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INDIA FASHION FORUM 2015
session reports
IMAGES FASHION AWARDS 2015
meet the winners
ACTIVE SPORTSWEAR IN INDIA

INFASHION SECTION INSIDE + SPORTSWEAR INTERNATIONAL



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Fashion in India has seen a lot happening over the last few years. The contact between retail and brands is now almost direct. Brands have felt the need to take control of the last mile and become retailers. Retailers felt the need to create their own brands – either for better profitability or to serve unserved niches. Bridge-to-luxury emerged as a strong segment. The market has fast tuned more casual. Core concepts of selling have been revised by e-commerce. The net, communication and digitisation has helped foster a two way awareness/ info-boom. Fashion forecasting and production are technologically much more evolved. The customer is much more aware, discerning and conscious about his fashion preferences. And has the wallet to back it too. Social media has given the consumer total power. Today where the customer info-searches and where he shops may be not the same. Fashion has truly turned on its head.

So, about six months ago when we began planning for the 15th edition of the India Fashion Forum we decided to speak to industry leaders across the country and we held a few pre-event meets in which we sought to crystallise the form and shape of a fashion business congregation that was truly meaningful in today's context. The chief concern formed the theme of IFF 2015 – Creating and Retailing Winning Fashion in an Omni-Channel Era. And, the critical components, i.e., the Fashion Brand, the Fashion Product, the Fashion Store, and the underlying advances in Fashion Technology, emerged as the four cores that need to buzz in order to control the creation and retailing of winning fashion.

And, ah yes, something was missing. So we went to a master. We invited Bonnie Brooks, Vice Chairperson, Hudson Bay Company, for her insights into fashion business. And I'm so glad that we did. I will broadly summarize what Bonnie shared with us at IFF'15 as "the Fashion Soul". She was so pleasantly adamant, insistent, (what-ever-you-call-it) at the all-encompassing criticality of businesses to look within and to understand what they stand for and the "tribe" they seek to serve, as being above all other issues. At a time when a lot of us are looking outside at economic and business changes, at challenges, at competition or forms of it... a bit perplexed and a bit wary we all are of the new tools to be mastered, and so Bonnie's words come as a pleasant balm. Indeed the need to know one-self, and to focus on what we do best, and give the best of what we can to our customers, may be the very catalyst that makes us embrace and take up the new tools and technologies that we are becoming aware of but wait for need of purpose, inspiration, clarity and simplicity.

In this issue of Images BoF, catch what transpired at several inspiring sessions at IFF'15. Read the Infashion reports, the India success story of UCB, lots of other great articles, and please don't miss reading the study on the Active Sportswear market in India. Another great piece is on Social Media in the Sportswear International section.

Enjoy the issue.



Amitabh Taneja

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52



48



106



42



110

EVERY MONTH

- 23 Editorial
- 30 Letters to the editor
- 38 Outlets
- 42 Seasons Offerings

RETAIL EXCELLENCE

- 48 **Big, Bold and Benetton**
The first 1000 Crore plus global brand in India on its journey and key mantras

LEAD STORY

- 52 **An Overview: Global Sportswear Brands in India**
An exclusive study on the high potential active sportswear market and how global players are leading it.

BRAND TRACKER

- 104 **Fitz: Offering comfortable style**
Fitz shares its thoughts on functionality in fashion and how it rides this wave

ACCESSORIES

- 106 **Lavie: Earning an admirable recall in a short span**
Bring customers back in store with CRM 2.0 says Capillary

TECHNOLOGY

- 110 **CRM technology in fashion**
With 200 outlets, Reliance Footprints growth plans include expansion via franchise route

KNOWLEDGE

- 114 **IBOFR'15 Launch**
The annual guide for fashion businesses in India launched at India Fashion Forum



114



63



78



88



80



90

COVER STORY

- 63 INDIA FASHION FORUM 2015
- 78 ONE-ON-ONE WITH BONNIE BROOKS
- 80 RETAIL TECH AT IFF'15
- 88 IFF KNOWLEDGE SESSION
- 90 IMAGES FASHION AWARDS 2015

India Fashion Forum 2015 was held in Mumbai from March 18-20, 2015.

