

IMAGES

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THE 2017 KIDSWEAR SPECIAL

Kidswear Market Research | Kidswear Leader Talk

Kidswear Focus: Organic, Designer, Denims & Infantwear | Top Brands

Dear Friends,

If the likes of Quentin Tarantino were fashion manufacturers instead of cinematic extraordinaires, I bet their preferred domain of choice would have been kidswear; because this is where the action is in India. And while the sector, as within the organized market, was almost non-existent till a few years, it now has embossed itself as the most propitious segment of the Indian fashion industry with dedicated trade meets and fashion weeks and shows to its name.

We all knew that it was inevitable, but if you're wondering when this transition from docile to demanding really happened, it is now amply clear that as financial stability and purchasing power of modern parents grew in the last few years, an inevitable shift from need based to aspirational fashion manifested resulting in a boost hitherto unseen in the Indian kidswear industry. Parents now exhibit considerable brand awareness and inclination towards high quality apparel products for their kids. The kids too have emerged as a fashion conscious, opinionated new independent buyer group altogether. The young generation is no more like their erstwhile peers, they are righteously more demanding and they will no longer take fuddy-duddy outfits or worn out hand-me-downs from elder siblings.

As our research shows, one of the fastest growing segments in its home turf, the Indian kidswear market was worth ₹59,520 crores in 2015 and accounted for 20 percent of the total apparel market of the country. Industry sentinels expect significant future growth and even project predictions of it surpassing men's wear and women's wear in the near future by growing at a CAGR of 10.8 percent to reach ₹1,65,120 crores in 2025. With such

immense market potential, a host of players, both home grown and international, have sprung up to cash in on this gold rush. While domestic brands like Toffee House, Ruff, Bambiola, 612 League, Toons, etc., are aggressively exerting themselves to mark their territories, the segment witnessed the advent of quite a few international brands in the recent past including, Pepe, Claesens, Reebok, Puma, Benetton, etc.; and retailers like Marks & Spencer, Zara, H&M, are also hosting dedicated sections. etc.

Recently global high-end bigwigs like Gucci, Armani, Hugo Boss, Karl Lagerfeld, Carrement Beau Fendi Kids, Versace, D&G and Paul Smith Junior have stepped in to test the Indian waters. This also is a clear indication of the potential of luxury and designer segment in the Indian kidswear market. Our exclusive report featuring veterans Ritu Beri, Archana Kochhar, Jattinn Kochhar and a slew of other designers, perfectly counts the pulse of this segment. In addition, the issue features exclusives on other emerging fragments of this market — kids' denim wear and organic kidswear. Plus, lots more in this issue that I hope you find worthwhile reading.

And finally, let me also take this opportunity to invite you to this year's edition of the India Fashion Forum which will be held at the Renaissance, Mumbai on the 12th and 13th of April 2017. Also, IIF 2017 will have an additional day on 11th April exclusively for fashion influencers. Look forward to meeting all of you there.

Thank you!



Amitabh Taneja

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Stores



Ahuja's
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Laabha
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Monte Carlo
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LAUNCH

Monte Bianco: The New Name of Being Not-So-Formal

Clothing Culture Ltd., the T&A division of the ₹4,500 crores Balkrishna Group, which is also known for its brand Sin Denim, has launched yet another brand called Monte Bianco this February. The launch featured actor Dino Morea.

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INITIATIVE

TOFFYHOUSE'S CREATIVE DISPLAY "WORLD OF WONDERS"

ToffyHouse left its visitors awestruck and amazed at CMAI's National Garment Fair with its seven different collections under the theme, "World of Wonders".

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Fashion Business



CAMPAIGN

Fendi's Spring/Summer 2017 Advertising Campaign

Fendi's Spring/Summer 2017 advertising campaign, called 'Other rooms-Other voices', featured the top sought after models of the moment.

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TIE-UPS

SoFT, Pune joins hands with Accademia De Costume e di Moda, Rome

Pune's School of Fashion Technology signed an MOU on February 17, 2017 with the prestigious Accademia de Costume e di Moda Rome for a series of joint initiatives in India.

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MONTE BIANCO

THE NEW NAME OF BEING NOT-SO-FORMAL

By Gurbir Singh Gulati



Clothing Culture Ltd., the textile and apparel division of the ₹4,500 crores Balkrishna Group, popularly known for its brand Sin Denim, has launched yet another sensational brand called Monte Bianco this February. The grand launch in Mumbai marked the unveiling of the logo by Directors Vijaylaxmi Poddar and Pooja Dhoot. The launch was followed by Monte Bianco's fashion showcase featuring veteran actor Dino Morea.

