the hour. Men want shirts which should define their personality and bring out the confidence which has led to the delivery of never seen before features. From functionality

to finesse, the shirt should be ideal for today's multi-tasking professionals. Innovation does not only mean the beautification of the shirt but also at the same time, a designer should keep in mind the usability and comfort of the wearer. A 21st century shirt should be wrinkle-free for effortless maintenance, should have a soft and smooth feel and most importantly the fabric should be breathable enough. It should blend technology and fashion effortlessly.

According to a February report by consultant Technopak Advisors, the Indian apparel market for men, which includes shirts, trousers, t-shirts, suits and innerwear was worth \$17 billion in 2012 and is likely to grow to \$25 billion in 2017. In a market which is huge and is growing day by day, the innovation is a key to emerge as a winner. Understanding the psyche and needs of the modern Indian men and offering them shirts according to their changing needs and lifestyle are some of the key areas upon which fashion players have to focus.



ABOUT SAGGAR MEHRA

Born with an artistic bend of mind, Saggur Mehra, Creative Director at Sunil Mehra, knew right from the outset that he wanted to be an artist. He did a course in Fashion Designing from Nottingham Trent University. Later, he joined his father and famous designer Sunil Mehra's bespoke design studio in Delhi. After closely observing his father's marvelous creations for few months, he took over as the Creative Director of the brand. He looks after the creative aspects of the studio, right from designing to quality control. With six years of total work experience in the men's wear fashion industry, he has garnered thorough and superior skills and knowledge of the market and has become the driving force at Sunil Mehra.

BEING HUMAN CLOTHING: GROWING STEADILY

Saurabh Singh, Head of Design - Men's Wear, Being Human Clothing, in a candid interview with Images BoF shares that the brand plans to continue offering the latest international trends to its customers by keeping up with the innovation and exploring further with textiles, design elements and much more.



Being Human, the clothing line with a heart, is a collaborative association between Mandhana Retail Ventures and Being Human - The Salman Khan Foundation - wherein royalties from the clothing line supports the twin causes of education and healthcare. The brand has rigorously expanded since its inception resulting in approximately 700 Point-of-Sales with over 50 exclusive stores and overseas business in over 15 countries. The brand is selling through the top e-commerce portals and large format stores in India.

Product Portfolio

Being Human Clothing offers a wide range of apparel and accessories in the casual wear segment. The brand offers categories like t-shirts, shirts, polos, chinos, denims, shorts, tracks and much more for men and boys' category and dresses, leggings, shorts, maxis, etc., for women. The pricing of the brand is set at mid-to-premium range; starting from ₹699 and go upto ₹4,599.

Core Target Audience

The primary target audience are men and women between the age group of 18-35 years. Nonetheless, the brand's audience is everyone who is young at heart, their

key traits being global outlook towards fashion and at the same time socially conscious. The brand is planning its extension into boyswear category in spring-summer 2016, with this their target audience expands to boys from the age of 5-14 years.

Retail Presence

The brand is present in over 15 countries worldwide with approximately 700 point-of-sales. It is being sold through 52 exclusive stores, 156 large format stores and 70 MBOs. It is also available through top e-commerce portals like Myntra, Jabong, Flipkart amongst others with a reach of over 20,000 pin codes.



– Saurabh Singh,
Head of Design - Men's Wear,
Being Human Clothing

Tell us about the new shirts collections that you have planned for in the forthcoming season.

For the upcoming autumn-winter season 2016, we have planned a

wide range of shirts including exclusive lines of printed shirts like dobby, jacquards, denim and a few hybrids in long line silhouettes which incorporate texture play like denim mixed with knits apart from the usual classic workwear style shirts.

Did you witness any major change in demand for your shirts category? Or, has there been any major upward or downward price movement?

The last few seasons have shown us immense growth in our shirts category. We recently launched a premium range which has the price set higher than regular. Overall, our shirts category is soaring higher every season.

What are your plans regarding new products or shirt category expansion?

Our plan is to continue offering the latest international trends to our customers by keeping up with the innovation and exploring further with textiles, design elements and much more.

What are your plans for exploring new markets in India?

Being Human Clothing's aggressive expansion plan involves reaching the deepest pockets of the country. With an average of one store opening per month, the brand is planning to leave no territory untapped. Being Human is growing rapidly on an international scale by focusing on increasing presence across the globe.

BLUE TONIC: BEING OMNI PRESENT

In a candid interview with Images BoF, Rajesh Sunder Ghanshani, Managing Director, Blue Tonic, highlights the price-war among e-retail giants and the hardship a brand faces due to price parity between online and brick-and-mortar.



Launched in 2004 by the owners of Topson multi-brand retail store, Blue Tonic is an ideal power clothing for men. Topsons had sold and made brands for over five decades. Its founder Sunder Topsondas Ghanshani, after returning from Hong Kong in 1961 set up a small readymade clothes outfit on Linking Road and probably the first retail store in the suburbs.

The brand has three stores in Mumbai and it is sold through more than 200 MBOs across the country. Talks are on, and the brand will soon open to its customers in New York (USA) as well.

Core Target Audiences

16-35 years old male in the price point middle class and upper middle class sections of the society. Mid-segment to premium.

Product Portfolio

It offers casual shirts, t-shirts, trousers, jeans, accessories, etc.

Retail Presence

Blue Tonic has three exclusive brand stores (2 in Mumbai and 1 in Pune) and is present in 200 MBOs. It is not yet present in large format stores as the company believes that there are still more to capture in the MBO market. Once they cover the country through distribution then they will go in for the LFS model.



– Rajesh Sunder Ghanshani,
Managing Director, Blue Tonic

What are the new shirt collections that you have planned for in the forthcoming season?

We have categorised our collection into solids, prints, denims, hi-design (designer casual wear shirts, here the accessories will be a little more funkier, the washes will be more severe and it will be more casual than the other range). The collection will offer high quality fabrics, intricate detailing and nice washes.

What are your plans regarding new shirt products or shirt category expansion?

We feel that there is a vacuum for good casual wear shirts in the country. I feel that India has not yet witnessed fantastic quality at reasonable prices.

What are your plans for exploring new markets in India?

We have presence in West Bengal, Odisha, Tamil Nadu, Delhi and Vidarbha Area of Maharashtra. In the remaining parts of the country we are dealing directly with the MBOs, and we are looking for distributors and agents in the rest of the country, who have product knowledge and good market hold.

What has been your progress through online retail?

We are in talks with Amazon.com and will soon tie-up with the mobile app Pretr. We were available on Flipkart, Snapdeal and Paytm, but since the past six months, we were not available on the e-commerce sites. We were waiting for the online war to stabilise with heavy discounting, as we didn't want to devalue our brand with the ongoing price war. We want to be present on multi channel, and we want to share the same experience across brick-and-mortar and online offerings at same price range.

What has been your growth and what is your brand aiming for in the next 2-3 years? (20 words)

We achieved 30 percent growth last year. We are aiming at 35 percent growth year-on-year for the coming three years.

BREAKBOUNCE STREETWEAR: EYEING TIER-II CITIES

Breakbounce is India's first streetwear brand for men that brings global street fashion and trends to the youth in India. Sanjeev Mukhija, Managing Director, Breakbounce Streetwear, in a candid interview with Images BoF, shares that they are eyeing tier-II cities for major expansion.

In 2012, Breakbounce Streetwear started a nationwide market research in collaboration with Myntra. Later, the brand made its entry with the launch of the autumn-winter 2013 collection across large format stores like Lifestyle, Splash Fashions and Central. Targeted specifically at youth fast fashion, Breakbounce Streetwear has achieved



a nationwide market penetration across 140-plus doors. This includes e-commerce platforms, MBO's and trade partners across the country.

With plans to expand its footprints, the brand opened its first exclusive brand outlet in Vadodara (Gujarat) in December 2015. The brand recorded Rs. 50 crore in FY 2015-16 and is aiming at a 50 percent growth year-on-year. And with 'team Breakbounce' having decades of expertise in product design and development, retail sales and distribution, marketing and communications, etc., it

plans to create a unique and experiential brand that reach-national and international location.

Product Portfolio

The brand offers shorts in the price range of ₹999 - ₹1,999; chinos at ₹1,499- ₹2,599; denims at ₹2,299- ₹2,499; t-shirts at ₹599- ₹1,099; shirts at ₹1,699- ₹1,999; joggers at ₹1,599- ₹2,599; sweatshirts at ₹1,499- ₹2,699; jackets at ₹1,999- ₹4,499; footwear at ₹1,499- ₹4,999; head gear and caps at ₹599- ₹799; and belts at ₹799- ₹1,399.

Core Target Audience

The majority of Breakbounce Streetwear's customers lie within the 18 to 35 years age-bracket. However, the core customer group lies in the age group of 22 to 28 males from urban cities and metros like Sec A+, A and B+ segment.

Retail Presence

Breakbounce Streetwear is present across 140-plus stores including MBO's such as Globus, Central and Lifestyle. It is also available through all leading e-commerce portals like Myntra, Jabong, Flipkart, Amazon, Koovs and Snapdeal, beside its own exclusive outlet in Vadodara.



— Sanjeev Mukhija,
Managing Director, Breakbounce Streetwear

Tell us about the new shirts collections that you have planned for in the forthcoming season.

The new collection offers a mix-and-match shirts with the use of two different qualities of fabrics. We have used dirty washes to give shirts a worn

out effect. There will be textured fabric shirts. Also, dip dye shirts in two colours, etc. And, cut and sew details will be seen across shirts with a lot of heavy washes.

Did you witness any major change in demand for your shirt category? Or, has there been any major upward or downward price movement?

We have observed that the category is shifting towards fashion forward trends and away from basic shirts. Today, consumers are ready to pay premium for quality, fashion and branded apparels.

What are your plans for exploring new markets in India?

We see a shift in demand. Today, fashion is being adopted by tier-II cities purely for aspirational motive. The youth from these cities are seen adopting fast fashion and are experimenting with new brands. Hence, our focus is mainly towards cities such as Ahmedabad, Surat, etc., followed by large metros for our flagship and exclusive outlets.

What has been your progress through online retail?

Present across all leading e-commerce portals, the online marketing contribute about 40 percent of our sales. We are soon launching our own e-commerce portal to have a strong hold in the online market.

CALLINO: RE-DEFINING STYLE IN MEN'S FASHION

In a candid interview with Images BoF, Bhushan Gupta, Assistant Vice President - Sales & Marketing, Callino India Pvt. Ltd., shares about the brand's expansion plans in order to reach its discerning customers.

Callino is a new addition in the ever-expanding men's wear market. Launched by young fashionistas of the National Institute of Fashion Technology (NIFT), the brand offers a collection of formals and semi-formals with a pinch of quality and style for men. Callino claims to redefine style with its wide range of formals, semi-formals and casuals. Cotton and linen used by Callino have an undisputed reputation for almost 200 years in Italy and only high-quality pure cotton from Egypt - Giza 45 cotton - is used.

Product Portfolio

The product basket of Callino includes shirts in the range of ₹1,400- ₹2,500,

trousers priced between ₹1,400- ₹2,000 and waistcoats in the price range of ₹2,500- ₹4,000. Callino also offers blazers priced at ₹4,500- ₹8,000, suits in price range of ₹6,500- ₹12,000 and t-shirts between ₹895- ₹1,4500

Core Target Audience

The brand targets executives and entrepreneurs of 35 years plus age.

Retail Presence

The brand retails through a total of 2 exclusive stores and also sells through 75 shop-in-shops. Callino is also available at three factory outlets. Furthermore, the brand is planning to double these numbers soon.



– Bhushan Gupta,
Assistant Vice President - Sales & Marketing,
Callino

What are the new shirt collections that you have planned for in the forthcoming season?

The men's wear apparel market is growing manifold. Callino, as a brand, is planning to introduce some evening wear for men and also brush cotton checks.

What are your plans for exploring new markets in India?

We cater to different parts of the country. However, we are planning on expanding our reach. Callino will soon enter the markets of eastern and western parts of India.

What has been your progress through online retail?

Callino is going with the current trend but its not very aggressive. We are present more on offline stores, however, the brand is trying to use e-commerce as a clearance channel.



CLASSIC POLO: CAPTURING BOYS SEGMENT

In a candid interview with Images BoF, Usha Periasamy, Director - Brands & Operations, Classic Polo, shares that with its brand CP Bro is for younger males, it will explore its way to the younger segment.



– Usha Periasamy,
Director - Brands & Operations, Classic Polo



Started primarily to manufacture t-shirts, Classic Polo slowly moved into designing and manufacturing of a complete wardrobe solution for men. Today, the brand is the largest selling t-shirt brand in the country with the widest distribution network supporting the sales and marketing of its branded merchandise. Its core team comprises the promoters, connoisseur in garment field who have brought in extensive knowledge to sculpt the brand to what it stands today.

Product Portfolio

Classic Polo offers 'core', 'updated fashion' and 'signature' collections. The core range starts at ₹999, updated fashion range starts at ₹1,199 and signature collection starts at ₹1,399.

Core Target Audience

Classic Polo is targeted at the new generation in the age group of 20 to 35 year old males.

Retail Presence

It covers the length and breadth of the country with 83 exclusive stores, 5,000 MBOs, 175 large format stores such as Shoppers Stop, Central, Globus, Pantaloon, Reliance Trends, etc., in addition to 13 shop-in-shop arrangements. The brand has a massive 1 lakh sq.ft. warehouse, 7 hubs across the country to cater to the market needs. It is also available on e-commerce portals like Flipkart, Amazon, Paytm and Snapdeal.

What kind of shirts collections have you planned for in the forthcoming season?

We have planned new shirts collections like natural shirts, AOP (all-over-print) shirts, indigo shirts, melange collections and linen collections.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Yes, our signature monopoly casual shirt category has a major demand. Each shirt product is unique in fabric, finishes and the price has no constraint for this product.

What are your plans regarding new products or shirt category expansion?

We have plans to expand our washed and printed category of shirts. Denim shirts have an evergreen potential among the youth, while casual shirts are the most preferred by every target group irrespective of any age and profile. Moreover, fabric innovation and style will remain the foundation of any innovation way forward.

What are your plans for exploring new markets in India?

Classic Polo is mostly present everywhere in the country, however deep ploughing is our objective this year. We are keen on getting into top counters vis-a-vis SIS mode and simultaneously into the family-stores in tier-II and -III cities. Classic Polo is a mature male brand and it recently explored its way to the youth segment with the launch of its sub-brand CP Bro. CP Bro is for males below 28

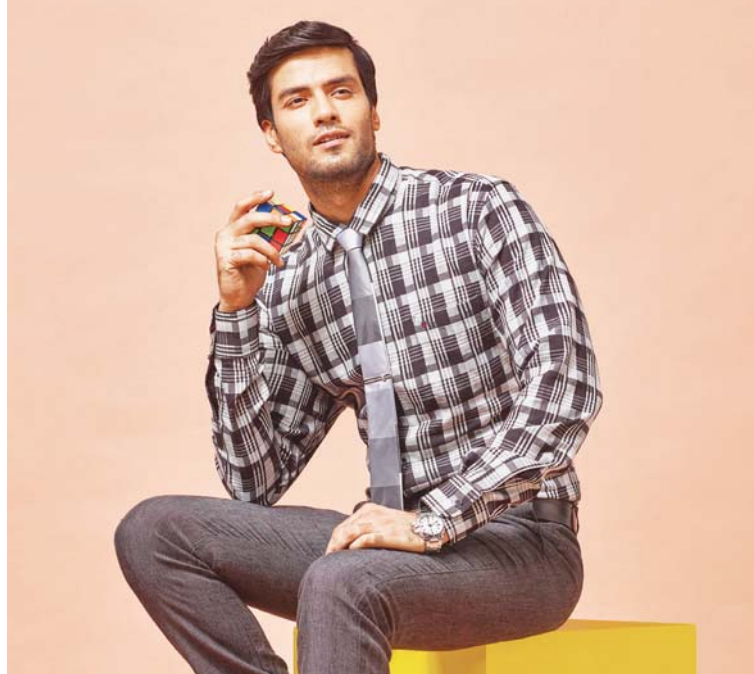
years. Its features and range is extremely casual with international appeal and styling, which is also the basic gene of the collection. Also, washed effects, chiseled fit, refreshing colours, etc., that pin-down the young is its USP.

What has been your progress through online retail?

Online retail is booming. We started associating with e-commerce business two years back and responses have been encouraging. Service is the mantra here and we are slowly and steadily building good customer base. There is less complications like in regular trade and retail businesses. It is definitely a model with ease and with promising future.

What was your turnover last FY (2015-16) and what is your brand aiming for in the next 2-3 years?

The brand recorded a turnover of ₹120 crore last year. We aim a business target to reach ₹500 crore in the next 2-3 years, to open 200 exclusive brand outlets and have presence in all reputed LFS chains with well penetrated trade business. With CP Bro also added to the spectrum, we are sure of meeting the projected numbers.



– Praveen Mutha,
Managing Director, Cool Colors

COOL COLORS: OFFERING COOL & TRENDY FASHION

Praveen Mutha, Managing Director, Cool Colors, in a candid interview with Images BoF, shares about his brand's commitment to provide new and trendy collections to its customers and also about its expansion plans.

Cool Colors, a fashion brand from the house of Bafna Clothing Pvt. Ltd., believes in the idea of 'life is now.' Bringing a new trend to casual and chic dressing for men, Cool Colors is a leading manufacturer of men's garments. From a steadily growing presence across India, Singapore and UAE to offering online shopping options, Cool Colors have gained significant recognition.

Product Portfolio

Cool Colors's product assortment consists of shirts and trousers for men. The brand offers everything from smart work wear, trendy casuals that suit individual's style to great party wear.

Core Target Audience

The target consumers are men in the age group of 25 to 50 years. Cool Colors caters to a consumer that aspires for good quality fashion at a reasonable price.

Retail Presence

The brand is currently progressing with a target on market expansion plans. The brand's expansion is in-line with its research and in understanding of the local markets. Cool Colors retails through a total of 5 exclusive stores and also sells through over 700 MBOs.

What are the new shirt collections that you have planned for in the forthcoming season?

With this collection, we have raised the bar even higher, with a combination of creative design and impressive style to offer the widest variety in a celebration of colours and choices. We take our customers on a journey through rich cotton, exquisite linen, stylish party wear, impressive formals and many others.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

There is an increased demand for our products with a lot of reputation being created through our advertising, social media and quite frankly, word of mouth too. We are very proud of our work that has enjoyed growing appeal in both old and new markets.

What are your plans regarding new shirt products or shirt category expansion?

We are always refining, refreshing and releasing a variety of products. As part of our strategy, we stayed focused on offering great style through our current categories.

What are your plans for exploring new markets in India?

East India is our next target market while we are currently also expanding towards the north, with a purpose of creating a national presence. Internationally, our strategy is also yielding extremely good results.

What has been your progress through online retail?

Our online progress is slow but steady as our customers still prefer traditional retail outlets as their first choice.

CORNELIANI: BANKING BIG ON SLIM-FIT SHIRTS

In a candid interview with Images BoF, Salesh Grover, Business Head, Corneliani, shares that going by the trends prevailing in shirts market, they are banking heavy on slim-fit shirts this year, at the same time they are also working on their casual range of Corneliani ID shirts.



— Salesh Grover,
Business Head, Corneliani



Corneliani was launched in 2012 when Chandan Mishra after endeavouring into luxury cars, decided to enter luxury fashion. After exploring many brands, Mishra found this Italian brand on which he had full faith and collaborated with it. At present, the business of Corneliani India is growing at a fast pace and the experience has been satisfactory.

Product Portfolio

The brand offers shirts that are available from ₹15,000 onwards, jackets from ₹90,000 onwards, suits from ₹98,000 onwards, trousers from ₹15,000 onwards, t-shirts from ₹9,000 onwards, denims from ₹22,000 onwards and accessories from ₹6,000 onwards.

Core Target Audience

A Corneliani wearer is one who understands style and luxury in terms of material and construction. A person who appreciates a refined quality of life is our core target audience.

Retail Presence

Currently, the brand is present only at three prime locations of India. They are DLF Emporio in New Delhi, The Taj Mahal Palace in Mumbai and UB City in Bengaluru.

Besides the shirts' category, what are other range or services available under your brand.

Our new made-to-measure service in the shirt category has gained quite a popularity amongst our customers. The reason being that it gives them a lot more options to choose, from collars to cuffs to buttons. Moreover, a person's initials can be embroidered if he desires.

What are your plans regarding new shirt products or shirt category expansion?

Keeping in mind the latest fashion trends, currently we are focusing on slim-fit shirts. The slim-fit shirts are so tailored that they sit neatly inside the pants without a hint of bulkiness. Similarly, another category which we are working on is our casual range of Corneliani ID shirts.

What are your plans for exploring new markets in India?

We are open to all kinds of opportunities for expansion of the brand. We are always looking for new and innovative proposals that would help us to strengthen our presence better. We will definitely evaluate something good in the form of a great retail space or any worthy plan that comes across.

What growth is your brand aiming for in the next 2-3 years?

The brand is growing at a steady pace and we aim to grow at 15-20 percent rate in near future.

HORIZON: RULING MEN'S SHIRTS MARKET

In a candid interview with Images BoF, Karim Lalani, Director, Horizon, talks about the ever dynamic and changing shirts market and also about how Horizon is emerging as a major competition for the rival brands.

Launched in 2006, men's wear brand Horizon started with a small set-up. The brand started its journey from Mumbai and later expanded outside Maharashtra. Known for producing casual and semi-casual shirts, the brand makes 12,000-15,000 pieces of shirts in a month.

Product Portfolio

Horizon offers basic shirts range for its consumers. The brand has two shirts sub-brands: Horizon Everyday which is a day-to-day fashion wear for men in the price range of ₹995- ₹1,295 and Horizon Premium Class which is a premium quality range for men priced between ₹1,395- ₹1,895.

Core Target Audience

Horizon is a mid-segment brand and do not target very high-income people. The brand's aim is to offer the best fashion and the best quality at the rate on which the customers are comfortable.

Retail Presence

The brand retails through 2 exclusive stores located in Mumbai and also through 550-600 MBOs.



— Karim Lalani,
Director, Horizon

What kind of shirt collections have you planned for in the forthcoming season?

Denim shirts are in vogue this season. All the fashion concepts will be visible on denim shirts. They are highly in demand in the market and thus, we have half of our collection dedicated to denim in different washes, which is around 50 percent of our product category. The remaining 30 percent of the collection focuses on checkered and plain shirts and 20 percent on the printed shirts.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

The shirt apparel market has changed a lot. There has been a drastic change in these 3-4 years. Earlier, a shirt fashion would last for about 12-18 months and would continue for a long time. Now with so much of competition around, fashion is changing everyday. A fashion does not last for more than 6 months whether it is men's or women's fashion. The fashion keeps changing every 3-4 months and we have to be really prepared for the changing consumer fashion cycle.

What are your plans for exploring new markets in India?

Our major markets are Gujarat and Maharashtra. Also, we have a good



presence in Delhi, Kolkata, Ranchi and in states like Madhya Pradesh, Punjab, Haryana, Chhattisgarh, Uttar Pradesh, Andhra Pradesh, Telangana and Kerala. India is a very vast market. Every state has its sales season. For example, Kolkata has Durga Puja, in Gujarat and Maharashtra its Diwali, in Kerala it is Onam, and in order to meet the demand, we have to be in all these places before the festivals begin. Hence, we can not be strong everywhere but we are trying to make our presence felt across the country.

What has been your progress through online retail?

We are not present online. Although we have partnered with a few e-commerce portals but we have not launched our products there, the reason being the price parity online and offline is making us sceptic on our marketing initiatives. So we are thinking of introducing a different product range for online alone.

How has the brand been growing and what is your brand aiming for in the next 2-3 years?

We are aspiring to grow at 20-22 percent rate year-on-year.

LALANA: FITS & SHAPES WILL RULE SHIRTS FASHION

In a candid interview with Images BoF, Anand Goenka, Partner, Lalana, shares that fits and shapes will be the most focused element in shirts in future.

Lalana was started to allow customers to stylise their own style. Lalana is an exclusive fashion brand which offers unique digital printing and enables finest fabric selection. The brand deals in providing stunning range of stylish products for both men and women fashion. The prime aim of the brand is to flash the beautiful souls of fashion addicts.

