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Issue No.

BUSINESS OF FASHION

August 2016

Volume XVIII // No. 8 // ₹ 100



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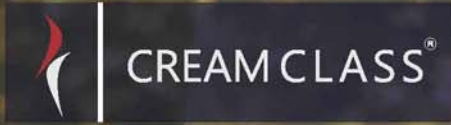


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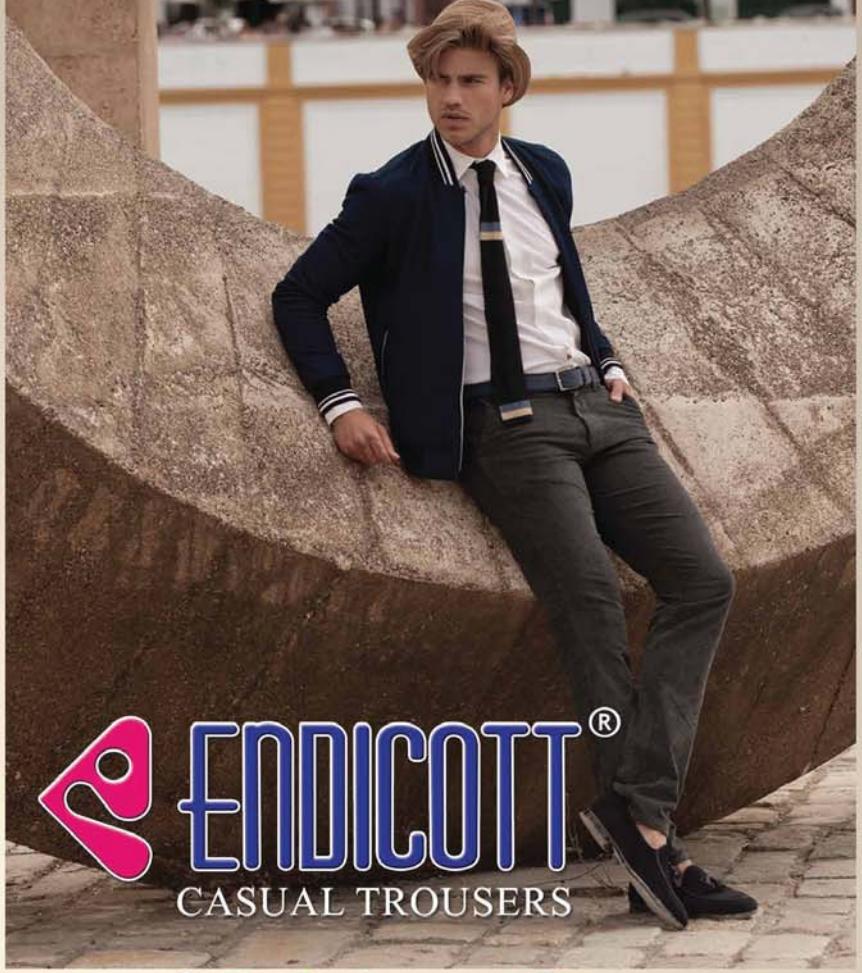
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Dear Readers,

Frustrating is the word that perfectly defined an innerwear shopping experience in India just some years ago. Forget fashion choices, even figuring out what is right for you whilst evading the ubiquitous stares was a quest. It was an absolutely fleet-footed affair; you either were hustled through the few insipid options laid out or had to satiate your needs with whatever the sales person claimed as the alternative options. And yes, shop attendants, you discovered, were ignorantly inept in guiding a customer on her size and fit queries.

For years, the industry as well as the women of the country yearned for some sort of a coup, which finally manifested in the form of e-commerce. The internet came as a saviour!!

The impetuous also compelled the traditional retail formats to revamp and stay relevant. While sizing up this issue, and especially going through the market mapping research by Technopak, I myself was completely overwhelmed by the progress of this industry over the last few years. Innerwear is now a booming sector – with new national and international entrants and established brands expanding their portfolio in an attempt to emboss a mark. The arrival of the international brands is also a welcome phenomenon, as it is increasing the importance of the category in large format multi-brand retailers and hitherto western skewed departmental stores, as well as upping the ante on the design side. At

last, sheeny straps have begun to sneak curious glimpses from racer backs and colorful thongs now gleam above svelte waistlines marking liberation from the traditional retail hegemony that treated the category just as a commodity. Even the men's segment is also no longer the realm of the blacks and whites.

Besides on-line retail, which we study as a phenomenon, there is also tremendous activity going on in several emerging segments. The featured studies on shape wear, lounge wear and sleep wear, beachwear, kids' innerwear, thermals, and socks, will take you on an odyssey of exploration on the opportunities brimming in the inner garment segment. Some segments are in fact being spawned by talented Indian designers as is evidenced by Nidhi Munim's interview in this issue. We also have featured an exclusive interview with Nick Tacchi, Global Marketing Director of the famed Italian luxury lingerie brand La Perla, as he discusses their launch plans for India.

In addition, the issue also looks into the moves of major innerwear brands like Jockey, Hanes, Triumph, Amante, Bwitch, Lux, Marks & Spencer, etc., who outlines the season's best selling trends and bet on upcoming fads.

I hope you enjoy this issue on innerwear as much as we enjoyed creating it.



Amitabh Taneja

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LETTERS TO THE EDITOR

The article, 'The Evolution of Fashion Retail in India', penned by Pankaj Renjhen of JLL India was worth reading for its information on the mushrooming of malls in India and its further expansion in tier - II, - III and smaller cities and towns.

-Priya Gill, Business Analyst, Ludhiana

The Images BoF Denim Special Issue 2016 was comprehensive – it covered everything – from bespoke denims to international brands to the prospering denim fabric industry. It mentions about kids denim wear market and the top trends in men's and women's denim fashion business. I laud the editorial team of Images BoF for putting up such an magnificent issue.

-Rajiv Reddy, Entrepreneur, Bengaluru

I really enjoyed the article, 'Super Premium Denims: The India Story', written by Dr. P R Roy and Nirav Shah. I truly agree with the article that despite the growth and visibility in this category, super premium denim is yet to achieve a significant market share in India.

-Ananya Gill, Fashion Designer, Mumbai

The latest emerging category in bottomwear is jeggings and this giving a tough competition to the denimwear range due to its flexibility and comfort. Jeggings is definitely changing the market dynamics for denim bottoms in India. The article, 'Denims go for a Jog with Jeggings', clearly pictures the where the market is moving.

-Ramnath Puri, Retailer, Cuttack

I have recently started reading Images Business of Fashion because of its section, Stores. I am interior designer and design for retail spaces and stores. I like the way your editorial team cover store stories. Please continue the good work.

-Priyadarshini, Interior Designer, Indore

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Celebration

Zola Celebrates its Silver Jubilee

As brand Zola completes 25 years in understanding and shelling out great women's fashion, Images BoF takes a look at the brand's journey.

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WOMEN

Spykar Extends into the Women's Fashion Vertical with Miss Spykar

Sanjay Vakharia, COO, Spykar Lifestyles Pvt. Ltd., shares with Images BoF, the identity that they have created for the new women's jeans and apparel range.

Pg No. 46

TRADE WINDS

CMAI's 63rd NGF Retains its Unparalleled Stature as India's Premier Trade Fair

A report on the 63rd National Garment Fair, which was held at Bombay Exhibition Centre, Mumbai.

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EIGMEF and the Bengal Pavillion At NGF

Continuing on their objective to promote garment business in East India, EIGMEF organised both their 23rd Garment Fair as well as partnered with the 63rd NGF.

Pg No. 50

HGH India 2016 Showcases the Rapidly Growing Indian Home Market

A report on HGH India, the annual trade show for home textiles, home decor, gifts and houseware, held in Mumbai from 1st to 3rd July 2016.

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LAUNCH

It's a Season of Big Launches with Lux Industries Ltd.

The innerwear giant seeks to strongly develop emerging sunrise segments in both men's and women's innerwear with aggressive launches.

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PERSPECTIVE

Men's Innerwear: Understanding the Dynamics

The men's innerwear segment is today a high activity category and has already witnessed substantial restructuring and high investments. Nischal Puri, Managing Director, Horizon Consulting India discusses.

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LEADER TALK

TOP TRENDS IN INNERWEAR

Images BoF talks to top industry leaders and takes an overview of the current and emerging trends in innerwear.

