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**THE
BRANDS
IN INDIA
2015**



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Ph: + 91-33-40080480, Fax: +91-33-40080440**Dear Readers!**

The fashion industry is all revved-up to embrace the challenges, re-evaluate strategies and pave the next way forward. With a new government in place, controlled inflation, and increasing industrial productivity, economic confidence has also returned. Fashion retail is ready to explore its synergies to optimise opportunities and overcome challenges, and will welcome new players as all together gear up for greater heights of success. The market is also set to grow at a much stronger pace driven by increased presence of organised retail, rising disposable incomes, changing demographics and increasing brand consciousness, and now with emerging e-commerce outlets too. The future is definitely going to be about the players who imbibe the very soul of fashion creation and retailing to the core in every essence.

Increased competition and a much more fashion aware customer will force most emerging and established brands to think smart and innovate accordingly. This is the fundamental thought that we have seen emerge very clearly as we have embarked upon the process of setting up our editorial agenda for the year 2015.

It has always been an objective with us to promote significant work in fashion creation and showcase it to the retail fraternity to support them in creating meaningful offerings to their customers, and as such, this issue of IMAGES BoF profiles some of the star brands in its cover feature – Brands in India, and highlights their growth, business strategies, retail presence, and future plans.

Even as I write this, the entire Images team is busy putting all efforts together for a bigger and better 15th annual congregation of the India Fashion Forum. While the main theme of IFF'15 is "Creating and retailing winning fashion in an omni-channel era" – this year the IFF will be in an all-new quad-core avataar. With four parallel shows--the India Brand Show, InFashion, Fashion Retail Tech, and India Shop, IFF will dive deep into the latest in fashion branding, fashion product, fashion retail technology and next-gen fashion store creation. It will also be a more closed door affair so we suggest you plan participation early. Look forward to seeing you at the Bombay Exhibition Center, Mumbai on the 18th to 20th of March 2015.

**Amitabh Taneja**

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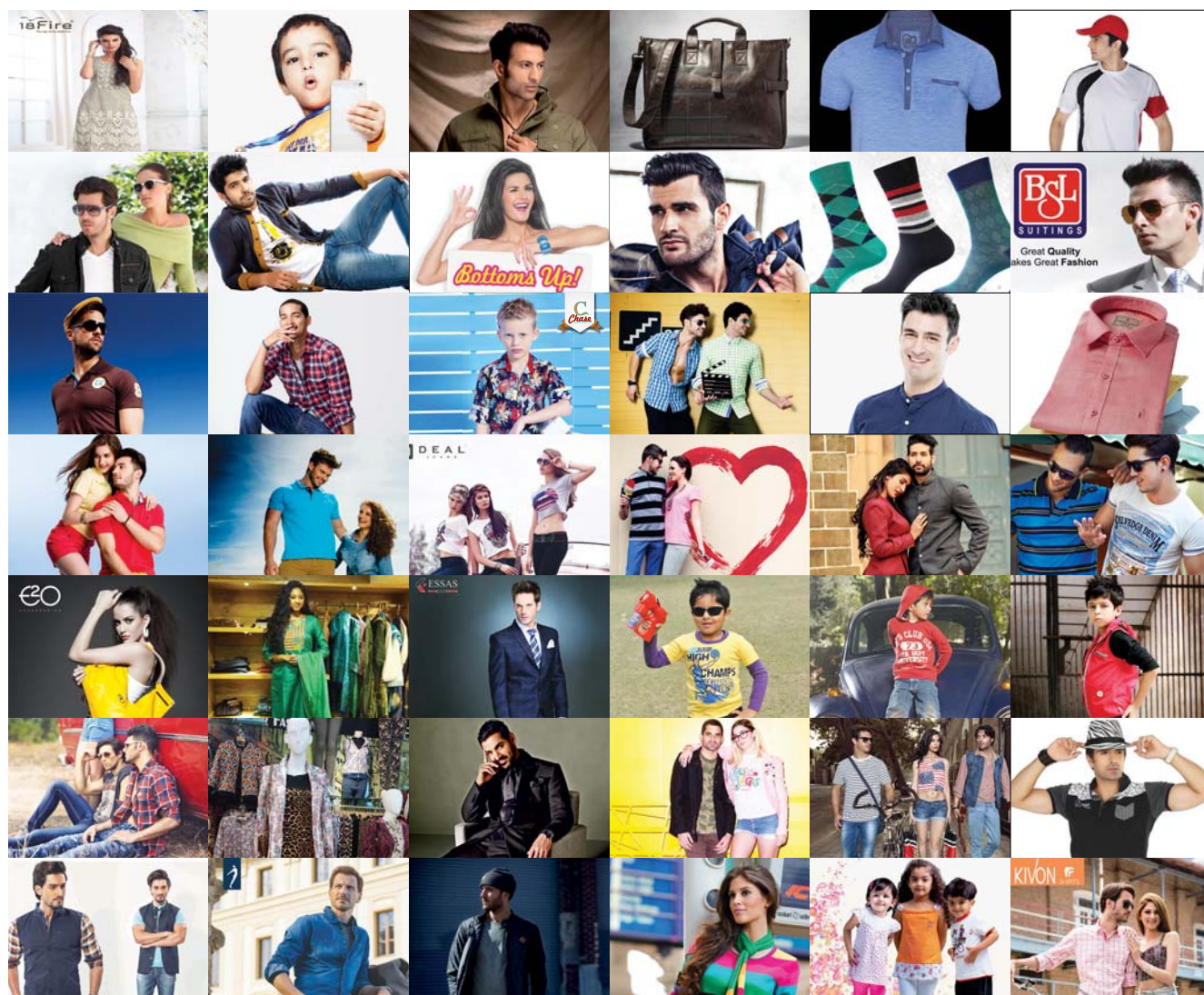
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RETAIL TRENDS