Product Portfolio

The brand offers fine design clothing for men and women. It also offers designer scarves and sarees for discerning female buyers. The MRP of the products starts from ₹600 to ₹4,000. Lalana allows its customers to choose from different print and patterns like florals, abstracts, animal prints, contemporary, damask, geometrics, ethnics, paisley, vintage and many more.

Core Target Audience

With a tagline like, 'Be different and wear your own style', Lalana targets men and women who want to wear something which suits their personality. The brand deals in providing a stunning range of stylish products for fashion conscious consumers.

Retail Presence

The brand is currently only available at its online portal www.lalana.in.



– Anand Goenka,
Partner, Lalana

Tell us about the new shirts collections that you have planned for in the forthcoming season.

The new collection of shirts is still in the developmental stage. But currently we are offering some fitted shirts and shirts with rolled cuffs.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

We have just launched hence it is very difficult to talk with Lalana as a brand.

What are your plans regarding new shirt products or shirt category expansion?

As Lalana is a newly launched brand, we are still in the process of extending more styles based on fits and shapes. We believe that in the coming times, fits and shapes will take over the market. Hence we are focusing on fits and will expand our range around fits.

What are your plans for exploring new markets in India?

We already offer an exclusive range of stylish products for men and women. Now, we are planning to explore ourselves in kids wear and into traditional wear for both men and women. Apart from apparel, we are also into home furnishings.

What has been your progress through online retail?

We have launched the brand very recently, and we are only available through our own portal. Our's is a very unique concept and creative too. It is too early to say about the experience but we are sure that our model will be liked by most of the people and we will achieve a speedy growth in coming years.



OFFICER: EXCELLING IN MEN'S FASHION

In a candid interview with Images BoF, Asif Memon, Director, Officer Fashion Craft Pvt. Ltd., shares his plans to further expand the brand in the states the brand is not present as yet. He also shares the brand's plans to focus on new fabrics and fits for its discerning customers.

Officer was started in the year 1990 and the company was only into manufacturing back then. The brand started with a small unit, selling shirts initially and gradually started the brand, Officer. The brand introduced trousers in the year 2007 and forayed into denims in 2013.

Product Portfolio

Officer offers 'Cotton Fever' in casual range, 'Outlook by Officer' in denim range and 'Officer' in formal wear. The price range for shirts varies from ₹795- ₹1,195, the trousers are priced between ₹795- ₹1,495, while the denims cost between ₹895- ₹1,795.

Core Target Audience

Officer targets fashion conscious men from middle class and upper middle class of the society.

Retail Presence

Officer retails through about 2,000 MBOs spread across the country. At some places, the brand has agents while at others, it does business through distributors. Officer does not have any presence in large format stores or online platforms yet.



– Asif Memon,
Director, Officer Fashion Craft Pvt. Ltd.

What kind of shirts collections have you planned for in the forthcoming season?

This season, we are working on different kinds of solids and plains. Deep dark colours of solids will be the theme this season. We are also working on new fabrics with more emphasis on slim fits.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

The market is in a sad mode. It is not very high or very low, it is showing an average of 10-15 percent growth rate. Shirts, specially formal, are witnessing a negative growth.

What are your plans regarding new shirt products or shirt category expansion?

So far, we are just concentrating on consolidating our product range in the market. And with rough weather, market consolidation would be the right decision.

What are your plans for exploring new markets in India?

We are present pan India except a few states. We are doing very good in north and south and are expanding our presence in east Guwahati and Digboi (Assam). In Rajasthan, we are doing good, while we have a minimal presence in Gujarat and Maharashtra.

What has been your progress through online retail?

We will start in e-commerce business in the next 2-3 months. To start with, we will retail through third party model.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

Last year, our turnover was ₹60 crore. With another 10 percent, we would be touching a decent growth rate in times to come.

RIVERBLUE: A BRAND FOR EVERY OCCASION

Riverblue approaches a very honest and simple principle of craftsmanship and authenticity in making its garments. In a candid interview with Images BoF, Naushad Patca, Director, Riverblue, shares insight on the brand's uniqueness - be it fabric, washes or detailing.



Riverblue is a smart casual fashion shirts' brand. It was launched last year (2015) by the makers of Ruff, the denim brand. Its company, D S Corporation, has been in the apparel industry for a very long time and had plans to venture into men's fashion. With years of expertise in apparel designing and creating fashion garments and coming from a mature company, the brand has been readily accepted in the market.

Product Portfolio

Riverblue is a brand created to suit every occasion - be at work, party or a casual occasion. The brand tries to define every garment with subtle details. Every product whether it is a shirt, jacket or knitwear is defined with sophisticated detailing. The price range starts from ₹1,395 and onwards.

Core Target Audience

Riverblue targets men in the age group of 20-35 years. It intends to target young futuristic individuals who are fashion conscious and want to represent themselves in smart fashion at work and day-to-day life.

Retail Presence

Currently, Riverblue is retailed through 150-plus multi-brand outlets across the country. It has presence in almost 15 states in India (Maharashtra, Gujarat, Goa, Uttar Pradesh, Punjab, Haryana, West Bengal, Assam, Tamil Nadu, Kerala, Rajasthan, Karnataka, Andhra Pradesh, Chhattisgarh and Madhya Pradesh). Similarly, it also has presence in the Gulf countries.



– Naushad Patca,
Director, Riverblue

What are the new shirts collections that you have planned for in the forthcoming season?

For the coming season Riverblue approaches a very honest and simple principle of craftsmanship and authenticity such as:

1. Authentic country check shirts have taken an urban direction.
2. Denim shirts have a high-winter appeal in bleached-out enzyme washes and softly tinted over-dyes. They are carefully customised and embellished with considered graphic appliqué placements and embroideries.
3. The graphic-pattern shirt forming the centerpiece of the look.
4. Camouflage print shirts are reworked to give all-over textural effects that trick the eye with obscure distortions.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Honestly this season (autumn-winter 2016 collection) will be the third-season for the brand. It certainly is growing in the male

apparel industry. There has been a steadiness in the price since its inception as every season we try to introduce some uniqueness in the brand's category -- be it fabric, washes or detailing.

What are your plans regarding new shirt products or shirt category expansion?

We intend to add more categories in our shirts' range. We also want to expand our range of classic t-shirt and jackets for the coming season, autumn/ winter 2016.

What are your plans for exploring new markets in India?

We want to make Riverblue a national brand. Currently, the brand is available at almost all major MBOs across the country. We are already in the process of tying up with good distributors and channel partners. Similarly, online marketing is our next plan which will soon start.

What has been your progress through online retail?

We are in the process of marketing the brand through prominent online channels. This is currently under planning and soon the brand will be available online too.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

There has been a substantial growth quarter-to-quarter since its inception. We have plans to set-up shop-in-shop and are focusing at opening an exclusive brand outlet soon.

ROUGHHELLS: EXCELLING IN MEN'S SHIRTS

In a candid interview with Images BoF, Prakas Patawari, Managing Director, Roughells, talks about the brand's plans on category expansion and also talks about its growth rate.

Roughells, a fashion brand from the house of JMD Trexim, started its journey in the year 2001 as a formal shirts brand, but now, the brand also offers casual shirts for men. Roughells majorly focuses on below ₹1,000 MRP category and this comprises about 80 percent of the brand's product category.

Product Portfolio

Roughells offers casual, formal and party wear shirts for men. The brand's 80

percent of the shirts are priced between ₹495- ₹995 while the remaining 20 percent of the shirts offered are in the price range of ₹1,000- ₹1,995.

Core Target Audience

The brand targets men from the mid premium category.

Retail Presence

Roughells retails through a total of 1350 MBOs. The brand does not sell through large format stores.



— Prakas Patawari,
Managing Director, Roughells

What kind of shirt collections have you planned for in the forthcoming season?

For the forthcoming season, Roughells is planning to offer business casuals, corporate casuals, smart casuals, resort casuals, etc. for the brand's costumers.

Did you witness any major change in demand for your shirt products category? Or, has there been any

major upward or downward price movement?

We are aware of the fact that casuals are a fast moving category as the boundaries between semi-formals and casuals are blurring. And this makes us feel the necessity of introducing the above mentioned categories in shirts.

What are your plans regarding new products or shirt category expansion?

We have plans to expand the brand and offer more casual wear as it is giving a major competition to the formal shirts. We believe that casual shirts are overpowering formal shirts due to increasing acceptance of casual shirts at workplaces, and also due to higher level of comfort in them.

What are your plans for exploring new markets in India?

We believe that Roughells can spread in the Indian market better with the opening of exclusive outlets of the brand.

What has been your progress through online retail?

We don't consider online retailing of shirts as a success mantra for a brand. The market is divided into luxury, premium and mid-premium segment and consumers of luxury and premium segment seek additional value in the product, which cannot be achieved through online purchasing. Roughells is aware of the fact and so, the brand is not into online retailing.

What has been your growth and what is your brand aiming for in the next 2-3 years?

Year on year, Roughells has achieved a growth at the rate of 21 percent. Coming FY 2015-16, we are expecting a growth rate of 30 percent.

SHERIFF:

A COMPLETE MEN'S WEAR BRAND

Dhiraj Ladha, Director, Sheriff, in a candid interview with Images BoF, talks about the brand's expansion strategies and also about its plans to introduce new categories in the men's wear range.



Sheriff, a men's wear brand from the house of C.K. International, has covered a long journey since its inception in 1985. The brand started as a shirts manufacturing company and then added t-shirts to its portfolio, and now, its a complete men's wear brand. By using the best fabrics and offerings, the finest cuts and styles, the brand has made a strong hold in the Northeast terrain.

Product Portfolio

Sheriff offers shirts in the price range of ₹599- ₹1,499, t-shirts priced between ₹599- ₹999 and denims at a price variation between ₹999- ₹1,999. The brand also offers suits and blazers priced between ₹1,999- ₹7,999.

Core Target Audience

Sheriff targets the fashion discerning male in the age bracket of 22- 45 years.

Retail Presence

Currently, the brand is available at 10 retail stores in the country. Sheriff also retails through over 400 MBOs. It is also available on e-commerce portals like Amazon and Snapdeal.



– Dhiraj Ladha,
Director, Sheriff

What kind of shirts collections have you planned for in the forthcoming season?

For the coming season, we are offering prints in rare textures, indigo collection, bold prints and linen in stylish cuts and fits. The forthcoming season has lots for the consumers.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

The market is becoming very price sensitive. But at the same time, the consumers are ready to shed an extra penny if the product oozes value and enhances one's lifestyle.

What are your plans regarding new products or shirt category expansion?

We are planning on adding several new categories soon.

What are your plans for exploring new markets in India?

We would be expanding the brand aggressively to nearby states and country as well for better business. Sheriff also plans to expand and add new EBOs in order to expand the brand's reach.

SO DESIGN: CONCEPT SHIRTS ARE IN VOGUE

In a candid interview with Images BoF, Sanjay Oswal, Director, SO Design, shares that they follow a fast fashion delivery model. Fashion constantly changes and hence they release new collection every 45 days.



— Sanjay Oswal,
Director, SO Design

Tell us about the new shirts collections that you have planned for in the forthcoming season.

We constantly change our base concepts every three months and release new collection every 45-days. So, ours is a fast fashion delivery model. Our collection range comprises 40 percent print, 30 percent plain shirts and the remaining are textured fabric shirts. We offer shirts which are usually 100 percent cotton fabric base.

Did you witness any major change in demand for your shirt products



concept t-shirts and traveller pants, which is fast gaining grounds in the segment.

Product Portfolio

SO Design offers concept shirts between the range of ₹1,095 to ₹1,495, concept t-shirts between the range of ₹699 to ₹899 and traveller pants that range from ₹1,095 to ₹1,295.

Core Target Audience

Its core customer base comprises young population in the age group of 18 to 32 years. According to the brand, off late they have witnessed an increase in the age group opting for their brand such as between 32 to 42 years old.

Retail Presence

At present, the brand is operating through 400 multi-brand outlets and 4 large format stores across the country.

SO Design was launched in 2010 with a purpose to introduce concept shirts in the Indian market. In these five years the brand has grown in leaps and bounds. They have been successful in building business channels in all major parts of the country and now are in the process of gaining more market strength. The company has recently launched its

category? Or, has there been any major upward or downward price movement?

We have witnessed a steady increase in demand for shirts in the male apparel market. We have observed 30 to 40 percent increase in demand for concept shirts under casual wear category. Meanwhile, there has been an increase in price range by 10 percent due to change in excise regulation.

What are your plans regarding new shirt products or shirt category expansion?

We want to consolidate our position in concept collections. Our business strategy for the coming years would be to increase our share in concept shirts and to make concept shirts a fashion thing.

What are your plans for exploring new markets in India?

Currently, we are exploring the markets

of North East India. Also, our focus is towards gaining grounds in the territories, where we have weak channel partners and to stabilise our presence there.

What has been your progress through online retail?

We have made substantial efforts in online retail but the sales volumes so far are not satisfactory.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

Our turnover was ₹13 crore during FY 2015-16. We have many plans for this financial year. We will open our first exclusive outlet soon in Bengaluru. Also, we are seeking PE fund raising to gain growth momentum and also to add more concept categories.

SUCCESS: ADAPTING CHANGING TRENDS WITH STYLE

In a candid interview with Images BoF, Mazhar Khan, Head Designer, Success, shares about the response the brand is receiving with its new range of shirts. He also talks about Success's plans to grow further and penetrate pan India.



— Mazhar Khan,
Head Designer, Success

What kind of shirts collections have you planned for in the forthcoming season?

Tropical prints and horizontal lines are in trend this season and we have tried to inculcate the same forecast into a very subtle taste. Our shirts are 100 percent cotton and tailored to perfection. The first theme is a very subtle Hawaiian print that became hot favourite with customers as soon as it arrived at stores. The second one is a casual yet sharp design, it has horizontal stripes print in pastel shades that can be worn casually and semi-formally as Friday dressing.

Established in 1996 by Rajnish Sethia, Success is a contemporary men's wear brand. Having started out as a trouser manufacturer, today the brand is a renowned name that offers a complete wardrobe solution for men. The brand boasts of being fast at adapting the changing trends in men's fashion and putting forth the finished product, instantaneously.

Product Portfolio

Success offers core products like suits in the price range of ₹3,995- ₹15,995, blazers priced between ₹2,995- ₹9,995, waistcoats and trousers with prices ranging from ₹895- ₹2,495. The brand also offers casual jackets, shirts, t-shirts and accessories, which are in great demand.

Core Target Audience

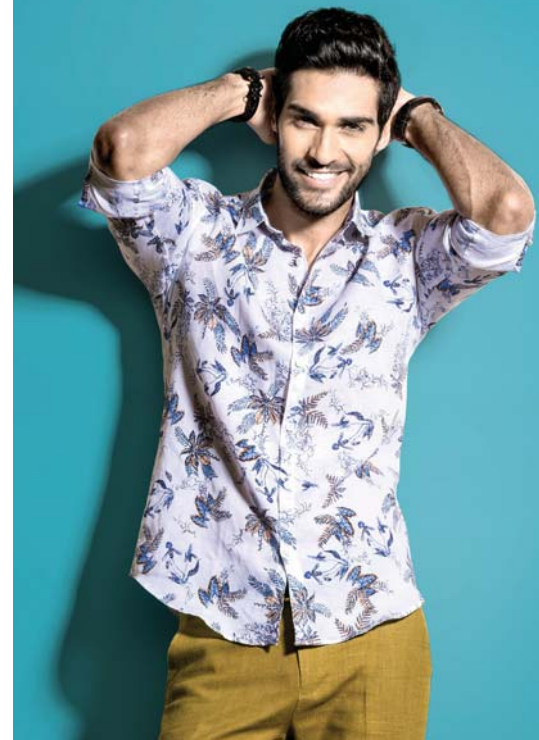
Paradigms dictating changing wardrobe preferences with age have somewhat melted and so, Success simply offers trendy merchandise for young men as well as garments of a classic taste keeping in mind the loyal customers as well as attracting new ones.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Being a brand which has suits, blazers and trousers as our core offerings, we have noticed a major upward movement in demand for shirts. We are giving honest, affordable prices and our brand perception is rising to be of a 'men's wear lifestyle' brand with time.

What are your plans regarding new shirt products or shirt category expansion?

We are planning to venture into 'club wear' with a new line of shirts that caters to this particular segment. This collection will be well versed with global trends and fabrics and the prices will be kept affordable at all costs.



Retail Presence

The brand is present in over 25 exclusive stores, more than 375 MBOs and 36 large format stores including Central, Brand Factory, etc. Success is also available on top e-commerce portals like Flipkart, Myntra, etc. In addition, the brand also sells through its own online store successonline.co.in.

What are your plans for exploring new markets in India?

With the unveiling of our new flagship store in Bhubaneswar this year, we are planning to open 7-8 new stores in the coming year. We are now looking to expand our visibility in tier-I and -II cities on a pan-India basis.

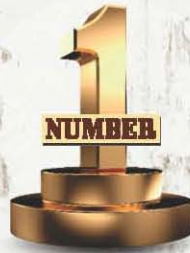
What has been your progress through online retail?

We have a remarkable presence on Flipkart and Myntra, while having our own website- www.successonline.co.in. Having received a fairly good response keeping in view the fact that our online presence is in a state of constant innovation, growth and learning, we are also looking forward to tie-ups with Jabong and other such big players very soon.

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SUMMERLINE: SUSTAINING COMPETITION IS TOUGH

In a candid interview with Images BoF, Nikhil Chheda, Director, Summerline Shirts, shares how they introduced casual shirts when people were not aware of the term casual wear and how the apparel market has changed over the years.

Summerline Shirts was the first cotton casual shirts' brand to be launched in the 80's. It was into manufacturing cotton shirts when majority of the population was buying polyester fabric shirts. It had been manufacturing for big brands before launching Summerline Shirts and has over six decades experience in the apparel industry. Over the years, its progress has been good. Every retailer in the apparel industry knows about the brand and people recognise it even today among so many brands. According to the brand, with so much of competition around, they have covered quite a long journey while offering cotton casual shirts.

Product Portfolio

It offers cotton casual men's shirts. The MRP for men's range starts from ₹795 to ₹1,595, while the boys range starts from ₹695 to ₹2,095.

Core Target Audience

Summerline Shirts is a mid-segment brand. For them a person who knows the value of money are their customers.

Retail Presence

The brand has presence in more than 1,300 MBOs pan India. It is also retailed through large format stores such as Chunmun, Jain Collection, etc.



What are the new shirt collections that you have planned for in the forthcoming season?

Our core category is cotton casual shirts. Hence in the forthcoming season, we will offer a lot of variety in cotton fabric mainly in indigo such as indigo checks, indigo prints, etc. Now a days denim is also much in demand, so we will be majorly focusing on denim shirts as well. We will also offer varieties in print shirts. We will also introduce brush checks (flannel) and brush print shirts in bright colours.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Competition is growing every year. But we have observed that nobody could sustain the challenging demands of the market and its consumers except for a few. There has been no major movement in price range except during inflation, as the apparel prices depend on price of cotton prices. We are a value-for-money brand, we maintain our MRP whatever the situation is and do not go beyond our MRPs.

What are your plans regarding new shirt products or shirt category expansion?

Not right now. With an economy slowdown, this is not the right time to introduce or expand a product portfolio.

What are your plans for exploring new markets in India?

We are looking for agents, distributors in South India for Tamil Nadu, Andhra Pradesh and Kerala. Our presence in the south market is weak, so we want to enhance our position there.

What has been your progress through online retail?

We are not available online. There is no particular reason for being not present online but we are quite satisfied with our business from MBOs. We are reaching every part of the country including tier -III and -IV cities, so the need to go online does not surface.

How has the brand been growing and what is your brand aiming for in the next 2-3 years?

We are growing at an average 12-15 percent rate year-on-year. And we aspire to grow at 20 percent rate in the next three years.

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Talkies) | Howrah & Kolkata Avani Riverside / City Centre / Mani Square / Hiland Park The Metropolis / Shyambazar (Beside Baghbazar Bata) / South City /
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SURREAL: STYLING MEN WITH SIMPLE STYLES

Raghav Mohan, Managing Director, Surreal, in a candid interview with Images BoF, talks about the brand's plans to focus mainly on 'club wear' category and also on how Surreal is planning to remain exclusive rather than spreading like any other 'mass brand'.

Surreal, a brand from the house of Noir Fashions Pvt. Ltd., believes that only great minds can afford to be simple yet stylish. The men's wear brand's collection showcases elegant, modern and chic designs. Surreal started out as a shirts brand, and later diversified to suits and jackets. Today, it is a renowned name in men's wear and suits and jackets are among its core strengths.

Product Portfolio

Surreal is a complete men's wear brand and offers a wide range of categories including shirts, trousers, suits, waistcoats and accessories. Each category that the brand offers, is further divided into Classic, Comfort, Club and Create. The price range for shirts varies between ₹1,999- ₹3,499. While the suits are priced between ₹8,999- ₹12,999, jackets are sold at ₹6,999- ₹8,999. The brand's trousers are priced between ₹1,799- ₹2,499.

Core Target Audience

We are serving fashion conscious people, especially, people who are passionate about clothing and

have a taste for it. Demographically speaking, the young, urban, educated, cosmo, chic and sassy people are the target consumers. The consumers are people with panache and those who are fashion forward.

Retail Presence

Currently, the brand is present in 3 EBOs. Surreal also sells through partnership with 7 premium fashion retailers.



– Raghav Mohan,
Managing Director, Surreal

Tell us about the new shirts collections that you have planned for in the forthcoming season.

For the upcoming autumn-winter season 2016, we have planned a new collection which will have more of dobbies, prints on dobbies, digital prints spread across a vibrant array of colours.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Yes, indeed. There is definitely an upward price movement for our brand. Even otherwise, the MRPs are on the rise in the market.

What are your plans regarding new shirt products or shirt category expansion?

Our focus is on the 'club' category, but with sophisticated and subtle styling.

What are your plans for exploring new markets in India?

Moving forward, we are aggressively looking to partner with more like minded and fashion forward retailers. However, we are more inclined towards quality rather than quantity; be it merchandise or our partnerships with our associates. So, we are looking at exclusive alliances with retailers and would want to have only one retailer in one city. We are not a mass brand and would not want to be seen in too many places. We are targeting top end MBOs and are more than willing to go to all lengths in order to ensure that secondary sale is happening at the retailer's store, thereby creating loyalty with the retailer.

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TURTLE: GROWING AT STEADY RATE

In a candid interview with Images BoF, Narendra Parekh, Head of Marketing, Turtle Limited, shares about the brand's plans on introducing new and more innovative merchandise for its customers and also talks about its commitment to accelerate the growth rate.



– Narendra Parekh,
Head of Marketing, Turtle Limited

Tell us about the new shirt collections that you have planned for in the forthcoming season.

This season, we are playing with lots of fabric like mélange, grindle, and also lots of textures in our collection. Solids as well as prints and structures are gaining equal prominence. We have also included indigos as a major part of the shirt basket, be it print or solids or checkered shirts. In formals, performance finishes are being done on the fabric like 'intelligent freshness' or 'super silk' or 'super cool', to name a few. Apart from this, various fashion elements are being added to the formal shirts range.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Demand for casuals is going up and in formals, consumers are asking for more fashion elements. There is an obvious upward price movement in the casual shirts range.

What are your plans regarding new shirt products or shirt category expansion?

We are planning on making stylized formals for the fashion conscious men and also on manufacturing multiple occasion wear.

What has been your progress through online retail?

We have grown substantially in the past 2 years, expanding in terms of presence as well as sales. The brand is also focusing on its own website for better sales.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

During the FY 15-16, we achieved ₹157 crore mark and with the past growth experience, we are aiming to achieve ₹250 crore turnover in the next 2-3 years.

Turtle's journey began in Kolkata, in 1993, as an aspiring yet steadfast enterprise. From a company primarily into men's readymade shirts, to a leading brand in men's wear fashion, Turtle has indeed, come a long way. The brand started with a production capacity of just 20 shirts a day, and now has an exhaustive in-house retail unit that caters to a large number of retail outlets across the country. With trendsetting fashion and redefining styles, its two iconic brands – Turtle and London Bridge – have become favourites among men who wish to stand out and make a statement.

