

IMAGES

7

Issue No.

BUSINESS OF FASHION

July 2017

Volume XVIII // No. 7 // ₹ 100
www.imagesfashion.com



THE BIG DENIM SPECIAL

// RESEARCH
// TOP BRANDS
// INNOVATIONS
// SUSTAINABILITY
// GLOBAL DENIM TRENDS

// ALSO IN THE ISSUE:
IFF INNOVATION CRUCIBLE

Dear Friends,

Greetings and a warm welcome to my personal favourite issue—The Denim Special. No other issue inspires more enthusiasm in me (and surprisingly my team too) than the denim issue. It's fairly apparent by the size of the issue too - 352 pages of just denim. It was a lot of hard work and the entire team enjoyed every bit of it because we love jeans. Yes, we all do! We slide into our favourite pair of denims and we feel at home as it moulds onto our body shapes. Personally, I wonder sometimes if my favourite pair of jeans is actually my spiritual partner.

From the ranches and work floors to evolving into a symbol of youth rebellion to being the forerunner of the global casual wear revolution, denim has traversed some interesting trajectories. Since the early 1900s the garment has been continually experimented upon and subjected to bountiful styles, cuts fits, and finishes. Recently, the only sustaining factor has been it's burgeoning dominance over wardrobes across the circumference of the globe, irrespective of gender and age.

Even in India, where western wear has traditionally been a prerogative of men, denim's penetration into the wardrobes of women and kid has been extremely impressive. And, true to the latent potential, as Technopak outlines in the lead research story, the women's denim market in India is growing at an astounding CAGR of 17.5 percent in contrast to the men's segment that relatively lags at 14 percent. In the women's denim trends article, a slew of experts

unanimously agree that it's one of the fastest growing markets of modern times in India.

Along with the core articles dedicated to market sizing, trends and spotlighting what popular brands of the segment has to offer for this season, we have introduced a new section — the IFF Innovation Crucible that encompasses a host of novel features including an exclusive interview with Ram Sareen of Tukatech opening up about the tech giant's expansion plans for the SMEs of India, G-Star Raw's innovation in deconstruction RAW denims and Patagonia's organic and sustainability based denims.

The fashion creation section highlights the efforts, innovations and plans of the unsung heroes of the Indian denim industry — the denim fabric manufactures of India. Also in the section is KVICs attempt towards popularizing Khadi denim among the youth in India.

Across the issue, I am also honoured to share the works of numerous committed and thoughtful people like Meher Castelino, exclusive fashion forecasts by Trend Council, and lots more.

I thank and congratulate all the contributors, participants and the entire BoF team for bringing out this mammoth of an issue and I hope you enjoy it as much as we enjoyed making it for you.

Cheers !!



Amitabh Taneja

All material printed in this publication is the sole property of Images Multimedia Pvt. Ltd. All printed matter contained in the magazine is based on the information provided by the writers/authors. The views, ideas, comments and opinions expressed are solely of the writers/authors or those featured in the articles and the Editor and Printer & Publisher do not necessarily subscribe to the same.

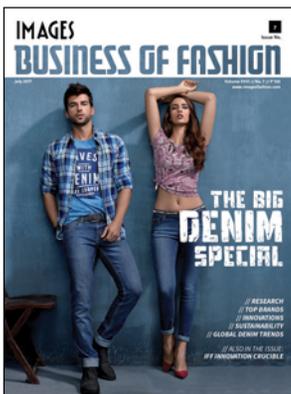
Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Samrat Offset (P) Ltd. B-88, Okhla Industrial Area, Phase-II, New Delhi-110020 and published by S P Taneja from S- 21 Okhla Industrial Area Phase - 2, New Delhi.110020 Editor : Amitabh Taneja

In relation to any advertisements appearing in this publication, readers are recommended to make appropriate enquiries before entering into any commitments. Images Multimedia Pvt. Ltd. does not vouch for any claims made by the advertisers of products and services. The Printer, Publisher and Editor-in-Chief of the publication shall not be held for any consequences in the event of such claims not being honored by the advertisers.