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BRAND WATCH

A PRECIOUS BLEND OF FEMININITY AND SENSUALITY

Nick Tacchi, Global Marketing Director of La Perla—the internationally famed Italian luxury lingerie and beachwear brand—shares a glimpse into the world of La Perla and also discusses launch plans for India.

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THE ESSENCE OF A WOMAN

Global luxury lingerie major Wacoal has completed one successful year of operations in India. Wacoal is now looking to fly to other Indian cities and launching its own online store.

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LEAD RESEARCH

THE INNERWEAR MARKET IN INDIA: TRENDS AND OPPORTUNITIES

Amit Gugnani, Senior Vice President - Fashion and Sakshi Chhillar, Research Associate - Fashion & Textile, Technopak, size the innerwear market in India and highlight key trends and opportunities

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NEXT WAVE

TRENDS IN SHAPE WEAR

Shape wear, which is fairly well entrenched in the western world and helps models & celebs to achieve the famous 'hour glass' figure, is now emerging in India too. Images BoF takes a look.

Pg No. 86

RISING STAR

MISSION 100 EBOS: C9 SWINGS FORWARD ON SEAMLESS TECHNOLOGY

Pranal Modani, Director, C9, bets on the vacant seamless category and offers plush, sensibly priced products within a new aspirational brand, Channel Nine, in 2015.

Pg No. 90

E-RETAIL

GETTING INTIMATE ONLINE

The online platform provides women a new environment with wider choice, flexible return policies, and more privacy, ensuring that customers buy innerwear online.

Pg No.94




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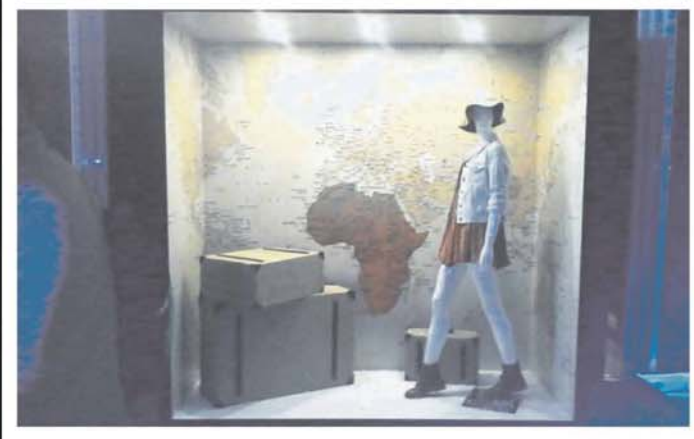
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ZOLA

CELEBRATES ITS SILVER JUBILEE

'We style, we don't simply dress', believes Zola, who has completed 25 years in understanding women's fashion and shelling out excellence. The brand name Zola evolves from a simple four letter brand name of Greek origin that means 'Earth' and stands as a testimony to their holistic and rooted approach to designing and styling its apparel range.

Kirti Shah, Founder, Pragati Fashions Pvt. Ltd., started his business and launched Zola, one of the most well known brands in women's wear, in the year 1991. Ever since then, there has been no looking back. His entrepreneurial acumen and quality products have made Zola a renowned and coveted brand in the garment industry today. The timeline below highlights his remarkable entrepreneurial journey of 25 years.

1991: Established the business at Veena Killedar Industrial Estate at Byculla in just 300 sq.ft. space.

1996: Shifted to Ram Gopal Industrial Estate, a prime market place centrally located at Dadar, Mumbai.

2007: Merged all firms into a single company, i.e., Pragati Fashions Pvt.Ltd.

2012: Shifted to a 20,000 sq.ft. space at Shree Sadguru Heights at Bhavani Shankar Road, Dadar.

2016: Extended its space vertically to cover a total area space of 35,000 sq.ft.

Celebrating his anniversary, Shah says, "In this journey of 25 years, I have not only fulfilled my dream, but also have set new benchmarks for growth. We have integrated horizontally by launching two other brands, Anora and Eka, that cater to the ethnic and fusion wear category, exclusively for women."

He further adds, "On this occasion of completing 25 years of our presence in this vibrant apparel industry, we would like to express our sincere and heartfelt thanks to all our fabric vendors, who have faith in our product design and quality, our stitching units who have mutually grown with our company while we create the best and our valued customers who showcased our creations and help us grow and improve each day. May the authenticity in creation and pleasure in service



"In this journey of 25 years, I have not only fulfilled my dream, but also have set new benchmarks for growth. We have integrated horizontally by launching two other brands, Anora and Eka, that cater to the ethnic and fusion wear category, exclusively for women."

-Kirti Shah,
Founder, Pragati Fashions Pvt. Ltd.

prevail for many more years to come to build an even bigger customer base and to create a footprint across all the countries of the world."

Products and Distribution

Zola has a wide array of products that caters to customers from different socio-economic backgrounds. The brand's USP is their 'Price Value Proposition' that has enabled them to build a loyalty with its customers. The brand offers:

Kurtis: An interesting twist to the routine salwar kameez style that has gained prominence over the last decade. With an Indo-western approach to traditional wear, the brand boasts a wide range of designer kurtis with the latest cuts, fabric mesh and kaarigari.

Gowns: Zola's collection of floor length gowns is something one would not want to miss. Carefully chosen fabrics, interwoven with stylish tailoring help the brand dress each of their customers with panache.

Tops: The brand's evergreen section. The brand features a wide range of tops that could be sported with just any kind

of bottoms. With the right selection of fabric and designs, Zola is famed for its trendy tops.

Nightwear: The latest offering from the Zola, the collection encompasses a deluxe yet comfortable range of night outfits for both women and children.

Kid's collection: Zola's kids' collection consists of ethnic kurtis, suits, western tops, formal shirts, denims and skirts.

Bottom wear: The gamut comprises denims, leggings, patiallas, plazzos, skirts, jeggings and a lot more designer products.

Retail presence

The brand has an international presence across 15 countries and its customer base has increased to 7,500 stores. Zola sells through multi brand outlets, family stores, women's wear speciality stores, small boutiques and franchisees. The brand is also present online in all leading e-commerce portals including Jabong and LimeRoad.





SPYKAR

EXTENDS INTO THE WOMEN'S FASHION VERTICAL WITH MISS SPYKAR



-Sanjay Vakharia,
Chief Operating Officer, Spykar Lifestyles Pvt. Ltd.

“The brand is for the young and fashionable women. The brand targets women right from the age of 18 years to late 20s. Miss Spykar for her targets consumers who are fashion lovers and are particular about good fit, quality and styling.”

Premium fashion brand Spykar has branched into a brand new territory in business – women's jeans and apparels. If Sanjay Vakharia, COO, Spykar Lifestyles Pvt. Ltd., is to be believed, the women's portfolio is an iconic launch for the brand and has been designed after a lot of market and consumer research. Vakharia shares with BoF, the different identity that they have created for the entire range.

By Gurbir Singh Gulati

EXCERPTS FROM THE INTERVIEW

Spykar has climbed up the ladder and launched women's denim as a complete line. Tell us about this new launch and what is the kind of research you did before getting into the women's market.

More women have accepted western wear in their daily routine across the country. The inhibitions have reduced considerably. Comfort and style wise – denims are preferred too. Spykar have the expertise – now an extension to address a larger audience, hence the decision.



FACT FILE

- Spykar, as a brand, has existed for 25 years and it believes that piggy backing around the same name would be a safer ride.
- The company has identified around 80 stores from its existing retail portfolio which would target the women's category quite closely.
- Spykar has also launched a new line of denim wear for the athleisure loving women.
- Product ratio and growth: Men's was 77 percent, grew to 88 percent; Women wear was 12 percent, Spykar wants it to become 30 percent.
- Design approach: Completely robust in-house design team, everything is created in-house with indigenous designs.
- Turnover: The company closed its turnover at ₹245 cores in March'16 and would estimate to close at around ₹325 cores, by March' 17.

RETAIL MATRIX

- 200+ Exclusive Brand Outlets (EBOs) currently and the brand plans to add 35 stores this year.
- 300 shop-in shops through Large Format Stores (LFS).
- 900+ mom and pop stores across 300 cities.
- Online presence through marketplace and the company website - spykar.com.

Since Spykar has been a denim lifestyle oriented brand, will Miss Spykar work on the similar lines or will capture a larger approach? Tell us about the product line.

