

# IMAGES Business of Fashion™

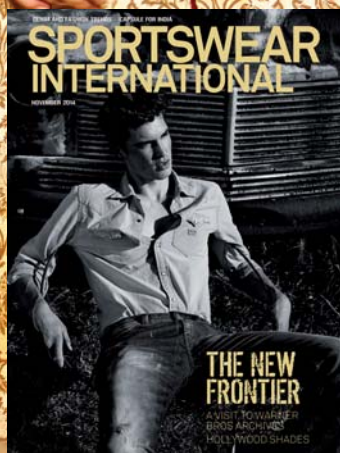
NOVEMBER 2014 | VOL. XV | NO. 11 | ₹100

## THE ETHNICWEAR MARKET IN INDIA

Prominent Ethnicwear Brands in India

*Manyavar*: Rooted in Tradition Growing in Style

*Neeta Lulla*: Czarina of Indian Ethnicwear



BEST IN MERCHANDISE AND TRENDS FROM ACROSS THE WORLD



Editor-In-Chief: **Amitabh Taneja**  
Editorial Director: **R S Roy**  
Publisher: **S P Taneja**

Head, Knowledge & Editorial Alliances: **Rajan Varma**

Bureau Chief (Mumbai) & Associate Editor: **Gurbir Singh Gulati**

Sr. Correspondents: **Rosy Ngaihte Sharma, Vandana**

Correspondent: **Roshna Chandran**

Contributing Editors: **Zainab S. Kazi**  
**Namita Bhagat**

#### Creatives

Art Director: **Pawan Kumar Verma**

Sr. Layout Designer: **Prakash Jha**

Sr. Photographer: **Vipin Kardam**

#### Marketing & Consumer Connect

General Manager – Consumer Connect: **Hemant Wadhawan**

Sr. Manager – Database: **Anchal Agarwal**

Asst. Mgr. – Subscriptions: **Kiran Rawat**

Sr. Executive – Database: **Neeraj Kumar Singh**

#### Circulation

Assoc. VP – Circulation: **Anil Nagar**

#### Production

General Manager: **Manish Kadam**

Sr. Executive: **Ramesh Gupta**

#### Support

General Manager – Administration: **Rajeev Mehndru**

#### Advertising

##### BUSINESS HEAD

**Santosh Menezes**, Assoc. Vice President

santoshmenezes@imagesgroup.in

Mob.: +91 9820371767

DELHI	<b>Jayant Arora</b> , Sr. Manager jayantarora@imagesgroup.in, Mob.: +91 9818626724
MUMBAI	<b>Waseem Ahmad</b> , Vice President & Branch Head waseemahmad@imagesgroup.in, Mob.: +91 9833628852 <b>Radhika George</b> , Manager radhikageorge@imagesgroup.in, Mob.: +91 9833446767
KOLKATA	<b>Piyali Oberoi</b> , Assoc. Vice President & Branch Head piyalioberoi@imagesgroup.in, Mob.: +91 9831171388 <b>Avishek Mukherjee</b> , Manager avishek mukherjee@imagesgroup.in, Mob.: +91 9830260612
BENGALURU	<b>Suvir Jaggi</b> , Assoc. Vice President & Branch Head suvirjaggi@imagesgroup.in, Mob.: +91 9611127470 <b>Smriti Bhagat</b> , Manager smritibhagat@imagesgroup.in, Mob.: +91 9686902343
AHMEDABAD	<b>Pankaj Vyas</b> , Manager pankajvyas@imagesgroup.in, Mob.: +91 9909977088
LUDHIANA	<b>Hemant Gupta</b> , Associate hemantgupta77@gmail.com, Mob.: +91 9814019745

##### TEXTILES, TRIMMINGS & EMBELLISHMENTS

**Jitender Sharma**, Asst. V.P.  
jitendersharma@imagesgroup.in Mob.: +91 9958729411  
**Adarsh Verma**, Sr. Manager  
adarshverma@imagesgroup.in Mob.: +91 9999251621  
**Shailesh Patel**, Asst. Manager  
shaileshpatel@imagesgroup.in Mob.: +91 9892617681

##### IMAGES MULTIMEDIA PVT. LTD. (CIN: - U22122DL2003PTC120097)

**REGISTERED OFFICE:** S 21, Okhla Industrial Area, Phase II, New Delhi 110020  
Ph: +91-11-40525000, Fax: +91-11-40525001 Email: info@imagesgroup.in,  
Website: www.imagesgroup.in