Gracing the occasion Dino Morea said, "Monte Bianco, is here to change the way we look at men's wear. The fitting and the comfort that the brand provides is something to watch out for. It makes me look dapper and stylish and definitely gives me the Hatke look."

The new brand will target young professionals of 25 years and above who have started their career and are looking at semi-formal clothing with value added features and relaxed fits. Monte Bianco symbolizes a collection that is "Not So Formal" which also stands as a brand positioning and statement in the market.

SOFT, PUNE JOINS HANDS WITH ACCADEMIA DE COSTUMEE DI MODA, ROME

By Meher Castelino

Indian fashion institutes are moving into the international fashion scene with foreign collaborations to upgrade the standard of fashion education onto a higher level.

The latest Indian fashion institute to tie-up with a foreign one is the School of Fashion Technology, Pune, India's leading fashion Institute established in 1998 by Maharishi Karve Stree Shikshan Samstha with a mission to identify young women with professional, managerial, technical and entrepreneurial aspirations. The institute signed a MoU in Pune on February 17 2017 with Accademia de Costume di Moda Rome. The event was a colourful affair in the presence of eminent personalities like Rahul Mehta, President, Clothing Manufacturers Association of India, Mr Andrea Lupo Lanzara, Managing Director, Accademia de Costume di Moda Rome, Adrien Roberts, Director of Education, Accademia de Costume di Moda Rome and Dr Mrs Manju Hundekar, Principal, School of Fashion Technology Pune.

SOFT, Pune and ACM, Rome will jointly run undergraduate and post graduate level courses that will contribute in the area of fashion buying, merchandising, brand design and high fashion design. The Accademia Costume & Moda (ACM) was founded in 1964 by Rosana Pistolesse (1925-2008), who previously inaugurated the Chair of Fashion Design at the California State University (Davis Campus) and was visiting lecturer at the Fashion Institute of Technology in New York. Costume and fashion historian, journalist and designer she dedicated a



lifetime to education. ACM established in 1964 is ranked by Business of Fashion as no.1 in Italy, No.5 in Master's Programs in the World and No.11 in Undergraduate Programs in the World.

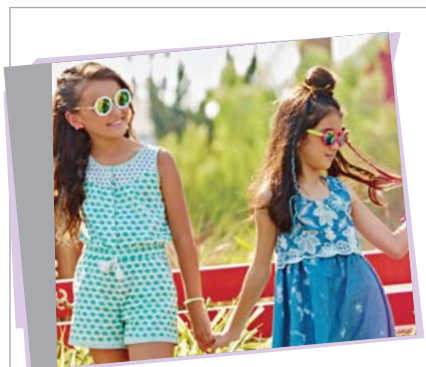
"SOFT and ACM experienced similarities in terms of strong liaison with craft and culture, which reflects strongly in the students' design interpretation. We also found that both institutions want to incorporate craft/culture and work towards its upliftment at international levels," informs Dr Manju Hundekar on the collaboration.

"ACM is part of the city of Rome and we would like to keep our school as a boutique one. We like our educational process to be assisted by international people from all over the world. With the faculty from SOFT and our international faculty, we will have a collaboration for Indian students to experience something unique and important when they want to target the world or India," declares Andrea Lupo Lanzara, Managing Director, ACM.

"ACM is a creative school for costume and fashion with traditions so our collaborations with SOFT, Pune will be a two-way system of blending courses so that Indian design students can succeed in their own market as well as move globally and be a success in the world markets," adds Adrien Roberts, Director Education, ACM.

The course will be formulated with the help of SOFT and ACM faculty as well as well-known Indian fashion experts who will ensure and monitor the programmes that will help the students to face the Indian as well as foreign markets with unique global advantages.





INDUSTRY TALK
No More Kidding With Kidswear
IMAGES BoF speaks to some key industry players to understand the current and changing dynamics of the kidswear market in India.

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FOCUS FEATURE
EMERGING WORLD OF KIDS DENIM WEAR

Brand heads of renowned denim brands, share the essentials that goes into making a successful kids' denim brand and also elaborate on the opportunities and challenges that exist in this segment.

