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KIDSWEAR SPECIAL

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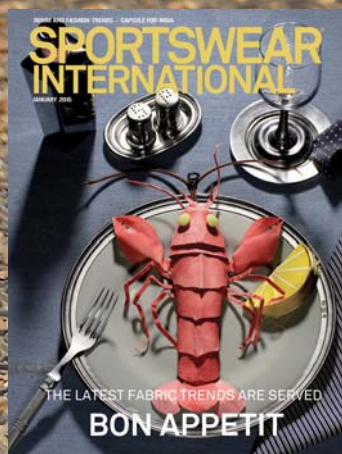
BRANDS & RETAILERS

MAJOR KIDSWEAR
E-RETAILERS

+
CHARACTER LICENSING
IN KIDSWEAR

ORGANIC KIDSWEAR

+
THE BIG OPPORTUNITY
IN POLYESTER FABRICS



BEST IN MERCHANDISE AND
TRENDS FROM ACROSS THE WORLD

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Wish you all a very happy new year.

Let us all welcome what promises to be a most defining year in fashion retailing.

This the first Images BoF issue of 2015 is a kidswear special.

I can clearly see that we were wrong when we thought that what happened to our parents would happen to us. We now start spending a bomb on the apple of our eyes much before the old, time-honoured, deadline of higher secondary education fees. The only saving grace is that we don't feel guilty when we buy something expensive for our kids, unlike when we indulge in buying something for ourselves. Therein lies a huge opportunity that has made it possible for the kids to wear Gucci, Armani, Kenneth Cole, Burberry, Roberto Cavalli, Fendi Kids, Miss Blumarine, Simonetta, I Pinco Pallino, Baby Dior, etc., in India today. Tommy, Benetton, US Polo, etc., have already made a big impact in the category. The sportswear (and footwear) majors like Nike, Puma, Adidas, Reebok, etc., have enjoyed success over both apparel and footwear.

As we study all this and more in this the January issue of Images Business of Fashion, what is most heartening to note that great work in kids category is also being led by a host of home grown brands and retailers. They form the core of our study.

As a business, kidswear is a tough game. It needs a higher number of SKUs, more involved product merchandising, and a very close watch on channel mix. Defining operating price points is tough due to an evolving knowledge base. Plus boys, girls and infants are totally separate categories but parents expect all from a single brand. Balancing fashion and basics is another challenge.

Those willing to face these challenges will be playing in a US\$13.6 billion market by 2018 and a US\$ 22.4 Billion market by 2023.

In this issue we also look at the big opportunity in polyester fabrics in India. We have an expert article on the future of luxury retailing in India, and we take a close look at Arvind's new brand Croyate.

We are all currently working towards hosting the finest India Fashion Forum till date. Hope you are all ready to be with us in Mumbai from the 18th to 20th March.



Amitabh Taneja

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Cover Pic:
Prince George
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With over 100 stores in its physical store network, Firstcry plans to hit the 400 stores mark by 2017 reports Supam Maheshwari, its Co-Founder and CEO

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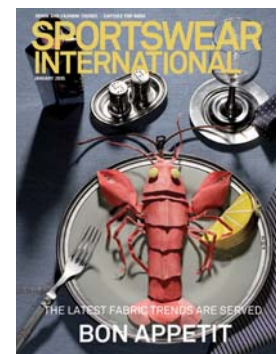
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THE FUTURE OF LUXURY RETAIL IN INDIA

EVERYWHERE PRODUCTS, BRANDS AND HOARDINGS ARE PROCLAIMING AND OFFERING LUXURY. ABHAY GUPTA, FOUNDER AND CEO, LUXURY CONNECT & LUXURY CONNECT BUSINESS SCHOOL, LOOKS AT SOME PERTAINING QUESTIONS AND THE FUTURE OF LUXURY RETAIL IN INDIA.



Luxury in India: A myth or a neo- reality?

Everywhere products, brands and hoardings are proclaiming and offering 'luxury' to 'uber luxury'! Pick up any media, be it newspapers, magazines, TV advertisements, or social media platforms, and you will be bombarded with offerings of luxury cars, luxury homes, luxury villas, luxury clothes – the list of goods and services in the luxury segment is practically endless.

At this point, there are some questions that arise in the mind: Is luxury a myth or a neo-reality? How can we define the real world of luxury? What differentiates true luxury from pseudo luxury? Is luxury here to stay? How well have luxury brands fared in India? Are more brands looking at coming to India? How optimistic are investors in entering this glamorous yet mystical world of luxury? Are Indian consumers embracing these luxury brands? And, lastly, whether Indian brands have matured to face competition from these brands?

While the above questions define the current quasi-confused state of luxury scenario in India, the fact also remains that:

- For the last several years, the overall size of the luxury consumption market has grown at a consistent pace of around 20 per cent year on year
- The size is estimated to touch US\$ 14.75 billion by 2016
- Luxury segments are expanding beyond the key cities of Mumbai, Delhi, etc. to the tier-II cities of Hyderabad, Pune, Nagpur, Chandigarh, etc.


So who is the incredible Indian luxury consumer who is fuelling this growth?

In a majorly 'aam aadmi' country, who is indulging in this extravaganza?

In my long career in this space, I have come across several unique, and some not-so-unique, incredible Indian Diaspora who shop luxury.

Kidswear market in India

AMIT GUGNANI, SR. VICE PRESIDENT - FASHION AND KANTI PRAKASH BRAHMA, PRINCIPAL CONSULTANT - FASHION, TECHNOPAK TALK TO IMAGES BUSINESS OF FASHION ABOUT THE BURGEONING KIDSWEAR MARKET IN INDIA AND WHAT IT WILL TAKE FOR RETAILERS TO SUSTAIN IN THIS HIGHLY COMPETITIVE ENVIRONMENT.



