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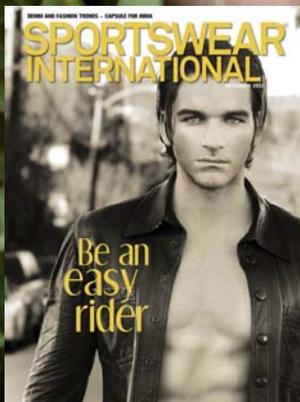
Forecast
Transform
Create

WGSN

Global
demographic
analysis
S/S 2014

Marks &
Spencer

Increasing
footprints



BEST IN MERCHANDISE
AND TRENDS FROM
ACROSS THE WORLD.

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Ph: + 91-33-40080480, Fax: +91-33-40080440*If winter comes, can spring be far behind?*

Of course not, dear Shelley. In this December issue of Images Business of Fashion, we present to you the Spring/Summer 2014 trends being predicted by global forecasting bodies and international designers.

We approach this, the cover subject, in parts. In the first, we present a demographic analysis by WGSN, the world's leading trend forecaster. This is a comprehensive breakdown of the key takeaways for the contemporary, modern missy and juniors' markets from the New York, London, Milan and Paris S/S 2014 catwalks. In the next part, INGene Consulting, has shared its perspective on global trends for womenswear for the forthcoming season and finally, international designers like Alexander McQueen, Givenchy, Burberry, amongst others, share their S/S 14 collections for men. Hence, a holistic view of fashion trends for men, women and children has been ably predicted.

In Brand Watch, Marks & Spencer is under review. Venu Nair, MD, Marks & Spencer Reliance Retail Pvt Ltd and Marc Bolland, CEO, Marks & Spencer, share their perspectives on the growth of the brand and its future plans. Also in focus are other brands like Surreal, Nee & Oink and Kalpana Creations. The words of wisdom written here will work like a venerable guide book for any newcomer in the line of fashion retail.

And yes, it's that time of the year once again, when anticipation and the preparations for the India Fashion Forum 2014 are in full swing. We present to you a countdown to IFF, slated to be held on 17 and 18 January, 2014 in Mumbai. In its 14th year, IFF has become a household name in the fashion retail industry, and virtually everybody who is somebody today, has graced its haloed portals, one time or the other. Indeed, an event of mammoth proportions, in this issue there are insights into the inception of the event, its tangible growth and the giant strides it has taken in the fashion fraternity of the country.

IFF is a livewire of networking opportunities and lots that will catalyse the exponential growth of your fashion business or career. Block the dates and enroll yourself as an exhibitor, visiting delegate or workshop participant now.

Would love to see you at IFF 2014 !

**Amitabh Taneja**

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All work and no play makes fashion a bore! Fashion is one of the most creative industries. At the 14th edition of India Fashion Forum 2014, the leaders of the fashion fraternity will come together to celebrate fashion and style in a whole new way. The countdown to the hottest event in the business of fashion retail has begun!



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JAYDEEP SHETTY, DIRECTOR, MINERAL, A FASHION APPAREL BRAND FOR WOMEN, TALKS ABOUT THE TRENDS FOR THE SEASON AND THE HOW RETAILERS SHOULD TARGET THE MIDDLE CLASS SEGMENT OF BUYERS WHO ACTUALLY END UP SPENDING A LOT OF MONEY ON APPAREL WEAR

HATS OFF TO THE INDIAN RETAILER

The Indian fashion retail industry is still nascent, much as the other markets. It seems to be gaining maturity quickly, but customers are still driven to stores through smart marketing messaging, than actual good value fashion products on the shelves. There are players who are intensely good and will probably live it out many more seasons, but there are also the quick-fire rockets, who fizzle out without ceremony. For one, I don't understand the obsession for China-made fabrics simply because they are cheap. In most cases, the quality doesn't even match up to what is available in the domestic market. But every single mid- to large-size retailer rushes to China like it is the mother lode to the next big thing in fashion and margins.

What I do like about Indian retailers is that they spend time on the floors of their stores listening to staff and customers. If you see the West, much of the top brass hardly even walks into their own stores. That is a large advantage in India. What also impresses me always about other Indian retailers is their use of systems or software. Some retailers can manage with notebooks what would take an ERP for a Westerner. Now, even small-sized retailers are using IT extensively in the business.