The product line has been designed keeping in mind the new fits in demand. We have added an ankle length super skinny fit - Alicia, a mid rise ankle length denim fit - Adora, and a skinny boot cut- Elissa, to our popular selling existing slim fit jeans - Selena and jegging jeans - G.

Our denim portfolio highlights subtle prints and tonal jacquards. Latest wash techniques, laser printing and overlay techniques, embroideries and fraying are Spykar jeans' continuing essential highlights.

This season, especially for women's wear, we have developed joggers in light weight denims, denim shirts and tops, knit and fusion top wear, which will be the highlights of A/W'16 range.

Spykar has also launched a new line of denim wear for the athleisure loving women, which feature extremely light weight specialized denim fabrics in knit, tencel and satin, that are extremely supple, comfortable and equally stylish. They provide support and flexibility for easy movement and can be worn for a heavy workout on the yoga mat or on the dance floor on a night out. This athleisure bottom wear fit is called Athlena and comes with complimentary athleisure top wear in denim, knits and woven, available at our exclusive Spykar stores.

Tell us about your retail planning and mapping for this new venture. How many EBOs, MBOs and LFS are you going to target?

The company has identified around 80 stores from its existing retail portfolio which would target the women's category quite closely. Apart from this, the company is exploring right markets with the same set of distributors, which can capture the right frame for the brand's new product identity. The company is in a constant endeavour

to add a new store in every season and year. Online retail is also another opportunity which the company has identified to use in order to expand the retail mapping of the brand.

Going ahead, tell us about the 360 degree approach which you will be following towards marketing and branding for your brand.

- Institute marketing has been our key strategy.
- We connect to youth by ways they would love.
- Below the line has been Spykar's game.
- Marketing spends - typically a new product launch, will have 12-15 percent (BTL and Digital) depending upon what the market demands.

Tell us about your current turnover and what growth prospects have been mapped for the next financial year.

We have closed our turnover with ₹245 cores in March'16 and would estimate to close by ₹325 cores - by March' 17.





(L to R) Smriti Irani, Textile Minister, Rahul Mehta, President, CMAI and Premal Udani, Chairman, Board of Trustees, CMAI.

CMAI'S 63RD NGF

RETAINS ITS UNPARALLELED STATURE AS INDIA'S PREMIER TRADE FAIR

The Clothing Manufacturers Association of India (CMAI) organized the 63rd National Garment Fair, which was held from 13th to 15th July 2016 at Bombay Exhibition Centre, NSE Complex, Goregaon (East), Mumbai. The fair was inaugurated by Union Textile Minister Smriti Irani.

Congratulating CMAI for organizing the fair, Smriti Irani, Union Textile Minister, urged everyone to reap the benefits of the Pradhan Mantri Suraksha Bima Yojna (PMSBY), in which by paying a premium of just ₹1 per month, workers will receive insurance cover of ₹2 lakh. The PMSBY will benefit garment workers immensely, as the largest number of people work in the textile sector in the country, after agriculture, she assured.

The B2B Fair was spread over an approx. area of 5,50,000 sq. ft., covering all the halls at the Bombay Exhibition Centre, and displayed 742 stalls from 812 brands. Attended by about 40,000 retailers, agents, wholesalers and distributors from all over India, this was India's largest ever garment fair held so far, as per Rahul Mehta, President, The Clothing Manufacturers Association of India (who is also the Chairman of International Apparel Federation).

Talking about the current statistics of the domestic apparel segment, which is estimated at around ₹2.5 lakh crores, Mehta said, "Out of this, the organised market accounts for ₹74,250 crores (30 percent) whereas the unorganised market dominates with ₹1,75,750 crores (70 percent). The domestic apparel industry's size is estimated to double within next 7 years."

Among other attractions, the event also featured business networking sessions for agents and distributors, high street retailers and e-commerce companies.

The key highlight of the garment fair was the participation of first timers like the East India Garment Manufacturers and Exporters Federation (EIGMEF) and the Iranian delegation belonging to the Tehran Garment Union. While the EIGMEF showcased the Bengal Pavilion with 25 brands from East India, the 12 member Iranian delegation studied the prospects of the Indian industry.

Rahul Mehta noted that the market in Iran is estimated to be around \$16 billion, of which, 40 percent came from domestic sources and rest met through imports. India has been absent from Iran due to an extremely high import tax by the Iranian government - 55 percent on apparels and 32 percent on textiles. After the Indian delegation's visit, Iran has agreed to reduce import duty to 20 to 25 percent in 2 years. "Iran offered immense opportunities for the Indian exports with a combination of western and traditional taste," he said.

CMAI further urged the government to speed up aggressive follow-up for Free Trade Agreement (FTA) with EU and other countries in addition to keeping garments in the lowest GST (goods and services tax) list.

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EIGMEF

With an objective to promote business in East India, the Eastern India Manufacturers & Exporters Federation (EIGMEF) organised their 23rd Garment Fair in Kolkata (West Bengal) at Hotel Hindustan International. The three-day event, which was held from July 19 to 21, 2016 was inaugurated by Lalit Agarwal, CEO, V-Mart Retail, Manoj Khemka, CEO, Baazar Retail and Shiv Daswani, Partner, Little Shop Group.

The objective of the event was to promote the trade in East India and it provided a healthy platform for the buyers and sellers from the apparel industry. The event was attended by more than 2,000 visitors and over 100 exhibitors participated in the grand fair.

This time, more than 100 India's top retailers and marketing channel partners were invited as special guests at the event. The garment fair also hosted a fashion show, which was a grand success.



BENGAL PAVILLION @ NGF

EIGMEF partnered with the Cloth Manufacturers Association of India (CMAI) at the 63rd National Garment Fair 2016 to promote the apparel brands from Kolkata amongst the national audience.

For the first time in the National Garment Fair organised by CMAI, a separate Bengal Pavillion was set-up to showcase products of Kolkata based manufacturers. The Bengal Pavillion was prominently located in order to attract maximum eye-balls.

This initiative with CMAI was a huge success. EIGMEF succeeded in creating the desired exposure for the brands of Kolkata on a national platform. EIGMEF had handpicked 25 brands from the East to participate in the National Garment Fair and they acquired maximum benefit from this. Kolkata is primarily known for its kids wear, so maximum participating brands were from this segment.





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Rashmi Verma, Secretary, Union Textiles Ministry, inaugurating HGH India.

HGH INDIA 2016

SHOWCASES THE RAPIDLY GROWING INDIAN HOME MARKET

HGH India, the annual trade show for home textiles, home decor, gifts and houseware, was held in Mumbai from 1st to 3rd July 2016, where 450 leading Indian and international brands unveiled their innovations and new collections.

HGH India 2016, the fifth annual trade show for home textiles, home décor, gifts and houseware held in Mumbai, in July 2016, received an overwhelming response from the industry. The annual trade show was specially designed to connect Indian and international brands, manufacturers, exporters, importers, distributors and suppliers in this segment, to the rapidly growing Indian market for home products and gifts.

Over 450 leading Indian and international brands and manufacturers from 30 countries unveiled their innovations and new collections at the fair. Nearly 25,140 trade visitors, primarily retailers from 422 cities and towns of India visited the trade show for their annual sourcing requirements. The show witnessed a 10 percent rise in the number of visitors this year.

Rashmi Verma, Secretary Textiles, Government of India, said, "India is one of the most promising markets in the world today with its 7.5 percent GDP growth and 65 percent population below the age of 35 years. This market held a huge growth potential for manufacturers and brands for home products from across the globe as consumers here were upwardly mobile with increasing disposable incomes."