Market size and growth

India has etched its name amongst the topmost promising markets for apparel due to the burgeoning economic activities taking place here and the ever widening consumer base. The Indian apparel market is expected to grow at a compound annual growth rate (CAGR) of nine percent, from US\$ 41 billion in 2013 to US\$ 102 billion in 2023. In 2013, the kidswear segment, at US\$ 8.3 billion, alone contributed 20 percent of India's entire apparel market. However, given its higher growth rate, this share is expected to increase to 22 percent by 2023.

Boys and girls' wear

The kidswear market is somewhat skewed towards boys' wear, which is estimated at US\$ 4.3 billion, as compared to the US\$ 4.0 billion-worth girls' wear market. However, with the increase in spending on the girl child, the girls' wear market is expected to catch up with the boys' wear market in the near future. According to sources, the market for girls' wear will grow at a CAGR of 11 percent over the next decade, while that for boys' wear will see a rise by 10 percent.

Uniforms and t-shirts, or shirts, are the two major categories within the boys' wear market, which contribute 57 percent of the total market. Denims and t-shirts are the high growth categories



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fashion trends for kidswear



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making heads turn with
their style sense



166 ORGANIC **ORGANIC KIDSWEAR ON THE RISE**

With organic cotton
growing successfully in
many regions of the world,
organic clothing especially
organic kidswear is
becoming readily available
at nearly every retailer



Gron Stockholm



Gron Stockholm

ORGANIC KIDSWEAR ON THE RISE

ORGANIC BABY CLOTHES ARE CATCHING THE FANCY OF NEW-AGE PARENTS LIKE WILDFIRE. WITH THE DEMAND FOR ORGANIC COTTON GROWING EXPONENTIALLY IN MANY REGIONS OF THE WORLD, RETAILERS ACROSS THE GLOBE ARE ENSURING THE AVAILABILITY OF ORGANIC CLOTHING, ESPECIALLY ORGANIC KIDSWEAR. BY ROSY NGAIHTE SHARMA



Nino Bambino

BonOrganik

As more and more people are getting acquainted with organic clothing and its benefits, there is a growing acceptance for organic clothes among Indian consumers today. Hence, terms like 'hand spun', 'hand woven', 'coloured with natural dyes' and 'brought to the customer directly from producers' (without middlemen) are gaining momentum in the corridors of retailers selling organic clothing.

Let us first understand the concept of organic clothing. Basically, organic clothing refers to apparel made from organic cotton with minimum use of chemicals and fertilisers. Organic clothes not only help in keeping environmental pollution in check, they are also feather soft on the skin. These factors make organic clothes an ideal choice for kidswear, since organic cotton baby clothes are also manufactured without the use of toxic chemicals that may harm the baby's soft skin. Even in the manufacturing process, the clothes are not be subjected to dyes or bleaches, nor are they sprayed with formaldehyde to preserve their 'fresh look' before shipping.

Status of organic apparels

Organic kidswear in India is still in its nascent stage. "There is definitely an increased awareness about organic food. However, the desire to wear organic clothing is still to catch on. At the end of the day, it is the design and the quality that sells a product," said Anurag

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New products, store concepts, 'it' girl ad campaigns and initiatives drive the global growth of Pepe Jeans London.

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ITALY'S STREETY CHIC INCREASINGLY, ITALIAN RETAILERS ARE TURNING THEIR FOCUS TO URBAN AND LUXURY STREETWEAR. BY MARIA CRISTINA PAVARINI



BRIAN & BARRY GALLERY IN MILAN



“We are perceived as a medium-high offer store, though we want to be perceived as more democratic and easy. We are focusing on younger brands because this is the new cool.”

—Cristiano De Lillo, Brian & Barry, Milan

➤ Streetwear's growing influence on fashion is now trickling down to the retail scene, especially in Italy. Numerous stores are modernizing their image, aesthetic and offer by stocking younger brands. This move also lowers the stores' average price points, which theoretically leads to increased foot traffic and turnover. The phenomenon, which originates from men's fashion, is a big influence on the Italian sporty-chic market. About a year ago Simona Citarella, co-owner of Wok Store Milano and consultant to the men's trade show White Milano, explained how streetwear and sportswear were influencing menswear: “There is a big revolution going

on in menswear,” she said. “In fact, the most interesting trends are happening there. The new man is now mixing clean coolness with clashing patterns and extreme sportswear details.” Similarly, Matteo Rancilio, owner of the multilabel store Dictionary in Milan, stated: “Streetwear is now back again, though highly revisited. In the past there has been a mixing together between fashion and streetwear. Now it seems that they are taking distinct directions finally again.” And when he described his store he added: “The atmosphere pervading my store is the one of that typical skateshop spirit of the early 1990s in a store offering international research products.” Reflecting this

mood is also Milanese trade show White Milano. In its most recent editions it has hosted more upper sportswear, sneaker and premium denim brands such as Asics Platinum Collection, Losers, Supe Design and Saucony, all of which exhibited at its September 2014 women's-focused show. In addition, the newly redesigned Brian & Barry Building in Milan inaugurated in March 2014 has taken a similar direction and from September on it rebaptized its ground floor as Gallery Experience with a new concept. Cristiano De Lillo, CEO of the store explains: “At present we are offering about 250 brands. In about two seasons we want to reduce them by about 50% in order to offer a more focused selection, better stock quality and reorder service. Today it is better having less stuffed stores, if not they may end up looking almost like full price outlets.” The store redesigned the ground floor by adding glass shelves that display more variants of the same products. Plus it is now offering younger and street-minded brands and products



May be,
I'm Nuts...

but my
Live-In
Jeans are...
just,
just too
comfy...
to get
out of!

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