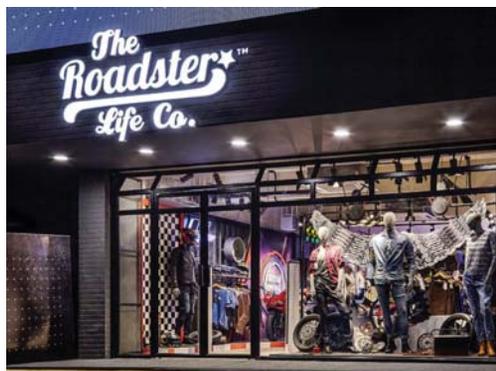
Copyright Images Multimedia Pvt. Ltd. All rights reserved. Reproduction in any manner is prohibited. All disputes are subject to the jurisdiction of competent courts and forums in Delhi/ New Delhi only. Images Business of Fashion does not accept responsibility for returning unsolicited manuscripts and photographs.



FASHION BUSINESS



Cover Picture Courtesy: Lee Cooper



STORE WATCH

ROADSTER: PIONEERING EXPERIENTIAL RETAIL IN INDIA

Designed by Restore, this first-of-its-kind store in India offers a seamless online to offline experience to the consumer. The road comes alive on a video wall.

Pg No.68

SHOW

Garment Show of India Vouches for 'Make in India'

The NCR hosted the Garment Show of India, a B2B exhibition that connects the apparel retail industry of India, at Pragati Maidan. A report.

Pg No.92



MERGER

Hunstman And Clariant : Two Giants that Impact Denims Announce a Merger of Equals

US based Huntsman Corp and Switzerland's Clariant AG combine to create a \$ 14 billion chemical powerhouse.

Pg No.88



CAMPAIGN

Lacoste Announces A New Ad Campaign: A film called Timeless

Lacoste, a fashion brand by tennis legend René Lacoste, releases its new campaign which emphasises on brand history and symbolism.

Pg No.90

RESEARCH

The Indian Fashion Apparel Market- 2016 and Beyond

Team Technopak sizes the Indian fashion retail market, its key categories and analyses the current and future growth prospects and trends, in an exclusive report.

Pg No.70



The RoadsterTM Life Co.



ROADSTER

PIONEERING EXPERIENTIAL RETAIL IN INDIA

'The Roadster Store', the first-of-a-kind retail store in India, designed and executed by Restore offers a seamless online to offline experience to the consumer. The state-of-the-art design allows the customers to just walk into the store and see the road come alive on a video wall. Co-Founder and Director Lisa Mukhedkar of Restore, spoke about some highlight features of the store to Images BOF.



Myntra's first offline store for one of its in-house brands, Roadster, opened its doors to treat shoppers to a pioneering experience. The first impression of the difference of the Roadster store is, the clearly visible technology. But, the idea of that experiential store runs deep. It stands on the solid ground of creating an unforgettable experience through design and technology.

Roadster is among the top choices of denim aficionados when it comes to apparel, footwear and accessories. The brand is modeled on an outdoor life style. When Restore created the Roadster store, it was with a singular purpose of giving the shoppers an experience like never before.

IFF INNOVATION CRUCIBLE

Contents ■ 97-138



Fashion Pioneer

SPEED, SENSE & SCIENCE: TUKATECH ON AN EXPANSION SPREE IN INDIA

Tukatech, a premier provider of fashion technology solutions for the apparel industry is looking to expand its market share in India with focus on SMEs, shares founder and CEO - Ram Sareen.

Pg No. 100



Ethics

Body Shop's Campaign Against Animal Testing

Actress Jacqueline Fernandez joins The Body Shop's new campaign for a global ban on cosmetics animal testing on products and ingredients by 2020.

Pg No. 116

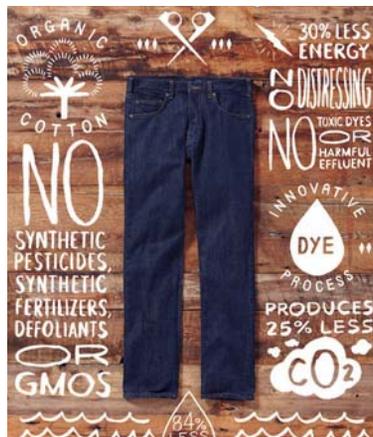


IFF Innovation Crucible

EXPERIMENTAL Denim Off the Beaten Path

Veteran fashion columnist Meher Castelino writes on how designers are experimentally using denim for new fashion horizons— shoes, bags, apparel, accessories, jewellery and even furnishings.

Pg No. 118



THE RIGHT WAY

Patagonia: Doing it Right All the Way!

Creating best products while causing no unnecessary harm and reducing impact on environment - is what Patagonia strives for. Jeans made of 100 percent organic cotton and advanced dyeing processes reduces the use of water, energy and chemicals and produces less carbon dioxide.