For 15 years now, the India Fashion Forum (IFF) has been the focal point for fashion leaders to converge every year with the single minded agenda to learn, share and evolve and catalyse the growth of the fashion value chain – from yarn to retail. It has been called “Easily one of the most focused and smartest fashion business conclaves in Asia”.

This edition of the IFF '15 was special. It was designed as an all new quad-core fashion experience, as immense evolution in both the consumer and the art and science of fashion Brand Creation, fashion Product Creation, fashion Store/Space Creation, and fashion Retail Technology, have made them game changers and subjects deserving focus as never before.

Therefore IFF 2015 took on a totally new feel, even as the philosophy of the annual show – to facilitate the convergence of out-of-the-box ideas and innovations in fashion creation and retailing by the IFF Forecast, Create and Transform ideology remained center-stage.

All four exciting cores had great insights with their own set of marquee speakers, workshops, master classes and conference sessions, besides each having their parallel dedicated exhibition zones.



133



117

PICTURE COURTESY: LIVA



BIG, BOLD & BENETTON

CELEBRATED AS INDIA'S BIGGEST GLOBAL FASHION BRAND, BENETTON IS ALSO THE FIRST EVER FOREIGN FASHION LABEL IN THE COUNTRY TO CROSS ₹1,000 CRORE IN ANNUAL SALES. GUNG-HO ABOUT ITS FUTURE IN INDIA, THIS ITALIAN FASHION MAJOR PLANS TO DRIVE ITS GROWTH VIA OMNI-CHANNEL. BY NAMITA BHAGAT

Founded by Luciano Benetton in northern Italian city of Treviso, the 50-year old Benetton Group is one of the most renowned fashion houses of the world today. Benetton's presence in India dates back to over 25 years. The company forayed into the country in 1991-92 via a 50/50 joint venture with Delhi-based DCM Group, and launched its flagship brand United Colors of Benetton. In December 2004, Benetton India became a wholly-owned subsidiary of the Benetton Group, Italy. Over the course of time, the country emerged as one of the strategic markets for the global fashion giant, and in 2006, it decided to introduce its fashion label Sisley in India. Today, both of its brands – UCB, a masstige brand and Sisley, a high-end label – are quite popular among Indian consumers.

The faith put in the country's market has reaped rich dividends for the company as it is today its largest market outside of Europe. In 2013, Benetton achieved the distinction of being India's biggest international fashion brand. It also became the first global fashion label in India to cross



₹1,000 crore mark in annual sales. Talking about the brand's success, Sanjeev Mohanty, Managing Director, Benetton India states, "The vision for growth and the resulting strategy of the Indian subsidiary is in tune with Benetton's overarching global vision. Also, the strength of the brand lies in combining a global fashion point of view with local sensibilities."

Benetton India's success story is remarkable even more because it achieved this incredible feat at the time when the parent company's fortunes were dwindling owing to European financial crisis and its inability to acclimatise to changing market trends. The Indian market has thus turned out to be a 'chalk horse' for the group.



AN OVERVIEW: GLOBAL SPORTSWEAR BRANDS IN INDIA

SPORTSWEAR IS REGARDED AS ONE OF THE HIGH POTENTIAL CATEGORIES IN INDIA'S SPECIALTY RETAIL TRADE. NOTABLY, THE COUNTRY'S SPORTSWEAR RETAIL PLAY IS MARKED BY THE DOMINION OF GLOBAL BRANDS. MANY PURE-PLAY BRANDS OFFERING APPAREL, FOOTWEAR ARE ALSO INTO ACCESSORIES AND SPORTING EQUIPMENT WHILE OTHERS HAVE EXPANDED THEIR OFFERINGS TO INCLUDE SPORTS-INSPIRED PRODUCT LINES. BY NAMITA BHAGAT

Over the last 15-20 years, people in India have become increasingly health-conscious. In their pursuit of physical fitness and mental wellbeing, they are turning to sports, outdoors and adventure activities. Moving beyond the realm of profession, today sports are perceived as a "lifestyle" by young and old alike, thereby presenting a huge market for sports products as in apparel, footwear, accessories, gear and equipment. Although nascent, the segment is fast emerging as a high potential category in India's specialty retail market driven by growing preference for branded merchandise of international quality and consumers willing to pay premium for such items. Not just a metro and big city phenomenon, the demand is as well catching up in tier II cities. Interestingly, unlike professional sportspeople, the consumers, in general, consider sports, outdoors and active wear as one category even as for many, sports-inspired clothing or shoes is a 'mark of fashion'. Taking cue from this, several apparel and footwear brands have started making sports-inspired clothing and footwear apart from their regular offerings.

