

IMAGES Business of FashionTM

MAY 2015 | VOL. XVI | NO. 5 | ₹100

The 2015 Innerwear Special

InFashion



**SPORTSWEAR
INTERNATIONAL**

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I do find the word *cliche* a bit of a *cliche* so, when it comes to oft-repeated phrases, I prefer the desi and filmy word '*dialogue*'.

And, the number one dialogue in this, the May 2015 Innerwear Special, issue of Images BoF was - *Innerwear in India is Coming Out of its Closet*. It was such a favorite with writers that a Salman, Amitabh or a SRK would be proud of it. I sadly, had to change this phrase to something else in many articles. But it was such a champ that I let it live in some.

Let us give two minutes to this champion, dear friends. Let us close our eyes and imagine we are standing in front of this huge innerwear closet that is swaying. Imagine you can hear it brimming with peppy gym beats and high-fashion ramp type background scores. Imagine you can also hear from within its bosom some very refined machinery whirring. A soft murmur, at first, that then slowly and surely gets louder as it works itself towards its crescendo. Feel the closet vibrate and inflate as though many new things are taking birth and straining to break out into the open.

Do you feel it? Can you feel the excitement and anticipation to see what amazing wonders will burst out? Yes indeed innerwear is coming out of its closet. And it's a bit more than coming out. More like a bursting out. That, friends, is exactly what the Indian Innerwear Industry in India is about achieve. Explosive growth.

Innerwear in India was worth Rs. 19,950 crores in 2014. In ten years it is expected to grow to about three and a half times this number. The women's part is 60 percent and this part is not just larger but will also grow much faster than men's innerwear. This is as far as we can see today.

I say this because the most striking thing about innerwear is the vast variation and range of possibilities it holds in terms of need and occasion of usage. It spans the vast spectrum from necessity to fashion to comfort, co-ordinate, shapewear, health-wear, sleepwear, active wear, and even fashion outerwear, etc. And by this very range and its amenability to innovation we feel that its growth may outstrip all estimates.

In the May 2014 issue we had traced the history of innerwear and a wide range of its facets. In this issue we look at other areas. And the more we look at the subject, we find, within it, more and more great work and scope for great work. Indeed Innerwear in India is a subject that deserves a research book in its own right.



Amitabh Taneja

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Swan Press of Lahore, B-71, Naraina Industrial Area, Phase - 2, New Delhi 110028 and published by S P Taneja from S- 21 Okhla Industrial Area Phase - 2, New Delhi. 110020 Editor : Amitabh Taneja

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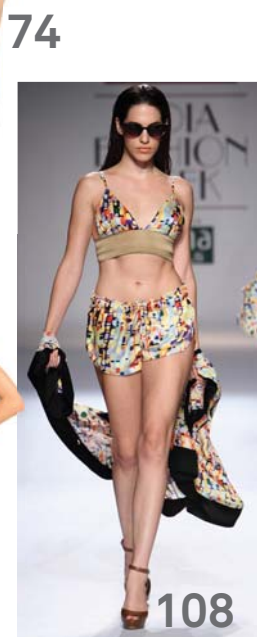
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PICTURE COURTESY: MANDALA APPARELS

THE INNER STORY

THE INDIAN INNERWEAR INDUSTRY IS ON AN UPSWING WITH INDIAN MEN AND WOMEN OPENING UP AND BEING MORE EXPERIMENTAL AND FASHIONABLE THAN EVER BEFORE. THE INTIMATEWEAR PLAYS A VITAL ROLE IN BUILDING CONFIDENCE AND ALLOWING PEOPLE TO MAKE A STYLE STATEMENT. **ARINDAM SAHA**, ASSOCIATE DIRECTOR, WAZIR ADVISORS SHARES INSIGHTS ON DOMESTIC MARKET TRENDS IN INNERWEAR. WHILE HIGHLIGHTING THE GAPS AND POSSIBILITIES IN INFLUENCING PREFERENCES AND PURCHASING BEHAVIOUR OF BOTH MEN AND WOMEN.