Product Portfolio

Turtle offers a range of shirts, trousers, jackets, suits, gilletts, denims and t-shirts, to name a few. The brand caters to all the men's apparel needs.

Core Target Audience

Turtle targets male customers in the age group of 21- 40 years from Section A and B of the society.

Retail Presence

The brand currently retails through 96 exclusive stores and about 1,200 MBOs operational across the country. The brand also sells through e-commerce portals like Flipkart, Jabong, etc. and also through its own online store www.turtleonline.in.

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www.bornfreefashions.com



URBANA: MASTERING THE MEN'S WEAR SEGMENT

In a candid interview with Images BoF, Tejpal Singh, Brand Manager, Urbana, talks about the brand's strategies for better growth opportunities in the segment



Urbana was launched in year 2005 under the Future Lifestyle Fashion Ltd. and the brand immediately captured the imagination of young professionals who like to settle for nothing less and go for Urbana - The Masterpiece. Each Urbana product is created with a fine blend of innovation and craftsmanship. Urbana started with techno formal shirts like anti-stain shirt, durawhite shirt, zero crush shirts and over a period of time, added hugely successful trousers and suits categories.

Product Portfolio

The brand offers a lot of options in mini and micro geometric prints, micro-checks and fine-stripes. Urbana has also used lots of structured fabrics in different weaves and textures to delight the customers. The brand's product basket comprise of shirts, trousers, suits and blazers. The price range starts from ₹1,899 to ₹4,999 in shirts and trousers and from ₹5,999 to ₹9,999 in suits and blazers category.

Core Target Audience

Urbana targets fashion conscious men who like to settle for nothing less but the masterpiece itself.

Retail Presence

The brand retails through a total of 40 exclusive outlets. Urbana also caters to its customers through 20 MBOs and 2 large format stores.



– Tejpal Singh,
Brand Manager, Urbana

What kind of shirt collections have you planned for in the forthcoming season?

In this season, we are offering our esteemed consumers with following collections in shirting and suiting range: essentials, techno-formals, linens, hall of whites, cocktail blacks, celestials, icon and eternal classics, which are our main themes and are offered in two distinct fits - classic fit and tailored fit. The brand also has Super Premium Limited Edition collection to offer to its consumers.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

We don't see fluctuation in demand

based on MRPs. As long as we are offering right price value equation, our consumers will keep buying from us.

What are your plans regarding new shirt products or shirt category expansion?

We have been offering ties/ bows, belts and pocket squares in the past and will reintroduce this category from SS'16. We will also try to introduce cotton formal trousers and winter wear in the coming seasons

What are your plans for exploring new markets in India?

Urbana will be focusing on tier-II and tier-III towns of the country, with an aim to explore growth opportunities.

What has been your progress through online retail?

We have an exclusive store on Amazon.com for Urbana.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

We are currently at ₹50 crores and want to quadruple the numbers in the next 3 years.



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MADE TO MEASURE SHIRTS

CREATING INDIVIDUALISTIC STYLE STATEMENTS

India has a rich heritage of bespoke or made to measure. The traditional practice of heading straight to a tailor with the procured fabric, lasted almost till the 21st century, until the retail market evolved and ready-to-wear apparel established its stronghold among the masses. As times changed, and the market further progressed, a proliferating disposition towards bespoke is being witnessed. IMAGES BoF delves into this newly accepted trend and the made to measure market in India.

By Gurbir Singh Gulati

Made to measure is a habit that started with shirts. Premium brands in the industry today have taken ownership of the term and turned it on its head for customer convenience.

Made to Measure: The Shirts Portfolio

With the emerging middle class and increasing disposable incomes, more people started buying branded clothes of particular sizes. There were still a few customers who were discerning and their expectations from a ready-to-wear were not fulfilled. They needed a bit extra customization which could understand their right fit and can give them different options in fabrics and styling. This expectation spurred the need for an organized made to measure market for those who could afford it. These brands carry a reputation and engineer garments according to the choice of the customer.



market has always demanded perfection and what could be better than made to measure. This is a process where shirts are made according to a person's body measurement and style. A customer can even create his own design. The concept has picked up and many brands- national and international- are providing these services."

MTM allows for differentiation in the products where consumers have a choice of playing with the fits, cuts, linings, lapels and collars, and personalising them as per their individual tastes and preferences. Tejinder Singh, COO, Creyate, believes in the fact when he says, "India is a country with diverse lifestyles; hence it has different body shapes and its impossible for any brand to cover all these body types. Made to measure is the true answer for this which is a universal and precise solution for a good fit."

Made to measure (MTM) is now popular in metros and is going to smaller towns and cities in the country. There are brands who have mastered this craft. Raymond Made to Measure is one of the finest example of this service. As Ramesh Gupta, Business Head, Raymond Made to Measure, defines, "Raymond Made to Measure is a combination of style advisory, a high degree of personalization and a readymade finishing process, that combine to create the perfect wardrobe solution, bringing the best of both worlds – finishing of readymade and fitting of customized tailoring. Our made to measure shirts guarantee a look sculpted for you. These shirts are an amalgamation of the finest fabrics, personalized fit and global designs and hence, a befitting tribute to the modern gentleman."

Defining the significance of MTM shirts, Harish Mittal, Director, Camellia Clothing Ltd., says, "They are a fancy for many, but a necessity for quite as many. They either don't fit well into a readymade size, or have a particular taste (say mandarin collar) in which there aren't many options available. Yet finer are the customers who have tasted the true comfort of a made to measure shirt. You can say the significance of made to measure shirts in my portfolio is like fine wine, standing tall amidst a multitude of craft beers and single malts."

Started 3 years ago, Bombay Shirt Company was India's first online-only, custom-made shirt brand. Today, they have morphed into a hybrid online-offline platform and have expanded their production capacity to cater to different markets.

Kachins Clothing, a pioneer in men's wear in India, has been creating the finest in made to measure for almost 40 years now. Zahir Shahpurwala, Director, Kachins Clothing, says, "The Indian shirts

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collar fail to pass your expectations and prove to be a misfit. With MTM clothing, all of these issues are eliminated and you get clothing that fits great, in a colour of your choice and a style picked by you.

Over the past few years, there has been a steady rise in the number of manufacturers and retailers of made to measure garments. With the evolution of online shopping, the made to measure segment has become more popular and is paving the path of growth of the industry.

However, traditional retailers still prefer to physically meet with their customers in order to ensure that they get the correct measurements and have their customers view fabric samples. The internet has also made it easier for suppliers to be found and thereby giving retailers more options in fabrics, craftsmanship, pricing and delivery.

Fashion moves in a periodic cycle. And Raymond Made to Measure has seen a paradigm shift in the men's wear industry. Ramesh Sharma, defines this change as he explains, "we have seen this from the age of our fathers and grandfathers having a local tailor who was like our extended family member. The new generation of millennials is hovering over all the brands to buy readymade shirts, to keep them abreast of latest global fashion trends and modern men's wear styles. However now, the cycle is gradually moving again towards the customization route, people have started prioritizing fit over everything else and brands, with their customization services in concurrence with absolute fashion oriented offerings, bridges the gap between the old tailoring emporium and new readymade brands."

Zahir has expertise of dressing the who's who of the Bollywood and corporate world in India. He terms made to measure as an additional services as he says, "Many



People have started prioritizing fit over everything else and brands, with their customization services in concurrence with absolute fashion oriented offerings, bridges the gap between the old tailoring emporium and new readymade brands.

Akshay Narvekar, Director, Bombay Shirt Company, believes that if "priced correctly, everybody should wear a made-to-measure shirt." He further adds, "Custom-made is gathering great momentum in the process of becoming the norm, with people preferring more and more to express their individuality. Also, social media has played a huge role in shaping people's preferences which has lead them to pay careful attention to how they're dressing."

MTM Shirts Emerging as a Big Business
You might get a ready-to-wear shirt in the right colour but either the sleeves or the



brands in the country and specialized fashion houses like Kachins Clothing are treating this as their mainline business. Customization is a service which is one step ahead of just being a branded shirt. It gives a customer more variety and options to select the fabric, styling and design of his personalized shirt.”

Made to measure shirts have an edge over ready-to-wear shirts. Brands in India are using this special term to enhance their branding proposition and give an edge to their business. Harish Mittal unlocks this as he says, “Brands, by definition, make a virtue of standardization – of fit, and look. Yet they take to MTM, often as a romantic dalliance. They sell it to

themselves as a differentiating value addition, which will ‘at least’ enhance their brand image. Unfortunately, the rigors of keeping a discerning customer happy, soon drives most of them back to the safe zone of replicable and scalable readymade garment (RMG). Worldwide, MTM labels are entirely separate from the RMG brands. While some RMG brands do offer MTM as an aside, more successful MTM labels, either online or offline, are not extensions of RMG brands. A point to ponder on!”

MTM definitely scores high in terms of getting the right sizes where ready-to-wear brands fail to satisfy. This, in turn, results in sales on the basis of size and fit. Tajinder Singh suggests that by opting for made to measure, they can prevent this. He explains, “This is 10-15 percent during full price sale and goes as high as 30

percent during end of season sale. Brands can make up for this lost sale with made to measure services.”

Understanding an MTM Customer

The increasing number of Indians travelling abroad who are getting acquainted with the idea of made to measure are also driving the growth of this concept. Before made-to-measure becomes affordable in true sense, the growth will be driven by a small set of customers who are armed with high disposable income and do not mind paying for a premium over ready-to-wear shirts. The premium price paid is viewed by these customers as an investment rather than cost.

The concept works very well for shirts as most users who are usually first timers, experiment with made-to-measure shirts as investment is relatively lower in comparison to jackets.

The target customer for these services are not segmented on the basis of age group, gender and socio economic classification. The customer for made to measure is a well-heeled and well-travelled customer who understands why he has to pay the amount for these services and does not even mind paying for the premium. Further, a shopper who is not satisfied with the fitting of his readymade clothes and availability of fabrics in the market is also a target customer for these services. Though very few established brands offer made-to-measure services due to the inherent production complexities, the customers who are willing to pay for this service and this segment is growing.





Most of the brands, for a substantial period of time, believed that affluent Indians reside in urban metros and are, without a doubt, city dwellers. However, others who did not believe the same has debunked this myth and have done a profitable business in tier - II and - III cities.

Akshay Narvekar is of the opinion that anyone who wears a shirt is their target consumer. He explains, “The psychographic profile of this consumer is one who is conscious of his or her appearance, is ready to explore options and has an inherent need to express their individuality through their clothing.”

Zahir, meanwhile opines that the made-to-measure shirts still cater to elite class premium customers who wants to define their personal style statement. This customer is conscious of quality and is particular about what he wears in order to make a fashion statement.

For Raymond, it means, “All men from 25-40 years of age who have innate sense of individualistic style and a discerning taste of fashion. For whom, fit comes first and holds prime importance. For those, who don't want to settle in conventional and want to take it further.”

Customer is a king and he truly deserves something special. As Tejinder Singh says, “The customer for made to measure and our brand, in particular, is anyone who would want to experience a true custom fit with best of ingredients and quality at par with any premium formal brand.”

Made to Measure Shirts: Retail Spread in Different Models

Offline

Currently, few made to measure brands are offering services in metros and tier - I cities. The reason behind this approach is

to create a sense of exclusivity even within current cities.

Asked why the services are being limited to a few cities, Zahir Shahpurwala explains, “Made to measure is an expensive product service compared to readymade. Hence in most cases, it is restricted to metros only. But with the growing affluent class, some brands have even started looking at Tier II cities.”

Though there are pockets of demand for such services in smaller cities where people are armed with higher disposable income, brands are and will be very selective in rolling out these services to those places, as an incorrect strategy may lead to brand dilution in these new markets.

Raymond believes in exploring boundaries and tapping the customer and fulfill his exclusive demand. Ramesh Gupta is of the opinion, “Most of the brands, for a substantial period of time, believed that affluent Indians reside in urban metros and are, without a doubt, city dwellers. However, others who did not believe the same has debunked this myth and have done a profitable business in tier - II and - III cities. Fashion has no boundaries; nowadays, with the best access of media and internet across the globe, people have imbibed their own sense of style. Binaries are no more present and so the brands have stopped discriminating against city boundaries.”

Tejinder Singh feels that made to measure market in India mainly exists in tier - I and - II cities as they are well developed and engaging. He shares this opinion when says, “Infact, tier - I and - II cities are expecting more services and products from us. The fact that in year or two of Creyate operations, we have already entered in markets of Pune, Chandigarh and Amritsar, is testaments that tier - II cities are equally profitable.”



Online

Today, more than a dozen companies work on made to measure- online business model, where customers can buy custom-made clothing online. By outsourcing or having an in-house production, they are selling directly to customers. These companies avoid retail markups and maintain healthy margins, despite being relatively modest.

These online companies offer customers the ability to customize their shirts online using modern product configuration and 3D modeling technology. The addition of video tutorials to assist customers to take their own measurements is a new feature and many modern shoppers have embraced the convenience.

Bombay Shirt Company being one of the first online shirts retailing platform has seen an overwhelming response to their product offering over the years. It's a clear example which shows that people have become more conscious of the cut, fit and style. The brand's concept of tailored shirts has gained prominence in the customer's minds.

Omni-Channel

Most companies comprise of both offline and online retail models. To make this experience better both these entities are trying the omni-channel approach to its retail business.

The online stores have started putting up kiosks in malls with a well defined brick-and-mortar store that can deliver the brand experience and connect. However, the offline brand is trying to connect and be more digitally savvy to its consumers.

Bombay Shirt Company has experimented with the omni-channel approach. They currently have two stores in Mumbai at Kala Ghoda and Bandra. They also plan to expand to different cities with their physical stores.

Akshay feels that made to measure should be made available to anyone who wishes to wear the same. He explains, "Our website, in particular, has been created in such a way that the process of customizing a shirt online has been simplified so that everyone has access to a well-made shirt, tailored especially for them."

TECHNOLOGY ADOPTED BY KEY PLAYERS

When one thinks of made-to-measure clothing, thoughts usually run to men's tailored shirts from retail clothiers specializing in that market. Most of these garments evolved from custom measurements, translated into handmade patterns and hand cut fabrics, for which the customer paid a handsome price in both cost and time for delivery. As we evolve from an era of mass production to one of mass customization, and as customer demands change from being a slave of fashion to asking for products and styles that reflect their own unique personality, there are a growing number of tools becoming available to both facilitate and automate the made-to-measure market. This rapidly growing product category, facilitated through the use of other technologies such as internet marketing and CAD software, has created some interesting challenges for both the software developers and their customers who use it.

Bombay Shirt Company: Has purchased licenses for measuring software. But, they still believe that old-school human intervention cannot be replaced.

Raymond Made to Measure: They have developed their own scaling system for the measurements to deliver something exclusive which any other 'tailor delivered outfit' will not match. Their state-of-the-art manufacturing facility is equipped with latest technological machines and is abreast of best operational procedures.

Kachins Clothing: They are using technology known as code lexicon, a system wherein they read the customers body structure before cutting the garments. This technology has been mastered by Kachins Clothing in India, and this technology has been bought from Custom Shop USA.

Creystate: Their stores are well integrated to the back-end by the brand's website. The orders taken by the brand at the front-end are reflected at the back-end which makes their factory to gear up immediately. The website also hosts the customization engine (Maya Software) where the customer can choose his fabrics and trims and its rendered live on screen for better visualization. Creystate showcases fits and patterns which are unique to the customers and are generated and cut automatically for clinical accuracy by Morgan Software.



A QUICK LOOK ON KEY FACTS



–Ramesh Sharma,
Raymond Made to Measure



– Zahir Shahpurwala,
Kachins Clothing

ARE MADE TO MEASURE SHIRTS EXPENSIVE?

Made to measure products are sold at a premium price vis-à-vis other readymade brands. However, their patrons do not mind paying extra for the exclusive personalized fit it guarantees. Our made to measure products are 'style and fit advisor delivered outfit' unlike an ordinary 'tailor delivered outfit'.

It is difficult to define an average price point for this service. It's an exclusive property and is definitely a bit expensive.

IS MADE TO MEASURE ONLY SUCCESSFUL IF DONE BY BRANDS WHICH ORIGINATE FROM TEXTILE BACKGROUND?

Brands which perpetuates from textiles background have a definite edge over the others with their expertise on fabrics and on-trend practices in the apparel industry. However, this doesn't stop other readymade brands from experimenting with this new concept emerging in the Indian market.

The understanding of textiles is very necessary to get the garment right. Made to measure shirts would not be exclusive until and unless, it has a bouquet of exclusive swatches to pamper the customer. Most of the time, it is seen that the made to measure service is being offered by companies who have a strong textile base.

HOW ARE BRANDS ADOPTING THE CHANGING TREND?

Brands are ever changing today with its product offerings, portfolio extensions, pricing standards and service enhancements. Brands, over a period of time, have adopted myriad ways from story telling to emphasizing the concept of path of affordable luxury to highlight their unmatched offering, which makes it superior across its competition.

Brands have recognized that there was a gap in tapping the affluent customer. Made-to-measure shirts were a good answer to tap them. This affluent customer may be undersized or oversized and is not able to get his apparel within the sizes available in the market or he is currently an aspirant and is willing to pay a little extra that he would consider reasonable.

WHAT RULES THE SHIRTS MARKET TODAY — PRICES, FASHION, CUSTOMIZATION?

I believe it's 'customization' rules today's market. Customers, today, have their own sense of style and wants to curate their garment than to just buy a designer's idea. If he gets his absolute choice, he would not mind paying little extra.

Today, with the middle class becoming more affluent, made-to-measure services are seeing higher demands. Shirts become one of the starting points for such services where price, fashion and customization play a big role.



– Akshay Narvekar,
Bombay Shirting Company

Custom-made doesn't have to be costly at all. We try to benchmark our prices to comparable brands in the readymade space. With our prices starting from ₹1,940, we strive to be an accessible, made to measure brand. We also offer a special range of high-end Italian fabrics for those looking for a more exclusive feel.

No, we've proven this to the contrary.

Our belief is fashion and customization, but we'd be foolish to disregard the importance of price.



– Harish Mittal,
Camellia Clothing Ltd.

True MTM is bound to be expensive. Making one shirt at a time demands high skill levels, necessitates loads of built-in buffer capacities, and puts high delivery pressures, with added quality requirements.

It's not about the background, but about the fact that if the brand's domain is bigger and it becomes easier. The design and production is simpler with more makers than you need, stores are easier to setup, no need of complex training, and predictable return on investment. So to put it in your syntax, "made-to-measure can only be done by brands who believe in it, with passion."



– Tejinder Singh,
Creyate

Creyate concept is quite unique where we do not want to pitch made to measure as an expensive and unaffordable proposition. Creyate is a solution for mass customization where the factory is geared up to solve for one individual order. The concept is geared for scaling up at any given point of time.

Not necessarily, made to measure is all about customer delight and offering the best experience. One should focus on the customer experience at all touch points and make it a seamless white gloved service.

Any brand will have to offer the current trends if it wants to be on top of the game. Customer today, is well read and well travelled and he picks what's in trend rather than the old and boring. Brands are launching capsule collections which are season and trend specific to attract customers.

While all these parameters are important I would feel the most critical is the fabric and fit. If the price is affordable, a customer would still check fabric and fit equation at that given price. Personalization and Customization is like pizza toppings that add to customer delight.



At the other end are the likes of Seville Row tailors, who have been serving generations of their clients. This segment is surprisingly holding on (or even consolidating, one could say!) despite the price pressures of fast fashion and mass customization.

Conclusion

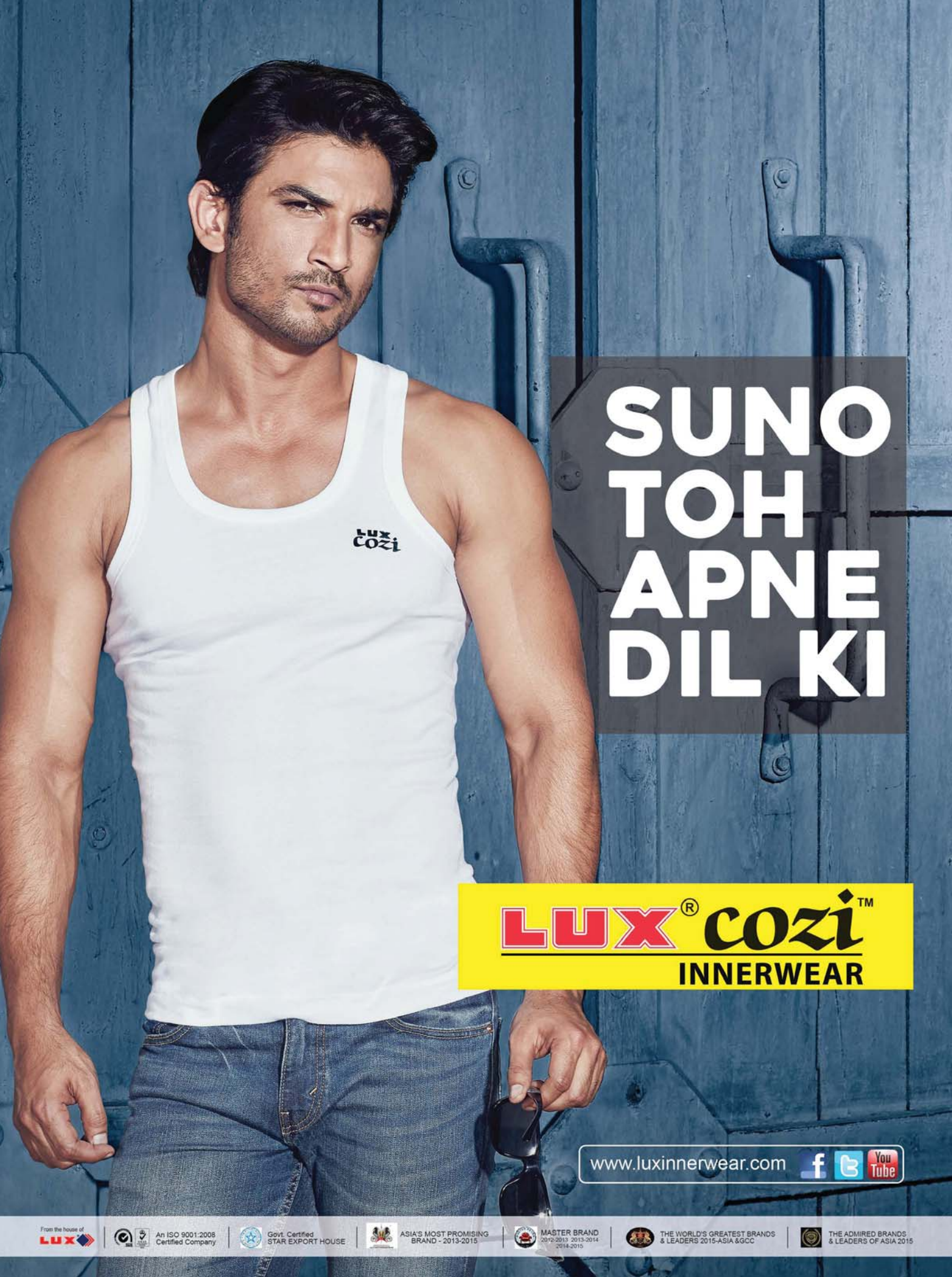
On being asked about the current state of the MTM business with shirts in India, Harish Mittal who carries an experience with mass RMG and MTM shirts in Indian B2C market, and has a long association with International markets through our B2B partners, informs that there are two ends of the spectrum:

First is the Mass MTM market, widely prevalent online and also serviced by home visit. The focus here is on the convenience of ordering at home/office without the hassles of a drive, and getting the few tweaks one wanted, either to the measurements or style. This customer is either not particularly educated about nuances of a fine shirt, or is willing to compromise on that for the price. This segment was hitherto served by a mobile-retail (travelling customer / travelling salesman) channel, dominated by players from Thailand or Hong Kong, often of Indian origin. Of late, this has morphed into online stores (websites) with European or American frontage, and back-ends in China or elsewhere in Asia, but essentially doling out the same McDonald fare of so-called MTM shirts.