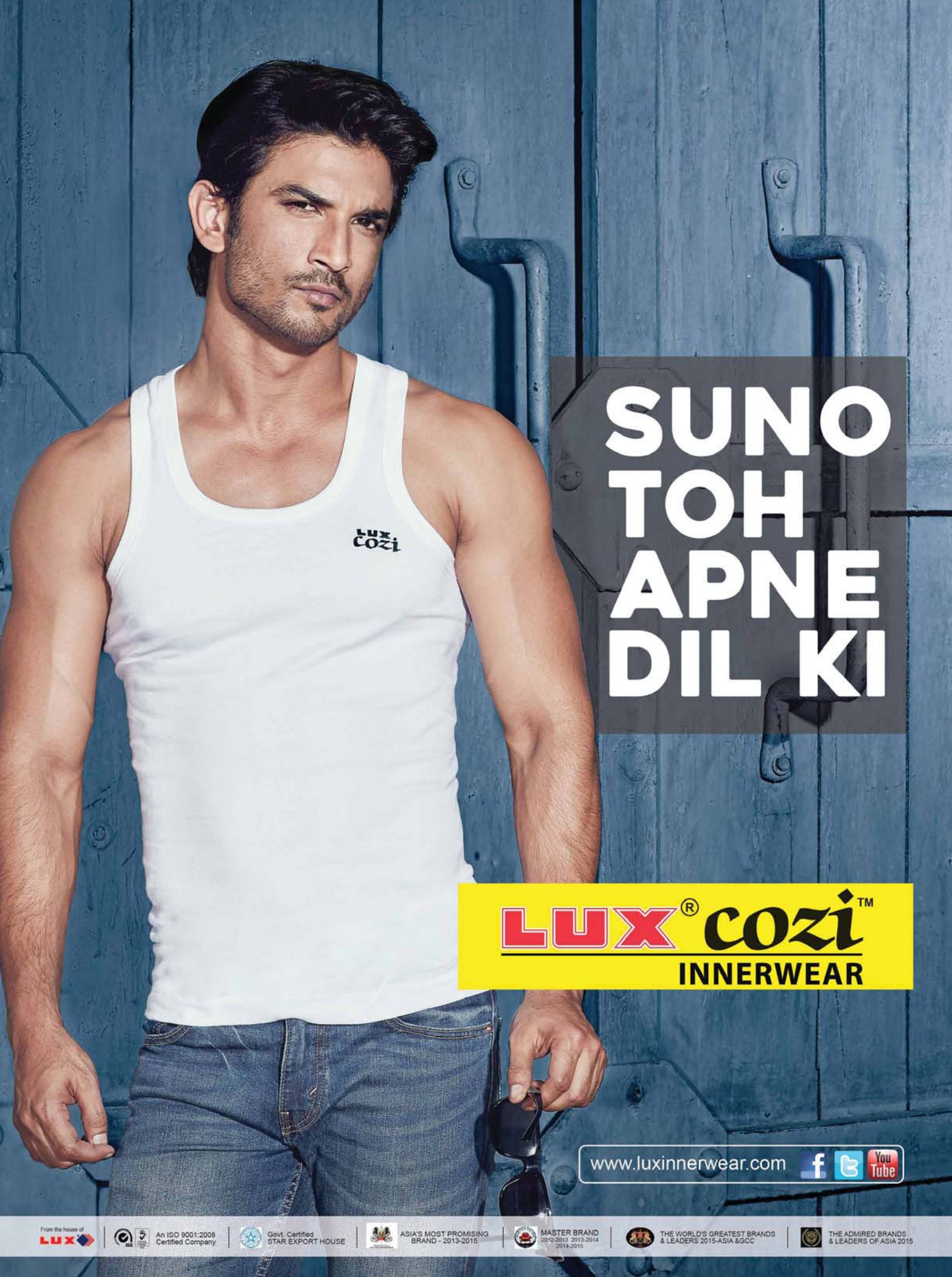
The trade show showcased the widest ever range of products and services from well-established international and Indian brands, manufacturers, importers, designers and service providers.

Many offline and online retailers, specialty stores, hypermarkets, distributors, importers, wholesalers and institutional buyers found the products and services at HGH India 2016 innovative, well-designed and of high quality standards.

Trade visitors could identify the new and upcoming colours, designs, textures, materials and styles for 2016-17 in home textiles, furnishings, home décor and houseware through 'cognizance', a stylish and well-researched trends pavilion, put up by the organisers. Many high powered brands revealed their new trade schemes, business plans and product innovations.

The show covered product categories like - bed and bath linen, furnishing fabrics, floor coverings and carpets, mattresses, table and kitchen linen, wallpapers, blinds and window dressings, home décor accessories, fragrances and spa products, handicrafts, artifacts, gifts, cookware, tableware, kitchenware and general houseware; international exhibitors from countries like China, Japan, Taiwan, Korea, Malaysia, Vietnam, Thailand, Germany, UK, France, Spain, Greece, Belgium, Italy, USA, UAE, Turkey, etc. also found HGH India a useful platform to expand their distribution network not only in the metro cities, but in the rapidly growing tier - II and - III cities and towns as well.





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Bodycare Creations Forays Strongly into Exclusive Men's Innerwear:

UNVEILS 'BODY X'

Bodycare Creations Ltd., one of the leading manufacturers and exporters of female innerwear, has recently launched its men's innerwear range over a ramp presentation at The Leela Ambience Hotel on the 1st of August 2016. Titled Body X, this exclusive range of innerwear brings together new age fabrics and international styles, all in an attempt to offer a whole new comfort to the users of the product. Targeted at today's men, the range looks at providing a wide selection of comfortable yet stylish vests, briefs and trunks. The collection combines comfort, versatility and innovative design. Bodycare seeks to deliver a personal style statement and an attractive, affordable wardrobe option. Through Body X, the brand aims at strengthening its already strong presence amongst male and female consumers.

Speaking at the launch Sanjay Dawar, Director Bodycare India, said "Some people turn to

innerwear for a comfortable and self-affirming feeling. However, Bodycare is a brand for men and women who simply seek an option that makes them feel good about themselves and their bodies. Through Body X, the brand strengthens its product portfolio and is all set to conquer the male innerwear market. We at Bodycare, are dedicated to designing garments around the individual body needs, no matter what shapes and sizes they are. We always strive to craft our products to deliver comfort, shape and style to everybody."

Keeping comfort and style in mind, the products under Body X are fashionable with the core consisting of categories such as trunks, briefs, gym vests and regular vests. Bodycare has the advantage of producing this collection under its own state-of-the-art factory with imported machines which meet all international standards for quality. Their own design team works hard on making the collection unique in terms of styling and colors. The biggest USP of Body X lies in best in class material quality with high sense of fashion and global trends. The price points have been decided after analyzing the buying pattern of consumers.

In the words of Jess C. Scott, "The human body is the best work of art". Bodycare has also recently launched its new identity. The new personality celebrates this very work of art. The brand name 'Bodycare' was coined conjoining the values of the Body and Care. While the soft, lusciousness takes care of the 'body', care is taken in the selection of fabrics and the technology used. Established in the Year 1992, Bodycare is a brand of repute in the innerwear industry. And today, the brand has a strong presence in arena of comfortable, stylish and intimate innerwear for women and men. This fashion house offers a complete range of inner and outer body wear products such as bras, panties, camisoles, shorts, bikinis, leggings, capris, briefs, etc., along with utility products such as tummy control panty, feeding bra & maternity panty. Under the guidance of Sanjay Dawar, Bodycare has aggressively grown within a decade and has become the preferred choice of millions of young men and women.



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IT'S A SEASON OF BIG LAUNCHES WITH LUX INDUSTRIES

The innerwear giant is seeking to strongly develop emerging sunrise segments in both men's and women's innerwear with an aggressive collection launch strategy, as it prepares for the coming festive season.



Onn Premium Wear

While the company had forayed strongly into premium men's innerwear 5 years ago with the launch of Onn premium wear, it has penetrated a network of 13,000 outlets across 3,500 cities and towns in India, and with a wide range of products like Basicz, Trendz, Premiumz, Casualz, Italia, Denimz, etc. Onn is emerging as one of the fastest growing brands in the segment.

With increased disposable income and the urge to dress up stylishly, there is a huge demand for stylish designer innerwear in the country. Onn premium wear has swiftly made its name in the hosiery world for designing high quality, stylish products, especially for youth, which add x-factor to their personality.

The latest launches are within the Onn Italia range and the Onn Denimz range. The first range has been launched with 10 products including stylish vests, briefs, trunks and shorts. Onn Italia fills the aspiration gap with its latest trending designs, cuts, and colours for the more style conscious Indian men. Crafted with 100 percent superior combed cotton and extra soft micro fibre waistband, Italia range is 40 percent softer than regular innerwear, besides maximizing stretch and softness. Quality, affordability, innovation and Italian styling are the core USPs. On the other hand, the Denim range brings the denim feel into innerwear. The stitches, the cuts and the patterns are extremely stylish and yet comfortable. The Denim range is being launched with 4 products which include vests, briefs and trunks. Onn Denimz is the first innerwear brand to offer the look of denim, while offering comfort innerwear.