42 Top trends in Fashion Retailing

India's fashion retail market is dynamic and encompasses a number of trends. Amit Guagnani, Sr. VP, Fashion and Kanti Prakash Brahma, Principal Consultant, Fashion from Technopak list the top trends in fashion retailing in India .



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TOP TRENDS IN FASHION RETAILING

INDIA'S FASHION RETAIL MARKET IS DYNAMIC AND ENCOMPASSES A NUMBER OF TRENDS. **AMIT GUGNANI**, SR. VP, FASHION AND **KANTI PRAKASH BRAHMA**, PRINCIPAL CONSULTANT, FASHION FROM TECHNOPAK LIST THE TOP TRENDS IN FASHION RETAILING IN INDIA .

Fashion retailing in India remains a lucrative business opportunity for both domestic and international retailers. After a period of low economic growth and sluggish business activity, the Indian economy has begun moving towards higher business activity and increasing consumer confidence. This, in turn, is expected to additionally boost the country's fashion retail market. India's merchandise retail market was worth USD 525 billion, in 2014, of which USD 41 billion, or around 8 percent, came from apparel. Further, this apparel market is expected to grow at a promising CAGR of 9 percent over the coming decade. Along with the increase in population and growth in disposable incomes, increasing access to fashion trends across the world, efforts by brands and retailers to allure Indian consumer, rapid penetration of organized retail into smaller cities, and spectacular improvements in product offerings and quality are some of the growth drivers for the fashion retail sector. Also, the widespread acceptance of e-tailing is most crucial in shaping the future of India's fashion ecosystem.

The fashion sector in India is registering certain distinct trends which have the potential to affect the way brands and retailers strategize their plans of action. While some of these

trends revolve around the impact of technology in consumer expectation and business models of fashion retailers, some of them are related to increasing competition among brands and retailers vis-à-vis attracting consumers.

Fashion goes Online

E-tailing in India has been growing rapidly, beyond gifts and books, and is now seeing traction from apparel and other lifestyle goods. Currently, apparel and lifestyle contribute around 25 percent of the USD 2.3 billion e-tailing market. Due to the increasing acceptance of e-tailing by consumers across the country, this share is expected to increase to 30% by 2020.

