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STRATEGY

All that a wardrobe of today's average Indian woman consists of.

EXPERT SPEAK

Key factors that help in driving loyalty in fashion retail.

Womenswear *Saga*

F A S H I O N • M A R K E T I N G • R E T A I L I N G

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The Indian fashion industry has seen tremendous growth in last few years. Today, it is poised at an interesting point with many international brands making a foray in the country, and domestic brands gearing up to face the competition that these brands bring along. Increasing purchasing power of the consumers coupled with easy accessibility to the brands, in brick-and mortar stores as well as online, has exposed people to a matrix of global styles and trends. The consumer is thus happy to make a style statement today with much ease.

With more global and domestic brands available to a larger number of women in not just metropolises but also small and big towns, women have stepped out from their cocoon to face the world with style and elegance. Womenswear today is buzzing with latest fashion trends that are being embraced with felicity by the discerning female consumers. According to Technopak Textile and Apparel Compendium 2012, the Indian textile and apparel market size was estimated to be ₹2,73,000 crores (US\$ 58 billion) in 2011 and is projected to grow at 9 per cent CAGR to ₹6,64,000 crores (US\$ 141 billion) by 2021. Menswear contributes 43 per cent of the Indian market; however, this contribution is expected to drop to 40 per cent by 2021 due to faster growth of womenswear and kidswear.

Our October issue of IMAGES Business of Fashion is dedicated to womenswear. Our team spoke to brands and retailers to get an insight of the best selling trends in the category. Read to understand your customer better and gain an insight into the average Indian woman's wardrobe.



Amitabh Taneja

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WOMENSWEAR IS GROWING AT A RAPID RATE THOUGH MENSWEAR STILL DOMINATES THE APPAREL CATEGORY. INDIAN WOMEN HAVE A MORE EVOLVED FASHION SENSE AND STYLE WITH GLOBAL EXPOSURE AND EASY ACCESSIBILITY. **IMAGES BOF** SPEAKS TO SOME BRANDS AND RETAILERS DEALING IN WOMEN'S WESTERNWEAR AND BRING FORTH SOME OF THE BESTSELLING TRENDS IN THE STORES THIS SEASON.



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Praveen Bafna, CEO, Cool Colors, reveals about his impulsive shopping sprees and taste for comfortable cottons, denims and leather accessories.



LICENSING BUSINESS HAS AN ENCOURAGING FUTURE IN INDIA BECAUSE OF THE ECONOMIC GROWTH AND THE POTENTIAL OF MODERN RETAILING IN THE COUNTRY. FAITH, CONFIDENCE AND COOPERATION ARE REQUIRED BETWEEN THE BRAND OWNER AND THE LICENSEE TO MAKE THIS BUSINESS A SUCCESS, BELIEVES

RAJEEV UPPAL, CEO OF SUNCORP EXIM INDIA PVT. LTD.

Licensing of Business

Licensing as a business has very large potential as it gives the opportunity to both licensor and licensee for introducing their products and merchandise to their respective target audience. The licensing business gives a lot of freedom to licensee as far as creation of merchandise and its placement for distribution are concerned. Pricing, however, is subject to approval from the brand owner or the licensor. This gives a lot of liberty to licensee in using the brand features and USPs and build the merchandise as per local requirements without diluting brand equity. Building this business requires a lot of patience. At the same time after the initial period of two to three years, once the brand is accepted well in terms of merchandising and distribution channel partners, the results can be much more on the positive side - both in terms of top line and bottom line.

The licensed brands add a lot of value to any retailer. For example, if a multi-brand retailer, doing business with local brands either in apparels, footwear or other accessories, adds any international brand to his product mix, it will certainly enhance the image and profile of the store in that particular market and will definitely help bring in more footfalls at that particular shop. Indirectly this will also help the retailer in improving his merchandise from local brands as he will be exposed to internationally renowned brands and this will result in keeping the retailer well informed about the trends in the market place; consequently there will be better sales and margins.





MIDDLE EAST'S LARGEST FASHION RETAILER AND PART OF THE DUBAI-BASED LANDMARK GROUP, SPLASH, OPENED ITS SEVENTH STORE IN INDIA. THE STORE SPREAD ACROSS AN AREA OF 9,000-SQ. FT., LOCATED AT THE PHOENIX MARKET CITY MALL, IS THE BEGINNING OF A NEW FORMAT OF STORE DESIGN AND UNI-BRAND CONCEPT. CEO OF SPLASH, **RAZA BEIG** TALKS ABOUT THE BRAND'S AGGRESSIVE EXPANSION PLANS IN THE COUNTRY.



Making a Splash!

Headquartered in Dubai, Splash was founded in 1993 as a single-brand shop in Sharjah and has now grown to 150 stores and 50 brand outlets across 12 countries. With its clean showcasing of merchandise and in-store design elements, the store unveiled its new Splash Uni-Brand concept across various categories and sections - Splash Youth, Splash Smart, Splash DNM, Splash Formals, Splash Accessories alongside international brands such as UCLA, Kappa, Smiley and Being Human. Splash's Fashion 365 brings together latest global trends that reflect an everyday attitude.

Bottomwear goes Trendy

STARTED IN 1997, X BLUES IS A FASHION BRAND OFFERING BOTTOMWEAR FOR WOMEN. **JAGTAR SINGH**, FOUNDER OF THE COMPANY, SPEAKS TO **IMAGES BOF** ABOUT THE BRAND AND ITS FUTURE PLANS.