Between Future Group and Shoppers Stop, I have about 14 years of experience in retail. I have been part of formative teams to bring in foreign brands and companies, which have included Replay, Etam, Celio and Lee Cooper, besides the duty-free partner, Alpha Airports - UK. Foreign underestimate the heterogeneity of the Indian market, and expect its behaviour to replicate the more developed markets. It is here that the Indian partner's expertise counts and if you look at the players around, it is obvious that the brands that do well are the ones that manage to adapt to the Indian customer. International brands have a lot more clarity in thought as well as superlative systems that geo-position their performance and plans, but often this also turns out to be their foible. As a professional, it was great helping these brands set up in India, and there has been a lot of personal learning, but the strategy for India has to be driven from within India and not in a suburb of Europe.

Working on these brands, one couldn't help realise that creating a brand DNA is most crucial and that was the first thing that we put in place for Mineral. You have to develop the brand with its identity and character just as if it were a person and then let the product and experientials evolve around it. Too many foreign brands approach the market in a rational, analytical fashion but this is not a good path to take for a new brand. You have to alter your sails based on the wind in the early days. I did set out with Mineral wanting to create a world brand, something whose provenance may not be very easy to establish. Some customers still buy thinking we are a Western brand.

We see Mineral as a bridge to the brands that are from the West and the mass brands that are Indian. We have been a fashion disrupter in the kind of silhouettes we work on, the fabrics and even the way we present our product in our stores. We still do not believe in the concept of seasons and

S/S 2014 TRENDS FOR MEN

FROM AFRICAN ETHNOGRAPHY, SKULL MOTIFS TO DELICATE FLORAL LACE WORK, THE FASHION HOUSES OF GIVENCHY, ALEXANDER MCQUEEN, CHRISTOPHER KANE AND BURBERRY, PREDICT A BLITZKRIEG OF STYLE FOR THE DISCERNING MALE.



DESIGNER: BURBERRY

- **Inspiration:** By writers and painters
- **Theme:** A celebration of artistic and intellectual spirit, with a nod and a wink to Alan Bennett and David Hockney. Easy, relaxed tailoring sits alongside lightweight pieces in linen and slouchy cashmere, while accessories add bright pops of colour among the painterly tones. Weatherproof cagoules and sou'westers take the whole collection outdoors and into the British summer.
- **Silhouette:** Knitwear as outerwear, shirts as outerwear, unstructured silk cabans, coats and jackets and the loose tie, unstructured paperweight, trench coats. A collection of relaxed knits, cagoules and sou'westers.
- **Print:** Spots Stripes Gingham English flowers
- **Fabric:** Cashmere, silk, linen, cotton
- **Colour:** All the blues, all the greys, camel olive, terracotta white, pink, dusty yellow, dusty green, bright red, bright green, bright yellow, bright blue.
- **Accessories:** The Duffle in painterly tones colour-smudged crêpe sole suede shoes. Multicoloured deck shoes, the summer snood and the Britain bright wave sunglasses.

DESIGNER: ALEXANDER MCQUEEN

- **Inspiration:** The rites of passage of man
- **Theme:** Ceremonial dressing
- **Colour:** Ivory, black, white, dark and pale oyster
- **Effect:** The internal structure of suiting is removed to give lightness. The sleeves of a frock coat have been ripped away with seams and shoulder padding left exposed. The silk lining of the suit jacket is introduced as a button-down robe or cardigan, layered over collarless bib shirts and exposed from the sleeves and hem of suit jackets.
- **Print:** The iconic McQueen skull motif is reworked into a cotton lace.
- **Fabric:** Faded fabrics that feel they have been left out in the sun and tarnished gold buttons. Hems, lapels and sleeves are unfinished and frayed. The lace is adapted as a print, distressed floral jacquards, cotton ticking with embroidered black roses or screen-printed by hand to create a mottled photocopy effect, washed silk, cashmere, cotton and brocade jacquard.

exclusive

QUALITY OVER QUANTITY



RAGHAV MOHAN, DIRECTOR, SURREAL BELIEVES THAT FOR HIS BRAND TO SUCCEED, IT SHOULD HAVE EXCLUSIVE ALLIANCE WITH ONLY ONE RETAILER IN EACH CITY. CALLING SURREAL A BRAND NOT FOR THE MASSES, HE SHARES WITH IMAGES BUSINESS OF FASHION THE MENSWEAR BRAND'S JOURNEY SO FAR, HIS PLANS TO INCREASE THEIR CUSTOMER BASE, AND FUTURE PLANS OF EXPANSION.