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KIDSWEAR BRANDS

IMAGES BoF introduces some of the most vibrant kidswear brands in india today. a dream team for every leading retailer

- 68 612 LEAGUE
- 70 APPLLEEYE
- 72 BAMBIOLA
- 74 BEGONIA
- 76 BIBA GIRLS
- 78 CLAESENS
- 80 CUCUMBER
- 82 ETEENZ
- 83 KRUNCHY
- 84 MASH UP
- 86 MOOZOO & NOTTIE
- 87 MUSTANG SOCKS & ACCESSORIES
- 88 OKS BOYS & OKS MINI
- 90 PEPE JEANS
- 91 RUFF
- 92 SIMPLY
- 94 SMARTY BOYS
- 95 SMARTY GIRLS/TEDDY
- 96 SPARK & BUTTON NOSES
- 98 TANTRA
- 100 TOFFYHOUSE
- 102 TOONZ
- 104 VITAMINS
- 106 UFO
- 108 ZERO



COVER STORY

THE IMMENSE POTENTIAL OF KIDSWEAR MARKET IN INDIA

Factors like growing disposable income, exposure to global fashion trends and entrance of foreign brands in the country have accelerating the growth of the kidswear industry. Team Technopak takes a look at this rapidly emerging segment.

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FOCUS FEATURE

INFINITE OPPORTUNITIES IN INFANT WEAR

Team Images BoF speaks to some stalwarts who share their experiences and thoughts on the fast developing infant wear market in India.

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LUXURY RETAILING

PRIVE LUXURY LTD.

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KIDSWEAR RETAILER

LITTLE SHOP

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MARKETING & DISTRIBUTION

KIDZANIA - CATALYSING KIDSWEAR BUSINESSES

At the sidelines of his latest fashion event held at Hotel Novotel, Kolkata, Images BoF speaks to Rajeev Harmilapi, Proprietor, Kidzania, to further understand the industry and the value that his organization brings in.

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>APPLEEYE<

Appleeye offers trendy designs of international standards that the brand shells out at affordable prices. It is the largest manufacturer and retailer of kids apparel in India. Appleeye's collection is aimed at new borns to early teens.

Top Innovations:

Appleeye uses N9 Fabric, the name for silver knight technology, where the cloth is processed with silver which works as a shield for the clothes to prevent it from any bacteria or fungus contaminating the cloth. This in turn helps the cloth to be more fresh as no bacteria sediment forms. It also gets less dirty and remains odourless.

Target Audience:

The brand targets upper-middle class and parents who understand fashion and comfort at the same time.

Manufacturing Capacity:

Appleeye's manufacturing units are located in Kolkata and Tirupur.

Design Capabilities:

The brand's designing head is trained in UK and Spain with technical tie ups from Italian and Turkish giants. The brand takes one week to develop designs and 50 days for a concept to hit the stores.

Marketing Strategy:

Appleeye has introduced B2C along with B2B, social media advertisement with 29k plus likes on Facebook. It looks forward to expand in new areas like party wear, ethnic and matured club wear for kids.

Brand's Presence in Online Retail:

The brand is present on most leading e-commerce sites like Flipkart, Amazon, etc.

New Territory/ Regions Targeted for Next Few Years:

Bengaluru, Hyderabad, Chennai, Pune, Visakhapatnam and Guwahati.



BRAND RETAIL MAPPING

Total no. of EBOs: 7

Total no. of MBOs: 2,000

Total no. of SISs: 100

LFS Stores:
RELIANCE TRENDS,
BRAND FACTORY



Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	1-16 years	Entire range	₹800-1,700	Shirts, t-shirts	₹400-1,600	Jackets, sweatshirts, wind cheaters, pullovers, entire range	₹1,100-3,000
Girls	1-16 years	Capris, shorts, leggings, pants, etc.	₹600-1,600	Entire range	₹400-1,500	Entire range	₹1,100-3,000
Others (Infants / toddlers, etc)	upto 1 year	Shorts, full pants, denims	₹70-500	Front open, boat neck, envelope neck, etc.	₹400-600	-	-

EMERGING WORLD OF KIDS DENIM WEAR

Neha Shah, Marketing Head, Pepe Jeans, and Sohail Patca, Director, D S Corporation (Ruff), both renowned denim brands, share the essentials that goes into making a successful kids' denim brand. They further elaborate on the opportunities and challenges that exist in this segment.