MEN'S INNERWEAR BRANDS BELIEVE ON CELEBRITY ENDORSEMENT AND SPEND A LOT USING ALL POSSIBLE MEDIUMS




For my mother, who has just retired from her government service and lives in a tier-II city of West Bengal, the variety in lingerie is restricted to just three different colours – white, black and cream. However, my niece, who has recently taken up a job with an MNC in the NCR, loves to experiment with her lingerie and is still unhappy with the quality being offered by brands. Pramila, another young woman, is busy preparing for her final examinations in M.A., while her parents are desperately looking for a Tamil Brahmin groom preferably working abroad. Pramila read about underwire bra in a women's magazine but could never try it while growing up in a conservative joint family at Coimbatore. Her mother buys innerwear for the entire family and after washes, never even puts it outside for drying.

It is a rather difficult task to generalise the domestic market trends of innerwear category as it varies a lot with geography, psychography, age, income level, gender, etc. Typically, young girls are ready to experiment with different lingerie and their preferences vary with different outerwear. Girls living in the metro cities desire fashionable products that they can flaunt among their social circle. They love to indulge themselves with the latest trend. For women in their mid-thirties and above, 'comfort' is the most important factor that influences their purchase decision. Working women want a mix of fashion

MARKS AND SPENCER'S NEW LINGERIE & BEAUTY STORE

LINGERIE AND BEAUTY ARE CATEGORIES WHICH THE UK RETAILER IS LEVERAGING UPON TO TAKE ITS CUSTOMER ENGAGEMENT UP IN INDIA. **venu nair, managing director, marks & spencer reliance india** SHARES INSIGHTS ON THE NEW BUSINESS IN AN EXCLUSIVE INTERVIEW WITH IMAGES BOF. BY GURBIR SINGH GULATI

 Marks and Spencer (M&S), a major British multinational retailer has recently added a new dimension to its business by starting its Lingerie & Beauty stores in India.

The standalone M&S Lingerie & Beauty store brings the very best of their product range to the customers. The company offers high quality, stylish and innovative lingerie which includes an extensive breadth of lingerie styles, shapes and sizes. They also retail clever lingerie innovations that enable their customers to look and feel their best. In the beauty category, they offer the very best of nature and science with improved beauty products.

EXCERPTS FROM THE INTERVIEW

What was the idea behind creating an individual identity with lingerie and beauty as a category?

Venu Nair (VN): The move to open Marks & Spencer Lingerie & Beauty stores is a part of our ongoing strategy to become a leading international, multi-channel retailer and build on our established position as the UK's number one lingerie brand and the increase demand for our lingerie and beauty products abroad. The format capitalizes on the growth opportunities in the lingerie and beauty markets in India, where we've already seen a huge demand for these products.

The smaller store footprint also enables us to access key positions in India's leading shopping malls, helping M&S to accelerate its growth in the market and takes our customer engagement to another level.



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



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fiber magic

INVIYA EYEING INNER WEAR

YC GUPTA, BUSINESS HEAD, INDORAMA INDUSTRIES LTD TALKS TO IMAGES BUSINESS OF FASHION ON HOW INVIYA, THE FREEDOM FIBER IS PARTNERING THE DEVELOPMENT OF NEW AGE INNERWEAR.

Q. What is INVIYA? What does it do and is it a generic composition, a technology, a process, is it patented by someone and players have to acquire the rights to manufacture it?

INVIYA®, the new age spandex is an elastomeric fiber that can be readily used in conjunction with cotton or synthetic filament yarns to produce fashion apparel with unparalleled qualities of stretch and recovery for higher value additions, especially in woven and knitted garments.

Made with continuous dry spun polymerization technology, the brand INVIYA® is patented and is being applied in various apparel categories like denims, fashion wear, intimate wear, swimwear, leggings, socks and shape wear and in the medical industry. Owing to its properties of strength and strong elasticity as well, its ability to return to its original shape after stretching as compared to ordinary fabrics, INVIYA® is significantly consumed in a wide range of textiles.