•BY PRIYANKA SAHA



Tell us about Surreal and its journey so far.

'Only great minds can afford a simple style' is something that captures the essence of Surreal. I would define the brand as intelligent, minimalistic, eclectic, elegant, modern, refined, sharp, chic, prêt, edgy, dapper, stylish, zestful, luxurious, and with a mark of perfection.

It has been four years since the brand was launched, and the journey has been really interesting throughout. We started with one EBO, with the primary focus on shirts. Over the next three years, we added two more EBOs as a result of a tie-up with two premium retailers in Delhi/NCR. We are very detail oriented and work very closely with our customers. As we increased the number of outlets, we were also in touch with our customers and got a lot of feedback from them. They loved our products and wanted more variety. It was then that we discussed with our channel partners to diversify into suits and jackets. Today, our suits have become a core part of our business. I can also say that we are very lean and mean, be it our fits or our organisation!

Give an insight on your retail presence. What are your plans to increase sales and number of outlets?

Currently, we have three EBOs and a partnership with two premium fashion retailers. Moving forward, we are aggressively looking to partner with more like-minded and fashion-forward retailers. However, we are more inclined towards quality rather than quantity, be it merchandise or our partnerships with our associates. So, we are looking at exclusive alliances with retailers and would want to have only one retailer in one city. In the next three to four years, we do plan to again focus on EBOs.

Who are your target customers?

We are serving fashion-conscious people, who are passionate about clothing and have a taste for it. Our target customers have panache, are urban and fashion forward men in the age group of 25-35 years.

Tell us about the stores, the product display and visual merchandising.

We follow a fashion model rather than a business model. Fashion is dynamic. At our stores, and also at our partner retailers (SIS), we give a fresh look every week. At the same time, new designs are fuelled into the store every third day. Also, our visual merchandising is very different from the rest of the brands. For example, for Spring Summer 2013 collection, we had a huge syringe made with the caption 'A Dose of

THE RISING

MARKS & SPENCER COLLABORATED WITH RELIANCE RETAIL TO OPEN UP STORES IN INDIA WAY BACK IN 2008. THE LATEST STORE TO COME UP IN MUMBAI'S UPSCALE BANDRA WEST, IS SPREAD OVER 35,000 SQ FT AND IS A SHOPPERS DELIGHT AS IT HAS JUST ABOUT EVERYTHING A WOMAN MIGHT FANCY.

•BY ZAINAB MORBIWALA



Arvind Singhal, Chairman, Technopak, says, "Marks & Spencer (M&S) has been inexplicably conservative in its ambition in India so far. However, as the success of some other relatively new entrants like Zara have demonstrated, M&S should consider becoming more aggressive and ambitious about its business in India, and should consider becoming more adventurous and trendsetting when it comes to its merchandising and the overall look and experience of its stores in India."

That very much sets the context for our story. Throughout its existence, M&S as a brand has known to extend a bit of sophistication and the legacy has well continued over the years. Since M&S formed its joint venture partnership with Reliance Retail in 2008, the retailer has built a solid platform to accelerate its growth in India. Since April 2013, M&S has opened seven stores in India, doubling its presence in Mumbai and entering the cities of Kochi and Vadodara for the first time. M&S today has 36 stores, trading from a total of over 500,000 sq ft. As part of the retailer's plans to take its business in India to the next level, M&S will open a further eight stores by the end of March 2014, followed by 36 more stores in the next two years.

