

IMAGES Business of Fashion™

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SHADES OF BLUE

Expanding, diversifying and experimenting denim and casualwear assortment of brands

DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

+ SPORTSWEAR INTERNATIONAL

Best in merchandise and trends from across the world.

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The recently concluded India Shopping Centre Forum held in Mumbai on 8 - 9 May 2013 discussed many aspects of retailing - starting from mall development, maintenance and infrastructure to real estate as the least understood and under-valued. It was pointed out that "modern retailing in India is only about 7 per cent compared to the U.S. where it is 85 per cent. Brazil has 25 per cent of modern retail and China is at around 20 per cent." With such state of affairs, it is only heartening to know that there are increasing number of players getting into modern retail. It is also noteworthy that the tier II and III cities are where the opportunities are being explored by many brands and retailers. As reasoned by an industry stalwart at the recently concluded forum, "Tier II markets bring with them low rentals and CAM charges and the ability to meet top lines."

The cover story in the issue reiterated the fact as many denim and casualwear brands who we spoke to echoed the same thought which is also reflected in their future plans and expansion strategies. The distributor profile indicates the relevance of local preferences and consumption pattern. Thus, it is imperative to localise according to the regional needs.

IMAGES Business of Fashion spoke to several international and home-grown brands across various regions to gauge the best performing locations in different parts of the country, multi brand retailers, fast moving product categories, price range and much more in the denim and casualwear categories.

Responding to our readers' demand for trend information on sportswear - denims & casuals - on regular basis, beginning this issue of *IMAGES Business of Fashion*, we bring a capsule for India from 'Sportswear International' presenting the best in merchandise and store design from world's leading brands and retailers.

Enjoy reading and share with us your thoughts on the issue.

Amitabh Taneja

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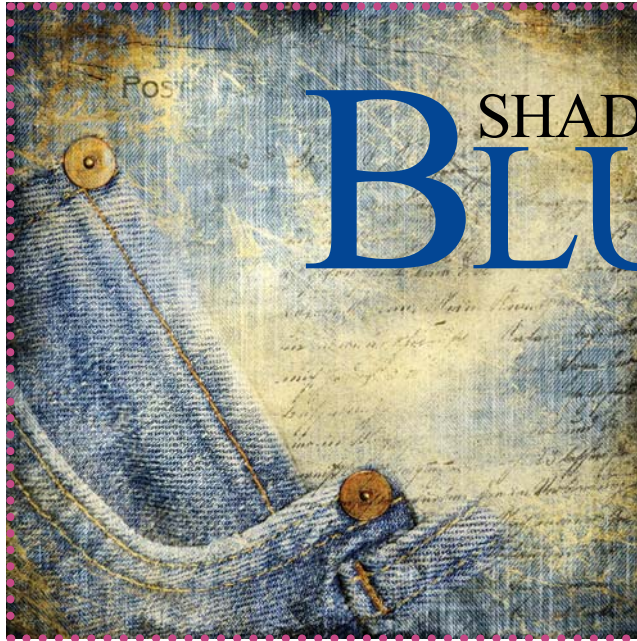
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Explaining the future plans of the e-commerce venture that primarily revolves around the innovative concept of offering nineteen flavours in retail, Gobind Singh Pahwa, MD, Shopnineteen.com, shares all that there is to his portal and how in a year's time it has done so well for itself.

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Distribution is integral to the apparel business. Avinash Chhapolia, Director, GRC Garments Pvt. Ltd., talks about the various aspects of distribution business in the Eastern region.



SHADES OF BLUE

Denim industry is at an all-time high. This is one category that has been consistently on the must-have list of the consumer and thus has always captured the interest of the brands and retailers alike. In this issue, we update our readers with the evolving denim and casualwear industry and the upcoming and growing brands from the two categories.

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EVOLUTION OF INDIAN FASHION

KAMAL KUSHLANI, DIRECTOR, CREDO BRANDS MARKETING TALKS ABOUT THE CHANGING NEEDS OF THE NEW AGE FASHION-CONSCIOUS CONSUMER WHO HAS LED TO THE EVOLUTION OF THE INDIAN FASHION INDUSTRY.

●●●●● A durable cotton fabric was created in Nimes and sold as Serge de Nimes (soon shortened to denim) in France. Later adopted in America in the late 18th century, the fabric was used as workmen's clothing and was associated with cowboys and railroad workers. Sometime in the twentieth century, affluent Europeans and Americans adopted the rugged denim jeans and denims as fashionwear were universally adopted.

The fifties and sixties were a period determined by understated fashion and, thereafter, the world gradually shifted out of the post-war austerity to an age of affluence. The world has also seen a major shift in people's incomes (especially post 1950) and fashion has ceased being the prerogative of the super wealthy or elite classes. In this democratisation of fashion, the humble denim has taken centre stage and has been leading the world fashion movement.

The late sixties and seventies saw the rise of a new generation, which was not scarred by war and wanted to be rid of imperialism, nuclear power, and caste and class prejudices. Music and fashion sensibilities changed and cultural rebellion was in the air. anti-Vietnam war protests, long hair, rock and roll music bordering on hard rock, bell-bottoms, bright colours, big feminine collars and smoking pot characterised the flower power generation. This was also the generation that took to denim jeans as its fashion statement.