**MUMBAI:** 1st Floor, Panchal Iron Works, Plot No. 111 / 3, Marol Co-Operative Industrial Estate, Marol, Andheri (East), Mumbai 400059  
Ph: +91-22- 28508070 / 71, Fax: +91-22-28508072

**BENGALURU:** 523, 7th Cross, 10th Main, (Jeevanbhima Nagar Main Road), HAL 3rd Stage, Bengaluru 560 075  
Ph: +91-80-41255172/41750595/96, Fax: +91-80-41255182

**KOLKATA:** 30-B, Anil Roy Road, Ground Floor, Kolkata 700 029  
Ph: +91-33-40080480, Fax: +91-33-40080440

Dear Readers,

Decorated streets, jam packed markets, and the waft of winter. Yes, it is the wedding season in India. With no second opinion this is the most exciting time of the year when people splurge and shop like never before. With several weddings in the row and week long celebrations at incredible destinations, big fat Indian weddings become much-talked about affairs. And, all this gives a big kick to the Indian ethnicwear market, which was already burgeoning off fashion statements in movies and daily soaps. Hence, the theme for Images Business of Fashion November 2014 issue is Indian Ethnicwear.

In this issue we bring to you an overview of Indian ethnicwear apparel market. Led by a research on women's ethnicwear by Technopak, the cover story of this issue discusses the biggest challenges being faced by the ethnicwear industry. It also highlights the strengths and opportunities of this category. The cover story also covers the potential of Tier II & III cities in ethnicwear segment.

The Infashion section boasts design and trend stories inspired by floral motifs and folk-inspired fashion. A special feature on poly viscose fabric is also a part of this section. PV fabrics are chasing a growth of nine to 10 percent but the fabric is unable to score the first place on the users' priority list. The feature shares insights on what major players are doing to reduce the gap between cotton and PV fabrics.

This time Images BoF monthly features two iconic fashion designers, Neeta Lulla and Rahul Mishra, who share their thought on the Indian ethnicwear category. Bollywood designer, Neeta Lulla defines the Indian ethnicwear category, shares her views on modern retail that promotes Indian ethnicwear, and role of ethnicwear in fashion consumption in India. On the other side, Woolmark prize winner Rahul Mishra divulges that to make it big, he needs to create clothes which have international appeal but remain rooted to Indian culture. Further the November 2014 issue is packed with Indian ethnicwear powerhouse brands and retailers.

Hope you like reading all about the Indian ethnicwear in this issue.



Amitabh Taneja

All material printed in this publication is the sole property of Images Multimedia Pvt. Ltd. All printed matter contained in the magazine is based on the information provided by the writers/authors. The views, ideas, comments and opinions expressed are solely of the writers/authors or those featured in the articles and the Editor and Printer & Publisher do not necessarily subscribe to the same.

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

In relation to any advertisements appearing in this publication, readers are recommended to make appropriate enquiries before entering into any commitments. Images Multimedia Pvt. Ltd. does not vouch for any claims made by the advertisers of products and services. The Printer, Publisher and Editor-in-Chief of the publication shall not be held for any consequences in the event of such claims not being honored by the advertisers.

Copyright Images Multimedia Pvt. Ltd. All rights reserved. Reproduction in any manner is prohibited. All disputes are subject to the jurisdiction of competent courts and forums in Delhi/New Delhi only. Images Business of Fashion does not accept responsibility for returning unsolicited manuscripts and photographs.

For subscription related queries, email to: [subscription@imagesgroup.in](mailto:subscription@imagesgroup.in)  
For feedback/editorial queries, email to: [letter2editor@imagesgroup.in](mailto:letter2editor@imagesgroup.in)



98



50



102



106



112



128

## EVERY MONTH

- 23 Editorial
- 30 Letters to the editor
- 48 Outlets
- 50 Seasons Offerings



COVER COURTESY: MANYAVAR

## BRAND EXCELLENCE

- 98 **Rooted in Tradition Growing in Style**  
Manyavar, the most valued men's clothing brand with 355 stores plans to reach 600 stores by 2016

## RETAIL EXCELLENCE

- 102 **In Tune with Trends & Technology**  
Sameer Manglani, COO, Meena Bazaar discusses the brand's retail presence, marketing and promotional strategies