Lyra Silk Leggings

The other neo brand from Lux Industries Ltd., is Lux Lyra, which has become a favourite with the women today. Lyra has introduced Lyra Silk, a range of premium churidaar leggings with shiny finish and ultra-soft feel. Lyra Silk is 96 percent cotton and 4 percent spandex which makes it highly stretchable too. The four-way stretch is backed by stitching in four ways too, from both upper and lower side, to give it a contoured snug, comfort, fit and to make thighs and calves look slimmer. The pricing of Lyra Silk has also been kept very economical. Currently, Lyra Silk leggings are available in the churidaar form in more than 100 colours, targeting women of all age groups.




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THE INNERWEAR MARKET IN INDIA

TRENDS AND OPPORTUNITIES

The innerwear industry in India holds immense growth potential. Amit Gugnani, Senior Vice President - Fashion and Sakshi Chhillar, Research Associate - Fashion & Textile, Technopak, analyse the market size and trends of innerwear segment in India for men, women and kids. It also focuses on the key opportunities, the factors driving the growth of the market and the challenges being faced by the players in the industry.

Innerwear has established itself as a potential apparel segment in advanced and developing economies. A similar trend has been observed in the Indian market too. With the growing penetration of organised retail and increasing population of fashion conscious youth, innerwear is expected to emerge as a promising segment in apparel retail.

With the evident shift in Indian consumer preference from price sensitivity to brand consciousness and availability of untapped markets, innerwear market holds immense business opportunities.

MARKET SIZE & GROWTH

The innerwear market (comprising of the innerwear and the comfort wear market) was estimated to be worth

₹28,133 crores and is expected to grow at CAGR of ~13 percent over next five years and reach ₹51,913 crores by 2020.

The men's segment is expected to grow at a CAGR of 9 percent over next five years, while women's segment is expected to grow at CAGR of 15 percent. The innerwear market is dominated by women's segment, accounting for 64 percent of the total market share. Owing to growing inclination towards spending on innerwear in Indian men, it is estimated that share of men's segment shall increase from 36 percent to 44 percent over the next five years.

MEN'S INNERWEAR MARKET

Men's innerwear comprises of product categories like briefs, vests, causal tees, shorts, etc. Briefs and vests contribute

more than 80 percent of the total men's innerwear market. In 2015, total worth of men's segment was estimated to be ₹8,125 crores and is expected to reach ₹12,501 crores by 2020.

It has been observed that preference for branded innerwear products is higher in men as compared to women. The share of branded products ranges 50-55 percent and is expected to reach 55-60 percent by 2020. Briefs and vests share 83 percent of the branded pie. Economy and mid-premium products are major players in this category, accounting to ~85 percent of the total men's segment; however, it is expected that by 2020 their share will reduce to ~82 percent.

EXHIBIT 1: INNERWEAR MARKET, 2015 (INR Cr.)

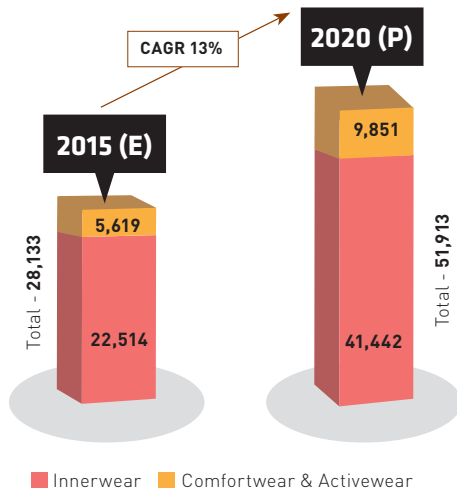
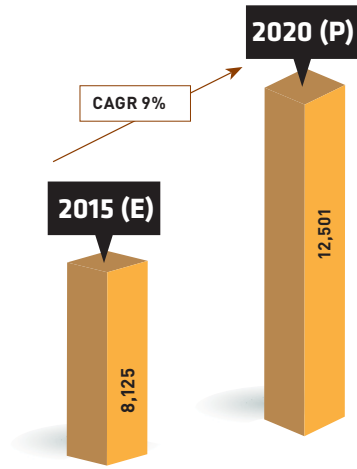


EXHIBIT2: MEN'S INNERWEAR MARKET, 2015 (INR Cr.)



Source: Technopak Analysis

WOMEN'S INNERWEAR MARKET

Various product categories in women's innerwear are - bras, camisoles, panties, tees, nighties, shorts, etc. Bras and panties contribute ~85 percent of the total women's innerwear segment. In 2015, this segment was estimated to be worth ₹14,389 crores and is expected to reach ₹28,941 crores by 2020.

Branded innerwear contributes to 35-40 percent of the total women's innerwear market and is expected that the branded share will account for 40-45 percent in 2020. Panties and bras contribute to ~82 percent of the total branded share. Major contribution to women's innerwear category comes from economy and mid-premium segment accounting for nearly 86 percent of the total market; however, the share of premium and high-premium is expected to rise in the near future.

GROWTH DRIVERS AND SELECT TRENDS

The definition of innerwear has broadened from basic requirement of commodity wear to designer wear premium segment along with comfort wear. **The rapidly evolving lifestyle has added various categories to the innerwear segment.** The present day lifestyle includes variety of fitness and sport activities that has created a space for evolution of numerous product categories under comfort wear and activewear. Comfort wear is among the fastest growing segments of innerwear.

Innerwear segment, like no other apparel category, finds significant high branded adoption from the mass segment. Many renowned players offer innerwear products in mass segment and have received wide acceptance among the consumers.

A significant shift can be observed in consumers from unorganised to the organised segment. Wide array of colours, designs and prints offered by mid-segment brands are

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EXHIBIT 3: DEGREE OF BRANDING- MEN'S INNERWEAR

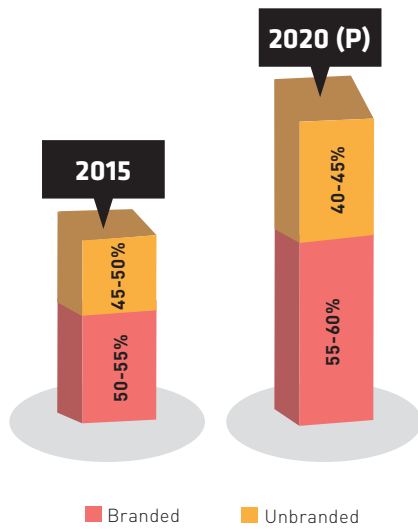


EXHIBIT 4: WOMEN'S INNERWEAR MARKET, 2015 (INR Cr.)

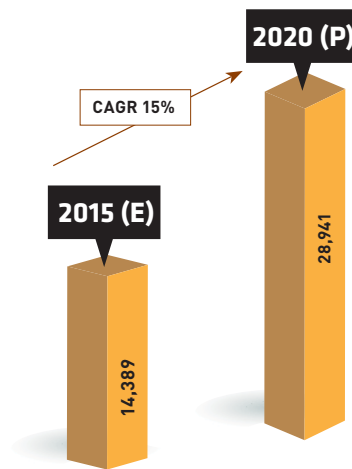
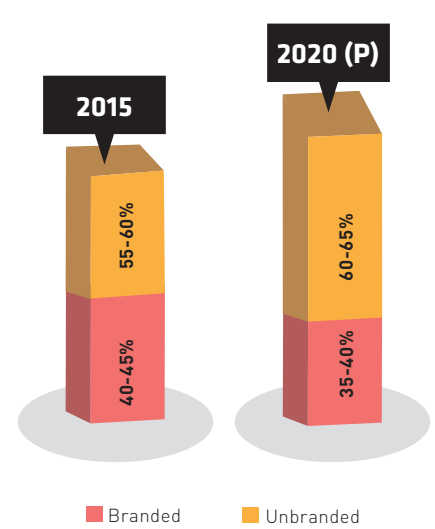


EXHIBIT 5: DEGREE OF BRANDING- WOMEN'S INNERWEAR



Source: Technopak Analysis

Indian innerwear market has experienced influx of international brands along with domestic private labels. The current consumer base looking for better designs, in vogue looks and comfort clothing, has widely accepted the new entrants.

increasingly luring consumers away from the unorganized sector. Further, the widening distribution network of organised players along with availability of online channels allows easy availability and reach even within the smaller Indian cities. Functional features that add value to the innerwear such as sweat and odour resistance, crease resistance, softer fabric and bacteria resistance are expected to be of greater demand in men's segment.