Pg No.134

Innovations

G-STAR RAW: CRAFTING INNOVATIVE DENIM

Redefining the meaning of RAW by deconstructing denim to its purest form, G-Star came up with innovations in construction, silhouette and shape.

Pg No.130



RECYCLING

Doodlage : Upcycling and Re-constructing from Waste

Doodlage re-designs, re-constructs and re-cycles old clothing or industrial waste to create something that is totally new and interesting. Each of their up-cycled garments are unique and stands out.

Pg No.136





SPEED, SENSE & SIMPLICITY

TUKATECH ON AN EXPANSION SPREE IN INDIA

Tukatech Inc, USA, a leading provider of fashion technology solutions for the apparel industry was founded in 1995. It offers award-winning 2D pattern making, grading, and marker making software, automated marker making software, 3D sample making/virtual prototyping software, as well as garment plotters, and automatic spreaders and cutters for apparel production. Their systems encompass training, consulting, process engineering, and implementation of their technologies.

Tukatech is now looking at expanding its market share in India. It already occupies 85 percent market share of the educational institutions and over 60 percent of the big apparel brand businesses in India. Having served almost all the high end international and national brands, their focus is now to bring the technology to SMEs in the apparel industry. Some of Tukatech's prestigious global clients are Guess, Jockey, Speedo, Calvin Klein, Forever New, Jones New York Lingerie, MIT, etc., and in India its clients include designer Tarun Tahiliani, BIBA, W, Westside, Pantaloons, Reliance, Orient Craft, Arvind, Gokul Das, Raymond, Color Plus, etc. With its latest innovation TUKA3D Enterprise Edition all set to increase the efficiency in product development, and reducing the time and cost in developing new samples and enabling effective 360 degree communications and faster sample approvals through TUKA Cloud, the company aims to revolutionize the apparel SME sector.

Contents

R

139-272

FASHION RETAIL



152

CATEGORY STUDY

How 'MAN-LY' ARE TRENDS IN MEN'S DENIMS

The article explores the changing trends for men's denims in India as shared by a few top industry veterans.

Pg No. 152



CATEGORY STUDY

TRENDS IN WOMEN'S DENIMS

Images BoF talks to the leaders of major women's denim brands and analyses the various trends in the segment and the prospective growth.

Pg No. 162

BRAND WATCH

IMAGES BoF introduces some of the most vibrant Denim brands in India today.

- 194 7th Sin
- 196 Afox
- 201 Awaacs
- 202 Being Human
- 204 Button Noses
- 206 CDF Columbia
- 208 Courtyard and Kraburs
- 210 Dare Jeans
- 212 Deal Jeans
- 214 Focus Jeans
- 216 Force Denims
- 218 GAP
- 220 Hard Currency
- 222 Hoffmen
- 224 Jack & Jones
- 226 Jealous 21
- 228 Killer
- 230 Lee Cooper
- 232 Leegend and Ceasar
- 234 Mexico
- 236 No Error
- 238 Parx
- 240 Pepe Jeans
- 242 Poison
- 244 Puff
- 246 Ricado
- 248 Rookies
- 250 Spark
- 252 Strano
- 254 Sunnex Jeans
- 257 Tarama
- 258 Texas Jeans
- 260 Toonz
- 262 Urban Navy
- 264 Urban Touch
- 265 Wert



194



202



212

214

SUSTAINABILITY

THE NEW WAVE: THE RISE OF ECO FRIENDLY DENIM

Good news is that concerned brands across the world are taking sustainable measures to prevent hazardous impact on the environment. We present a few.

Pg No. 266

Fashion Retail



COVER STORY

THE INDIAN DENIMWEAR

MARKET 2016:2026

The youth driven denim market promises unmatched growth. Team Technopak, size the market and delve into its dynamics as a whole.

Pg No.142

Focus Feature

EMERGENCE OF CUSTOMIZATION FOR THAT PERSONALISED DENIM

With an increasing number of customers gravitating towards perfect fits and designs in accordance to their personality, the trend of customisation in denims too is slowly picking up in India.

Pg No. 182

CATEGORY STUDY

NO MORE KIDDING WITH THE TRENDY KIDS DENIMS

Leaders from renowned denim brands in the kids' category talk about the trends, opportunities and evolution of this segment.

Pg No. 174





EMERGENCE OF CUSTOMISATION FOR THAT **PERSONALISED DENIM**

'Bespoke' has emerged in the Indian market in a big way. With an increasing number of customers gravitating towards perfect fits and designs in accordance to their personality, the trend of customisation is slowly picking up in India, especially in the denim wear segment. However, whether the trend has taken over the Indian market or has the ball just started to roll, is a question that still remains unanswered. We talk to the leading brands in the segment to find out.