At the other end are the likes of Seville Row tailors, who have been serving generations of their clients. This segment is surprisingly holding on (or even consolidating, one could say!) despite the price pressures of fast fashion and mass customization. The online avatars of this have not been so successful, and that would give rise to doubts about their future. Though, that only goes to prove the draw of the wholesome experience of going to a master craftsman (tailor) with years of knowledge, who gives you a fine shirt and free fashion advice, customized to you.

The future of 'Made to Measure Shirts' is definitely bright. More and more customers are being educated about the difference. Not only men but women too prefer to customize their corporate wear shirts by MTM specialists in the country. But very few are addressing the women's MTM segment which is lying vacant to be occupied by the new entrants in this category.





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RAYMOND MADE TO MEASURE

MAKE YOUR OWN STYLE

There isn't a single Indian brand that has reinforced its presence more prominently than Raymond. In 2010, the company ventured into bespoke apparel with Raymond Made to Measure and completely changed the dynamics of the then niche market. Ramesh Sharma, Business Head, Raymond Limited, talks to IMAGES BoF in detail about Raymond Made to Measure.

Raymond's comprehensive presence across the world inspired it to inculcate a vision of 'fusion of fashion'. To this vision, Raymond Made to Measure started in year 2010. In this enduring journey, Raymond Made to Measure has become a repository of the best fabrics, technical knowledge, best in class operations, material, design, production and innovative solutions.

Product Portfolio

Raymond Made to Measure's product list can be categorized into three broad segments namely apparel, accessories and leather. Apparels include dapper tuxedos, classy trench coats, bandhgalas, classic suits, blazers and jackets, premium trousers and a wide range of shirts. Accessories, which make a big difference to your ensemble, include ties, cufflinks, bowties, pocket squares and many more and the leather section consists of handcrafted shoes, fine luxury men's bags and belts and small leather items with an

option of your personalized signature. Prices are on request only.

Target Customers

All men from 25-40 years of age who have innate sense of individualistic style and a discerning taste of fashion. For whom, fit comes first and holds prime importance. People who have an eye for detail and look for finesse in every piece they purchase are indeed the loyalists of Made to Measure.

Retail Presence

Raymond has over 700 stores in 300 towns and over 20,000 multi brand outlets. This also extends to International waters of South Asia and Middle East.

Raymond Made to Measure has 52 exclusive brand outlets, over 50 SIS and 2 stores in Dubai. With this, today Raymond Made to Measure has presence in over 110 stores, in more than 30 cities and plans to open 30 new stores this year.



— Ramesh Sharma,
Business Head, Raymond Limited

What are the new shirts collections that you have planned for in the forthcoming season?

Our Spring/Summer 2016 collection brings you the best of sartorial shirts for this sultry summer. The highlights include printed and checked linen shirts that feature pocket pouch as pocket square, bellow pockets, trim tape detailing, pocket detailings, contrast button threads, button down and narrow collars, contrast inner cuff and collar band, etc. Also there are mix and match patterns in pinstripes with checks and summer colors.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

There has been a constant endeavor to offer something refreshing every season. Our eclectic range includes a handpicked assortment of various stripes, checks, plaids, prints, indigos, florals, mini and window panes, paisleys and many more. All in all, a choice for everyone and for every occasion. Pricing have

not seen any change as this has been carefully thought through. Even the Made to Measure section features extremely competitive prices.

What are your plans regarding new shirt products or shirt category expansion?

Made to Measure shirts reflect a true panache. Our focus for the shirt category is not to limit to only those discerning few where readymade product expectations were still undelivered but to make our made to measure shirts a choice over readymade shirts in consideration to our pricing and quality.

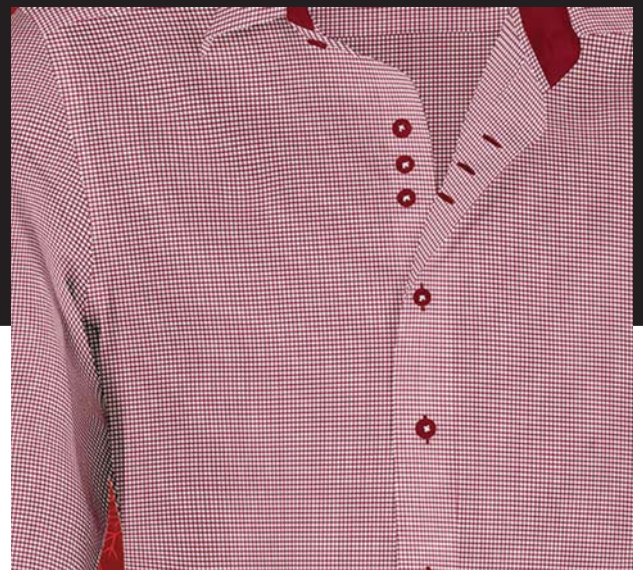
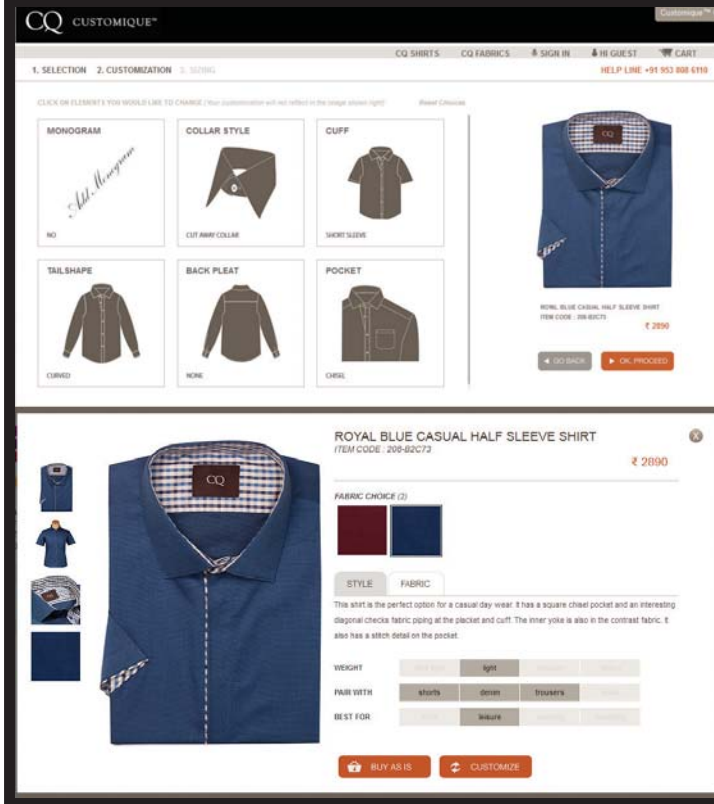
Technology has been playing a very important part in understanding the measurements and correct fit? Tell us the technology which you are adopting?

Raymond is a pioneer when it comes to technology. Treading to the same path, we have developed our own scaling system for the measurements to deliver something exclusive which any other 'tailor delivered outfit' will not match. Our state of the art manufacturing facility is equipped with latest technological machines and is abreast with best operational procedures.

What are your plans for exploring new markets in India?

Raymond Made to Measure has always explored beyond tier-I cities. The reception for Raymond Made to Measure stores in cities such as Coimbatore, Vijayawada and Surat etc. have been extremely encouraging.





CUSTOMIQUE

BE YOUR OWN DESIGNER

From classic formals to cool casu- als, from evening wear to ceremonial shirts, Customique has embossed marks of unmatched excellence with its range of bespoke shirts for men and women. IMAGES BoF catches up with Founder and Director, Harish Mittal to know more about the brand and its future plans.

It all started when Camellia Clothing Ltd., started making custom shirts 12 years ago, to honor a request from one of its overseas clients. Custom shirts turned out to be a tough business, but was also inspiring at the same time, and Camellia learnt on the go. The M2O (made to order) section, as it was then called, grew from 3-dedicated-tailors in the midst of multiple-lines floor, to an independent end-to-end fully equipped cutting-edge shirt making facility. Somewhere along the line, Customique was spun off as an independent SBU.

Product Portfolio

Customique shirts are offered in a wide array of models – classified into classic office wear to fun evening wear, with several casual, sports and special occasion models thrown in. In each

model, the customer gets a choice of fabrics in different colors (and sometimes in different textures or prints) and gets an option to modify some key elements (like collar or pocket) to his taste, without compromising the design and look.

Having said that, MTM shirts, or ‘custom shirts’ as we prefer to call it, are all about giving the customer what he wants. So we thrive on making what the customer wants - however difficult, or however different.

Core Target Audience

Customique targets the well-heeled and well-travelled gent (and lady – albeit to a lesser extent), who can recognize a worthy shirt at a glance, values the skill that goes into making it, and will settle for nothing less.



– Harish Mittal, Founder and Director
Customique

What are the new shirts collections that you have planned for in the forthcoming season?

Prints and simple lines are the flavor of the season, plus there is constant enhancement to the classical shirts line. Again, it's not about what we are offering, but about what the customer wants. To that, we respond in quick time.

Technology has been playing a very important part in understanding the measurements and correct fit. Tell us about the technology which you use.

We believe the technology to replace human hands in measuring a body is yet to be mastered. More important is the matter of customer experience. Not even the best vending machine cola leaves you as satisfied as a handmade lemonade.

What has been your progress through online retail?

We feel custom shirts experience is too complex to be replicated or enjoyed online — as yet! The market shall mature, and so will technology, in a few years if not earlier.

Made to measure is the new benchmark of luxury and is fast catching up in India. What is your overall impression of the market and its future?

My experience with mass ready made garments and made to measure shirts in the Indian B2C market, and my long

association with international markets through our B2B partners, tells me that there are two ends of the spectrum.

First is the mass made to measure market, widely prevalent online and also serviced by home visit. The focus here is on the convenience of ordering at home/office without the hassles of a drive, and getting the few tweaks one wanted, either to the measurements or style. This customer is either not particularly educated about nuances of a fine shirt, or is willing to compromise on that for the price. This segment was hitherto served by a mobile-retail (travelling customer/travelling salesman) channel, dominated by players from Thailand or Hong Kong, often of Indian origin. Of late, this has morphed into online stores (websites) with European or American frontage, and back-ends in China or elsewhere in Asia, but essentially doling out the same McDonald fare of so-called made to measure shirts.

At the other end are the likes of Savile Row tailors, who have been serving generations of their clients. This segment is surprisingly holding on (or even consolidating, one could say) despite the price pressures of fast fashion and mass customization. The online avatars of this have not been so successful, and that would give rise to doubts about their future. Though that only goes to prove the draw of the wholesome experience of going to a master craftsman (tailor) with years of knowledge, who gives you a fine shirt and free fashion advice, customized to you.

Custom shirts are here to stay. I look forward to when we discover the right mix of channels to indulge this loyal and discerning customer.



BOMBAY SHIRTING COMPANY

MADE WITH PRIDE

The first online custom shirt brand in India, Bombay Shirting Company has been creating ripples among the fashion-conscious circles of the country of late. Banking on constant innovation and super attention to details, the brand conjures design options that are curated to reflect the latest sartorial trends. Director Akshay Narvekar talks to IMAGES BoF.



Incepted in the year 2012, Bombay Shirting Company, or BSC in short, is the first choice of many when it comes to custom made shirts. As the first custom online shop in India, the brand is propelled by the singular aim of making made-to-measure accessible for all. The idea clicked and today, the brand has morphed into a hybrid online-offline platform catering to hundreds of various markets.

Product Portfolio

As of now, the brand exhibits a solid assemblage of nearly 200 different types of fabrics to choose from for the custom

collection, for both men and women, with the price points starting at a minimum of ₹1940, and going up to ₹30,000. It also features a rich "Shop Ready Collection" for both men and women.

Core Target Audience

The brand's target audience encompasses the fashion forward section who are extra conscious about the fit and style of their clothes.

Retail Presence

The brand has two stores in Mumbai, at infamous flagship store at Kala Ghoda and another one in Bandra.



– Akshay Narvekar, Director
Bombay Shirting Company

What are the new shirts collections that you have planned for in the forthcoming season?

We do have a couple of collaborations in the pipeline and we are very excited about it, to say the least.

Did you witness any major change in demand for your shirts? Or, has there been any major upward or downward price movement?

Since we were the first online store in India to offer custom-made shirts, we've seen an overwhelming response to our product offering over the years. This shows that people have become more conscious of cuts, fits and styles, and obviously the concept of having a shirt tailored as per their precise preferences has gained prominence in their minds.

What are your plans regarding new shirt products or shirt category expansion?

We are constantly innovating and pushing the bar. The coming season will be no different.

Technology has been playing a very important part in understanding the measurements and correct fit. Tell us about the technology which you are adopting?

Frankly, while we've purchased licenses for measuring softwares, we believe that old-school human intervention cannot be replaced.

What are your plans for exploring new markets in India?

We plan on expanding our physical presence through the rest of the country with more stores in different cities.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

While we can't disclose numbers, we have been growing at a rate of over 200% a year.



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CREYATE

MADE FOR YOU. BY YOU.

Creyate aims to provide an unprecedented experience with the help of an intuitive user-interface where customers can personalise almost everything about their garment. IMAGES BoF talks to Tejinder Singh COO, Creyate - Arvind Internet Limited about the brand and its future plans.



Arvind Internet Limited (AIL) is the online arm of the Arvind Limited and has been founded by Kulin Lalbhai, Executive Director of Arvind Group. Creyate, the first offering from AIL, was set out to be a revolutionary concept and has managed to do so. The brand offers a curated set of collections for customers to have as a starting point to their customisation journeys. Creyate enjoys a fantastic 40 percent loyalty along with a long list of customers to boast of.

Product Portfolio

Creyate offers customisation options in shirts, suits, denims and chinos for men and in shirts and denims for women. The pricing are as follows: Shirts start at ₹2,499, Suits start at ₹14,999, Chinos start at ₹2,999, Denims start at ₹2,999.

In addition, there is the Linea D'oro collection (line of gold) which is super luxury collection and the ingredients are flown in to the factory on individual request. The fabrics are sourced from the most reputed mills across the world like

Ermenegildo Zegna, Dormeuil, Scabal, Tresca, Albini, Thomas Mason, DJA and Huddersfield. The products are at par with those at Milan hi-street and customers can order it from the comfort of their home.

Core Target Audience

The brand targets the well travelled, evolved Indian people who appreciates quality and attention to details.

Retail Presence

As of now, the brand is present in 7 EBOs and 2 MBOs.



– Tejinder Singh, COO
Creyate

What are the new shirts collections that you have planned for in the forthcoming season?

We plan to go big on our wrinkle resist story as it adds lot of functional benefit in formal wear. Microdobbies are seen as a big trend across the globe and Creyate has already curated an Italian microdobby collection for the coming season. Luxury indigo shirts in super fine counts is also the highlight in Creyate's line up this autumn season.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

Shirts have been steady at 45-50 percent of volume contribution to the business and this has often been the category which new customers have opted to try Creyate for the first time.

What are your plans regarding new shirt products or shirt category expansion?

We plan to build the Linea D'oro shirt offering as there is a lacunae in super premium made to measure shirts. These super fine luxury shirts are in 2/300 counts and made with precision and best of ingredients.

Technology has been playing a very important part in understanding the measurements and correct fit? Tell us the technology which you are adopting?

Our stores are well integrated to the back

end by the brand's website. The orders taken at the front end are reflected at the backend in real time which puts the factory in gear immediately. The website also hosts the customization engine (Maya software) where the customer can choose his fabrics and trims and its rendered live on screen for better visualization. The fits and patterns are unique to the customers and are generated and cut automatically for clinical accuracy by the Morgan software we use.

What are your plans for exploring new markets in India?

We plan to open over 20 EBOs and 10 SISs by the end of FY 17 in all the metros and tier - II cities like Ahmedabad, Chandigarh, Chennai, Kolkatta, Lucknow, Amritsar, Jalandhar, Jaipur, Ludhiana, Kochi, Pune, etc

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

We plan to be a ₹60 crores brand by the next fiscal year.



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KACHINS

DESIGN YOUR OWN STARDOM

Kachins has been the pioneer in men's wear in India and has been creating the finest in bespoke for almost 40 years now. In a candid chat with IMAGES BoF, Zahir Shahpurwala, Director, Kachins Clothing, shares about the brand's rich heritage and it's list of celebrity clients including Amitabh Bachchan and Mukesh Ambani.



– Zahir Shahpurwala,
Director, Kachins Clothing

What are the new shirts collections that you have planned for in the forthcoming season?

Our new summer collection of shirts is all about bright collars with special cottons and linen fabric.

Did you witness any major change in demand for your shirt products category? Or, has there been any major upward or downward price movement?

The shirts category being the core

Kachins' concept of "Total Look" has been time tested and drawing on the brand's formidable heritage of design and craftsmanship, and innovation in hand-cutting and tailoring, a suit from Kachins clothing remains an ultimate sartorial investment. Incorporated in the year 1973, Kachin Clothing has today become a hallmark of luxury, and as per the brand's director, continues doing what it does best – providing men with tools to educate themselves and build a wardrobe that best compliments their individual style. The brand is also the preferred choice of Bollywood and has designed costume wardrobes for iconic films like *Sholay* (1975), *Amar, Akbar, Anthony* (1977), *Bobby* (1973), *Don* (1978),

business in the garment industry has not witnessed any major changes in demand and pricing. It has been constant and is growing at a organic rate of 10-12 percent.

What are your plans regarding new shirt products or shirt category expansion?

We are known for bringing innovation in made to measure. It's always an ongoing process at Kachins clothing to bring out the latest in fashion.

Technology has been playing a very important part in understanding the measurements and correct fit? Tell us the technology which you are adopting?

It is known as code lexicon, a system wherein we read the customers body structure before we cut the garments. This technology has been mastered by Kachins

Karz (1980), and *Return of the Jewel Thief* (1996) amongst others.

Product Portfolio

Kachins' product portfolio comprises a wide range of custom made suits, trousers, shirts, sherwanis, etc.

Core Target Audience

The brand's target audience is from the upper middle class and above, and people who are well placed in society and require something exclusive for a fashion statement

Retail Presence

As of now, the brand operates through 4 exclusive brand outlets.

clothing in India, and this technology has been bought from a custom shop in the USA.

What are your plans for exploring new markets in India?

We are looking forward to expand all over India and are gearing up for this retail expansion in all affluent markets.

What has been your progress through online retail?

Online adds convenience for a shopper, who is delighted to see the collection before making a choice. Kachins clothing has made good progress in online retail and now provides customization facilities online, where a person choose a fabric, style, and get the shirt delivered at his doorstep in 10 to 15 working days.



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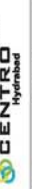
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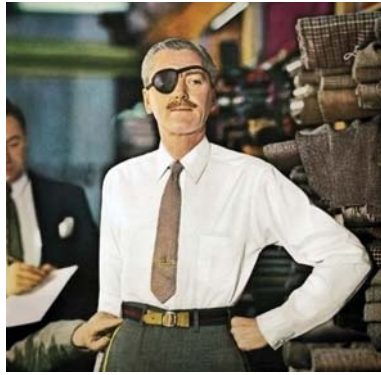
ICONIC SHIRT CAMPAIGNS OF ALL TIMES

Mediocre advertising clings to stereotypes but good advertising breaks all stereotypes and creates a spark that goes down in history as legends. We browsed through the archives to bring forth some of the most creative ads we could find.



Zodiac Man

Zodiac was just a unknown tie brand until the Zodiac Man happened, thanks to Ulka Advertising. Headed by none other than the "The Last of the Great Advertising Nawabs", Bal Mundkur, the campaign catapulted the brand to unprecedented repute, positioning it as a classy and fashionable brand, with quality at the heart. The campaign's influence was such that the word 'Zodiac man' became synonymous with any man with a handsome beard.



The Man in the Hathaway Shirt

David Ogilvy's (of Ogilvy & Mather fame) 1951's groundbreaking campaign for CF Hathaway, a small shirt-maker from Maine, went down in history as the most iconic shirts campaigns of all times. Hathaway had been making shirt for 116 years, unnoticed. The ad's impact was immediate. Within a week, every Hathaway shirt in the city was sold.



Van Huesen Century Anti Wrinkle

The neatest christmas gift of all!", said Ronald Reagan in what is unarguably the most iconic shirt campaigns of all times. Designed by none other than the ingenious pop art guru Andy Warhol during his early years in commercial advertising, the advertisement, over the years, transcended from being just a medium of selling to become an integral part of American culture.



The Arrow Collar Man

The Arrow Collar man campaign dates back to the early 1900s and even predates the Marlboro Man. The Arrow Collar Man was the name given to the various male models who appeared in advertisements for shirts and detachable shirt collars manufactured by Cluett Peabody & Company of Troy, New York. Collaboratively produced by Calkins and Holden, New York, the campaign ran from 1905-1931. Such was its impact that by 1920, the fictional character started receiving fan mails. Even now, the company continues to refer to its consumers as the 'Arrow Man'.



Honest Shirt Peter England

The Peter England 'Honest Shirt' ad reinforced the fact that it is possible to sell without banking on tall claims, flamboyant marketing gimmicks or roping in celebrities to reveal that the brand is his secret of success. A milestone in the history of Indian advertisement campaigns, the creative campaign was in tune with the target segment and established the brand, that wasn't radically different from its compeers, as one of the the best selling mid segment brand of India.

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TOMMY HILFIGER

SPRING 2016
GLOBAL
ADVERTISING
CAMPAIGN

Laidback island style gets a fresh, colourful twist in the Spring 2016 campaign, which headstarts on an island-hopping adventure through the Caribbean.



NEW YORK AND AMSTERDAM (January 2016) -

Tommy Hilfiger, which is owned by PVH Corp. [NYSE: PVH], announces its Spring 2016 global advertising campaign, *Wish You Were Here*. Inspired by an island-hopping holiday to exotic locales in St. Vincent and The Grenadines, the campaign celebrates relaxed Caribbean lifestyle with an eclectic, spirited twist that's uniquely Tommy. Set against a backdrop of turquoise waters and white sand beaches, the signature style combines laidback island ease with a sophisticated touch; it's iconic holiday style at its best.

Tommy Hilfiger sends warmest wishes from exotic Mustique, where Behati and her handsome crew of castaways are hitting the beach with spirit and style. Island casual meets sporty cool, with an

individual twist. Nautical red, white and blue meet native flora in sophisticated pieces with laid-back ease.

"Our Spring '16 campaign is inspired by the eternal island vacation," said Tommy Hilfiger. "My family and I have always loved the Caribbean, and Mustique in particular is our favorite place to spend time together. This season, we channel this 'island life' inspiration into our colorful, cool campaign with an eclectic twist. We mix nautical and tropical influences with sun-washed palettes and athletic accents; it's all about a relaxed beach holiday with a glamorous touch."

Wish You Were Here is photographed by Craig McDean, styled by Karl Templar and creatively directed by Trey Laird of Laird + Partners.

"Our Spring 2016 advertising campaign embraces our brand's unique visual identity and signature 'twist' that's irreverent, playful and cool," said Avery Baker, Chief Brand and Marketing Officer for Tommy Hilfiger. "

Photographed in Mustique, an island in St. Vincent and The Grenadines, the campaign stars supermodel Behati Prinsloo - who returns as a brand ambassador for the third consecutive season - with a handsome crew of castaways: Miles McMillan, Marlon Teixeira, Nathan Owens, Jordan Barrett, and Darius Trabalza Haynes. Hair was done by Tomo Jidai and makeup by Francelle Daly.



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FASHION

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Shows

THE 23RD HONG KONG FASHION WEEK FOR SPRING/ SUMMER TO DEBUT WOMEN'S WEAR & KNITWEAR ZONES

The 23rd HKTDC Hong Kong Fashion Week for SS'17 is to hit the stage from 4-7 July. A preview.

Pg No. 158

TRENDS

MILANO UNICA FW 17-18: TRENDS & MOODS

A dialogue between past and present, arts and crafts, tradition and modernity, East and West, creates the codes of elegance for Milano Unica's FW 2017-18.

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TEXTILE STUDY
SHIRT FABRICS: AN ANALYSIS OF ITS TREND, INNOVATION & CONSUMPTION

New innovations and newer forces of competition in shirt fabric manufacturing are fast changing the face of the industry. A study.