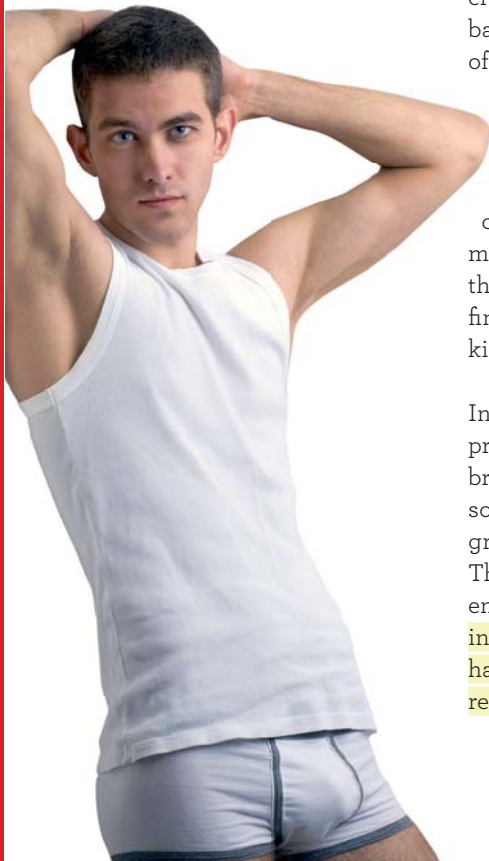
Kid's innerwear segment is also moving towards the branded category. The smart pricing of comfort wear categories offered by mid-segment brands in comparison to the unbranded market is increasingly finding acceptance from consumers for kids comfort wear products.

In women's wear, occasion specific products like seamless bras, strapless bras, padded bras, etc. are also being sought. This is expected to drive growth in the premium segments. The digital advancement is becoming eminent in the fashion retail industry; innerwear and comfort wear segment has not been left untouched by online retail. The wide range of products

and easy access offered by online channel is being preferred among tech-savvy consumers over traditional brick and mortar stores. Increased digital penetration, improved supply and higher discounts have lured a significant consumer base to e-commerce.

Indian innerwear market has experienced influx of international brands along with domestic private labels. The current consumer base looking for better designs, vogue look and comfort clothing has widely accepted the new entrants. The increasing number of brands in innerwear sector is transforming the available retail space to a more structured and organised format. With the increasing penetration of corporatized retail, innerwear market will also witness introduction of more number of styles and designs. Many Indian retailers and manufacturers will continue to blend the latest trends of international fashion with the traditional Indian styles to make their fashion accessories distinct and unique.

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The innerwear market has huge opportunities for industry players due to increasing penetration of the category into smaller towns, rural areas and youth. The growing awareness of brands and products is making the environment conducive for the growth of innerwear market.

CHALLENGES

The industry is struggling with challenges like lack of quality raw material and unstructured supply chain. Another impediment for innerwear segment is availability of quality retail space. Though mall infrastructure has developed recently in the country, but unplanned design and improper locations have made selection of right retail space critical to the success of retailers.

The Indian innerwear market also witnesses the presence of fake products/ design copies, which negatively affects the sales as well as reputation of the established brands and retailers.

CONCLUSION

The innerwear market has huge opportunities for industry players due to increasing penetration of the category into smaller towns, rural areas and youth. The growing awareness of brands and products is making the environment conducive for the growth of innerwear market.

The innerwear market is witnessing trends in terms of fabric design, finish application, introduction of wider colour choices and fitting. These factors have led to innovation oriented growth in the segment. With correct knowledge of consumer preference, opting for multiple channels and following global best practices, innerwear brands can exploit the available growth opportunities in domestic market.



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MEN'S INNERWEAR

UNRAVELLING THE DYNAMICS

Men's innerwear segment has emerged as a high activity category in the last decade. The category has witnessed substantial restructuring and high initiatives. If the last decade has witnessed stabilisation in the category, then the next decade is expected to be of many more high octane initiatives.

By Nischal Puri

The traditional segmentation of men's innerwear as a category into economy, middle, premium and super premium is losing its relevance in the new emerging market reality. As a norm, I am often asked by investors trying to understand the category as to how the market is segmented and what is the growth trajectory expected. The keenness to understand the segment highlights the proliferating interest amongst the investor community, and stands as a testimonial to the immense opportunities it harbours.

Largely, the reason for this increased interest is the growing number of players who have got listed. With Page Industries, Lovable, Valentino, Lux, Rupa, Dollar, being listed and a couple of more players expected to get listed in the coming years, the hosiery segment perhaps flaunts the maximum number of listed players in comparison to any other industry or category.

So there must be something typical about the hosiery/innerwear industry wherein, most players are able to gain scale and hence able to explore and succeed in the primary markets.

The dynamics of the category are indeed very conducive to scale. Being a functional and primary need server, the innerwear segment, including both men and women, has about 700 plus labels and brands in India. While almost 80 percent of the players are in the sub 30 crores top line bracket, its the balance 20 percent that have garnered substantial market share and have made the category noticeable.

So the price based segmentation is loosing its relevance as most brands have their products in more than 2-3 segments. The economy brands have products stretching till the middle

Whatever be the dynamics, one thing is evident – the segment will keep witnessing launch of newer brands and relaunches by existing brands. Brands need to develop more consumer centric strategies and ensure that they make efforts to understand the consumer more often.



Christopher Gardiner / Shutterstock.com

segment and the premium brands have products stretching till the economy segment. Analysis of the product price wise sales of the premium brands showcases that almost 55 percent of the contribution comes from economy segment products.

The action in the economy segment is extremely high with brands like Lux, Rupa, Dollar, Dixey and Amul having perfected the distribution model. These hosiery behemoths are at the forefront of supplying to the Indian consumer. Lux and Dollar have one of the best marketing strategies in the category. These brands have 35 percent of their offerings in the middle price segments and have strategies to further strengthen the middle price point offerings.

Product differentiation in the economy and middle segment is lowest with most brands having almost similar product offerings. Any innovation by one brand is evened out by similar launches by the other players. These segments are the fast moving consumer apparel (FMCA) wherein, the role of marketing is pivotal. The battlefield from hereon, will have new ammunitions; with most brands having crossed the 800 crores top line, the journey to the 1,500 crores mark will be very different. Marketing innovation, product newness and professionalisation of the sales function will be some of the key parameters defining the emergence of 1,500 crores brands.

The mid to premium segment also witnesses satisfactory activities. New launches have been almost a routine event, although its another matter that not many brands have been able to establish

traction. Brands like ONN, Crusoe, Hanes, Zoiro, and Chromosome did begin the journey with a lot of promise but consumer appreciation and loyalty is still eluding these brands. Of all these brands, ONN is one of the strongest contender in the kitty. With pan India reach, the brand has been slowly but surely, establishing its inroads into the consumers' cognition set. It is expected that the success in the middle to premium category will depend on how fast and how perfectly the brands are able to establish consumer connect by employing 360 degree brand building





initiatives. Right from product quality, perfection of the distribution channel, consumer engaging communication to retail imagery, experts opine that the sooner all these loops are tied, the faster a brand will cross the 200 crores mark, if that can be regarded as the first milestone.

Substantial consolidation is being witnessed in the premium men's innerwear segment with Arvind retailing brands like CK, Hanes, US Polo, etc. While the consumer awaits action from the brand house, the competitive dynamics will surely witness increased churning as the years pass by. Hanes is perhaps one of the biggest disappointment in the Indian men's innerwear segment. Despite its international lineage and strong pockets, the brand failed to establish its reputation pan India. One such significant instances in the brand's India entry strategy is

it's shift from a subsidiary based model to a licensing model. While the exact financial details are not available in the public domain, it would be interesting to note the brand's strategy for the Indian market with its new partner. Another surprise has been CK in India. While the luxury market across the category is growing, success is still eluding CK.

While analysing international brands' India strategy, it becomes more and more lucid that not all has gone right. Be it Hanes, CK, Fruit of the Loom, FCUK or Playboy, none of them have been able to demonstrate strategic perfection the way Jockey has. While the consumers have been expecting and demanding more brands in the premium segment, most brands are yet to put together a workable and winning strategy.