## OPINION

- 106 **Czarina of Indian Ethnicwear**  
Neeta Lulla, Bollywood's renowned fashion designer shares her views on Indian ethnicwear category

## BRAND PROFILE

- 110 **The Quintessential Indianwear**  
Parveen Agarwal, Director, Prapti Fashions shares the journey, growth and expansion plans of the brand
- 112 **Creating Majestic Fashion**  
A feature on the magnificent journey of Kolkata-based Manish Creations
- 128 **Mickey is Back to Rule**  
Jacky Ahuja, Director, Mickey shares his future plans and growth strategy of the brand
- 136 **There is Nothing more Natural**  
Vimal Dhoka, CEO, Cotton Natural talks about the brand's latest collection and its emergence as one of the most sought after menswear brands

## MY THOUGHTS

- 116 **Survival of Handloom Beyond Subsidies**  
Arindam Saha, Associate Director, Wazir Advisors pens his thoughts on how to strengthen the handloom sector





## COVER STORY

### 54 THE ETHNICWEAR MARKET IN INDIA

The ethnicwear market is expected to grow at a CAGR of 8 percent to reach US\$ 19,600 million in 2018, share Amit Gujnani and Kanti Prakash Brahma of Technopak

### 62 RENDEZVOUS WITH ETHNICWEAR

Indian ethnicwear brands have become active in their branding and offerings thanks to the burgeoning demand for this category

### 84 PROMINENT ETHNICWEAR BRANDS IN INDIA

A snapshot on the leading ethnicwear brands in India.



118

## PERSPECTIVE

### 118 Saree: A Fashion Statement

Dr. Sanyogeitaa Chadha highlights the women's most glamorous ethnic wardrobe

## WEBWATCH

### 122 An Exclusive Purveyor of Indian Artistic Fashion

Rahul Narvekar, CEO, Indianroots.com discusses the journey, philosophy and future plans of the ethnic and designer wear online brand

## TRADEWINDS

### 124 Denim and Jeans: An Expo to Boost Denim Trade

Highlights of the second edition of denimandjeans expo held in Bangladesh

## TECHNOLOGY

### 126 Fashion Forward

Bino George, Head (Pre-Sales), Infor India shares his views on the apparel and fashion industry's need

## Q&A

### 130 Paving Fashion's Future through Innovation & Loyalty

Rajiv Nair, CEO, Celio talks about the future business plans of the brand

## PERSONALITY OF THE MONTH

### 135 Blending Dreams with Passion

A tete-e-tete with Anant Daga, CEO, W on his professional and personal life



130



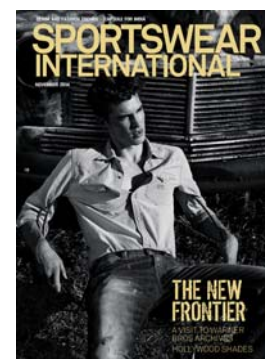
122



135



139




163

PICTURE COURTESY: GRASIM

# THE ETHNICWEAR MARKET IN INDIA

THE ETHNICWEAR MARKET OF INDIA STOOD AT US\$ 13,100 MILLION IN 2013 OUT OF WHICH THE CONTRIBUTION OF MEN'S ETHNICWEAR IS ONLY 3 PERCENT, CONTRIBUTION OF KID'S ETHNICWEAR IS 9 PERCENT AND THAT OF WOMEN'S ETHNICWEAR IS 88 PERCENT. THE ETHNICWEAR MARKET IS EXPECTED TO GROW AT A CAGR OF 8 PERCENT TO REACH US\$ 19,600 MILLION IN 2018. **AMIT GUGNANI**, SVP - FASHION (TEXTILE & APPAREL) AND **KANTI PRAKASH BRAHMA**, PRINCIPAL CONSULTANT - FASHION, **TECHNOPAK** SHARE MORE INSIGHT ON THE ETHNICWEAR MARKET.

 The apparel market of India was valued at US\$ 41 billion in 2013, and is projected to grow at 9 percent CAGR for the next decade. In this huge market, the menswear category contributes 42 percent, womenswear 38 percent and kidswear 20 percent.