Brick & mortar retailers are also moving away from purely physical store-based e-tailing to multi-channel retailing, which helps them reach a wider customer base and also enables them to compete with pure-play online retailers.

The proliferation of digital technology and its utility in attracting consumers has helped e-tailing players explore new frontiers through launching user-friendly applications. In India, due to the increasing penetration of smartphones, consumers have also started purchasing their fashion needs via mobile applications.

CELIO



● Celio is a leading menswear brand from Europe having dominant presence in France, Spain, Italy and 65 other countries. Celio was launched in India five years ago and today it has 40 standalone company stores and over 130 shop-in-shops in major Large Format Stores.

Brand USP: Celio stands for style which is contemporary yet understated. The collection reflects the European roots with an effortless style for men in polos, t-shirts, shirts, winterwear, denim, chinos, accessories, etc.

Target customers: The brand targets urban men between 22-35 years of age group. Celio customers are aware of fashion and have an individual style statement of their own.

No. of Indian cities currently present in: Celio is present in 15 cities across the country through exclusive brand outlets and in 38 locations via shop-in-shops format.

Total no. of EBOs: 40
Total no. of MBOs: 130
No. of EBOs added in 2014: 5
No. of MBOs added in 2014: 30

Presence in Large Format Stores: Shoppers Stop, Lifestyle, Pantaloons and Central
Total no. of flagship stores: 3

Presence in online retail: Celio has partnered with major e-commerce portals like Myntra, Jabong, Flipkart, Amazon, Snapdeal, Fashion&You, etc.

Future plans: The brand has plans to open 15 standalone stores in 2015. It will be a combination of company-owned and franchisee-owned stores. Also, their expansion through multi-brand outlets and shop-in-shops formats will continue at a strong pace.

Targeted cities in the next couple of years: The brand is looking for further expansion in key markets of East India, Lucknow (Uttar Pradesh), Kolkata (West Bengal), Delhi and NCR, Kerala, Andhra Pradesh and Gujarat.

Growth percentage (CAGR of last 3 years): 40%
Franchise requirement: The brand is looking for franchisees in North-east, South, Lucknow (Uttar Pradesh), Kolkata (West Bengal), Delhi and NCR, Kerala and Gujarat. The interested franchisee should have an area of around 1,000-1,500 sq.ft. or is willing to invest ₹3,500 - ₹4,000 per sq.ft. and investment in stock.

CRIMSOUNE CLUB



Crimsoune Club is one of the verticals in the pyramid of Mangla Group, which was founded in 2005. It is nationally recognised for celebrating the essence of smart casual clothing, featuring soothing yet preppy garments with a twist in designs. The brand delivers premium styling in men's and women's casualwear including shirts, t-shirts, denims, trousers and winterwear.

Brand USP: Crimsoune Club is best described as design for fun.

Core Product Offering: Men's and women's shirts, trousers, denims, t-shirts and winterwear

Target consumers: Crimsoune Club targets at men and women between the age group of 19 and 50 years.

No. of Indian cities currently present in: 450

Total no. of EBOs: 15

Total no. of MBOs: 2,200

No. of EBOs added in 2014: 6

Presence in Large Format Stores: The brand is present at Reliance Trends .

Total no. of flagship store(s): 2

No. of flagship store(s) added in 2014: 2

New territory or region added: UAE

Presence in online retail and multi-channel expansion plans: Crimsoune Club is available on Jabong and shall have sales driven through brand's own e-commerce portal and other online market places shortly.

Future plans: The brand is launching its own e-commerce portal soon. Crimsoune Club is going to be available in international markets like US, Canada and Mexico.

The targeted towns or cities in the next couple of years: It is already available pan India.