THE PARTNERSHIP

Commenting on the collaboration with Reliance in 2008, Venu Nair, Managing Director, Marks & Spencer Reliance Pvt Ltd shares, "Under our previous franchise partnership, we were positioned as a premium retailer with small stores carrying limited products at high prices. Through our partnership, we've made a lot of progress since 2008. We have been able to open newer and larger stores, close smaller stores, roll out our new store format and align our pricing. We have also introduced new product ranges including our kidswear offer." Adding further, he shares, "We are working closely with Reliance Retail and have set a clear plan to build a leadership position in India."

INDIA STRATEGY

Adding to what Nair shared, Marc Bolland, Chief Executive, M&S spoke on the brand's perspective on the Indian market and what makes them consider India as being the most important market for them after the UK. Bolland shares, "India is a priority market for M&S and working closely with our partner Reliance Retail, we have set a clear plan to build a leadership position here. As the nation's leading retailer



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SPORTSWEAR INTERNATIONAL

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PASSION FOR NATURE

CARING FOR THE ENVIRONMENT AND FOR INNOVATION ARE THE TWO DRIVING FORCES BEHIND TEJIDOS ROYO'S 110 YEARS SPENT MANUFACTURING FABRICS AND DENIMS.

BY MARIA CRISTINA PAVARINI

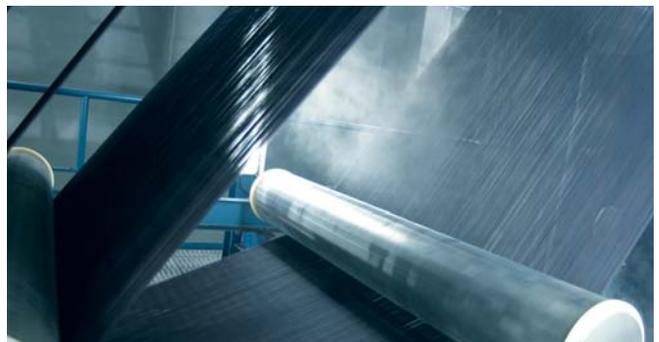
➤ For S/S 2015 Tejidos Royo, a 110-year-old cotton casual fabric and denim manufacturer from Valencia, Spain owned by the Royo family, launches a new eco-minded initiative called NRLess. It is a three-way partnership with Tonello, an Italian industrial washing machine producer that employs ozone technology; Everest, a specialized Italian laundry that developed a new ecological washing process; and Denim Valley by Tejidos Royo, Royo's own denim division that produces both regular denims and eco-friendly denims made with recycled yarns from used garments. The company has shown commitment to environmental issues for a long time and has gotten recognition for doing so. In 2012 it received the Oeko-Tex Standard 100 certification and earned the Oeko-Tex Association's 'Eco Sustainable Company'

designation. In September 2013 it was also granted with the Recycled Content Certification from SCS Global Service, a global leader in third-party environmental and sustainability certification. Royo's 7708 Crudo denim cotton contains at least 18 per cent from recycled denim cotton garments plus the company is recognized to have recycled a quantity of denim comparable to about 20,000 pairs of blue jeans in 2012 alone. Tejidos Royo is also keen on developing new products. In 2012 it gave life to a new specific division, Royotec, aimed at devising new treatments, materials and special fiber mixes. "We established Royotec because we have the know-how to reach new targets, such as brands and companies looking for technically advanced duty fabrics," says Ignacio Casanova Royo, president of Tejidos Royo.

"Although Royotec will offer about 10 to 15 between denims and non-denims per season since this special apparel sector has limited employs." For S/S 2015, Royotec has developed a series of functional denims for urban mobility and active sports uses to be worn by bikers, motorbike riders, skaters, snowboarders and skiers. Tejidos Royo has a productive capacity of 20 million meters per year and sells casual fabrics and denims to international jeanswear and casualwear specialists.

ABOUT TEJIDOS ROYO

- *Founded: 1903*
- *Production capacity: 20 million meters per year*
- *Divisions: Royo, Denim Valley (founded in 2009), Royotec (founded in 2012)*
- *90 per cent of the company's products employ Lycra*



DEVELOPING NEW PRODUCTS THAT ARE TECHNICALLY ADVANCED IS A MAIN GOAL FOR TEJIDOS ROYO.



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