Keeping the style of today's women in mind, Jagtar Singh, with years of experience in garments manufacturing and exporting, started X Blues in 1997. The endeavour of the brand, offering wide range of bottomwear, is to provide everyday clothing with a keen eye on fashion, quality and value. The vision of the brand is to tap the complete womenswear market with its product range that includes denims, capris, skirts, shorts, casual trousers and bermudas. In 2007, the entire product range of X Blues got revamped from mid-premium to more affordable, economical range along with high fashion.

Who is your target audience? Which cities or markets are your main drivers?

Jagtar Singh (JS): The target audience is women between the age group of 15 and 40 years. Cities where X Blues gets good response viz-a-viz brand recognition and sales are Ludhiana, Chandigarh, Jalandhar, Karnal, Ambala, Panipat, Yamunanagar, Amritsar, Delhi, Allahabad, Lucknow, Meerut and Varanasi.

UPDATES

Year-on-year growth: 45 per cent

Any strategy change: X Blues plans to launch high-end premium range of apparels for women.

Retail presence: We are available in more than 700 MBOs in metros as well as in tier-II and III cities.

Expansion plan: We plan to expand our brand's reach in the states of South and East India. Recently we have added Mumbai region to our portfolio.





The Leggings Story

ESTABLISHED IN 2009 BY THE SONTHALIA GROUP OF KOLKATA, TSG FASHIONS LTD. IS A LIFESTYLE BRAND, WITH LADIES LEGGINGS AS ITS SIGNATURE PRODUCT. CEO **UDAI KUMAR AGARWAL** TALKS TO **IMAGES BOF** ABOUT BUILDING A STRONG WOMEN'S LEGGINGS BRAND AND REFLECTS ON COMPANY'S FUTURE PLANS.

The desire to dish out fashion at an affordable price point led the visionary, Sudesh Kumar Sonthalia, the promoter of Kolkata-based Sonthalia Group, to launch TSG Fashions Ltd. The company claims to stock some unique products at an affordable price range without compromising on quality. TSG Fashions, with its roots lying primarily in the Indian culture and tradition, is a perfect anecdote for showcasing a fast-paced lifestyle that's a heady cocktail of cultures, trends and traditions. With a humble beginning, the brand has stuck to its core virtues and principles and has carved a unique success story out of it.

The retailer always wanted to enter into womenswear segment. "The sole motivation behind moving into womenswear category was the wide scope of launching numerous styles and designs, expertise in fabric and the desire to reach every woman customer. The volume of work in this segment is comparatively larger," says Agarwal. TSG Fashions is also planning to enter the menswear segment very soon.

Today, the brand is one of the leading manufacturers of women's leggings and has stuck to the choice of dealing mainly in this category. Their wide variety of products range from different sub categories of leggings coming in different knits and sizes to knitted ladies tops, knitted track pants, knitted men's polo – pique, cotton, spandex capri, woven bermuda and jamaicans. The retailer has a collection of leggings in both Indian

Eclectic Wardrobes



THE INDIAN APPAREL MARKET HAS UNDERGONE A TRANSFORMATIONAL PHASE OVER THE PAST FEW YEARS. WITH FACTORS SUCH AS GROWING NUMBER OF WORKING WOMEN, RISING LEVEL OF MEDIA EXPOSURE AND CHANGING FASHION TRENDS, THE WOMENSWEAR CATEGORY HAS IMMENSE GROWTH POTENTIAL.

IMAGES BOF DISCUSSES WITH THE INDUSTRY PLAYERS ABOUT WHAT THE WARDROBE OF TODAY'S AVERAGE INDIAN WOMAN CONSISTS OF.

by **Shilpa Shree**

A woman is considered exotic outside. Besides managing office work, she also runs her home. Just like she seamlessly juggles between work and home maintaining that delicate balance efficiently, she also shifts between five-yard long sari that is uniquely Indian and trousers and a shirt, which is considered a global form of dressing. On one hand, there are women who love to dress up in a sari, while on the other there are those who prefer Western formals. And of course we also have those who effortlessly alter between Indian and Western clothing.

Yes, we are talking about womenswear market in India and it's a serious business. "The Indian textile and apparel market size was estimated to be ₹2,73,000 crore (US\$ 58 billion) in 2011 and is projected to grow at 9 per cent CAGR to ₹6,64,000 crore (US\$ 141 billion) by 2021," says Technopak's Textile and Apparel Compendium 2012. According to Ankur Bisen, Vice President, Retail and Consumer Products, Technopak Advisors, "Of this, 38 per cent is made up of

Future Factories in India

SEEING A LOT OF SCOPE OF GROWTH FOR THE APPAREL BUSINESS IN INDIA, **AMIT GUGNANI**, SENIOR VICE PRESIDENT, APPAREL OPERATIONS, TECHNOPAK, FEELS THAT THE MANUFACTURING PROCESS OF APPARELS NEEDS TO BE REDEFINED AND GARMENT FACTORIES SHOULD BE DESIGNED IN A WAY THAT ENSURES SUSTAINABILITY AND RELIABILITY, THUS INCREASING PROFITABILITY.



Apparel manufacturing has seen a tremendous shift in past 8-10 years. Globally, manufacturers have always tried to shift to low-cost destinations and thus Bangladesh (which is the lowest cost country today) has witnessed a large shift. Consequently, its apparel exports have grown to about US\$18 billion. The growth in Indian apparel exports has not been an encouraging one. Apparel manufacturing in India seems to be moving away from the fundamental high volume business to more skill driven, high fashion - low volume business. This has put significant pressure on the manufacturers to redefine their process.

Traditionally, apparel factories in India have worked with long manufacturing lines and a significant amount of work-in-progress. Until a few years ago, it was assumed that higher work-in-progress translated to higher output. Today, however, with

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