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FABRIC MAJORS

SIYARAM SILK MILLS LIMITED: COME HOME TO SIYARAM'S

Siyaram Silk Mills Limited, established in 1978, is a company that believes in values and adheres to its ethics. Ramesh Poddar, Managing Director, Siyaram Silk Mills Ltd, talks to Images BoF.

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ARTEX FABRICS PVT. LTD.: 176
The Denimization of the East

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The Linen Mantra to Success

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Welcome to the Linen Fiesta

INNOVATION

RAYMONDS READY TO WEAR: ALL SEASON WOOL SHIRT

Raymond continues its saga of innovation with its product—the All Season Wool Shirt.

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ZOOM IN

TYPES OF COLLARS: STYLE OPTIONS OF A DRESS SHIRT

The collar, without a doubt, is the most striking features of a shirt. We check its evolution and sartorial options.

Pg No. 186

Trims

WENDLER: THE HEART OF THE SHIRT

Peter Heim, International Sales Director, Wendler, a world leader in shirt interlining, shares insights on the business.

Pg No. 188

DESIGNER WATCH
A SHIFT IN PREFERENCES

Although cotton reigns as the enduring choice, the preferences in shirting fabrics are evolving with time. Arti Kapur Singh delves into the latest trends.

Pg No. 190

INSPIRATION
WHEN SHIRTS MADE STATEMENTS

Right from Dev Anand, who was legally barred from wearing a black shirt in public to Ranveer Singh who makes really bold statements with his designer shirts, Bollywood's non-conformists have set quite a few shirt trends.

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NEXT SECTION
SPORTSWEAR INTERNATIONAL

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THE 23RD HONG KONG FASHION WEEK

FOR SPRING/
SUMMER TO
DEBUT WOMEN'S
WEAR & KNITWEAR
ZONES

By Rajan Varma

Fashion world has something great to look out for the coming July as the 23rd HKTDC Hong Kong Fashion Week for Spring/Summer (FWSS) is all set to hit the stage at the Hong Kong Convention and Exhibition Centre from 4-7 July. The fashion week will charm the fashion world with its debut zones in knitwear and women's wear, in order to optimize buyer's sourcing edition. The premium fair in the region is expecting around 1,200 worldwide exhibitors this time. Previous edition attracted 16,000 buyers from 65 countries and regions.

HKTDC or Hong Kong Trade Development Council, a statutory body established in 1966, is the international marketing arm for Hong Kong-based traders, manufacturers and service providers. The HKTDC promotes Hong Kong as a platform for doing business with China and throughout Asia.

Popular Thematic Zones Return

Private or house labels have become increasingly effective marketing tools among fashion industry players to differentiate and upgrade the image of products. Emporium de Mode in FWSS is a dedicated premium section, dedicated to promote elegant fashion brands. Fashion Gallery is an ideal platform to display brand labels and high fashion while the International Fashion Designers'



Showcase exhibits unique designer brands for potential clients. Under the four major categories of Apparel, Upstream Supplies, Fashion Accessories and Technology and Business Matching, zoning will be fine-tuned to footwear, leggings and socks, eyewear, hair accessories & headwear, belts & ties and embroidery & sewing supplies to offer one stop platform to best catering buyers' demand. Other popular zones will return with splendour, including activewear & sportswear, intimate & swim wear, children's wear, men in style, denim arcade and fabrics & yarn. Qualified exhibitors are awarded a "Green Solution Suppliers" insignia on their booth fascia to address the growing demand on eco-friendly apparel.

China Market, A Driving Force

Chinese mainland market continues to

be a driving force for Hong Kong Fashion industry. Hong Kong's total exports of clothing and clothing accessories to mainland and Macau rose 2.2 percent and 8.8 percent respectively to \$1.42 billion and \$504 million, as on 29 Feb, 2016. According to HKTDC's research, mainland consumers generally find Hong Kong clothing brands trendsetting, fashionable and tasteful. They are willing to pay an average premium of 36 percent to purchase Hong Kong branded garments. Hong Kong Fashion Week for Spring/ Summer serves an effective springboard for traders to expand their business in mainland and Asian market.

"This fair is the right place for us to gain exposure to meet buyers. Buyers from the mainland and Australia are especially keen to source from us," said Martens

Yiu, Managing Director, Deut St. Limited. Stationed in Hong Kong, Deut St. Limited has been an exhibitor of Hong Kong Fashion Week for Spring/ Summer for consecutive 3 years.

The Glitz & Glamour

A series of fashion house shows and runway parades will go alongside the Fashion Week to reinforce Hong Kong's position as Asian fashion trendsetter. HKTDC offers business matching services, networking receptions, seminars and buyer forums during the fair to provide a perfect platform for industry players to exchange market intelligence and explore new business opportunities. The Small-Order Zone is available for buyers sourcing from 5 to 1,000 pieces.



A dialogue between past and present, arts and crafts, tradition and modernity, East and West, created the codes of elegance for Milano Unica's FW 2017-18 collection.

-By Rajan Varma

The FW 2017/18 trends were presented to the exhibitors and the fashion community at "La Pelota" in Milan in April 2016. It was a moment of excellence and inspiration for the entire fashion community where six great internationally recognized personalities - the Italian artist Alberto Burri and architect Renzo Piano, the Italian artist Lucio Fontana and the Japanese, Katsushika Hokusai, and the Lombard fashion designer Walter Albini and the Milanese architect, Piero Portaluppi, participated in the comparison and guided to create a story of this edition's trends in textiles and accessories in line with the elegance of the finest Italian tradition. The event, conceived by Stefano Fadda, Art Director of MU, and his staff in collaboration

with Antonella Matarrese, renowned fashion journalist, and SGS Architetti Associati, displayed a striking combination of modernity and style. Though all the six personalities were different from each other, as regards their expressive language, but they were very similar in accuracy and freedom from conventions. Burri and Piano focused on the power of raw materials and their poetic capability of transforming it. While Fontana and Hokusai, were the alpha and omega of elegance. They focused on sharp cuts instead of stormy curly waves. On the other hand, Albini and Portaluppi relied on lines and details, on the re-interpretation of the classics but in a less serious and more contemporary way.

MILANO UNICA: FW 2017-18 TRENDS & MOODS





ALBERTO BURRI vs RENZO PIANO La trasformazione della materia

La qualità espressiva della materia sono state l'oggetto d'indagine quasi ossessiva che ha guidato il lavoro di Alberto Burri, uno degli artisti italiani forse più amati nel panorama internazionale. La sua è un'arte "informale", nel vero senso del termine: priva di forme precise, lontana dal figurativo.

Burri si esprime attraverso macchie, catami, combustioni e combonazioni. La plasticità della materia lo affascina e la sua trasformazione lo provoca artisticamente. Ma è la «conoscenza», ovvero la forza evocativa dei materiali correnti, il fulcro della sua poetica. In contrapposizione a questo mondo astratto, materico, privo di forme e privo dello scultoreo, Renzo Piano opera tra tradizione e innovazione. Forte della sua cultura umanista, il disegno a mano è la soluzione di modelli in grado di dialogare con l'uso di materiali e tecnologie d'avanguardia. L'idea di bottarga per l'arricchimento di materiali e l'evoluzione di materiali di cui studio si ripresenta con l'uso di materiali e tecnologie d'avanguardia. Ma Burri che Piano sono però legati alla potenza comunicativa della materia di cui sono fatte le loro opere. Che sono dopo strati strati strati come rocce di metallo che resistono all'arricchimento e al trattamento in qualsiasi modo, come se fossero in una fornace, magicamente, regitano così e forme contemporaneamente.

The transformation of matter

The expressive qualities of matter have been the object of the almost obsessive research of Alberto Burri, one of the most beloved Italian artists on the international scene. His art is "informal" in the true sense of the word: no defined shapes, far from the figurative. Burri expresses himself through molds, tars, darnings and combustions. Whereas Renzo Piano's work is based on form. He works between tradition and innovation. Strongly influenced by his humanist culture, drawing by hand is the solution of models in dialogue with the use of materials and advanced technologies. The idea of bottarga for the enrichment of materials and the evolution of materials of which the study is repeated with the use of materials and advanced technologies. But Burri and Piano are however linked to the communicative power of matter of which their works are made. Which are after layers layers like metal rocks that resist to enrichment and treatment in any way, as if they were in a furnace, magically, they govern so and forms contemporaneously.

Alberto Burri's art is "informal": no defined shapes, far from the figurative. Burri expresses himself through molds, tars, darnings and combustions. Whereas Renzo Piano's work is based on form. He works between tradition and innovation.

Double face felt in fine version has been worked with oxidations, charred prints, rubber coatings and overlapping of metallic elements. Yarns are proposed both as bouclé enriched with embossed drawings and blackened iron stamps, and peat effect with metal details. Bouclé is also coppery version with steel ribbons. Many are the mix of materials such as metal jersey, overlapping super-soft wool and moiré suede, which is as worn out as metals.

Fur, even fake, is super soft and presents wood effect carvings, while leather shearing is reinterpreted with wire mesh and mercury drops. Denim is luxury version, worked with metal yarn and semi-gloss coatings.

Fancy pattern fabrics, macro-pads, irregular pleats, which are characterized by blurred abstract prints, and cast iron and rusted iron effect films. Cotton is

strategically worn out, soft to the touch, with artistic effects. Tweed is matched with printed corduroy embellished with chromed stitching. The usual 3D weaves are overturned by mesh/fur inserts, with explosive effect on the fabric. Shirt fabrics are characterized by plain metric printings, as well as transparencies overlapping heavy materials inspired by an environmental stratification.

The "colour chart" has been inspired by metallic shades. The main colours are simple, ranging from camel to ecru. In accessories, metallic processing techniques are used for felt manufacturing. Edgings are precious and modern and seem to be animated by metal exposed weaves. Metal weaves themselves are combined with cracked glass effects. Tags and labels that assume a three-dimensional shape. The glass effect is reproduced both in buckles and in decorations. Labels are also more matter like and present plating overlapping on materials. Buttons and decorations are large, with irregular shapes and often mixed with fabric. Edgings are bulky, rich and made out of fancy yarns. Zippers, characterised by oxidized or blackened plating, are embellished by burned and torn out ribbons.

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L to R: Ercole Botto Poala, President, Milano Unica, addressing the gathering at the event



LUCIO FONTANA vs KATSUSHIKA HOKUSAI

GEOMETRICAL THINKING MEETS THE ELLIPSES OF NATURE

While Lucio Fontana is fascinated by the elusiveness of the concept of space, Katsushika Hokusai is inspired by the power of nature. The focus is on experimentation of geometric, three dimensional, graphic, full and empty forms, combined with the idea of contact with matter. Fabrics and accessories with their sophisticated, elaborated and overlapping shapes have a strong tactile value. The concept of three-dimensionality obtained by material overlappings has inspired back printed fabrics, double face raw laser cuts, embossed cloth, carded selvedge overlays with paddings and carved textile.

Jacquard is proposed with glossy and matte games, combined with the typical kimono patterns, with needle loom ribs and transparency effects. Heavy-duty textiles for outerwear present hair effects with glossy and matte games, fine yarns mixed with synthetic metallic threads, short-haired fabrics with flat woven patterns or contrasting vinyl spotted prints. Many tone on tone moulinè jersey fabrics are proposed for knitwear. Fancy patterns realised with *fil coupé*, show Japanese inspired influences, while laces are decorated with geometric glossy/matte drawings and decorations in gold satin. Shirt fabrics have scribble effects, interrupted pinstripes and geometric weave games.

The idea of “purified colour” is translated into a chart of alpha and omega : whites and blacks, where black is both gloss version, like oriental lacquers and matte

like paintings on canvas. The presence of ancient gold and silver in the colour chart are memories from the past. Dark purple, as well as gray, are different shades of black depending on light intensity.

Fontana’s ellipses and ovals, as well as the shapes of ancient kimonos, give substantial inputs for the research of new shapes in accessories, where buttons become giant and present lacquered finishings. Fontana’s lashes or Hokusai’s wavy patterns have inspired the production of embroideries and laser-cut decorations. Decorations and ribbons present stylized patterns, alternating stripes and glossy and matte macramé.

Zippers, as well as zipper-pullers, are edged with velvet and metallic lace. Labels and tags are laser-cut with scribble patterns and have metal decorations. Fastenings are sumptuous and are decorated with pins and damask satin.

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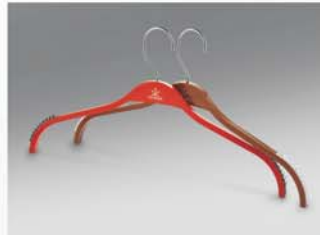


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WALTER ALBINI vs PIERO PORTALUPPI

The genius of these two great creative talents has suggested the third theme of Milano Unica, which becomes the mouthpiece of an elegance sumptuous but irreverent, classical but not arrogant. Portaluppi's diamond pattern floors have inspired the study of new printings, while Albinì's love for jersey has urged the new research of the great potential of this fabric.

The carvings of the architect's wood paneling has influenced chiseled fabrics or accessories, embroideries, while Albinì's passion for furnishing fabrics explains the reinterpretation of tapestry in relation to jacquard.

The large braided knitwear have giant fish thorns on woolen cloth for coats. Shaved



sections on the cloth define geometric patterns tone on tone. Original pied-de-poule present alternating embossed and flat patterns in order to draw geometric blocks. Macro frame paddings enhance fine yarn textiles.

Jersey is covered with lace and lacquered decorations, or is enriched with printings reminding of metal carvings. Fur is matched with velvet to produce a rich double faced effect both outside and inside the garment, like a wardrobe of past times. The extremely soft fake fur is made of stretch jersey. Velvet is made of silk or viscose, pleated with printing effect, needle felt, needle cord both thin and large and back printed devoré, decorated with embroidery and patterns. Check games with blurred lines, as if they were covered by a blanket of fog, are combined with micro and macro frameworks. Tapestry patterns define jacquard fabrics.

Degradé nuanced diamond patterns on silk shirt fabrics have very clear colour shades and are overlapped to stripes, sticks and pinstripes to obtain an embossed paper effect. Halftones of beige, green and light blue colours, play the leading role. They are slightly faded colours but with a strong visual impact.

In accessories, satin becomes an element of contrast with tissues, creating games of materials. Belts are embellished by refined bows. Band zippers are classic with clean lines. A set of patterns, decorations, macro blocks and buttons enrich pied-de-poule and micro-herringbone fabrics on the trimmings. The buttons are made of glossy materials, cut like double coloured diamonds. Buckles are lacquered, colourful and imaginative, overly large, rich and sophisticated. Micro and macro spheres, bows and jacquard patterns decorate tags.





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SHIRT FABRICS

AN ANALYSIS OF ITS TREND, INNOVATION AND CONSUMPTION

When we look at the shirt fabric segment, it suggests drastic technological changes resulting in increased quantity and quality of fabrics. New innovations in shirt fabric manufacturing are fast changing the face of the industry. Due to globalization and liberalization, the fabric makers in one country face competition not only from domestic but also from international manufacturers.

By Gurbir Singh Gulati

SHIRTING BUSINESS IN INDIA

Shirt fabric is the main contributor to the quality of a shirt. Shirt fabrics, or “shirtings” as they are called by tailors, are of various nature and have their own properties. Cotton is by far the most common fabric for shirts in India. Besides pure cotton, polyester-cotton blends cover the major consumption ratio in the market. The trend for linen too has picked up and it is demarcated as a status symbol. The various trends in linen like cotton-linen are also working well with the mid-segment market.

Raymond is one of the strongest players in the shirt fabric business in India. Innovations have always spearheaded its growth as Atul Apte, Design Director – Formal and Ceremonial Wear, Raymond Limited (Park Avenue and Raymond Ready To Wear) defines the different types and blends of fabrics which are selling in shirts as he says, “In the apparel industry most preferred choice is superfine Giza, Supima cotton as it has a brilliant lustre and looks rich. Second best most preferred fabric is pure linen. In blends cotton linen and cotton silk work very well.”

It is important for manufacturers, retailers and consumers to know emerging trends in fabrics for men’s shirts as men can try different shirts fabrics to create variation within their wardrobe.



Atul Agarwal, Director, Vrijesh Natural Fibre & Fabric (Linen Fiesta), feels that India is a market which has consumption for all types of shirt fabrics as he shares, “In general, all the blends sell as in the market, you are trying to cater to different price ranges for different demographics. From pure polyester to Giza cotton which is very expensive, all sell and even pure linen from 150 lea sells at retail for ₹3,000 a metre.”

The shirt industry is offering high quality fabrics in diverse designs and blends as per the latest fashion trends. Shirting fabrics play an extremely important role in a readymade shirt. Fabric type is one of the important factors, as a functional criteria during formation of a readymade garment.

Talking on the variety of the most preferred shirt fabrics, Ramesh Poddar, CMD, Siyaram Silk Mills Ltd., says, “It varies across the geographical locations. In some states cotton blend is preferred more whereas in some states linen blend is the need of the hour. There is a tendency to opt for blended shirting, natural and eco-friendly finishes on the consumer front.”

Amit Dhelia, Director, Artex Fabrics Pvt Ltd defines the different types and blends of fabrics that are selling recently in the market as he illustrates, “Customer prefers 4/1 weave satin look, which comes beautifully on the 60’s fabric. Also denim prints are in huge demand. It includes magic prints, aztec prints, shaded prints. Fabric with laser finish is also very much acceptable because of its smoothness.”

The Indian shirting business is distinguished completely according to zones in India. The 50 percent of the shirt fabric is on the formal line which is cotton, blends in cotton and linen. Vimal Jain, Managing Director, Supriya Silk Industries (Deep Blue) shares his opinion, “The taste in shirt fabrics differs from state to state in India. The northern sector is the only market which is fashion conscious and goes in accordance with the seasons. Apart from it the rest of India prefers similar trends.”

TRENDS IN SHIRT FABRICS

There is a steady growth in the Indian men’s wear industry. This is witnessed in last few years as men are becoming more fashion conscious and following the international trends. According to the changing fashions in the men’s garment industry, manufacturers have to adjust their production cycles as per these fashion oriented changes. Nowadays garment represents a status symbol and also makes a fashion statement; therefore importance is given on quality of fabrics and its design.

Fabric type is also one of the important factors as the functional criteria during formation into a readymade garment. Shirt fabrics also play important criteria for selection and buying decisions. As Ramesh Poddar defines the current trends in shirt fabrics, “In shirting fabrics the trend is more towards plain sorts, structures, subtle prints etc. The preferred blend is more towards 100 percent cotton, CVC, 100 percent linen, slubs, linen look etc.”

The most preferred shirt fabric would depend on the category in which it is placed. As Vimal Jain explains, “The premium segment in the garment industry prefers cottons due to its properties of being comfortable, soothing to the skin and yet fashionable. As the





“There is a gradual shift in many states from 36” shirt fabrics to 58” fabrics. Also we see an increasing demand for 100% cotton shirt fabrics due to affordability.”

- Ramesh Poddar,
CMD, Siyaram Silk Mills Ltd.



“Easy to iron, and premium non iron, wrinkle free, easy clean (Use of less or no detergent), Intellifresh (for anti bacterial/ anti odour) treatments have been key innovations which have been very well accepted by the consumers. These are more travel friendly and require less maintenance inspite of being 100 percent cotton.”

- Atul Apte, Design Director
Formal and Ceremonial Wear, Raymond Limited (Park Avenue and Raymond Ready To Wear)

cotton fabric can be played in both formal and casual segments.” He further says, “The actual India lies in Tier III cities where people want to buy cotton but their budgets don’t allow them to do so. In this price sensitive markets blends of cotton happens to be a second most preferred option.”

Majority of the shirt fabric is being consumed by the ready to wear shirt manufacturers in India. As Atul Apte talks about the trends in the apparel segment, he quotes, “The most preferred trends in the shirt fabrics are chambrays oxfords, fil-a-fil, micro dobbies and prints.” He further illustrates as he quotes examples from the trend preferred by two important brands like Park Avenue, Raymond Ready To Wear where the shirt comes with lot of features as he explains, “Nowadays easy care fabrics, wrinkle free and non iron have seen an excellent sale throughout the season.”

Vipul J. Raichura, Director, Silverline Fashion Fabrics Ltd, (Linen Mantra) highlights on the fact that, “in the mid and premium market cotton and linen are in demand. Varieties of viscose-linen, tencel-linen, cotton-linen have also registered a good growth.”

INNOVATIONS LEADING THE WAY

We are a shirt wearing nation and there is a strong demand for different varieties of fabrics.

Fabrics provide men with the right choice of fabric that suits their lifestyle. Besides colour and patterns, the fabrics also provide shirts with varying textures and give the men, literally, a different feel for each fabric. There are lots of innovations happening in the shirt fabric segment, there are smarter categories of fabrics which are leading the way and are being preferred by the consumer.



Silverline Fashion Fabrics

Atul Apte talks about such innovations and says that the apparel shirts with product plus features make a good mix. He says, “Easy to iron, and premium non iron, wrinkle free, easy clean (use of less or no detergent), intellifresh (for anti bacterial/anti odour) treatments have been key innovations which have been very well accepted by the consumers. These are more travel friendly and require less maintenance in spite of being 100 percent cotton.”

Working atmosphere is changing as companies are allowing men to wear semi formals and casuals at workplace. This has resulted in change of focus of manufacturers as they are also shifting production from formal wear to casual wear. Atul Agarwal showcases an overall pictures as he says, “As far as the innovation is concerned people are going in for finer products. People are going for nanotech and other finishes which enhance the quality and functionality of



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“It is very difficult to demarcate a ration of consumption between formal, casual and party shirts because people cross dress in India. Something which would classify as party wear in Delhi would be day to day wear in Andhra. In men’s wear there is no distinct classification.”

- Atul Agarwal, Director, Vrijesh Natural Fibre & Fabric (Linen Fiesta)



“There has been stability in terms of pricing in the market. There is demand for all categories of products from very premium to affordable.”

- Vipul J. Raichura,
Director, Silverline Fashion Fabrics Ltd.
(Linen Mantra)



Artex Fabrics Pvt. Ltd.

the fabric. It has still not made a mark as yet in a big way and is coming as a new thing.”

Consumers in India are yet to get an experience of wearing shirts made from high performance fibers. Consumers are becoming fashion conscious and expect desirable, fashionable styles in shirts. Emerging trends indicate that consumers ask for quality and high performance fabrics and innovative design features. Ramesh Poddar Siyaram agrees that the shirt fabric has evolved over the years as he says, “New structures, different types of prints, new blends having natural fibres such as Tencel, Modal, Flex are in demand.”

Amit Dhelia says that the innovations for 2016 will be focused on, “Shine yarn developed in Oxford weave, dobbies and plains. Also, abstract prints will be seen soon in the market.”

CONSUMPTION PATTERNS

Shirts are demarcated as formal, casual and occasional wear. Let’s look at the different consumption patterns seen in the following categories:

Formal shirts: these are sub segmented into two categories for, premium shirts and popular shirts. In Premium formal shirts cotton still remains the front runner as 90 percent of the fabrics consumed in this category are cotton. Linen is another promising fabric which is giving higher level of comfort than cotton. This is

gaining as a fashion symbol beyond being restricted to summers.

Popular formal shirts is another growing segment where lots of innovative fabrics are being offered. Here also 100 percent cotton becomes the first choice. Blends like poly-viscose, poly-cotton are also defining a good consumption ratio in the shirts category. Apart from this of CVC and silks, mock linen, linen look in polyester cotton fabrics, instead of linen or linen blends are being consumed by the readymade shirt manufacturers.

Casual shirts: 80-85 percent casual shirts are made of cotton. Poplins and tussar in solid designs in yarn dyed cottons are being consumed. Other fashion fabrics in trends for casual shirts are polyester, viscose and their blends and specialty fibers like lycra, modal, tencel, lyocel, polynosic etc. Linen is other favorite fabric for casuals but restricted only due to higher costs.

Occasional shirts: There is a wide range of fabrics used for occasional wear shirts. Variety of fabrics like cotton, polyester, polyester blends, polynosics, linen are used, but cotton still leads. Cotton blended with polyester and also polyester viscose is a great combination and will continue to dominate for occasion wear as they provide sheen in the fabric. Spun polyester is an excellent fabric for special events when a heavier look and durable fabric is preferred.



Artex Fabrics Pvt. Ltd.