Whatever be the dynamics, one thing is evident — the segment will keep witnessing launch of newer brands and relaunches by existing brands. Brands need to develop more consumer centric

strategies and ensure that they make efforts to understand the consumer more often. Understanding the analytics and consumer buying behaviour before launching a range or a brand is imperative. But in the innerwear category in India, it's observed that newer products are launched by keeping successful products of existing brands in the centre, resulting in similar looking and poorly differentiated products. It is a no brainer to establish the fate of these products, as they seldom possess anything too unique to appeal to the consumer.

The men's innerwear category is teeming with opportunities and it is anticipating new players and brands who can establish a perfect exceptionable strategy, but till then, it seems that the current market leaders have nothing to worry about.



ABOUT NISCHAL PURI

Nischal Puri is the Managing Director of Horizon Consulting India. Nischal Puri is a veteran in the apparel and retail industry. He is also a successful entrepreneur, an established thought leader, brand strategist, a consultant and an author.

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A photograph of two women modeling modern innerwear. The woman on the left is wearing a peach-colored strapless bra and matching briefs, with lace detailing on the underwire and waistband. She is looking down and smiling. The woman on the right is wearing a yellow strapless bra and matching briefs, also with lace detailing. She is looking towards the camera and smiling. The background is a softly lit room with a window and a bed.

TOP TRENDS IN INNERWEAR

The innerwear market in India has undergone a great deal of transformation over the last few years. Today, the under things have become as important as outer clothing, be it in terms of branding, price or fashion and style trends. BoF talks to industry leaders and takes an overview of the current and emerging trends in innerwear.

Those days are passé when the main purpose of innerwear was to preserve one's modesty! Being an intimate wear, people felt shy and shopped in a hush-hush manner, without much consideration for fashion or style. They would quickly buy and walk out of the store. The innerwear industry in India has been experiencing a revolution of sorts in recent times. Modest no more, the under things nowadays have become as important as outer clothing, be it in terms of branding, price or fashion and style trends. As it happened with other fashion, the innerwear revolution in India also bears a strong western influence. The credit goes as much to the innerwear companies as the consumers. Numerous home-bred and international innerwear brands are available today, offering various kinds of trendy and innovative products while Indians too have become much more candid about their innerwear choices. E-commerce has played a major role in the category's evolution, as online shopping is a private affair and one can buy without inhibition.

"Indian innerwear market is booming," affirms Vinod Kumar Gupta, Managing Director, Dollar Bigboss. As per him, men's innerwear market was pegged at ₹8,125 crores in 2015, and is expected to reach ₹12,501 crores by 2020. Women's innerwear market is relatively smaller in size, however, is expected to grow at a faster pace of 9 percent CAGR.

Markedly, the women's innerwear or lingerie segment is growing more rapidly as compared to the men's. Sharad Prasad, Vice President at Lovable, apprises, "The women's innerwear category has been clocking a CAGR of 15 percent."

States Jennifer Kapasi, Head of Operations - India, Triumph International, "The next few years will see very exciting developments in the lingerie sector. Changing lifestyle has played a significant role in this, and there is a healthy mix of good products and fashion. Also, we have more international brands pushing their way into the market, mostly in the premium and luxury segment."

Emerging categories

Innerwear, these days, is not limited to 'basic' underwear as before. The category has expanded to take various other related products into its fold. "Night wear, swim wear, dance wear, home wear, and fashion innerwear are some emerging categories within the innerwear industry," tells Gupta at Dollar Bigboss.

According to Ganga K Rathna, General Manager - Operations, Crusoe, both men and women innerwear categories are witnessing a steady growth. About the promising product categories, she notifies, "In the men's innerwear, boxer brief is an emerging category while lounge wear and active wear are becoming quite popular among women." She, however, also points out that 2016 has seen a slowdown in sales of boxers for men.

Referring to the women's segment, Smita Murarka, Head

- Marketing, Amante, shares, "Owing to the growing versatility in Indian woman's wardrobe, seamless and functional innerwear has become an emerging category. In addition, the demand for active wear is also on rise, as athleisure dressing has gained importance among women."

Prasad at Lovable informs that "seamless lightly molded bras" which offer high degree of support to active lifestyle and also "shapewear" are drawing a lot of interest from women clientele.

Kapasi from Triumph says that people are becoming more fitness conscious, and the demand for appropriate innerwear for fitness activities is booming. Sportswear has also

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“Seamless innerwear is fueling our product growth. The growth in speciality lingerie for saree and traditional clothing seems to be declining amongst the Sec A profile consumer, as a choice of daily need.”

-Smita Murarka,
Head - Marketing, Amante

penetrated mainstream fashion with ‘athleisure’ becoming a huge trend. Beginner bras or ‘training bras’ is yet another promising category in women’s segment.

Even as there’s a heightened activity in the women’s segment, the brands are also coming up with newer products to up the men’s ‘inner’ style quotient. One can find an assortment of lowers as in regular, boxer brief, trunk, boxer shorts, etc., and uppers such as vest, muscle vest, or inner t-shirts. As fitness is a way of life these days, men’s active/sportswear too has emerged as a high potential segment. The not so fit men, mostly in large urban centres, are also experimenting with shape wear, although the use of shape wear is more prevalent among women.

Trends now!

Every fashion trend has a life span and they come and go. The concept of ‘fast fashion’ was alien to the innerwear category, but not any longer. Further, bold colours, softer fabrics and embellishments have always been a key feature in women’s innerwear; but men’s were rather simple and boring. Now men’s innerwear has also turned more stylish, colourful, bold and even sexy.

Apprising on the types of products that are losing steam now, Gupta from Dollar Bigboss says that full sleeve vest for men falls into this category. He explains, “The reason is very simple; men nowadays prefer fashion over comfort. Youngsters like gym vest and fashionable vest for daily use.” He, as well, lets in that bright colours, bold waistbands, outer elastic are much in demand in men’s underwear whereas in women’s lingerie, floral designs, light colour with lace are quite popular these days.

Crusoe’s Rathna avers that men have become even more style conscious about their underwear. He finds ‘boxer briefs, printed waistbands, and bold colours’ intimidating and is his current favourite options.

Murarka from Amante observes that women consumer preferences are shifting towards fitted garments. “Seamless innerwear is fueling our product growth”, she says. “With increasing number of women preferring western wear, especially in the urban centres, the demand for innerwear suitable for ethnic wear has somewhat slackened. As Murarka shares, “The growth in speciality lingerie for saree and traditional clothing seems to be declining amongst the Sec A profile consumer, as a choice of daily need.”

According to Prasad at Lovable, “Lacy bra and underwire bra are not doing so well,” while he informs, “Athleisure is also an upcoming trend in the women’s innerwear.”



“The next few years will see very exciting developments in the lingerie sector. Changing lifestyle has played a significant role in this, and there is a healthy mix of good products and fashion.”

-Jennifer Kapasi,
Head of Operations - India,
Triumph International



Triumph's Kapasi's top picks for the women's category trends are: sportswear, delicate lace, satin, novelty- straps and cotton t-shirt bras. As per her, fitness conscious women like highly functioning sports bra that won't compromise their looks. At the same time, delicate lace lingerie goes well with their feminine side. Similar to the lace trend, women like the sensual nature of satin lingerie in romantic colours. Novelty- straps are no longer just a functional item and different straps such as lace, multi-strap etc., are gaining vogue. T-shirt bras that combine the smoothing features of a t-shirt bra with the comfort of cotton are also in trend at the moment.

Designs in vogue

People today want to feel fashionable inside out. They want a variety in designs and quality craftsmanship for innerwear, and are also knowledgeable about what's in vogue. The innerwear manufacturers are going an extra mile to understand the market pulse and introduce relevant products. Regardless of the price tag, every brand is steadfast on wooing the consumer. Their endeavour is to design and develop innovative, exciting products that are able to capture the consumer fancy.

In reference to the well-admired innerwear designs, Gupta at Dollar Bigboss stated that abstract and geometrical designs are a rage among men. On the other hand, women mostly go for floral designs or, light colours with lace. He further added that buttons and lace embellishments are very much in trend in innerwear designs. Rathna at Crusoe apprises that men are highly into innerwear in bold colours with printed waist bands. Fabric and waist band are the two most important elements that they consider design wise.

Fabric and waist band are the two most important elements that they consider design wise.



Obviously, as compared to men, women's innerwear offers a greater scope for experimentation with different design elements, viz. fabrics, textures, colours, silhouette, embellishments and more!