With 29 percent of the country's 1.2 billion population under the age of 14, India is potentially a massive market for children's clothing. Neha Shah, Marketing Head, Pepe Jeans, shares, "This is due to the increasing awareness, growing brand consciousness and rise in disposable income." And as India's purchasing power grows, its image-conscious parents want to dress even their children as per their definitions of fashion. "Kidswear is now taking cues from adults' wear as both parents and kids base their buying choices with ongoing trends. Branded kidswear is one of the most propitious markets in India, today," she adds. Thus parents living their childhood dreams through their kids is creating a huge demand for kidswear especially in the denimwear segment. "The denim wear segment in kidswear is witnessing a good market and is expanding day-by-day," said Sohail Patca, Director, D S Corporation (Ruff).





Premium & Designer Kidswear

PREMIUM & DESIGNER KIDSWEAR IN INDIA

What used to be simplistic and basic outfits a few years ago, now flaunt the formidable traits of premium luxury – modish cuts, styles and designer tags. The upper-end market for kids wear in India has plenty to offer and we talk to some star designers and retailers in the segment.

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Designer Watch

- 131 ARCHANA KOCHHAR
- 132 BABY BERI
- 133 JATTINN KOCHHAR
- 134 KIDS AROUND
- 135 NEEDYBEE



Standards

GOTS THE HALLMARK OF ORGANIC ASSURANCE

The Global Organic Textile Standard (GOTS) is the worldwide leading textile processing standard for organic fibres, including ecological and social criteria. IMAGES BoF talks to Sumit Gupta, their representative on his work and core values of GOTS, especially as applied in kidswear.

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Fashion Creation

Q&A

BETTING ON KIDSWEAR GOING ORGANIC

Neha Garodia, Founder and Creative Director, Mi Dulce An'ya speaks to IMAGES BoF about the current status and future prospects of organic kidswear in India.

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Profile

MI DULCE AN'YA - A BRIEF PROFILE

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Textiles

Luthai India

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Collection

ANNOUNCING SWITCHERS BY UNDERCOVER THE FIRST MIX AND MATCH BRA

With roots in Mumbai, the brand Undercover offers a luxury, fashionable and innovative line of intimate wear that gives women the freedom to pick comfort and style, at the same time.

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NATURAL
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GOTS

THE HALLMARK OF ORGANIC ASSURANCE

The Global Organic Textile Standard (GOTS) is the worldwide leading textile processing standard for organic fibres, including ecological and social criteria. It is backed up by independent certification of the entire textile supply chain. Since its introduction in 2006, the aim of the standard has been to define world-wide recognized requirements that ensure organic status of textiles, from harvesting of the raw materials, through environmentally and socially responsible manufacturing up to labelling in order to provide a credible assurance to the end consumer.



“As a manufacturer, one must use GOTS certified raw materials (like yarn, fabric, etc.), dyes and chemicals, and use accessories like sewing thread and labels that meet the requirements put forward by GOTS for accessories.”

– Sumit Gupta,

Representative in India and Bangladesh, GOTS

IMAGES BoF talks to Sumit Gupta, the GOTS representative in India and Bangladesh, about broadening and implementing the core values of GOTS in India, especially in kidswear.

According to you, what is the status of organic textile in India, especially in the kidswear segment?

Honestly, organic textile in Indian retail is in a nascent stage. There are only a handful, say 10-12 brands, in India selling GOTS certified home textiles and garments (mainly casual wear).

As for kidswear, I can't think of a brand particularly selling GOTS certified products in India. There is a second category that includes businesses selling organic textiles with self-claims. They make organic claims because their supplier 'said' the fabric was organic. GOTS strongly discourages this kind of practices for lack of credibility and verifiability of such claims.

Have you encouraged brands to increase their share of GOTS certified textiles especially in kidswear in India?

The GOTS team actively engages with international brands and encourages them to increase the share of certified organic textile products in their portfolio. There are already several international brands that sell only GOTS certified products. Kidswear is an important section that makes a quick connect with the ethos of GOTS, which includes chemical and social compliances along with use of organic fibres.

How does GOTS stresses on the need to create more awareness and understanding regarding sustainability and organic textile among brands and manufacturers?

GOTS ran a consumer focused campaign 'Have you cottoned on yet?' in partnership with Soil Association, UK, wherein brands selling organic textiles were listed in the section 'Where to Buy'. We also created consumer oriented educational material like



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Contact us: Seema Enterprises, 1st Floor, Status House,

Behind Lathiya Rubber Industries, Andheri Kurla Road, Sakinaka, Andheri (East),

Mumbai 400072. Tel: 28598162/65293849 Distributor Enquiry Solicited

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