Denims at this time were available as rigid products, which the wearer converted into creased, wrinkled, faded, and distressed personally by use and design. All this rebellion and extreme fashion became toned down in the eighties as this generation entered jobs and middle age. Denims, however, retained their appeal (even if loud floral shirts made an exit) and appeared as off-the-shelf creations with a washed, faded look.

Formalwear and drab officewear shifted to smart casuals and then to fashion and casualwear with the liberalisation of office cultures. This has been helped along by the rise of new industries, especially the IT revolution, which were run by a much younger lot vis à vis traditional manufacturing industries. The rugged denims metamorphosed into the current world fashion of washed, distressed, embellished and even coloured denims.

SHADES OF BLUE

DENIM INDUSTRY IS AT AN ALL-TIME HIGH. THIS IS ONE CATEGORY THAT HAS BEEN CONSISTENTLY ON THE MUST-HAVE LIST OF THE CONSUMER AND THUS HAS ALWAYS CAPTURED THE INTEREST OF THE BRANDS AND RETAILERS ALIKE. IN THIS ISSUE, WE UPDATE OUR READERS ABOUT THE EVOLVING DENIM AND CASUALWEAR INDUSTRY AND THE UPCOMING AND GROWING BRANDS FROM THE TWO CATEGORIES.

BY AMIT GUGNANI, SENIOR VICE PRESIDENT, FASHION, TECHNOPAK

The Indian apparel market has demonstrated impressive growth despite the country's economic slowdown. With an annual growth rate of 9 per cent, the apparel market is expected to reach a value of ₹3,21,800 crore or US \$59 billion by 2017, from the existing ₹2,07,400 crore or US \$38 billion mark as of 2012. The most interesting phenomena in the Indian apparel market is the growth recorded in organised retail, characterised by the entry of many national and international players, the emergence of e-commerce as a retail channel, and the growing acceptance of casualwear across all age groups and geographic locations.

Casualwear: A high growth category

Casualwear is emerging as a promising category within the Indian apparel market. This category includes casual shirts, casual trousers, T-shirts, denims, casual skirts, shorts, tops, et cetera. The high proportion of youth in India's demography, the increasing levels of discretionary spending, the acceptance of casual dressing at workplaces,


and the growing demand for comfort apparel are key growth drivers for the casualwear market in India. Contemporary fashion in India is also being driven by the rapid penetration of electronic media across urban, semi-urban, and rural areas. The aspirational Indian consumer no longer views clothing as a basic necessity. For them, fashion is a means of self-expression, of building an identity and of communicating their personality. Casualwear, with its trendy look and comfort characteristics, is addressing the change in consumer dynamics.

The casualwear category is expected to grow at a double-digit rate, which may be much higher than the 9 per cent annual growth rate registered by Indian apparel. Within the menswear category, casual clothing categories such as denim, T-shirts and activewear are the fastest growing ones with annual growth rates of 16 per cent, 12 per cent and 14 per cent respectively. Casualwear is the most promising category within womenswear as well. Women's denim is growing at an annual rate of 17 per cent, while woven tops and T-shirts along with casual trousers and skirts are burgeoning at 11 per cent each.



INTERNATIONAL MIDAS TOUCH

BY RAJEEV KUMAR

 American denim brands have midas touch in India. The rise of denims as a global phenomenon is closely associated with “Americanisation” due to its “Made in America” tag that has dominated most of the twentieth century. However by the 1980s, denim had become the proxy of contemporary fashion transforming itself from cowboys to catwalks. *IMAGES Business of Fashion* traces the roots of blue jeans and tries to understand whether the American connection still works for the big three of American denim in attracting Indian customers and the relevance of core denim brands as compared to modern lifestyle brands.

The rich heritage

America has been the epitome of innovation for the last several decades and when it comes to denims, the country has been the inventor of ‘blue jeans’, as it was commonly known. Denim, which started out as a workmenwear due to its durability and tough texture, has transformed into a global phenomenon dominating the world of fashion. It has been a staple garment donning every wardrobe around the world.

Today jeans have become a very popular form of casual dress around the world and they are readily available in different styles and colours. However, the ‘blue jeans’ are typically associated as being an integral part of American culture and America has produced three historic denim brands – Levi’s, Lee and Wrangler, also known as the Big Three of denim. According to Lifestyle Monitor Survey 2012, a research done by cotton research firm Cotton Incorporated, every seven out of 10 American consumers love or enjoy wearing jeans and on an average they own about seven pair of denim jeans.

FOR THE WOMAN OF TODAY

RETAILING FROM BOTH METROS AND SMALL CITIES, 109°F HAS BEEN GOING STRONG AT A STEADY PACE. SANJHI AGARWAL SPOKE WITH RADHESH KAGZI, PRESIDENT, 109°F, TO FIND OUT ABOUT THE BRAND'S FUTURE PLANS AND GET OTHER INSIGHTS.