Q. What are the USPs of INVIYA the freedom fibre over others? What market share does Inviya hold in India currently?

INVIYA®, the freedom fibre from the house of Indorama is made from advanced polymer and has excellent properties of high modulus enabling higher tenacity, stretch power and better heat resistance properties with high run speed in core spinning, draw texturing, circular knitting, warp knits applications and other textile processes. Available in exhaustive range of deniers to choose from, INVIYA® is lightweight, soft and quite stretchable, imparting a perfect fit and shape to the garment further providing comfort to the wearer. It imparts added features like long lasting fit, engineered designs, omni-directional movement, perfect shape and durability in wide applications.

All this has enabled an immense growth for our business. Since its launch in India in 2012, INVIYA® has acquired more than 30 percent share of the domestic market. Producing 5000 MT annually, we are the first and only producers of Spandex in India and are positively contributing to the Indian clothing and textile industry. This has led to higher value additions in the products manufactured by yarn spinners, knitters, weavers etc.

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E-COMMERCE-ILLUSIONS SPUTTER OUT

A GUEST EDITORIAL BY MARCUS DIEKMANN, SHOPMACHER CEO AND AUTHOR OF THE PUBLICATION *ECOMMERCE LOHNT SICH NICHT*. (“E-COMMERCE DOES NOT PAY OFF.”)



➤ E-commerce does not pay off. When I first stated this thesis in public in 2011, online fashion retail was caught up in a bonanza atmosphere. The multichannel idea was booming. One brand after another, one physical fashion store after another were setting up their own online shop. Leading online retailing experts were promising that 10% more revenue could be achieved with a store's own online shop within two to three years. May of 2014: The ECC Köln (E-Commerce Center) warned that up to 80% of online shops would fail. The end of August: Alexander Graf said on the e-commerce portal Kassenzone: From 2011 through 2013 the major e-commerce players achieved an average net profit of 0.3%. At the same time the major physical retailers posted an average net profit of 5% for the same reporting period. By the end of October: Amazon announced

a net loss of \$437 million in the third quarter. The German Retail Industry Association (BVH) says the online retail market has cooled off significantly: only 4.2% growth was reported in Q1 2014.

An utter price war

If you want to do business online, you have to answer this question: What sense does it make to have 200 stores in “virtual downtown” when I can find exactly the same products from the lowest priced retailer at the click of a mouse? That is exactly what is happening in “downtown e-commerce”—an utter price war. There are only a few prime locations in the e-commerce world: Page one of Google and the major online platforms such as Amazon, Zalando or eBay are turning into product search machines themselves. By the way, Amazon and Zalando are the retailers that people feel have top customer service (a 100-day return policy)—not the traditional brick-and-mortar shops. Purchases on account and free returns will not save the online retailing business. The killer factors are product and price. The rule of thumb: having the biggest range of products and a great deal of patience when it comes to operating income—see Amazon, it's as easy or as hard as that.

When does e-commerce pay off?

One thing is definite: Consumers demand e-commerce, but it isn't worth doing for most online shops. What are the prerequisites a standalone retailer must meet in order to thrive in multichannel retailing?

1. Service. For example, ordering in the local store and home delivery when the item is not in stock. Or every branch store has to provide the entire range. Any website visitor has access to the complete range—the customer orders from home, buys in the shop or has items that are not available shipped to their home address.

2. Marketing. A select and attractive range and “offers of the week” as well as basic consumer goods based on the Tchibo shop principle of “Every Week is a New World.”

3. Genuine unique selling points based on available products/specialist niches, which are hard to find or not available online at all. This includes shops which market and distribute private label goods.

Anything else hasn't got a chance. But beware: all of these options assume that the shop solution is highly efficient, allowing enough room for redesign in order to position the online shop as a flagship e-store. Physical retail still has to come to grips with these main topics:

1. Dynamic pricing. The Internet makes all prices transparent—brick-and-mortar shops can't isolate themselves from that.

2. Availability. Just like with pharmacies, networking among physical locations should ensure optimal availability of product.

3. Expert advice. This is often the decisive game-making difference.

4. Fulfillment and exchanging goods have to be straightforward.

And take heed: In the future, regional physical retailers will also have to be competitive across multiple regions. The store can't just say its range of goods is great. It must also have the best product sales advice in its segment and the ability to procure everything the consumer needs in that segment of the market. And do so at the best price, nothing more, nothing less. That means: being efficient in all process areas—or perish.



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