Bharti Sood and Shivam Gautam

Bespoke denims are the next big thing in the world of customised fashion in India. While individual tailors were offering bespoke services in denims since years, the entry of organised sector offering these services has created an altogether new wave among denim fashion enthusiasts. Now you have the option to customise your favourite branded denims the way you like it. Many denim brands have started offering bespoke services. Emphasis is being laid on personalisation to offer absolutely detailed denims that suit one's personality and style.

Industry reports suggest that the denim market is going to be valued at an astounding ₹54,600 crores by 2023. In India itself, the denim market in the last 5 years has undergone a huge transformation. Says Neha Shah, Head-Marketing, Pepe Jeans India, "When it comes to customisation, there are several players that offer customisation services. Recently, customisation in denims has seen tremendous demand. The term coined by social media 'street style' has become popular the world over and has majorly influenced denim wear. It's a sizeable market and growing by the day. It also is an important market as it helps a brand achieve a connection with its customers. This is a big enough



Textiles Study

THE INDIAN DENIM TEXTILE INDUSTRY 2017 : AN OVER-VIEW

The blue jeans has become a wardrobe staple and a fashion essential, and as such the denim textile industry is focusing a lot inward into the domestic fashion market. Images Business of Fashion talks to leaders of some of India's largest denim fabric companies.

Pg No. 276

Fabric Players

ARVIND 286

CENTURY 288

DOTTED JEANS 290

KG DENIM 292

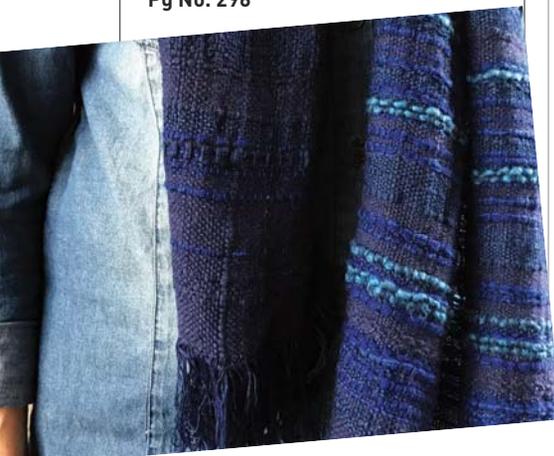
RAYMONDS UCO 294

Innovations

MOOD INDIGO

Wool denim fabrics are a new approach to improve the aesthetics of traditional denim fabric. The Woolmark Company talks about the benefits.

Pg No. 296



Innovations

RELIANCE RECRON

Bets Big on Functional and Performance Denims Team Images BoF speaks to the kings of polyester, Reliance about its plans for the denim industry.

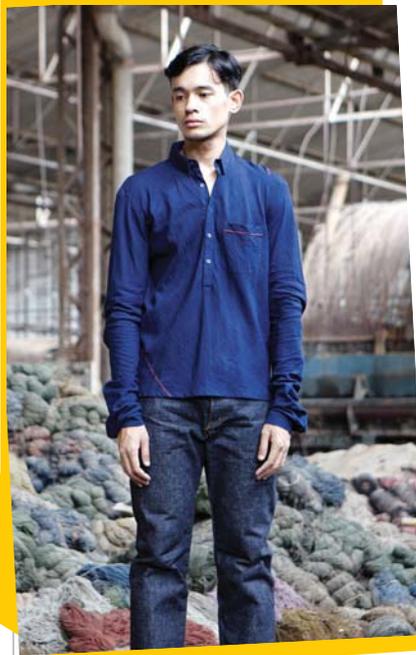
Pg No. 299

Initiative

KHADI DENIM: THE INDO-FABRIC OF THE YOUTH

Khadi Denim, a hand-spun and hand-woven soft-feel fabric, is the new rage in the fashion world. Team Images BoF speaks to KVIC the apex body that operates with the mandate to promote Khadi.

Pg No. 301



Accessories

TEX ZIPPERS: DENIM MAGIC IN METAL

Tex Zipper is a multinational zipper company that was established in 1987. Team BoF speaks to Mudit Tandon, Vice President, Tex Corp Ltd., to know what is trending.

Pg No. 304

Trends

GLOBAL DENIM

TRENDS - SS-2018

Trend Council presents exclusively for Images Business of Fashion its top Global Denim Trend picks for SS18.