Picture Courtesy: Shutterstock

FABRICS USED FOR SHIRTS

CHAMBRAY: It has an obvious cross-weave and carries the look of classic men's workwear. It can most often be found in cotton.

CORDUROY: It is a cut pile fabric which is available in solid colors. The cut pile fibers are seen in the form of ribs on the surface.

CREPE: It is a silk fabric which is originally characterized by a crinkle, puckered surface formed by highly twisted yarns in the warp or weft or both.

DENIM: We all know denim as the fabric of our jeans. But construction wise, denim is a twill fabric. Sturdy, possibly coarser twill often dyed with indigo. In Denim shirting it is much softer, lighter versions of the fabric than what your jeans are made of. Denim shirting can come in many forms but generally have a different colour on the inside than the outside.

DOBBY: This is very similar to Jacquard, although technically different and varies widely. Some versions are quite similar to broadcloth in terms of thickness and weight, while others can be thicker or woven to almost look like twill. Many dobby fabrics have stripes woven into them, although some are solid colors.

FLANNEL: The brushed texture of flannel makes it popular for the cooler months.

Cotton flannel is the most common, and the easiest to wear and care for. Wool flannel can also be used for shirts.

GABARDINE: It is a twill weave fabric which is made of a variety of natural and synthetic fibers. It is a medium weight fabric made of fine yarns. Gabardine fabric contains more number of warp yarns than weft yarns.

HERRINGBONE: Another type of weave, with a zigzag look. This is a sturdy fabric, often made in cotton for shirts.

KASHMIR SILK: It is a silk fabric produced in plain weave. The motifs used here which are the characteristics of Kashmir silk.

KHADI: It is a familiar term used to a wide variety of fabrics that are hand spun and hand woven. Khadi is produced by using mainly one cotton fibre, blended of two or more fibres.

LINEN: It is another fantastic summer fabric, due to its breathability. It's also quite durable and tends to soften and improve with time. It tends to have a classic look that's casual while maintaining a look and feel of quality.

MÉLANGE: They can come in every sort of weave—poplin, twill, royal oxford, etc., and are woven using multi-colored yarns. Each yarn will be dyed this way, most often

with 2-3 subtly different hues. These unique yarns can help achieve a heathered, intentionally inconsistent, somewhat organic look.

OXFORD: It is a type of a weave. The weave has a visible basket weave type appearance, and it's very often used for semi-formal to more formal men's shirts. It looks great on women, too.

PINPOINT OXFORD: Pinpoint (also referred to as Pinpoint Oxford) has the same weave as oxford cloth, although it uses a finer yarn and tighter weave. It is more formal than oxford cloth, but less formal than broadcloth or twill.

RAYON: Rayon is a great choice for summer shirts, because it's cool and breathable. Hawaiian shirts are often made from rayon. It often has a silky feel to it.

ROYAL OXFORD: this is called a "pretty fabric". Although the name is similar, it is not at all similar to pinpoint oxford or oxford cloth. It is a dressy fabric with a distinctive shine and texture.

SEERSUCKER: Seersucker has a crinkled texture, and is often patterned with stripes. It's a comfortable, easy to wear summer staple. Look for lighter weight seersuckers for shirts, since the weight can vary.





"The MRPs have been very constant in Tier I and II cities so the fabric manufacturers have to control it and work."

- Vimal Jain,
Managing Director,
Supriya Silk Industries (Deep Blue)



"The 4-5% increase or decrease in demand or price has not made much of a difference to the market. It's the thumb rule for the market."

-Amit Dhelia,
Director, Artex Fabrics Pvt Ltd.

Vimal Jain gives us a market understanding about the ratio of the fabrics going to the different segments as he says, "When we talk of the formal lines of shirting fabric it has to be cotton and poly-cotton in which 70 percent ratio will be of poly-cotton and 30 percent of cottons. But when you say casual and semi-formal where the garments are washed 90 percent cotton and the remaining is poly-cotton." He further adds, "Linen saw a tremendous growth in 2010 onwards to 2014 and now we are seeing a little saturation where it is consolidating. Linen is a premium fabric and has to be worn and maintained by a certain class. Linen has been tried by lot of youth and other customers in casual segment and they have understood that it is not meant for them."

People cross dress in India, as Atul Agarwal is of the opinion that, "It is very difficult to demarcate the ratio of consumption between formal, casual and party shirts because it keeps on changing and one overlaps the other."

CONCLUSION

The future of shirt fabric category looks promising, buoyed by both strong domestic consumption as well as export demand. The retail sector has experienced a rapid growth in the past decade with the entry of several international players which believe to 'Make In India'. This will directly uplift the raw material consumption where Indian shirt fabric companies are deemed to benefit.

Vrijesh Natural Fibre & Fabric (Linen Fiesta) is there in the linen fabric production from 8-9 years and is relatively young in the domestic market. Their business in linen has really increased over the years. This is also because of the growing awareness of linen. People have not only liked linen because of its aesthetics but also have understood its comfort reposition.

Siyaram Silk Mills predicts that the demand seems to be increasing off late



Silverline Fashion Fabrics

particularly with China facing labour and production cost issues. However during the last year India too faced a tough situation in its growth story due to various reasons. But still the company managed an increase of 10 percent in its annual sales.

Artex Fabrics has not seen a drastic change in demand from the last 2-3 years. The company supplies over the years have seen a constant growth, with more supplies to corporate brands.

Supriya Silk Industries (Deep Blue) has witnessed growth despite of slowdown in the market. It has grown as a company and is recording a growth of 35 percent CAGR. Even further they expect to grow at the same pace.

Silverline Fashion Fabrics also points out to the slow demand because of financial crunch but he is optimistic about the demand and consumption. The company has recorded a growth of 30 percent.

The growth story of shirt fabric is intact and will not see any major downfall. However the Indian manufacturers have to continuously upscale their production to good quality innovation by adopting the latest technology and trends prevailing across the world.



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-Ramesh Poddar,
Managing Director, Siyaram Silk Mills Ltd.

Siyaram Silk Mills Limited, established in 1978, is a young company that firmly believes in its values and adheres to its ethics. The company trusts the principal of mutual respect and appreciation of human capital. Siyaram has been able to create a good market presence across India with its loyal customer base and its core values such as Passion, Integrity, Team Spirit, Humility, Value Creation and Excellence.

Target audiences

The company focuses on the age group of 18 to 35 years who enjoy a lot of buying power and are looking for a product which has a good brand appeal and value for money. The company branding enjoys an equal appeal from urban as well as rural India.

Product portfolio

Siyaram's is one of the largest manufacturer of blended high fashion suitings, shirtings and apparels. The assortment of its fabrics is very diverse and this diversity has been crafted to provide the consumers with ideal fabrics for the diverse climate and weather conditions of India. The product basket also includes rich look 100 percent linen fabrics, polyester wool, wool lycra fabric.

The brand has a fabric bouquet which has individual characteristics of crease recovery, fall, porosity etc with absolute comfort.

Siyaram's new footprint in the readymade garments category is fast shaping this category. Their finely crafted premium



Siyaram's is one of the largest manufacturer of blended high fashion suitings, shirtings and apparels. The assortment of its fabrics is very diverse and this diversity has been crafted to provide the consumers with ideal fabrics for the diverse climate and weather conditions of India.

formal wear is all about being stylish but suave. Its trendy casual wear is all about being stylish and straight talking.

Product/ Category Expansion

Siyaram highlights on the fact that the difference between synthetic poly-viscose and 100 percent cotton fabrics has reduced and hence they are aligning their production capacities in line with the market demand. The company also intends to capitalize on growing cotton fabrics demand and have already increased their in-house production capacities accordingly.

Present Capacities

Siyaram's sells over 60 million meters of fabrics annually. The company has been a firm believer in technology and has been very early in adopting advanced technology from all over the world. They have state-of-the-art manufacturing plants located at Tarapur, Daman and Silvassa.

Retail Presence

The company has 200 exclusive Siyaram Shops across India and a retail network of over 1 lakh MBOs spread over the



length and breadth of the country. Their designs and styles of blended high fashion apparels have had a rich and vibrant history of creating fashion trends. Siyaram's today is one of the largest manufacturers of blended fabrics and its products are available through an unparalleled network of over 0.1 million outlets spread across India.

Ratio/ Share of Sales

The company is supplying around 90 percent in retail stores and about 10 percent to garment manufacturers.

New Collections

The upcoming Eid as well as other major festivals is seeing a demand for fancy colours and bright shades. The brand has developed an exclusive collection on these lines in 100 percent Linen blends and blended poly-cotton. They have also developed a wide range of these in

solids and self structures. Apart from this the brand has planned some subtle prints in 100 percent cotton blends which is expected to have a good run in the upcoming festive season.

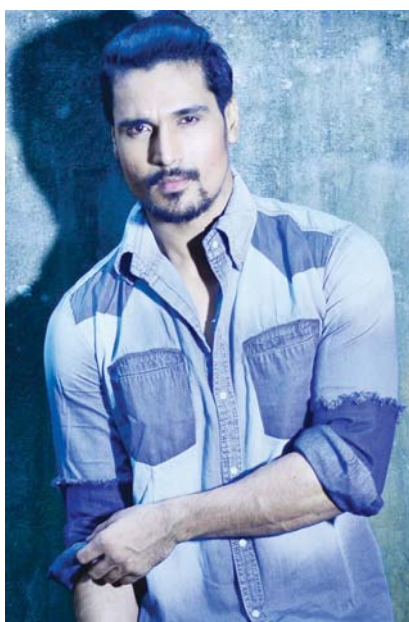
Plans for Exploring New Markets

Siyaram's holds a pan India presence and wants to further strengthen its network in the existing markets and register the change in demographics and buying pattern. The company intends to conduct detailed state wise study and focus on improving on any of its shortcomings.

Current Turnover and its aim for the next 2-3 years

Siyaram's has achieved a net turnover of ₹1,600 crores in 2015-16 and is deemed to cross ₹2,000 crores turnover in the next 2-3 years.





ARTEX FABRICS PVT LTD

THE DENIMIZATION OF THE EAST

Artex Fabrics Pvt Ltd started in the year 2011 and since then there was no looking back. The company started with a small turnover of 30 million and has gradually grown to 200 million. There have been many challenges during its journey, but all have resulted in its profitability.

Target Audiences

The company caters to all major big brands like, Moustache, Hoffmen, Success, Turtle, Courtyard, Dollar, Kraburs, Hyphen, Concord etc. Apart from this, they are selling to over 1000 garmentors across Kolkata and eastern region.

Product Portfolio

Its product portfolio comprises of 70 percent denims and 30 percent textiles and corduroy.

Denim comprises of fabrics for bottoms, kids, ladies and shirtings. Textiles and corduroy comprises of bottom wear and kidswear.

Product/ Category Expansion

The company has plans to add on 5-7 mills in the next 2-3 years time frame. They

currently have 500 plus types of denims and textiles fabrics and expansion is always on their cards.

Present Capacities

The company is having distributorship of 9-10 mills like Mafatlal Industries Ltd., RSWM Ltd., KG Fabriks Ltd., Surya Processors Pvt. Ltd., Bhaskar Industries Ltd, Anubha Industries Pvt. Ltd., KG Denim Ltd., etc.

Retail Presence

Artex Fabrics is available in all the big brand houses along with some 1000 garmentors, all over eastern region, whose garments are available in the local outlets as well as EBOs, MBOs, etc. The company is present in Kolkata, Delhi and Ranchi.

Ratio/ Share of Sales

Selling 100 percent to readymade garment manufacturers.

New Collections

The new collections planned for the forthcoming season are magic prints/ shaded prints/back prints/denim prints/ denim with overdyes and laser finish, knits. It has 500+ varieties of denims and textile fabrics.



-Amit Dhelia,
Director, Artex Fabrics Pvt. Ltd.

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SILVERLINE FASHION FABRICS

THE LINEN MANTRA TO SUCCESS



Silverline was established around 8 years back. The company has a strong understanding of shirt fabrics over the last 60 years which has been its family business. Linen Mantra was launched as a brand in the year 2013 and the company is totally focused on meeting its one of the popular names in the industry. Silverline has recently made its corporate office at Keval Industrial Estate, lower Parel, Mumbai.

Target Audiences

In the domestic market, Linen Mantra is being supplied to mainline brands in the industry and to the private labels of the large format stores.

Product Portfolio

The company is making both Linen shirting and suiting fabric. We are making linen counts right from 25, 44, 50, 60, 70, 80, 100, 125 to 150 lea.

Product/ Category Expansion

The company has recently launched Giza fabric with its new brand Giza Mantra in which they have 100 double, 120 double counts. The company is scheduled to produce around 50,000 meters per month.

Present Capacities

Silverline has recently doubled its capacity from 45 looms to 93 looms. They are manufacturing 3.5 lac meters of linen fabric every month. The company has put a new sizing machine and is venturing into the production of 100 percent Cotton Giza shirt fabrics. This expansion is under the brand name Giza Mantra.

Retail Presence

The company is targeting dealers and premium garment manufacturers. It has



-Vipul Jayantilal Raichura,
Director, Silverline Fashion Fabrics

some 20 dealers in its network through which their product is being retailed to 200 stores. Silverline is also into exports.

Ratio/ Share of Sales

Silverline is supplying 50 percent of its products to the retail counter sales and the rest 50 percent to the garment manufacturers.

New Collections

There are new yarn dyed, dobbies and jacquards in the new collection. The brand is focusing a lot now on jacketing fabric where it has developed an exclusive range of yarn-dyed checks.

Plans for Exploring New Markets

Kolkata in West Bengal, Uttar Pradesh, Punjab and Haryana will be our next target.

Aim for the next 2-3 years

The company is looking at 100 percent growth in turnovers with its latest expansion plans.



SUPRIYA SILK INDUSTRIES

DEEP BLUE ELEGANCE

Supriya Silk Industries was founded in the year 1984. It was started with a set-up of shuttle looms which were running with the company till 2012. In the year 1997 the company started supplying to the garment manufacturers and corporate players in the industry. The company has been an innovator and has carried experimentation with wider width of 58 inches.

The company has always stood high on the standards of quality and has grown to its next level from the year 2011-2015.

Target Audiences

The company follows two concepts with its brand Deep Blue, one they supply to the garment manufacturer and another is where they have a distribution channel for Linen. Their actual target are the garment makers, corporate brands and mid-sized regional brands.

Product Portfolio

In terms of meters the company produces 40 percent poly-cotton, 30 percent cotton, and 30 percent linen. In terms of evaluation it is even to all, being 35 percent.



-Vimal Jain,
Managing Director, Supriya Silk Industries

Product/ Category Expansion

The year 2016 will be more of consolidation for the company and it will further like to grow post November. Supriya Silk has already added new products in its shirting portfolio and will see its actual performance in the market. Will shortly launch Linen suiting in its product range.



Cientele

At national level the company is supplying fabric to brands like Turtle, Sero, Touche and the list runs to 120 players in total.

Present Capacities

In poly-cotton Supriya Silk is doing 1,25,000 meters a month. They are planning a 25 percent increase in the production of poly-cotton. In Linen they produce 55,000 meters of fabric in a month and target to grow by 100 percent by next year.

Retail Presence

Supriya Silk supplies to around 25 distributors all over India which in turn cater to 10,000 retailers across the country. The company holds a good footprint in South, Maharashtra, Gujarat, Rajasthan, Uttar Pradesh and Madhya Pradesh.

Ratio/ Share of Sales

The company is supplying 70 percent to the readymade garment manufacturers and the rest goes to the retail stores.

New Collections

Prints are in demand and we are trying in every fabric in poly-cotton, cotton and linen.

Plans for Exploring New Markets

The company is doing international markets like Sri Lanka and Dubai where it will expand further.

Current Turnover and its aim for the next 2-3 years

The company is eyeing a growth percentage of 60 percent.





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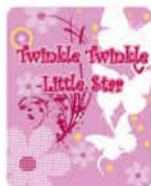
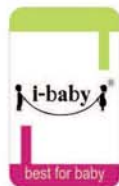
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VRIJESH NATURAL FIBRE & FABRICS

WELCOME TO THE LINEN FIESTA

Linen Fiesta is acclaimed by European Flax, which is a quality mark given by CLC, a European body which controls all the linen fiber production in the EU. This certifies that the best European Flax fiber is used in Linen Fiesta fabrics. The company is only the second one to hold the European Flax mark.



-Atul Agarwal,
Director, Vrijesh Natural Fibre & Fabrics

Target Audiences

Linen Fiesta sells mainly to over the counter retail stores who sell fabric by the meter and get it tailored. The brand is planning its next step to add shirts. The company has already started to develop ready to wear shirts with their linen fabric. Today, they are outsourcing its stitching but very soon they are going to set up their own shirt making factory in the near future. The company came across this idea when they saw many of its premium customers who like linen fabric but do not want to get into the hassle of stitching. It's a convenience factor for these elite customers who have a trust on Linen Fiesta fabric and would be delighted to wear its readymade shirts.

Product Portfolio

The company is making linen fabric. They make super fine linen fabrics from 150 lea and across all count ranges. They also make blends of linen-modal, linen-cotton. Linen Fiesta follows the international quality standards as they are in exports and supply to lot of customers like Zara, Tommy Hilfiger, Polo Ralph Lauren, J Crew etc. Company has a larger share in exports than its domestic supplies.

Product/ Category Expansion

The company is launching ready to wear linen shirts which will be retailed through their existing dealer network and through MBOs in the country. These shirts will be launched in two segments one which is going to be very classy and the other is going to be party shirts.

Present Capacities

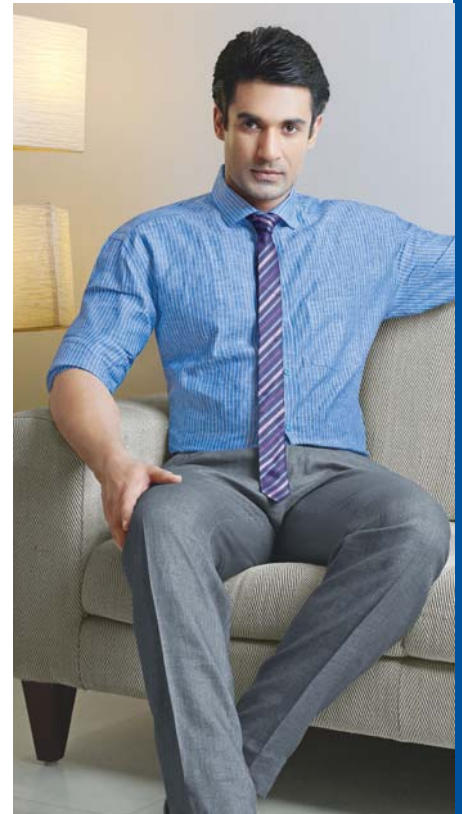
The company has just had one round of expansion last year. Their current weaving capacity is 3 lakh meters a month.

Retail Presence

Linen Fiesta has 16 dealers in its network wherein they are present in 800 to 900 outlets through these dealers. The lion share of its business comes from the Southern state and Maharashtra. Apart from this the company is into exports to Europe and United States.

Ratio/ Share of Sales

The company sells fabric to brands like Wills Lifestyle and smaller brands in Mumbai area. 65 percent of the fabric is going to over the counter trade.



Plans for Exploring New Markets

Geographically, Vrijesh Natural Fibre & Fabrics is very well covered in the domestic market. Since they are launching themselves in ready to wear shirts, it would be experimenting with all the markets which have not explored.

Current Turnover and its aim for the next 2-3 years

The domestic turnover of the company is ₹45 crores. They are looking at increasing its present turnover by 15 percent by the next financial year.



RAYMOND READY TO WEAR

ALL SEASON WOOL SHIRT

NOMINEE FOR THE MOST ADMIRABLE FASHION DESIGN CONCEPT OF THE YEAR AT IFA '16

Raymond has always been in the forefront when it comes to product innovation, but now the company is all decked up to set a new future for itself with its product—the All Season Wool Shirt. Combining the properties of wool to give the feel of cotton, the revolutionary product from Raymond Ready To Wear promises to indulge its customers in the soft and luxurious feel of wool throughout the year. Touted as being the first of its kind, this ingenious innovation in the shirts segment earned Raymond Ready To Wear a nomination for Most Admired Fashion Design Concept of the Year at the Indian Fashion Forum 2016.

The Modus Operandi

Fibers in wool trap pockets of air to create insulating layer in between the fibers. This makes wool an excellent insulator, keeping the wearer warm in winters and cool in summers. Wool creates warmth when it absorbs moisture from the skin or from the atmosphere and acts as a temperature and moisture buffer. Its lightweight property, due to the merino wool used, makes it user-friendly. It is also easy to maintain due to its creaseless and wrinkle free property as compared to cotton.

Development

Ever since Indian designer Rahul Mishra bagged the International Woolmark Prize 2013/14 and designer Rajesh Pratap Singh was honored as The Woolmark

Company's inaugural Indian ambassador, traditional misconceptions about wool being suitable only for cold climates changed. Wool became the talk of the town and strong advocacy for wool as a all season fiber pertained. Raymond took this opportunity and in alliance with the The Woolmark Company launched Cool Wool in India, at the Indian Fashion Forum 2013.

Developing an innovative product in wool for formal shirt was an uphill task; but convincing Indian customers about wool as an all season fiber suiting Indian climatic conditions was more challenging. It was imperative to come up with an exclusive product that is not only rich visually but also makes obvious the potential, versatility and breathability of the light weight fine merino used. In line with this, Raymond emphasized on making the designs extremely classy and formal with intricate structures and very interesting deep colours. Emphasis was laid on the craftsmanship, and superior quality fusing, stitching, buttons and trims. The result was a first of its kind innovation that ushered in new consumption possibilities and successfully widened the appeal of wool.

Benefits to consumer

Apart from keeping the wearer cool in summer and warm in winter, the All Season Wool Shirts are crease resistant, odourless and dust resistant. They are very easy to maintain and can be worn for about two-three times before every wash. They also provide superior UV protection.

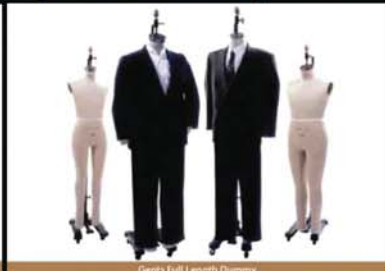


While the UV protection of a normal cotton shirt is at around SPF 10, these wool shirts promise a SPF 30 protection.

Consumer response

The All Season Wool Shirt received overwhelming response during its commercial launch. According to sources from the company, the response was 'fantastic', esp., with globe trotters who appreciated its maintenance free and light weight properties.





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TYPES OF COLLARS

STYLE OPTIONS OF A DRESS SHIRT

The collar, without a doubt, is one of the most striking features of a shirt and has, over the years, evolved to offer a profusion of sartorial options. As a result, zeroing in on the right collar has become an overwhelming task for many men. Browsing through the myriad options commercially available today, we bring to you, the 5 essential types of collars needed to mould a consistent and complete wardrobe.



The Button-Down Collar

A more casual option, this collar type is said to have been invented in 1896 for polo players who had a hard time putting up with their bouncing collars. As a result, they took to button down collar shirts, featuring buttons that fasten the collar points of the shirt. Button-down collars are occasionally dressed up with suit and tie looks, and many are seen wearing them unbuttoned to make a fashion statement.



The Straight Point Collar

Another very common collars type, you could readily tell apart a straight point collar by the small spread between the collar points. A classic look, this collar can have a visually slimmer effect for those with round face shapes and can be worn in all most any situation with an appropriate tie knot.

The Spread Collar

The spread collar is the most prevalent type of collar. It also has a rich history, being flaunted by luminaries like Duke of Windsor and Doug Fairbanks. As the name suggests, the spread, or distance between the collar points, is wider than usual. The collar is perfect for both small and large tie knots and best suits thin men or men with thin faces.



The Cutaway Collar

The perfect option for the adventurous man who likes to add a modern twist to traditional attire. With wider collar points that are angled outwards, the cutaway collar can boast wider tie knots and is best suited to someone with a slimmer or a longer neck as it accentuates the width of the wearer's neck. For a casual look, keep a button or two undone and team it with a blazer.