Give us a brief introduction of, and background to, the brand 109°F. What is the prime focus of 109°F?

Radhesh Kagzi (RK): 109°F is a fashion brand for women. It offers classy collections of trendy women's western casuals. Rather than imposing a predetermined style, it helps women create a unique style of their own. The range offers a chic look using bold, confident lines and body forms. The collections are seasonal and contemporary, which infuse versatility, and the cuts are complimentary to every body type. Our products are designed after careful research of fashion and colour trend forecasts for the upcoming season. The colour palette, cuts and styles, fabrics, trims and accessories are all taken into consideration during the research process.

When did it come into form and what was the driving force behind it?

RK: The Creative Group has been among the leading apparel exporters of our country since 1974. We have been exporting to several leading brands all over the world. We foresaw the potential of retail in India and launched the brand here.

Please give us an insight into your retail presence.

RK: We have a multi-channel business model. We have our exclusive brand outlets (EBOs) across India and overseas. We are also present in national chain stores such as Shoppers Stop, Lifestyle, Pantaloons, Central, Westside and Reliance Trends. 109°F is also available at the regional LFOs, such as Chunmun, Rituwear Big Life, Kapsons, Stanmax and Sohum Emporia. We even export to the U.K. and U.S.A. besides other countries like Italy, France and Denmark, Abu Dhabi, Ajman, Al Ain, Qatar (Doha), Saudi Arabia (Jeddah), Kuwait, Nepal (Kathmandu), Sri Lanka, Ecuador and Iraq.

Who are your target customers? What is in offing for them in near future?

RK: A 109°F woman is a cosmopolitan woman from the upper or upper middle class, with a bold and carefree outlook. She is one who is well aware of international trends. Typically, a 109°F customer will belong to the age group of 22 to 35 years. She wants to look fresh, beautiful and is very urbane. The 109°F woman has an active social life and is confident when it comes to style. The latest collections in offing for our customers are Fresh blooms (a fresh, floral, summer collection) and the Bold Solids collection. We will launch our Autumn-Winter 2013 collection in August.



THE RANGE AT 109°F OFFERS A CHIC LOOK USING BOLD, CONFIDENT LINES AND BODY FORMS.



Editor's
Pick

TRENDS, THEMES, TEMPERAMENTS

WHAT HAPPENS WHEN TRENDS DON'T REACH THE STREET? OR WHEN THEY DO?

➤ It doesn't hurt to question your work from time to time, especially appropriate on the occasion of our jubilee. A basic question which often occurs to me: Is anyone actually interested in what we write? Or more precisely: Do the trends we forecast here have any sort of life expectancy? Do they ever reach the end of the food chain? Or does this all run parallel to reality?

As a fashion editor you might think so when you hear commentary such as "I can't use these shoots—all too far away. That will never sell. No one can wear it." It doesn't have to be, because that's not what it's about.

There are trends, no question, which are more suitable for the masses as others. (All-over prints are rarely seen in the supermarkets I go to, dip-dye skinny jeans don't flatter every figure and if anyone appeared in the small town I come from with a seaman's cap and a bushy beard, he'd probably get beaten up). Some looks which are worn lovingly by fashion editors, insiders in the trade, designers and buyers never find their way onto the shelves. If they do, they rot there. As a rep during the last Bread & Butter said to me: "As an outsider, you might think on entering the trade fair halls that what the people here are wearing must be the present bestsellers—but hardly any of it would work commercially." (The brand, known for its rustic and authentic men's shoes, which he mentioned, need not be mentioned here). Similarly, the tenor of a blog which a retailer recently started (successful, with several branches, high-end sportswear and denim genre, medium-sized town), to talk about the trade and how crazy it can be, when repeatedly in fashion magazines looks are introduced that nobody can wear and are impossible for everyday wear, and how she would rather stay with her safe and comfortable assortment with training pants and sneakers. (Sure that's "in" at the moment, but there is still a little more than that out there).

Right, you could now protest: she knows all her customers and knows from experience what is in demand or not. Why should she, especially in these difficult times, deliberately walk on



WOULD YOUR CUSTOMERS WEAR IT? SAINT LAURENT LOOK FOR A/W 2013-14
(PHOTO: MARTIN VEIT)

to thin ice and buy in brands and fashions that are risky? And isn't the criticism justified of unworldly, naive journalists and designers who seriously suggest walking across the heath in winter with naked legs and high-heels or wearing rainbow-colored suits?

By the way, you can't steal away from the responsibility here, especially if you belong to those who produce the stuff that we're talking about. We from the media can be charged, at most, for what we make of a trend, how we select, how we interpret, place in the foreground or sweep under the carpet. All that admittedly is not a little and exactly why we should watch that our output pass the everyday-test. Does the retailer accept and need the suggestions and, in the end, does the consumer? So far, I would agree. But, as always, in life it's rather more complicated. That is why I find the attitude of the retailer mentioned above dangerous—and sad. For who, please, if not the multibrand retailer, should be absolutely bursting with fashion-consciousness?!! ➤



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