Pg No. 309

Star Trends

JEANS OF THE STARS

The hottest trends and the hot Bollywood heroes that drive them.

Pg No. 326

Stars Distressed

DRESSED IN DISTRESS

Distressed or ripped denim looks edgy, raw and if styled right, sometimes utterly feminine too. It's a favourite amongst Bollywood divas. Hear it from them.

Pg No. 330



Efficiencies

"HOW IMPORTANT IS FABRIC ROLL PLANNING IN THE APPAREL INDUSTRY?"

Understand why roll allocation or roll planning ensuring the least possible number of end bits are left behind is a critical issue.

Pg No. 334



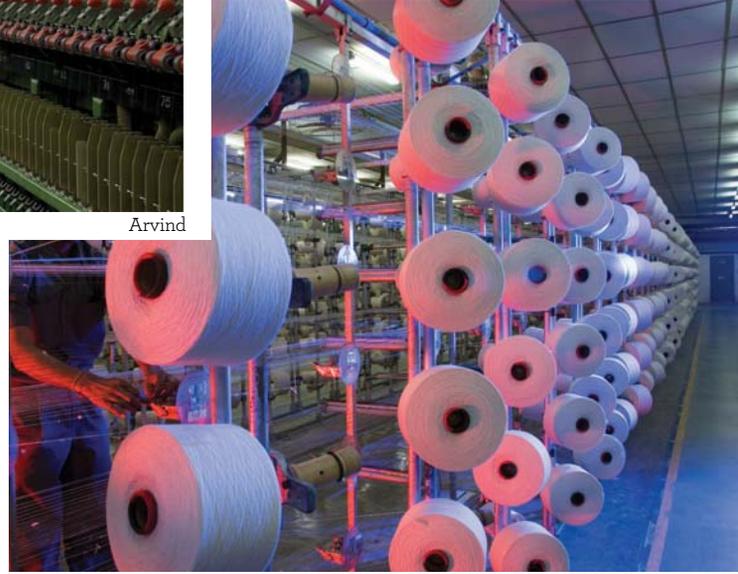


Arvind

THE INDIAN DENIM TEXTILES INDUSTRY 2017: AN OVERVIEW

The denim textiles segment has always been one of the leading segments in the Indian textiles industry. The blue jeans have indeed become a wardrobe staple and a fashion essential, and as such the denim textiles industry is focusing a lot inward into the domestic fashion market. Images Business of Fashion talks to representatives of some of India's largest denim fabric companies to take an overview.

Bharti Sood and Gurbir Gulati



Arvind

Setting the context of the study, Arvind Mathur, CEO, Raymond UCO Denim Pvt. Ltd introduces that, “Globally, the customer segments of denims can be broadly classified as luxury/super premium, premium, mid-market, mass market and economy/value. Within these, the premium and mass market segments are expected to grow more than others globally, however, in India, the economy segment is also expected to gain.” And, speaking upon the current structure of the market for Indian denim fabrics, Rajan Gupta, General Manager, Marketing, KG Denims explains, “Denim fabric industry has expanded its wings across all product lines due to its varying usage in the fashion industry. The industry is divided into the following three categories- RMG (ready-made garment brands), manufacturer-exporters, and home furnishing/upholstery.”

Arvind

According to him, RMG is the brands sector which covers a major share and has good consumption of bottom weight qualities like flat finish, dobby, knits etc., throughout the year, and even more during the festive season. The manufacturer exporter category has seasonal consumption but in good quantum for American Buyers vis-a-vis European labels. Major products in demand are Tencel and its variants, fine count silky in denser reed picks and fine count slubs/cross hatch. The home furnishing/upholstery category – has shown an increase in demand due to extra comfort, less maintenance and versatility of usage in blue variants for mix and match products. Saurabh Samnol,





100% NATURAL



RAYSIL. ADDS ELEGANCE TO FASHION. The superior quality VFY from Indian Rayon.

Presenting Raysil. The versatile yarn that helps create the best of georgettes, crepes and chiffons that flow and drape well. Go ahead, try Raysil and feel the difference it makes to fabrics.



Raysil[™]
The fashion yarn

For details, call: Mumbai: +91 22 66917930 / 31, Surat: +91 261 4003362 / 64 | Email: raysil@adityabirla.com



Stall No. 411
Hall No. VII A

Please do visit to us at NSE Complex,
CMAI on **10th July to 12th July 2017**
Goregaon (E), Mumbai 400 063.

 QR CODE



 QR CODE