The ethnicwear market of India stood at US\$ 13,100 million in 2013, out of which the contribution of men's ethnicwear has been a mere three percent; the contribution of kids ethnicwear has been nine percent; and that of women's ethnicwear a whopping 88 percent. This market as a whole is expected to grow at a CAGR of eight percent to reach US\$ 19,600 million by 2018.

In this segment, the market has largely been driven by women's ethnicwear as it comprises 74 percent of the overall women's apparel market with a market size of US\$ 11,500 million. It is a large part of women's wardrobe and will continue to grow at a promising rate of eight percent.

Unlike in the past, when ethnicwear was restricted to being an apparel of choice, it has transitioned into a fashion essential for the college going girl as well as for the elite socialite. India's fashion legacy lies in its vibrant colours and traditionally available artworks. Handwork and handprint techniques, Rajasthani prints, Kashmiri work, Kutch work and mirror work are some popular traditional methods employed to existing fashion ranges. These style mixes present countless choices of dresses that reveal the background of a particular place. This explains why, in spite of the growing popularity of casuals, traditional ethnicwear continues to





# THE QUINTESSENTIAL INDIANWEAR

**PRAVEEN AGARWAL**, DIRECTOR, PRAPTI FASHIONS SHARES THE JOURNEY AND GROWTH AND EXPANSION PLANS OF THE BRAND WITH IMAGES BUSINESS OF FASHION.

BY PIASI SINHA

Way back in 1990, the residents of Kolkata queued up in front of a boutique that offered stunning collections of ethnicwear for men and women. It was the swanky boutique, located in the prime area of Gariahat, which became a landmark destination for ethnicwear over the years. Spearheaded by Praveen Agarwal, the boutique evolved into an ethnicwear brand in 2010. Between in 2010 and 2014, the brand saw a meteoric rise in the ethnicwear segment and expanded its network to 32 stores and clocked a turnover of ₹80 crore in FY 2013-14 from a humble ₹5 crore.

“When Prapti opened its store in Gariahat, the organised retail was unexplored and there was no one in the category that specialised in ethnicwear retailing. We were the only retailer that catered to this segment, both for men’s and womenswear. Hence, we received phenomenal response. However, until then we did not think of exploring the category further through organised retail. We started only in 2010 and it has seen exponential growth since then,” says Praveen Agarwal, director, Prapti Fashions.



All the way through its journey from 1990-2010, Prapti redefined the concept of ethnicwear retailing. It was through its craftsmanship, design and quality that Prapti earned a loyal customer base not only in Kolkata but also in other parts of eastern India. In spite of being a one-store retailer, Prapti established itself as a brand in ethnicwear. “In fact, it was such a landmark destination that even the first Pantaloon store in Gariahat opened bang opposite to Prapti store,” informs Agarwal. Prapti Fashions was incorporated in 1985 and since then it has been one of the leading names among ethnicwear fashion brands in India. Currently, the fashionable traditional attire offered by Prapti is retailed across the country by company-owned outlets. In the



WELCOME TO THE  
IN FASHION 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



148

## DESIGN

### GARDEN OF FIVE SENSES

Florals are zeitgeists with pastels ruling the roost and petals donning a brand new avatar with applique and 3D motifs



156

## FOCUS

### GOING SYNTHETIC

Despite chasing a 9 percent growth rate poly viscose fabric is not the first preference of consumers in major textile markets. Lets see why?



152

## DESIGNER

### MOST OF THE CRAFTS IN INDIA ARE COLOURLESS

Celebrated designer Rahul Mishra shares his passion for wool and other fibres

142

## DESIGN

### FOLK TALES

Global trends for the coming season celebrate magnificent fairy and folk tales motives



160

## RAMP

### PONDICHERRY FASHION WEEK

Highlights of the show  
from Pondicherry fashion  
week





# FOLK TALES

FOR THOSE THAT HAVE ALWAYS BEEN CHARMED BY GULLIVER'S TRAVELS OR THE STORY OF POCAHONTAS AND OTHER FOREVERLASTING TALES THAT MAKE CHILDHOOD SO VIVID, WINTER 2014 OFFERS A CHANCE TO RELIVE YOUR GROWING UP IMAGINATIONS, FASHIONABLY. GLOBAL TRENDS FOR THE COMING SEASON CELEBRATE MAGNIFICENT FAIRY AND FOLK TALE MOTIVES JOINT WITH MINIMALISTIC AND AT TIMES EVEN MONOCHROME LOOKS. WHO WOULD HAVE THOUGHT THAT LITTLE RED RIDING HOOD WOULD END UP BEING A TREND SETTER WITH HER RED HOODED CAPE? BY AARTI KAPUR SINGH