IMAGES F&R research estimates the combined market size of India's active sportswear market (including sports footwear, apparel and accessories) at ₹6,000 crore (approx.), growing at 13 percent (Y-o-Y).

WELCOME TO THE INFASHION SECTION OF **IMAGES BUSINESS OF FASHION**. IN THIS SECTION, WE BRING TO YOU THE LATEST VISTAS AND INSIGHTS IN FASHION CREATION ACROSS FASHION DESIGN, FASHION TRENDS AND FASHION INGREDIENTS



120

INFASHION AT IFF'15

Team BoF report on fashion creation sessions and workshops held at the India Fashion Forum



130

TRADE WINDS
9 THINGS THAT MADE AMAZON INDIA FASHION WEEK'15 STAND OUT

Images Business of Fashion makes its pick



126

INNOVATION
BIRLA CELLULOSE LAUNCHES 'LIVA' TO DELIGHT CUSTOMERS WITH ITS FLUIDITY

250 partners on board. Kangana on board. LIVA is making big waves in its first season of national launch.

128

EXPERT TALK
MERINO WOOL IS A VIABLE FIBRE FOR THE PREMIUM MARKET

Images BoF talks to Roy Kettlewell, Global Innovations Manager, Australian Wool Innovation, The Wool Mark Company on the prospects of wool globally and in India in particular.



BIRLA CELLULOSE LAUNCHES 'LIVA' TO DELIGHT CUSTOMERS WITH ITS FLUIDITY

IT IS RARE TO FIND CLOTHES THAT ARE CLASSY, COMFORTABLE AND AT THE SAME TIME DO NOT WEIGH HEAVY ON OUR CONSCIENCE. BUT ALL THIS AND MORE HAS BEEN MADE POSSIBLE WITH BIRLA CELLULOSE'S NEW-AGE FABRIC BRAND 'LIVA'. THE NEWLY LAUNCHED LIVA FABRIC IS NATURAL, AND FASHIONABLE, AND MOST IMPORTANTLY INFUSES FLUIDITY INTO THE GARMENT. BY GURBIR SINGH GULATI

As Kumar Mangalam Birla, the group's chairman, Aditya Birla Group says, "With the launch of Liva, our endeavour is to establish the same connect with the end consumer (who in the viscose fibre business is several steps away from our operations) and while doing so, take the entire value chain along with us." He further states, "The pulp and fibre business is an integral part of our group. Over the years, it has contributed significantly to our growth and has carved for itself a remarkable position in terms of global presence. We enjoy a leadership position with over 20 percent of the world market share. Over the last 3 years alone, our investments have been in excess of ₹4,300 crore and our capacities have scaled close to 1 million tonnes per annum. Also, as a group, we have always been customer-centric and VSF continues to move ahead of the times. We at Aditya Birla Group firmly believe that the customer is at the core of how we operate. You would be surprised to know that our consumer brands are over ₹60,000 crore, larger than that of many leading consumer brands put together."

Understanding Liva

Liva is created from natural cellulosic fibres; they transform your garments, giving them the most fluid, soft drape. Based on a consumer research, which the company did, they zeroed down on five potential proposition spaces, which would be considered for carving out a differentiated positioning of the product. Out of these 'Fluidity' emerged as the strongest proposition space, which was not just unique but also held tremendous potential going ahead. It not only aptly emphasised the most important feature of this fabric, which is drape or flow, but also held a lot of potential in terms of connecting with the consumer for emotional sense.

Liva is an aspirational brand. The company wants to create more value for itself as well as for its partners (spinners, fabricators, processors, garmenters, wholesalers, brands and retailers).

Liva has gone through multiple collaborative steps in its journey:

> Design and development of innovative fabrics embodying the brand promise.

DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

SPORTSWEAR INTERNATIONAL



138

140



FOCUS | TALK SHOW

138 'The Customer is our Employer'

Berit Petersdorf, owner of Hamburg based Angelo multibrand stores, speaks on poor delivery scheduling and a lack of courage.