Club Collar

The club collar came to prominence after The Eton School in England instituted it in their wardrobe in the 19th century. Soon, the rage for Club Collar caught on in an attempt to mimic the elitism of the high society Eton students. The points in this collar type feature a round shape and it can come in either spread or point collar styles. It has a distinctly vintage feel, and works very nicely for those who want a unique look for a tailored wardrobe.



WENDLER:

THE HEART OF THE SHIRT

Wendler is a world leader in shirt interlining. It specialises in top quality woven interlining for shirt fabrics, Peter Heim, International Sales Director, Wendler, shares insights on the shirt's interlining business.

- Team Images BoF



-Peter Heim,
International Sales Director, Wendler



A renowned name in shirt's interlining, Wendler offer interlinings with the highest standards to its quality products e.g. good bonding, low shrinkage, high and stable whiteness and consistent quality parameters. With a market share of 45 percent, its woven shirt interlinings are used by almost all international fashion brands.

"We provide the highest quality and always on time," shared, Peter Heim, International Sales Director, Wendler. He further said, "Successful innovations and individual solutions are the result of competent research and development in our laboratories. In our design studio we transform fashionable trends. Our production sites, applying high German quality standards, offers and guarantees for optimum results."

With a robust distribution network, Wendler is present in more than 70 countries. In India Wendler products are marketed by Welco Agencies with offices in Delhi, Gurgaon, Mumbai, Bengaluru, Chennai and Ahmedabad.

Its Usage

The vast array of Wendler interlining covers all the fashion needs such as: wrinkle-free shirts, dress shirts, formal shirts, semi-formal shirts, button down shirts, casual

shirts, enzyme wash shirts, ladies shirts, top and blouses, trousers waist bands, wendler armhole interlining (AH025/AHF) can be used for armhole, side seams to give a complete pucker free shirts.

Shirt Interlining

According to Heim based on the international shirt market, the most important types of shirt interlining are fusible, non-fusible and temporary-fusible interlinings. All of them are made from 100 percent cotton. The fusible interlinings, which is used by majority of the shirt manufacturers, its most important quality is that its pillars offer excellent bonding strength that add value to the life cycle of a shirt. It has the lowest shrinkage even after fusing and washing, and it give a consistent white shade, especially for white shirt fabrics.

Non-fusible interlinings are mainly used for casual shirts or as an interesting alternative for dress shirts, which are usually fused on collar and cuff. It gives a tailor-made formal style to shirts with a non-fused appearance of top collar and cuff.

While, temporary-fusible interlinings have become very popular during the last couple of fashion seasons. They are used primarily for garment washed and/or garment dyed shirts. It's advantage is in the make-earlier the interlining is fused on top of the fabric.

This simplifies the sewing operation. During the washing and/or dyeing treatment, the coating dissolves and the interlining lies free in collar and cuff and gets the shirt the targeted non-fused and thus emphasis casual appearance.

Collars & Cuffs

For cuffs too the same categories of shirt interlining are used. The use of fusible, non-fusible or temporary-fusible interlining depending on the shirt style and character. "Actually, it depends on the design philosophy of each shirtmaker whether they want a fusible or non-fusible 100 percent cotton interlining and if the request is on extremely soft and even brushed hand-feel or on medium soft or even hard hand-feel," shared Heim.

Shirts' Placket

There are various options on how to apply a placket. In case of a fused front placket, the interlining weight should not be too high. "We recommend a maximum weight of 100g/m² or below. Typical interlining articles for front placket start from 50g/m², usually with a soft or medium soft handfeel. Lowest shrinkage values of the placket interlining are key because of an excessive shrinkage - either of interlining or shirt fabric - might implicate a wavy appearance," he said.



A male model with brown hair and light eyes is the central focus. He is wearing a textured, olive-green Nehru-style vest over a white long-sleeved shirt and dark trousers. He is leaning against a wooden counter with a row of black metal lockers below it. The background is a wall of large, light-colored stone tiles. In the top right corner, there is a logo for 'Mahajan Premium Suitings' with the tagline 'Excellence in Every Thread'.

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A SHIFT IN PREFERENCES

Although cotton reigns as the enduring fabric of choice, the preferences in shirting fabrics are evolving with time. Arti Kapur Singh delves into the evolving trends of fabric in the Indian shirt, from blends of polyester, mock linen, chambray to contemporary Tencel, Modal and Ahimsa silk.

- Aarti Kapur Singh

Donatella Versace once said, “The three biggest fashion mistakes are cheap suits, shoes, and shirts. Spend your money on something good.” A shirt is indubitably the second most important part of a man’s wardrobe — the first being his attitude. Because attitude is what will help a man decide the appropriateness of what he chooses to wear and how he chooses to wear it.

A good shirt can bring to life the dullest of suits. There could be a plethora of shirts — in terms of detailing of the fabric, pattern, collar, buttons, placket, and cuffs. Therefore shirts need not be homogenous and monotonous in shape, style, and design. Broadly, shirts fall in the category of formal, casual and occasional wear. There could be further segments in these categories, depending on buyer profiles, pricing and so on.

While in this day and age, many innovations such as smart clothing, eco-friendly garments are popular and being tom-tommed about, the most basic aspect where novelty is creeping in is fabric. Fabric type is the numero uno concern of any





The fabric is the chief determinant of the comfort and care of shirt. A fabric that is smooth in texture, absorbent, and can be laundered easily will result in a super comfortable shirt.

readymade garment and a shirt is no different. The performance of the fabric does not necessarily predict the performance of the shirt but the two are strongly related as the right fabric is required for a shirt to meet the aesthetic and functional performance expectations. Standards for fabric for shirts are based on factors such as design, fashion trends, consumer's preferences, price and market profile.

Besides colour and patterns, the fabric also provide dress shirts with varying textures and give the wearer, literally, a different feel for each fabric. Men, while making purchases, base their decisions on designs as well as the fabric; they choose a fabric that suits their lifestyle. It is important for manufacturers, retailers and consumers to know the emerging trends in fabrics for men's shirts so that men can try different dress shirt fabrics to create variation within their wardrobe. Also it is the task of textile technologists

and designers to be aware of the emerging raw materials of readymade shirts in order to help the common people to access the quality parameters of the garment before selection. According to the changing fashions in the men's garment industry, manufacturers have to adjust the way they produce a shirt.

EMERGING TRENDS

Readymade garments have almost phased out the custom-tailored garments which were earlier used by men. Big names and international players are coming up with standardized garments in numerous designs and styles. A lot of importance is being given to the comfort of the finished garment. Working atmosphere are becoming 'casual' as men are being allowed to dress semi-formally. Manufacturers are also, consequently, veering away from formal wear to casual wear.

This probably allows for more innovative fabrics to emerge as well. The shirt industry is offering high quality fabrics in diverse designs and blends as per latest fashion trends. The fabric is the chief determinant of the comfort and care of shirt. A fabric that is smooth in texture, absorbent, and can be laundered easily will result in a super comfortable shirt. There is direct relationship between fabric cost and count, fineness of yarn and fabric design. Cotton is king! It rules in fabrics. Manufacturers are providing a mix of products for shirts in blends of polyester, cotton, tencel, viscose, etc., and in variety of weaves such as plain, twill, satin and dobby. Also available are techno-natural ranges that cover all blended fabrics which are blends of cotton with man made fibers. Emerging trends indicate that consumers ask for quality and high performance fabrics and innovative design features. New apparel lines are being launched with such fabrics

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The shirt is actually constantly evolving. There is a phenomenal adoption of the slim fit. More and more people want good tailoring, new, untried colours and prints in menswear from socks to blazers as style.

as Revival, Holofiber, Spectra Lite and Spectrum. Each of these fabrics offer quality and high performance. A super comfortable range of wovens and knits in various blends are in trend. In vogue for extra comfort and stretch into men's shirt, is a luxuriously soft cotton jersey, with a touch of spandex. But the bottomline, according to celebrated designer Raghavendra Rathore is - how functional is the fabric. "The garment needs to be functional. No matter how great the innovation is, I wouldn't wear it if it isn't functional," insists Rathore.

STRUCTURAL AND FABRIC TRENDS

Talking about the latest trends in shirts, designer Narendra Kumar Ahmed says, "The shirt is actually constantly evolving. There is a phenomenal adoption of the slim fit. More and more people want good tailoring, new, untried colours and prints in menswear from socks to blazers as style. We have finally lost the classic shirt." Echoing his sentiments, designed Rohit Gandhi says, "Silhouettes started going slim four-five years back with the advent of the skinny fits in young fashion and eventually made their

way to tailored clothing." Yasho Gupta, menswear designer at Bhane, says, "It has become imperative to keep the slim-fit quotient in mind. The classic shirt itself has become better-tailored but boxy fits are out." Men's fashion, specifically shirts, has moved closer to Italian cuts and fits. Aarti Vijay Gupta, whose shirts have found a permanent fan in Bollywood's iconoclast style icon, Ranveer Singh, while acknowledging the trend says, "This is a cyclical trend, like most trends. Slim fits will start moving towards looser fits again."

Coming to fabrics, most of the fabrics used in premium formal shirts are made in India. And cotton continues to rule - even if it is hybrid with other fabrics. There is varied percentage of usage of imported versus Indian fabrics by different brands in these shirts. Most premium brands use 100 percent cotton or high percentage of cotton blended with polyester. Innovative fabrics are being used by designers to create product

differentiation and also to add value addition to their products. Because of the comfort factor, 100 percent cotton is usually favored in these shirts. Blends that are in trends for readymade shirts are poly viscose and poly cotton. The last couple of years have seen both manufacturers and designers using more of poly cotton against poly viscose, which was the only blend available in synthetics. "There is also a rise in the popularity of polyester and cotton blends and CVC and silk, mock linen, linen look in polyester cotton fabrics, instead of linen or linen blends by various brands of formal popular shirts," says Narendra Kumar. But if Rohit Gandhi is to be believed, work shirts are not seeing too much experimentation. "Poplin, chambray, twill, denim and drill cloth, in fibers of cotton, nylon, acrylic and polyester are still more popular in work wear shirts as these shirts need durability," says Gandhi.

“The silk spun from mulberry pierced cocoons - referred as ‘Ahimsa silk’ is also gaining popularity abroad. While the ethical aspect is important, the fact that Ahimsa Silk is low maintenance is also the key,” reveals Kusuma Rajaiah, the technocrat responsible for the Ahimsa Silk revolution in India. To produce designer’s shirtings, Ahimsa silk (extracted after the silkworm has completed metamorphosis and emerged from the cocoon) is compatible to be woven with cotton, rayon, tricot and flature silk.

Global fabric trends also focus on ‘radiant sun shirts’, which provide 40+ UPF sun protection even through the dense weave and synthetic fibre. And yet they are lightweight, quick drying and extremely versatile. Raghavendra Rathore seems impressed with a new fibre he discovered on a trip abroad. “Tencel has properties similar to cotton and I discovered that it actually has more breathability than cotton,” says Rathore, who is keen to adapt that fabric in his signature bandhgalas.

Designers the world over are also developing newer fabrics. Modal woven, a new kind of natural fabric that combines the benefits of natural fibre and the fantastically soft feel of modern microforms is finding greater favour. Rajesh Pratap Singh is gung-ho about it too and says, “Made from beechwood chips, the fabric remains soft and lustrous after several washes and has hydroscopicity of cotton and the sheen of silk.”

Bhu:Sattva, a Gujarat based organic clothing brand makes use of fabric made from natural fibres to create unisex shirts. Fibres used in weaving these wonderful accoutre are hemp, bamboo, organic cotton and silk, soya bean,



Even men’s formal shirts are becoming younger, fresh and are emerging with a strong element of fashion. Colours are becoming younger, brighter and fresher. The colour palette has a wide choice with beige, chrome, blue, fuchsia, brown and so on.

modal, aloe vera, banana, pineapple, milk protein fibre, flax, jute, khadi, etc., with colours extracted from beetroot, pomegranate, henna, catechu, teak tree leaves, turmeric, madder red, kesu, haritaki, sewali flowers, indigo and more. There is also a remarkable rise in trend of the products made of hosiery material – and shirts come in this product category too.

INNOVATIONS ARE IN

Even men’s formal shirts are becoming younger, fresh and are emerging with a strong element of fashion. Colours are becoming younger, brighter and fresher. The colour palette has a wide choice with beige, chrome, blue, fuchsia, brown and so on. While the traditional designs included checks, micro checks, plains and stripes, designers such as Aarti Vijay Gupta and Raghavendra Rathore are pushing the envelope. Rathore launched his ‘Rathore Shirt’ and used delicate embroidery on the 70s thread count Giza cotton. “A host of heritage techniques are employed in the making. The cufflinks and buttons bear an engraving of ‘RR’. The customisation possibilities are immense and this ensures that each piece tells the story of not just the craft, but also the individual who chooses it,” emphasises Rathore.

Occasion-wear is another category of shirts where innovations become increasingly acceptable, agree designers almost unanimously. “Jacquards lends itself to a lot of interpretations and value additions,” reveals Rathore. “I love thinking out of my own boxes when I do shirts. So there are a lot of hand-painted shirts, those with surface embellishments in shells. I want to work with tussar now and make a few metallic shirts,” says Aarti Vijay Gupta, refusing to reveal any more about her new collection. In the same vein, designer Narendra Kumar says, “A casual shirt can also be made into a style statement – garment washing, appliqué detailing, and even ornamentation and embroidery are great ways to reinterpret a shirt.”

The writing on the wall is clear. Men (and women) are willing to try different shirt fabrics, textures and tailoring to create a wardrobe that stands out. The onus is also on textile technologists and designers to be aware of the emerging raw materials that are not just futuristic but also, as Rathore says, “functional”.





WHEN SHIRTS MADE STATEMENTS

The shirt as a sign of rebellion? Bollywood has done it, finds Aarti Kapur Singh

Every age has fed into the “ideal” look, defined the “hippest” and “hottest” styles. It should come as no surprise then, that conforming to trends can mean that one is indirectly comfortable with the prevailing social norms. Which is why a sartorial rebellion not only makes for good eye candy but also shakes us out of our daily stupor. Of course, being a part of structured and organised society can be a great thing — it ensures traffic rules are followed, work gets done efficiently, and that people take their designated seat at fashion weeks. But truth be told, a smart and confident act of subversion is always so exciting, however innocuous it may be. Publicity stunts and attention-seeking aside, fashion as a means to subvert moral and social order, authority or hierarchy can be a powerful tool when applied with the correct intention and some basic levels of intelligence. Some fashion rebels may not always be understood or accepted, but they have a very exciting role to play in. And Bollywood has had a few in every age! It is amazing to note how an item of clothing as basic and as ubiquitous as a shirt could be used as a sign of non-conformity. But Bollywood has always been known to be more dramatic than can be imagined. Far from protocol, Bollywood’s actors brought a perfect dichotomy of good-meets-bad with their shirts. So right from Dev Anand, who was legally (yes, a court had to step in) barred from wearing a black shirt in public to avoid ‘chaos among girls’ to Ranveer Singh who makes really bold statements with his designer shirts, Bollywood’s non-conformists have set quite a few trends. Here’s profiling a few...



DEV Anand

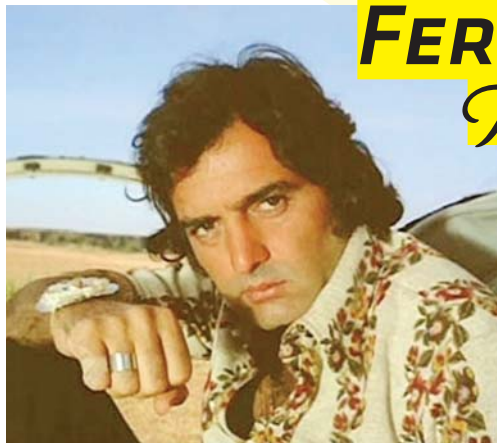
Dev Anand, the style icon of 1950s and 1960s, scripted a fashion statement with his scarves, mufflers and jackets and his signature puff, inspired by his childhood idol Gregory Peck. The new age designers describe him as a trendsetter and a mentor who gave a fillip to Bollywood fashion. A film studio exec gave the Indian actor his big break in the forties because of his 'smile and beautiful eyes and tremendous confidence'. It was that confidence that propelled him to sartorial pin-up. Dev Anand had a unique style, combining high collar floral shirts with colourful scarves. Anand's signature piece may have been the necktie, but he raised quite a storm with his full-sleeved, fully buttoned shirts with large collars. And he carried it off with aplomb. In *Kala Bazar*, *Teen Deviyani*, *Nau Do Gyarah* and many films of that time, the hero that Dev Anand portrayed was city-bred, confident, sometimes even immoral and unscrupulous. He smoked, fell in love with cabaret dancers and was rather footloose. And this was brought out in the shirts he wore - blithe and unrestrained. Vibrant colours and psychedelic hues in his wardrobe of the 50s and 60s and right up till the 70s, combined with understanding of colour-coding was phenomenal and personalised it to the hilt. In *Guide* he challenged all the existing norms with his big floral prints and buttoned up turtle-neck shirts.



AMITABH Bachchan

The angry young man of yesteryears, Amitabh Bachchan remains one of the most stylish people in this country. Remember his happy-go-lucky 60s chic in *Dekha na haye re socha na* from *Bombay to Goa*? The lovable tapori who wore dog-collared shirts in *Amar Akbar Anthony*? The pan-chewer-turned-criminal-imposter in *Don*? The visually-startling genie in *Aladdin*? Or the natty and debonair rock n' roll dancer Sexy Sam of *Kabhi Alvida Naa Kehna*? The classy master chef with the ponytail in *Cheeni Kum*? He's Bollywood's favourite clothing icon. The first fashion trend that he set was that unforgettable knotted shirt in *Deewar*. This, incidentally, was accidental because the tailor had stitched it too long and there was no time for alteration. His shirts have always been custom-made because his arms are too long. Amitabh Bachchan maintains his style effortlessly - the nonchalant folding of the cuffs over his elbows in *Sholay* or the everyday waistcoat that sparked a huge trend in *Don*. Bachchan redefined (and continues to do so) how casuals were not torn jeans or t-shirts. His interpretation of shirts makes them casual too - in the way he sports them. Even if his colours and their clothes spell casualness, his sense of styling is always on the dressier side which makes his look sharp and smart.





FEROZ *Khan*

Top buttons open, chest hair showing — Feroz Khan personified the macho cowboy look. But he was also totally at ease in tuxedos with shirts that had crisp white collars as he stared deep into the eyes of his heroines. Feroz Khan, the man who inspired film actors to have delectable sartorial choices paired his shirts with cravats and turtlenecks, but his signature style — unbuttoned shirts, remained his alone right till he passed away.



RAJESH *Khanna*

If Kakaji made women go weak in their knees, he also made the men imitate his distinct style. While the 'guru' kurta, so popular with Narendra Modi, is his most famous contribution to fashion inspired by Bollywood, his flamboyant colourful shirts made quite the splash too. Hardly ever spotted underdressed, Kaka was known for his love for colours and new trends. Whether it was shirts stitched safari-style or worn with a belt over them Rajesh Khanna spearheaded a fashion revolution. He looked dapper as the smart air force officer in *Aradhana* and as hip as one could look in the song *Jai Jai Shiv Shankar* in *Aap Ki Kasam*. Rajesh Khanna's style was a source of envy for his peers. Right from the bold check shirt of *Yeh Shaam Mastani* to the crisp one he wore in *Yeh Jo Mohabbat Hai*; or even the bandhgala shirts that he made his own — Rajesh Khanna was one icon who flaunted his shirts with great panache.

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SHAMMI *Kapoor*

Shammi Kapoor single-handedly transformed a formal shirt into casual and informal avatar with as much ease as he taught film-lovers to groove. He modelled himself on Elvis Presley, but the raunchiness was toned down. Pairing upturned collars with bomber jackets or wearing shirts with cravats and gorgeous ties, Shammi Kapoor made everyone believe you could serenade on a shikara as well as glide down snow-covered slopes in a shirt in tow! Shammi Kapoor brought casual to men's fashion in a way that it has stayed back forever.



RANVEER *Singh*

Ranveer Singh is confidently trampling over conventional fashion rules and doing it with a cool, easy flair. Right from dainty floral prints to elegant pastels, his style often borders on bizarre and we can't help but admire his guts. He even stepped into an awards function wearing a shirt reading: no f**** to give. The dapper Singh hasn't shied away from being a part of the zeitgeist, and he's moving away from the typical "macho man" stereotype that years of Bollywood conditioning has produced. He represents a new generation of men who're comfortable in their skin and fashion choices. From pretty florals to polka dots, pastel hues and hand painted mulmul, we've seen him sport myriad shirts with a cool flair, despite confusing fans and providing critics with ample style fodder. He's even tried various silhouettes, including a shirt inspired by the traditional Gujarati kedia, and one that has detachable collars and becomes a t-shirt! It couldn't get more trendsetter than this!





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- Denim Movement: Online VS Physical Stores.
- Study of Penetration and Preferences with Special focus on Denim Penetration in Rural and Tier - III cities and into Kidswear and 40+ age brackets.
- The vivid world of Women's Denims.
- Latest trends in Styling and Embellishments.
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- Great Denim Stores- Case Studies

We also look at...

What Types of Jeans are going to do well in the future? # Is India ready for Organic Denims and Luxury Denims? # Are Silk Denim & Khadi Denims just a fad? # Customization in Jeans retailing

Also profiling...

- India's top Denim Brands # Top new International Entrants # Top Denim Fabric Companies
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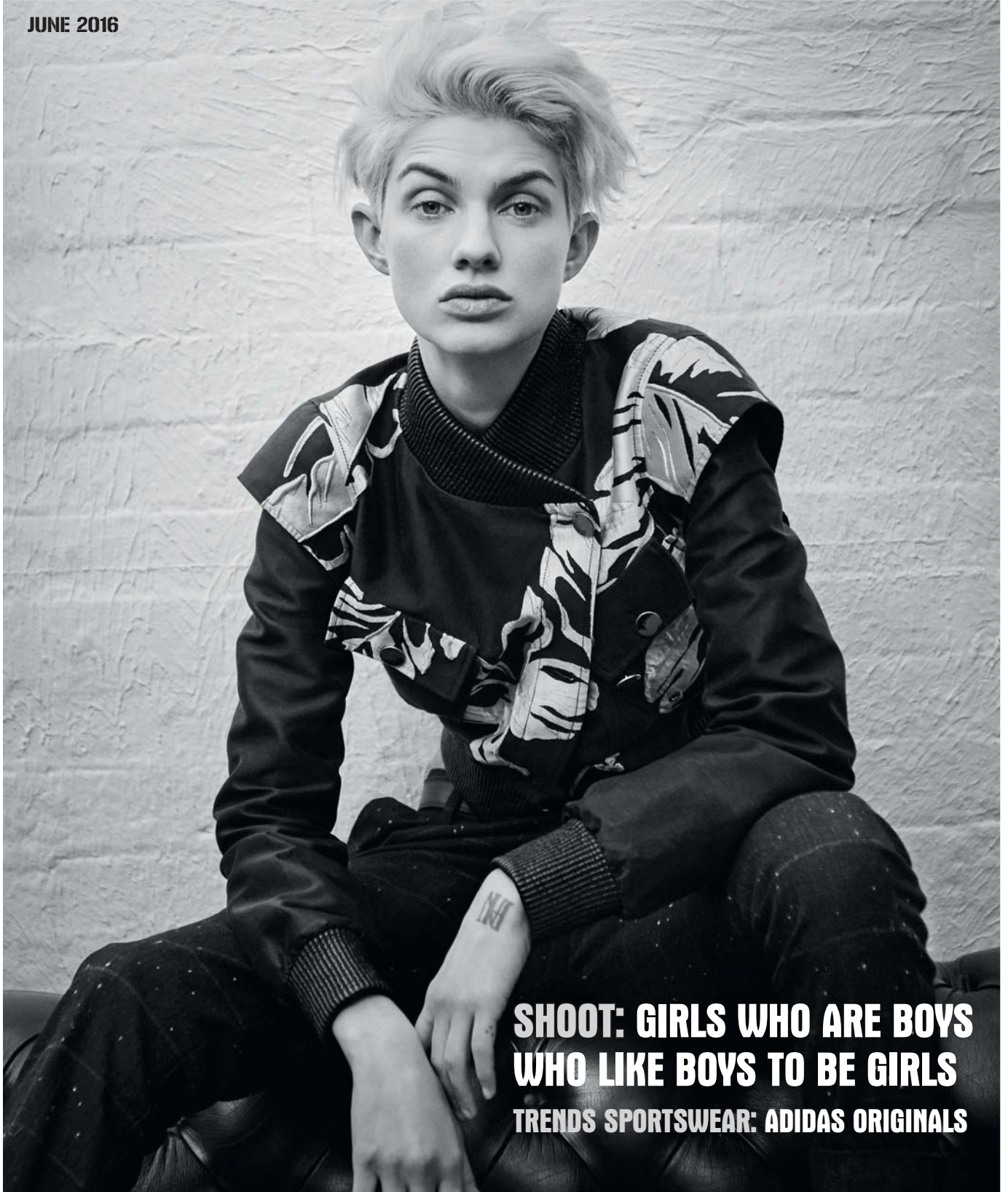
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202 TRENDS/SPORTSWEAR Work Together

Unisex fashion insiders Toni Muccio and Melissa Tarozzi who own the premium brands Scarti-Lab and Brand (Not) Brand talk on their clothes, their love for Made in Italy products, great craftsmanship and handmade manufacturing techniques.