From Dolce & Gabbana's forest tale, Alexander McQueen's nod to Game of Thrones, Fendi's take on Little Red Riding Hood and Valentino's sense of ethereal enchantment, designers looked to a whimsical and imaginative world for their inspiration this season. Beautiful embroideries, ethnic prints, rich earthy tones and a gorgeous play on texture are sure to turn this trend into an irresistible movement. This fall becomes all about mixing traditional motifs with modern silhouettes, for an aesthetic appearing to be carved out straight from the pages of a fairy tale.

Folk fashion was actually popular in the 60s as well. Yves Saint Laurent was the first who used folk styles for his collection and today this is one of the most popular trends of new season. Folk fashion doesn't stand for newness,

for innovation, as its beginnings entwine with history, with world-wide traditions and customs that bear their own kind of timeless appeal. But in constantly being reimagined, the folk aesthetic does get a contemporary makeover. For fall 2014, folk fashion merges with the glamour of the '70s, in building a style defined by effortless elegance, and nuanced with plenty of fairy-tale inspired motifs and silhouettes.

Dolce & Gabbana had images of walking knights the models were turned into, as well as flashes from 'Beauty and Beast'. Squirrels, floral prints with fairy tale motives and the extremely charming colour palette really take us to the magical world of our childhood.

Rodarte's show was marked with the curious and creative colour solutions thus putting the colorful prints and patterns



DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

# SPORTSWEAR<sup>®</sup> INTERNATIONAL

## FACTS | BRANDS

### 166 More than a Bomber Jacket

Alpha industries, an European offshoot is taking the fashion world by storm with today's version of it's earlier military jackets.



166



167

## FOCUS | REPORT

### 167 3D Printing: The Third Industrial Revolution

The people in the revolutionary technology of 3D printing see exactly this in the future - every household which print out shoes, pants and bags for you.

## FOCUS | TALK

### 168 Election

The industry insiders share their (fashion) film favorites

## FASHION | LABELS

### 169 Craftsmen

The newcomer labels are not following fashion trends but instead focus on elaborate fabrics and details



169

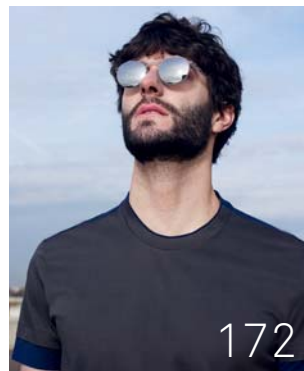


170

## FASHION | TEENWEAR

### 170 The Main Thing is Act Like an Adult

Chinos, shirt, a short neat haircut - fashion - conscious teenage boys between 11 and 17 know exactly what they are after



172



174

## FASHION | ACCESSORIES

### 172 Empire of the Sun

No accessory is as essential in the everyday life of Hollywood stars as the right pair of shades

## FOCUS | COLLECTORS

### 174 Treasure Island

No journalist has ever set foot into the Warner Bros. archive. Until now-because we have!

## SHOOTS

### 176 The New Frontier



176

Credits for India Capsule

**SPORTSWEAR<sup>®</sup>  
INTERNATIONAL**

Editor-in-Chief: **Sabine Kühnl**

Creative Director: **Gian Luca Fracassi**

Senior Editors: **Maria Cristina Pavarini/Christopher Blomquist**

Fashion Editor: **Juliette Nguyen**

Managing Editor: **Wolfgang Lutterbach**



# MORE THAN A BOMBER JACKET

ALPHA INDUSTRIES HAS STOOD FOR JACKET EXPERTISE FOR OVER 50 YEARS. NOW, THE EUROPEAN OFFSHOOT IS TAKING THE FASHION WORLD BY STORM WITH TODAY'S VERSION OF ITS EARLIER MILITARY JACKETS. BY MARIA HUNSTIG



> The newly opened headquarters of Alpha Industries GmbH & Co. KG stands out in the crowd. The highly modern and spacious new building is located in quiet, parklike Neu-Isenburg just a few minutes away from the Frankfurt/Main skyline. This is where the team gathered around sales and marketing director Hubertus Junge runs all of the European operations of

the label, well-known primarily for its iconic orange-lined American bomber jackets. Four and a half years ago the German Alpha subsidiary acquired the license to market the locally designed collection not only in the DACH region but all across Europe. Since then it has worked continuously on the distribution network, on building up the brand and on the collection itself.