FASHION | DENIM

139 'Stretch is incredible and people just want to be comfortable'

A talk with Jonathan Cheung who leads the global Levis



139

FOCUS | TECHNOLOGY

140 Smart Clothes

Wearing technology is no longer the stuff of science fiction design team

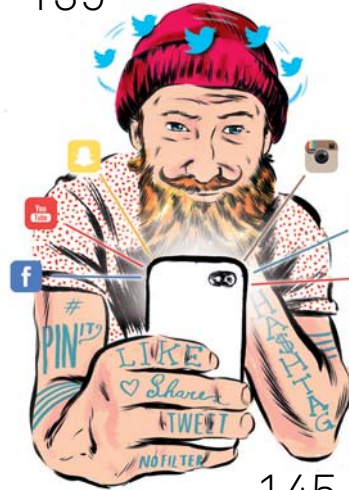


142

FACTS | BRANDS

142 REELL!

Reell has made men's stretch jeans socially acceptable. Now jeggings for the guys are getting their chance, too



145

FOCUS | FEATURE

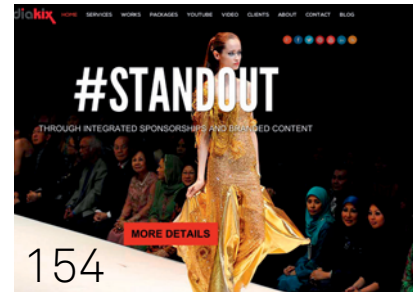
145 How social media changes the fashion industry

Social media and its narcissistic platforms are here to stay. So you better learn how to play by the rules of self-staging.

FOCUS | DIGITAL

154 Native advertising and bloggers: status quo

A look at the ins and outs of brand-blogger collaborations, and a peep into the future

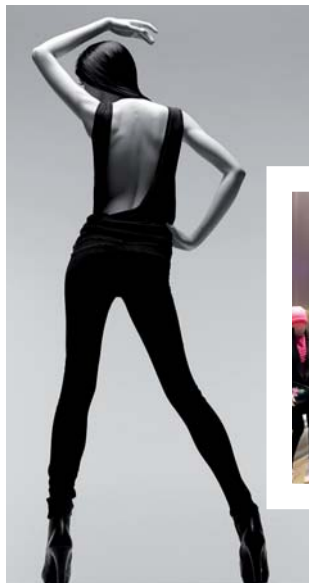


154

FACTS | RETAIL

158 Ladies with an attitude

Individualism and realism are in. We are talking about mannequins.



158

FACTS | STORE

165 Simplicity wins

No distractions. Stores that concentrate on essentials



165

Credits for India Capsule

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SMART CLOTHES

WEARING TECHNOLOGY CLOSE TO YOUR SKIN OR BODY, IN THE SHAPE OF A COOL GARMENT OR AS A SENSOR ADDED TO YOUR ACCESSORIES, IS NO LONGER THE STUFF OF SCIENCE FICTION.

BY MARIA CRISTINA PAVARINI

➤ After the advent of cyberpunk in Gibson's novels from late 1970s and the craze for virtual reality that exploded in the 2000s, consumers finally can find their favorite wearable technology. All of these devices can be worn and carry a microprocessor inside—be it a simple digital watch or a more sophisticated full-body device aimed at accessing augmented reality effects. These items can elaborate information, speak with a smart connected device—a computer, a smartphone or a tablet—or can connect themselves independently via the Web. According to statistics, the future belongs to these devices. IDC, an IT global consulting company, found out that in 2013, 6.2 million wearable devices were sold. By end 2014 sales reached 19.2 million, more than tripling results of 2013. By end 2018 IDC expects the number to reach almost 112 million.

The devices will be employed in different industry areas, though especially in medical and healthcare ones—from where they originated and developed—to many other applications fields such as advertising, clothing, sports and fitness. At present bestsellers are especially complex wearables such as bracelets and smartwatches and count for 70% of total sales, though they soon might be cannibalized by smart accessories and watches with functions that can be hyped by connected software and apps. Smart wristband UP Jawbone, for instance, works a virtual coach that monitors one's sleep, sports activities, calculates burnt calories and fixes daily training targets. Similar models are crowding the market including the newborn luxury MICA (My Intelligent Communications Accessory) born from a collaboration between designer brand Opening Ceremony and Intel. It

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