Growth percentage (CAGR last 3 years): 40%

Brand turnover (estimated for CY2014): 250 crore approximately

ETEENZ



Established in 1977 by Dhananjai, Eteenz is a brand that captures the spirit of kids freedom and fashion. It caters to the need of today's young generation who fall in the age group of 0-14 years. The brand is also an authorised licensee of internationally popular character brands like Doraemon, Barbie, Mickey & Friends, Justice League etc.

Brand USP: Eteenz stands for excellent quality and trendy style. Through Eteenz, the company tries to offer world class quality and stylish apparels for kids without taxing the pockets of parents. The product range includes t-shirts for boys; and tops, trackpants, shorts, jamaican shorts, denims, skirts, etc. for girls.

Target customers: The brand targets mass markets that offer kidswear for 0-14 years old.

No. of Indian cities currently present in: The brand has presence in 72 cities pan India.

Total no. of EBOs: 26

Total no. of MBOs: 1,500

No. of EBOs added in 2014: 3

No. of MBOs added in 2014: 300

Presence in large formate stores: Reliance Mart, Reliance Trends, Star Bazar, More, Spencers, Easyday, Jubilant Retail, Walmart, Max and Pantaloons

Total no. of flagship stores: 1

Tell us about your presence in online retail: The brand has tied-up with Snapdeal, Homeshop 18, Firstcry, Jabong, Amazon, Flipkart and Unamia.

Future plans: Eteenz wants to strengthen their online presence.

RED RIDING



Launched in 2014, Red Riding is owned by Mahak Group of Industries. The brand focuses on fashion accessories particularly scarves, stoles and shawls. According to the brand, this category holds a lot of potential, and is completely untapped and unorganised.

Brand USP: The brand offers exclusive designer scarves, stoles and shawls that are made with finest fabric and skin friendly dyes. It showcases a wide range of products at very affordable prices, starting from ₹99.

Target customers: The brand targets young girls and middle-aged women.

No. of Indian cities currently present in: The brand has presence in more than 100 Indian cities.

Total no. of MBOs: 1,200+

Presence in Large Format Stores: Ritu Wears, Chunmun, Bindals, Stanmax, Suvitha stores, Wardrobe, Meena bazaar, Monalisa and Goenka Shoppee

New territories or regions added: The brand recently entered the markets of South India.

Presence in online retail: The brand has tied-up with Snapdeal, Jabong, Myntra, Flipkart and Fashionandyou to retail the fashion accessories.

Future plans: The brand aims to reach each and every corner of the country.

Targeted cities in the next couple of years: The brand is focusing at all prominent cities including tier - III cities.

Growth percentage (CAGR of last 3 years): 1400%

Brand turnover (estimated for CY2014): ₹6 crores

SHERIFF



Established in 1985 by C K International, Sheriff is a menswear brand. The brand started from manufacturing shirts for men; they introduced t-shirts last year to complete menswear range. By using the best fabrics and offering the finest cuts and style, the brand has made a strong hold in the north-east terrain.

Brand USP: The brand offers shirts, t-shirts, trousers, denims, blazers and gilets. They are known for contemporary fashion and high value garments at affordable prices so they are within the reach of many.

Target customers: It targets young aspiring male between the age group between 22-45 years old, who have a taste for fashionable clothing.

No. of Indian cities currently present in: The brand has presence in over 40 Indian cities.

Total no. of EBOs: 10

Total no. of MBOs: 400

No. of EBOs added in 2014: 1

No. of MBOs added in 2014: 50

Total no. of flagship stores: 3

No. of flagship stores added in 2014: 1

New territories or regions added: The brand has recently ventured into the state of Bihar.

Tell us about your presence in online retail: The brand is currently available on Snapdeal and Flipkart; they are looking forward to tie-up with more e-commerce portals.

Future plans: After tapping the menswear market for years, the brand now wants to venture into women's wear category.

Targeted cities in the next couple of years: The brand is targeting the markets in Uttar Pradesh and Maharashtra.

Growth percentage (CAGR of last 3 years): 25%



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I'm Nuts...

but my
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to get
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