204 TRENDS/SPORTSWEAR We're Not a Brand Which Should Be Chasing Fashion Trends

Adidas Originals has recently done a lot of things right in Street Fashion. What's the vision behind it? The brand's new vice president of global design, Nic Galway shares.



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SPORTSWEAR INTERNATIONAL

- Menswear Trends for Fall/ Winter 2016-17
- Menswear Key Items for Fall/Winter 2016-17
- Menswear Colors & Materials for Fall/ Winter 2016-17

Credits for India Capsule

SPORTSWEAR INTERNATIONAL

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 Senior Editors: **Maria Cristina Pavarini/Christopher Blomquist**
 Fashion Editor: **Juliette Nguyen**
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THE SCARTI-LAB TEAM WITH OWNERS MELISSA TAROZZI (1ST PERSON, LEFT) AND TONI MUCCIO (FOURTH FROM RIGHT); PHOTO: NICK CLEMENTS

‘WORK TOGETHER’

UNISEX FASHION INSIDERS TONI MUCCIO AND MELISSA TAROZZI OWN THE PREMIUM BRANDS SCARTI-LAB AND BAND (NOT) BRAND. THEIR CLOTHES SHOW ALL THEIR LOVE FOR MADE IN ITALY PRODUCTS, GREAT CRAFTSMANSHIP AND HANDMADE MANUFACTURING TECHNIQUES.

Interview **Maria Cristina Pavarini**

How did your project originate?

We wanted to do away with the old mass-oriented industrial production techniques we didn't believe in anymore. For this reason we have our whole collection manufactured in Italy—from design to final treatment—in Emilia-Romagna, Marche and Abruzzo. We could not do that differently because we are highly demanding in terms of quality and production value chain control. Scarti-Lab is a man's line that women also love. Its own premium denim identity is also connected to other quality fabrics and to a strong tie with country apparel traditions based on dignity rather than showing off, on contemporary comfortable fits and maniaclike care for details, fits and similar aspects.

What materials do you employ?

We mostly use high-end traditional fabrics,

preferably by Italian and British historical specialists, and made with cotton, linen and wool. We also use Italian and Japanese selvedge denim. We also offer denims by “Blue Selvedge,” a small company of Bovolenta, part of Berto, and producing selvedge denim and some small indigo-dyed handwoven fabrics that are very expensive even if delivered slowly.

Can you describe the main aspects of your collection?

Our men's total look includes trousers and shirts plus vests, jackets, hats, ties and men's accessories. Smaller sizes are mostly appreciated also by women looking for self-confident men's fashion that is never out of style. We wanted to intercept that male's research for a relaxed, timeless, essential and pleasant elegance. Our price range is premium even if costs vary according to materials and finishings. We also offer a

special collection characterized by a more vintage attitude—Band (Not) Brand. It is more expensive because many aging steps are handmade and require much time and work.

You also present your collections in a peculiar way. Can you explain how?

We are no longer participating in traditional trade shows. We consider them old and not helpful enough occasions for presenting collections such as ours. We prefer to build a solid and sincere relationship with our customers. For this reason we created our own order show “Work Together” held in our headquarters outside of Bologna. We spend time with our clients and eat in small local restaurants, listen to music and dance with them like old friends meeting for bank holidays. It's not pure business—we like to spend time with the people who like us.

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Interview **Maria Hunstig**

NIC GALWAY, VP GLOBAL DESIGN,
ADIDAS ORIGINALS



Nic Galway is a transportation and car designer by trade but during his studies he noticed that wasn't what he wanted: he preferred to actually *make* things. So in 1999, he answered an advert at Adidas and was hired. Since then, Galway has accompanied and led some of the most interesting developments in the sportswear giant's lifestyle segment, from the creation of the Originals brand to collaborating with

Yohji Yamamoto (finally resulting in the Y-3 brand), Stella McCartney and Rick Owens, and (re)launching iconic footwear styles such as the Pure Boost, Tubular and, very recently, the NMD, the first new Adidas sneaker that is not fully based on any archive model, but only fuses elements of iconic Adidas styles with the brand's latest technology, such as the Boost and Primeknit fabrications. Today, as VP of global design, Galway oversees the whole of Adidas Originals.

You only spend very little time in the Adidas headquarters in Herzogen-aurach—what's the most inspiring destination to go to for you?

I travel a lot. Whether it's to factories to work on the products or to capital cities to take part in events or to see culture. I don't have a favorite place but what I like to do is go just for a very short amount of time.

And what kind of things do you look at there?

I tend to not take inspiration from what's going on around me. So if I travel to cities and I'm looking at other brands it's just to give me a feeling of where we are. Inspiration has to come from other places. I've always been inspired by looking at how other products are made, completely outside of our industry. Different colors, materials and textures.

So what other industry could that be?

I am very interested in furniture. Working with Tom Dixon for example, he always amazes me. I find it really inspiring to see how one product was developed for one purpose and then start thinking about how I can translate it into a different situation. Because sometimes when you take something familiar into a new situation, that's where the magic happens.

What are your ingredients when designing a new product?

When I'm creating a new product, I don't try to be fashionable. I think this isn't the way, I think you need to be confident and challenging. But you have to find your own way. I like to really work hands-on with a product, so I draw a little, but then I really encourage my team to actually make things.

Do you look at fashion trends?

I think we're not a brand which should be chasing fashion trends. I think we should have a consistency and a direction, as every brand should have.

But I think right now, Adidas is very trendy...

Yes, I hear this a lot, too and obviously that's very nice to hear. But you have to be careful with that; you have to always find a balance.



“People may like what you’ve done or they may not but they will always appreciate the fact that you’re pushing forward. I think what people wouldn’t appreciate is if you stop. Or if you just sell the past.”

How long do you think this whole sportswear trend will stay around?

I discussed this with my team recently. I don’t know if that is a trend. I think it evolves and adapts, this is for sure, but I think sportswear is part of our life. It’s like denim is part of our life, too. Sometimes it’s more important, sometimes it’s less important—but it will always be there. We must always remember that the key role of Adidas is innovation for sports and if we remain true to this, then the trends can come and go.

Are you ever scared to make a product that doesn’t match that moment?

I think the only thing to be scared of is being complacent or maybe of being afraid. I believe people will accept success and failure provided you always have integrity and be true to who you are. People may like what you’ve done or they may not but they will always appreciate the fact that you’re pushing forward, I believe. I think what people wouldn’t appreciate is if you stop. Or if you just sell the past. Originals has to be a culture brand, it can’t be a retro brand.

So how much retro do you allow yourself?

We have such a rich archive. You have to respect that and people love that. There will always be a place for the Stan Smith and the Superstar. But people expect us to be pioneering—that’s what the company was founded on. And innovation doesn’t just mean technology. I think everything we do should somehow be innovative. But it doesn’t mean the product itself has to be innovative. That’s a key learning: the future doesn’t always have to be futuristic. But it does always have to be interesting and engaging.

Was that actually successful, releasing a shoe in 50 different shades?

When I first met Pharrell I asked him why he wanted to work for us and he said, “Because you guys are a people’s brand.” And this was the first thing that stuck in my mind. He talked about how he is very much about equality and bringing people together and celebrating everyone in the world not just only the lead. And he said: “I wanna do 50 colors.” Any rational marketing man would say, “That’s too many, what about only doing the best ones?” But he was like: “No, I wanna do 50.” His point was: don’t think about it in terms of commerce, think about it in terms of showing who you can be and he was absolutely right. This product wasn’t limited edition and it wasn’t super high price, but with the stunning window displays and social media of the 50 colors, it got the same press as if it was. And it largely sold out.

How do you approach collaboration with people like Pharrell or Yohji Yamamoto?

Everyone is different; that was actually one of my very early learnings. The way that you work with one partner won’t work with the next. You have to get to know each other and understand the cultural differences.

I like making things. Once I understand what’s in their mind I will make an actual series of studies just to ask “Is this what you meant or do we need to try something different?” I don’t like if there is one fixed idea presented at the end, because then they feel pressured to say yes.

Do you instantly feel if a product is ready or not?

Absolutely. When I made the first Tubular shoe, the Y-3 version, I made one, and I said yes. That’s it. I did one sketch, one quick handmade shoe and then I saw what I was looking for.

What’s the next step in sneaker design for you?

We’ve had a couple of progressions. You had the time where sneakers were just for sport and then you had the heyday time of fashion sneakers and now that’s all come together and you have where we are today.

I think we are ready for the next step and for me that will be finding how can we mix the future and the past. With innovative materials like Primeknit you don’t have to follow the constructions of the past, because it will mold and move with the foot so it allows you to take on new silhouettes.

And which will be Adidas’ next big retro sneaker after the Stan Smith and Superstar?

Everyone knows the Stan Smith, the Superstar, the ZX, the Equipment. But then there are so many other stories in there that people don’t know. These I would like to look into, the shoes which were never made, for instance.

Does it happen that sometimes a silhouette becomes very popular and you didn’t anticipate it?

It can happen, yes of course. There is a mix between the trends we can see and also the trends that we set. That’s kind of the interesting thing. In today’s fast times, you cannot have a one-way conversation. We can learn so much from the consumer, too. I always find it amazing how people adapt my product and how they wear it. It’s an exciting time and I think we’ve only just started on this journey.

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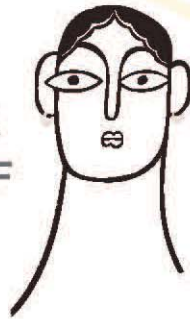
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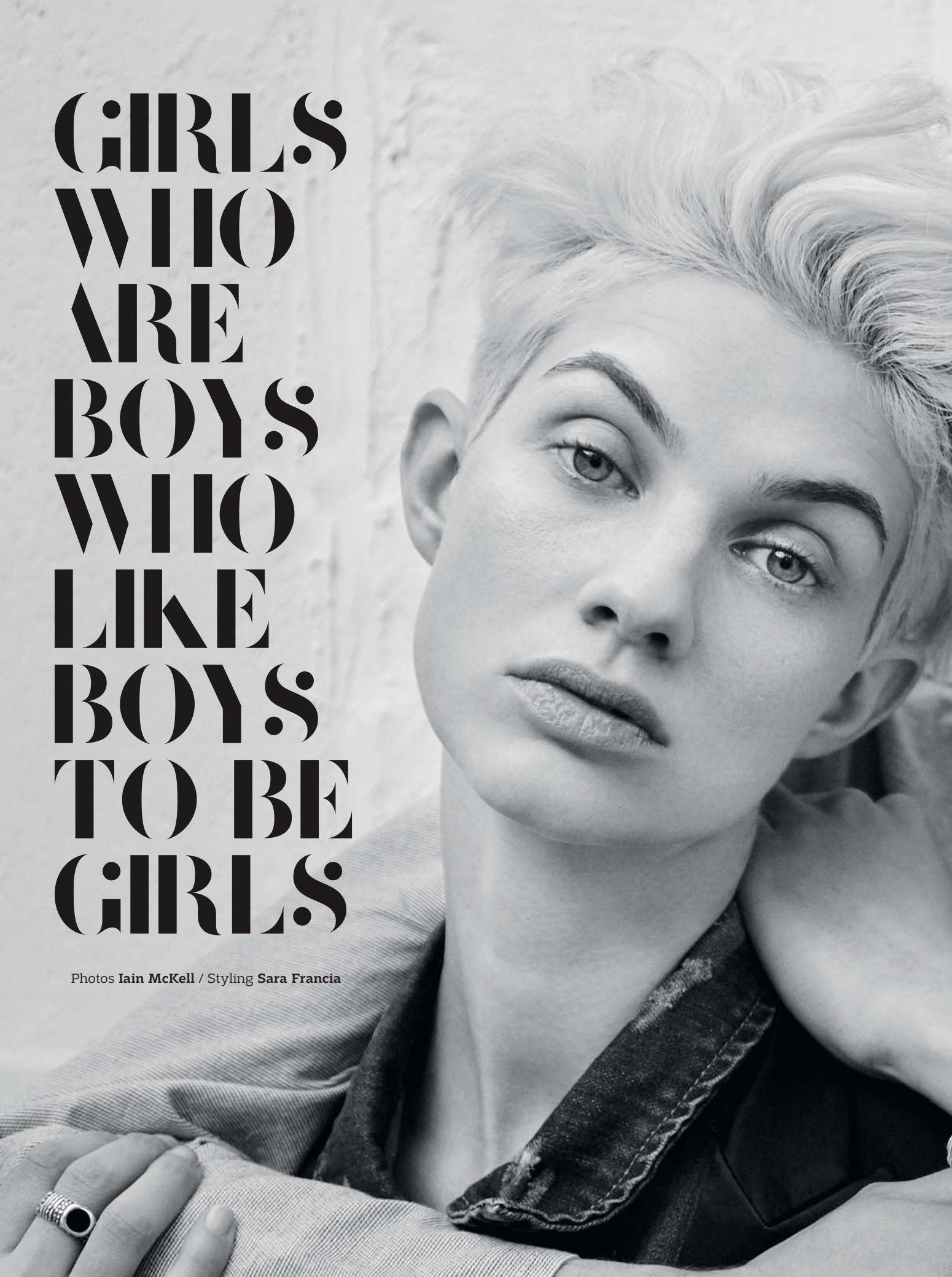


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GIRLS**

Photos Iain McKell / Styling Sara Francia





HARMONY WEARS BLACK BLAZER **DONDUP**,
DENIM JACKET **COLORADO DENIM**,
RING **MANUEL BOZZI**
JOHN WEARS SHIRT **OLIVER SPENCER**,
BLACK T-SHIRT **STAMPD X PUMA**

HARMONY WEARS BROCADE JACKET **GUY LAROCHE**,
TROUSERS **RICH AND ROYAL**, BELT **DENHAM**,
SOCKS **BENEDICT**, RING **MANUEL BOZZI**



JOHN WEARS PADDED BLAZER **TATRAS**,
BLACK SHIRT **CHEAP MONDAY**,
PLEATED TROUSERS **MAISON SCOTCH**,
CERAMIC BROOCH **COR SINE LABE DOLI**,
SHOES **UNDERGROUND**



JOHN WEARS MESH SHORT SLEEVE TOP **AVARO FIGLIO**,
KNITTED VEST **AUGUSTIN TEBOUL**,
MELANGE PRINT SHIRT **ROQUE**,
TROUSERS **NEIL BARRETT**,
SOCKS **BENEDICT**, SNEAKERS **Y-3**,
RING AND BRACELET **MANUEL BOZZI**





HARMONY WEARS MILITARY COAT **ANGELOS FRENTZOS**,
BLACK VEST **NEIL BARRETT**, JEANS WITH CHAIN **GUY LAROCHE**



JOHN WEARS SHIRT **OLIVER SPENCER**, BLACK T-SHIRT **STAMPD X PUMA**, LEGGINGS **ASICS**, SHORTS **GALL**, SHOES **UNDERGROUND**

HARMONY WEARS BLACK BLAZER **DONDUP**, DENIM JACKET **COLORADO DENIM**, SUSPENDERS **MESSAGERIE**, STRIPED TROUSERS **PAUL SMITH**, ANKLE BOOTS **DIESEL**, RING **MANUEL BOZZI**





JOHN WEARS JACKET **LEVI'S MADE AND CRAFTED**,
SHIRT **BLK DENIM**

HARMONY WEARS BLACK JACKET **STAMPD X PUMA**,
WHITE JACKET **COME FOR BREAKFAST**,
LEATHER TROUSERS **ZADIG & VOLTAIRE**,
BOOTS **PEDRO GARCIA**, RING **MANUEL BOZZI**





HARMONY WEARS BOMBER JACKET **ACNE**
DENIM TOP **CRISTIANO BURANI**
STRIPED SHIRT **G-STAR RAW**
TROUSERS **ILARIA NISTRI**
SOCKS **BENEDICT**
SHOES **UNDERGROUND**

JOHN WEARS MESH SHORT
SLEEVE TOP **AVARO FIGLIO**,
KNITTED VEST **AUGUSTIN TEBOUL**,
MELANGE PRINT SHIRT **ROQUE**



HARMONY WEARS WINDBREAKER JACKET **K-WAY**,
DENIM SHIRT AND TROUSERS **ALESSIA XOCCATO**,
WHITE BOOTS **PEDRO GARCIA**





HARMONY WEARS BOMBER JACKET **ACNE**,
DENIM TOP **CRISTIANO BURANI**,
STRIPED SHIRT **G-STAR RAW**,
JOHN WEARS JACKET **ANGELOS FRENTZOS**,
METALLIC SHIRT **PAUL SMITH**,
BULLET PENDANT **MANUEL BOZZI**





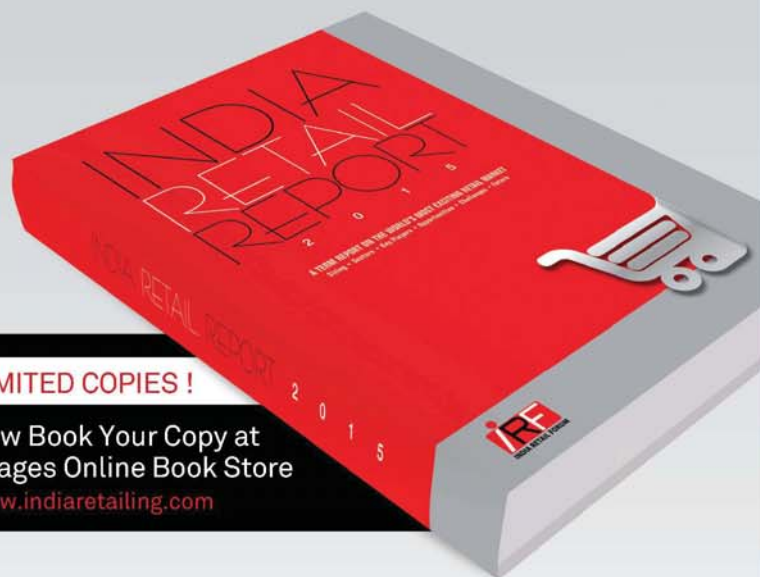
THIS PAGE:
JOHN WEARS BLACK COLLARLESS SHIRT **Y-3**,
MELANGE PRINT SHIRT **CHEAP MONDAY**,
TROUSERS **PRINGLE OF SCOTLAND**,
SHOES **UNDERGROUND**

OPPOSITE PAGE:
HARMONY WEARS
PUFFER JACKET **DENHAM**,
BLACK JACKET
AND BOOTS **DIESEL**,
JEANS **J BRAND**.
JOHN WEARS JACKET
LEVI'S MADE AND CRAFTED,
FRILL SHIRT **BLK DENIM**,
TROUSERS **ANTONY MORATO**,
BELT **DENHAM**, SNEAKERS **Y-3**

MODELS: **JOHN WHILES (PREMIUM MODELS)**,
HARMONY BOUCHER (SUPA MODEL MANAGEMENT),
HAIR: **ROGER CHO**,
MAKE-UP: **ANGELA DEVIS DEACON**

INDIA RETAIL REPORT

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The India Retail Report Highlights:

- ▶ Sizing the Indian Retail Market
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- ▶ Large Indian Corporate Houses in Retail
- ▶ Profiling the Key Players
- ▶ The Biggest Opportunities & The Main Challenges
- ▶ Emerging Formats & Sectors, Store & Non Store Formats
- ▶ Special perspective on E-Commerce



Smt. Nirmala Sitharaman
Minister of State
(Independent Charge)
Commerce & Industry, India

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MEMBERSHIP FORM

Recognised by the international fashion and retail community through its B2B Magazines, Conferences, Exhibitions, Research Volumes, and Web Portals, the India Fashion Forum is trusted as the catalyst for profitable growth of fashion business through knowledge platform leadership.

A strong portfolio of business publications and research reports have served since 1992 to inform, advise and inspire leaders and decision makers of the fashion industry. Focused media serves the Fashion industry across various operations through its various print and online publications and websites.

The need to connect with businesses, people, knowledge and ideas associated with fashion creation and modern retail is served by IFF Business Exhibitions and networking meets. Conducted alongside these, Knowledge Forums and Conferences featuring global leaders inspire not just debate and discussion, but even influence policy decisions.

Images Fashion Awards (IFA) at IFF recognises outstanding performances in the business of fashion.... And are loved for the style with which these successes are celebrated.

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IFF offers a host of services to its privilege members - connecting the entire value chain (designing, buying & sourcing to manufacturing, merchandising, branding, marketing & retailing) - serving the entire fashion sector through its various knowledge & innovation platforms round the year.

HOW TO ENROLL?

Choose your category/ies from below:

- Fashion Retailers Fashion Brands, Exporters & Manufacturers Suppliers & Service Providers to Fashion Brands, Retailers, Exporters & Manufacturers

A group operating in more than one category may enroll its different companies in their respective categories. To know the applicable fee and entitlements please visit membership link of www.indiafashionforum.co.in. Service tax will be levied as applicable which at present is 14%. A proforma invoice can be mailed on request.

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- Please send brand / organization logo along with high resolution pictures of key people, products & services. The pictures can be sent through yousendit or wetransfer. All visuals should be of 300 dpi.
- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

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DELIVERABLES										
1	Feature/s, editorial coverage in Images/ IFF magazine/s, IFF e-briefs/ portal (inputs from members)	1 Page	1 Page	2 Pages	4 Pages	6 Pages	2 Pages	1 Page	2 Pages	1 Page
2	FOC ads/ promo banners in IFF e-briefs/ portal or in classifieds section of Images Business of Fashion magazine (applicable as per category)	FOC up to Rs.5,000	FOC up to Rs.25,000	FOC up to Rs.50,000	FOC up to Rs.1,00,000	FOC up to Rs.1,50,000	FOC up to Rs.50,000	FOC up to Rs.15,000	FOC up to Rs.50,000	FOC up to Rs.30,000
3	Entry Pass for IFF/ InFashion Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Shows	1 Pass	2 Passes	2 Passes	4 Passes	6 Passes	2 Passes	1 Pass	2 Passes	2 Passes
4	Special Invite for IFF Power Breakfasts, Networking Lunches, Awards & Gala Dinners	NA	2 Invites	2 Invites	4 Invites	6 Invites	2 Invites	1 Invite	2 Invites	2 Invites
5	Research Reports & Publications (Print/ Online)	FOC up to Rs.3,000	FOC up to Rs.5,000	FOC up to Rs.10,000	FOC up to Rs.20,000	FOC up to Rs.30,000	FOC up to Rs.10,000	FOC up to Rs.5,000	FOC up to Rs.10,000	FOC up to Rs.5,000
6	Presence at India Fashion Forum Website	URL link	URL link	URL link	URL link	URL link	URL link	URL link	URL link	URL link

*Deliverables are subject to submission of inputs/ confirmations/ approvals/ additional charges wherever applicable by specific dates/ deadlines as communicated to members. Deliverables are subject to change without notice.

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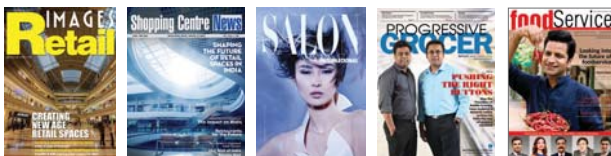
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