Anyone entering the showroom located in the basement will find much more than classic MA-1 bomber jackets—even though that model has been substantially responsible for the fact that in recent years everyone has been talking about Alpha Industries and it has graced the bods of such opinion leaders as Kanye West, Pharrell Williams and Cara Delevingne. Bomber jackets are part of a larger trend toward authenticity and brands with a “heritage”—at the moment all of that is playing to Alpha’s strong suit. But Junge knows that you can’t rely too much on a single successful product: “In the past we placed too

much of a focus on our core styles, but for some time now we have been continually expanding our range in all the product categories and are trying to incorporate emerging trends into the collection better. Currently, for example, the fashion trajectory of the bomber jacket has established itself with slender silhouettes and new materials in Scandinavia and southern Europe. At the same time we feel there is still a lot of potential for it in central Europe,” he explains. As a result, the current fall/winter 2014 collection contains many variants on the MA-1: more slender models, reversible jackets, down-filled, wool or soft shell, with a hood, pilot patches or camouflage prints. “We’ve also worked on the other classics, for instance the M-65 field coat, and have created a wide range of variants,” he adds. Although the trend-conscious customer prefers the original model with loose sleeves or the quilted jacket liner, which can be worn on its own, the version in the more slender “vintage fit” with less visible branding is also turning up in stock at menswear stores. Over the years Alpha Industries has come to appreciate the tastes of its customers—and they are as varied as the distribution network which extends from military shops to designer boutiques. “We are continuing to work with army shops because that’s where we come from. These army shops have been customers for years and years, some managed over several generations,” he says.

“In addition, this sales mix makes it possible for us to market products at army shops as well as in the streetwear and urban fashion area in the same city, because our Alpha product range is continuously expanding and highly varied.”

To expand in fashion, Alpha will concentrate more strongly in on image-driven collaborations with other brands in the near future. A few projects are already in the pipeline. Womenswear too, which currently accounts for 20% of Alpha sales at the most, will be tackled: With tailored fits, a broader range of colors and key styles such as the fishtail parka. Alpha Industries achieves the lion’s share of its sales through its core product, jackets, supplemented by cargo pants, shirts, sweaters, tracksuits and accessories. Does Alpha intend to branch out to running its own retail outlets in the future? Junge won’t rule it out, but for now the product range must first be expanded. “At the moment with our product portfolio we are planning shop-in-shop concepts. We still have a lot to do!”



TOP: HUBERTUS JUNGE, SALES & MARKETING DIRECTOR EUROPE; BOTTOM (F.L.): BOMBER JACKET MA-1 AND FIELD JACKET M-65





May be,  
I'm Nuts...

but my  
Live-In  
Jeans are...  
just,  
just too  
comfy...  
to get  
out of!

**LIVE IN** JEANS  
CAN'T LIVE WITHOUT



URL: <http://www.facebook.com/liveinjeans> / [www.livein.in](http://www.livein.in)

**snapdeal**.com  
India's Favourite Online Mall

**rediff SHOPPING**

**ShopClues**.com

**amazon.com**

**Reliance trends**

Manufactured & Marketed By:

Federal Brands Ltd. -

A-46, Road No. 2, M.I.D.C, Andheri (East), Mumbai - 400 093

Tel: (022) 28383581 / 28383582

e-mail: [liveinjeans\\_info@federalbrands.in](mailto:liveinjeans_info@federalbrands.in)





QR CODE



QR CODE



Contact us: Seema Enterprises, 1st Floor, Status House,  
Behind Lathiya Rubber Industries, Andheri Kurla Road, Sakinaka, Andheri (East),  
Mumbai 400072. Tel: 28598162/65293849 Distributor Enquiry Solicited

 [https://www.youtube.com/channel/UCe\\_tD7W5wZT\\_cCK-czIzIbgQ/videos](https://www.youtube.com/channel/UCe_tD7W5wZT_cCK-czIzIbgQ/videos)

 <https://www.facebook.com/OKSboys>