Multi-way bra which is a multi-function product, has become a must have in every woman's wardrobe. Full cover bra is a favourite for all innerwear needs as this has the most coverage and is suited for daily use whereas, bikini is the most preferred silhouette in women's underwear, says Murarka from Amante. According to Kapasi at Triumph, the most popular designs of bras are highly functional full support styles, followed by t-shirt bras. Multi-way 'party' bras have also become popular, of late. Sports bras with racer back are also gaining popularity.

Regarding embellishments on women's innerwear, both agree that 'lace' is a clear winner. Murarka explains "Laces are the most popular element for a fashionable/occasion wear, as it gives a very feminine appeal." While Kapasi lets in, "Lace panels, all-over lace cups and multi- straps are most popular at the moment." Prasad at Lovable shared that full coverage bras and medium coverage bras are big sellers. As per





“Functionality and comfort wise, 100 percent cotton single jersey, 100 percent cotton single rib, and jersey cotton stretch are the most popular fabrics for men’s innerwear. Modal stretch is the most-liked fabric other than cotton.”

-Ganga K Rathna,
General Manager - Operations, Crusoe

him, breathable fabric and elastics which are not harsh on skin are the most vital elements in innerwear.

Preferred fabric

Does style trumps comfort and functionality when today’s fashion-forwards go out shopping for innerwear? Of course not! Barring the fashion crazy, the consumers, by and large, look for stylish yet comfy underclothes since they are worn next to the skin and it’s important that they are made of fabric which is flexible and skin-friendly.

Shedding light on the preferred fabrics for innerwear for women in terms of functionality and comfort, Lovable’s Prasad underlines that 100 percent cotton continues to be the most preferred fabric, adding “Value adds such as cotton with lycra are also becoming popular.” In India, cotton is a synonym for comfort. Hence, cotton and cotton blends are the most preferred fabrics when it comes to choosing comfortable lingerie, points out Kapasi of Triumph. She

also informs about other popular fabrics, besides cotton, that are used to make lingerie. “Light microfibres have a smooth touch and provide better hold and support than pure cotton. In addition, fabrics with elastane/lycra provide shaping and are also very popular,” she tells.

Amante’s Murarka also agreed that cotton remains a mass favourite among women due to the mindset of it being most comfortable and breathable. Cotton apart, microfibre is the choice of fabric for international brands like ours, as it gives perfect fit and durability.

Functionality and comfort wise, Rathna of Crusoe holds 100 percent cotton single jersey, 100 percent cotton single rib, and jersey cotton stretch as the most popular fabrics for men’s innerwear. Modal stretch is the most- preferred fabric other than cotton, as per him.

Elucidated Dollar Bigboss’ Gupta, “Innerwear made from fabrics such as cotton, lycra, modal, organic cotton, supima cotton are high on functionality and comfort, hence are very popular these days.” Other than cotton, single jersey cotton, spandex, cotton-lycra are also used extensively for men’s underwear, whereas cotton lycra, satin, silk and viscose materials are most popular fabrics for women innerwear, as per him.

High on innovation

In the last years, there have been several remarkable technology and product innovations in innerwear. For technology innovations, one can mention stretch fabric, ultra-soft fabric, denim and silicon materials, wrinkle-free, quick dry, sticky bras, eco-friendly innerwear and what not. The category has also made a huge progress in the area of design and elements. Points in



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case — seamless, digital and 3D prints, women's strapless bras, etc. Products like maternity wear and shape wear find many takers.

About the latest innovations in innerwear development, Lovable's Prasad notifies that bralettes are the latest trend and the latest innovation in women's category sweeping globally and in India. Murarka from Amante shares that their company has been awarded the most innovative lingerie product category for its "Floral Romance" collection which is a 2mm padded t-shirt lace bra. This continues to be their best seller till date. As per Rathna at Crusoe, fabrics with moisture management are one of the latest innovations in innerwear.

Women's segment has always been high on design, but now men's innerwear also has pushed its boundaries through design innovations to add some excitement to the products for men. For instance, men can select from low-rise, mid-rise or high-rise brief depending on their outer attire. Like, low-rise brief matches with low-rise jeans, and high-rise brief goes well with high-waist trousers. Anatomically correct designs and waist tuckering waistbands are bought by many. Men thongs and bikini style underwear are also in vogue.

Trends to watch for

While lingerie in basic colours and nude tones is always in demand, the year so far has seen fruity shades and pop colours being favoured, shared Kapasi from Triumph. Regarding the anticipated top colours in innerwear for women, she expounds, "For the upcoming A/W season, there are two distinct palettes — Romantic colours such as reds, deep wine

and dark pinks mixed with seductive blacks and deep grey in the first palette. The second palette will be on the lighter side with tones such as pale yellow, light grey, silver, ivory and mint green." Trend wise, she foresees the sports and lace trend of 2016 to continue to be strong in 2017, and prints taking center stage — be it tribal, geometrical or nature inspired prints, besides increased demand for push-up bras.

Colours this season transcend gender norms, notes Prasad (Lovable). "Vivid brights are giving away to classic and natural tones such as skin tone". He forecasts that 'innerwear that supports



active lifestyle, functional fashion, and fast fashion' as top trends of the coming season. Murarka (Amante) indicates that this Autumn/Winter, dark shades of red and blue will be the mainstay of women's occasion wear. She opines, "The current trends will gain momentum and continue to stay for some time, as the innerwear industry is at the brink of consumer modernisation."

For Rathna (Crusoe), fashionable waist band, fabrics with skin-friendly dyes, bold colours and innovative designs will be the top trends in men's innerwear for the forthcoming season. The top colours, according to him, will be the different shades of blue. As per Gupta (Dollar Bigboss), all the bright and pastel colours will be the hot sellers for the coming season. "In terms of fabric, we will see lots of use of satin, polyester, water absorbent material to thermal in men's innerwear. Transparent, colourful, halter neck straps will be the top trends to watch for in the women 's category," he sums up.





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A PRECIOUS BLEND OF **FEMININITY & SENSUALITY**

In an exclusive dialogue with Images BoF, Nick Tacchi, Global Marketing Director, La Perla, gives us a look into the world of La Perla, an internationally famed Italian luxury lingerie and beachwear brand. He also discusses their launch plans for India.

By Namita Bhagat



-Nick Tacchi,
Global Marketing Director, La Perla

Artisanal heritage, knowledge of the female body, blend of innovation, tradition and Italian identity are the founding values of the La Perla universe. The brand offers collections of lingerie, sleep wear, beachwear, lounge wear and accessories for both women and men. In 2013, the company was acquired by Pacific Global Management, owned by Silvio Scaglia's family holding and already active in the fashion industry through the world's largest model management network, operating under the brands Elite, Women and The Society. La Perla is now all set to launch its first boutique in India. The Indian luxury sector is experiencing an evolution. The present market scenario fits very well into La Perla's ongoing global retail expansion strategy!

Brief us on the history and evolution of La Perla. How has been the journey so far?

Nick Tacchi (NT): La Perla has been founded in 1954, in the Italian town of Bologna by Ada Masotti, a skilled corset-maker. To choose the name of her lingerie atelier, Ada Masotti was inspired by a case lined in red velvet in which she presented her



The brand is now all set to launch its first boutique in India. For the launch, it has chosen DLF Emporio which is considered the best luxury mall in New Delhi.

creations as if they were jewels. Thanks to her artisanal experience, she laid down the foundations of that unique know-how that is still today an integral part of the La Perla philosophy. The deep know-how of the female body, the fusion of innovation and tradition and the Italian identity – these chromosomes of the La Perla's DNA transformed her little lingerie laboratory into the brand it is today.

Describe the essence of your brand. What is its USP?

NT: La Perla, for more than 60 years, has followed the evolution of the female body through different fashions and trends, becoming a lingerie and beachwear brand synonymous with authentic Italian luxury. A unique blend of femininity, sensuality, preciousness, and a hint of surprise represents its uniqueness.

Who is your core target audience?

NT: One of the most important values of La Perla is the complicity with women. We never think in terms of target groups because we know that different kind of women love La Perla and that La Perla is about enhancing the beauty and the femininity of every kind of woman.

Let us know about your latest collections and their key highlights.

NT: The Fall/Winter 2016-17 season proposes an architectural approach to dressing the body, reinterpreting the style codes of intimacy in lingerie, night wear, swim wear, lounge wear and accessory collections. The main inspiration comes from Brazil's master architect, Oscar Niemeyer, whose curvaceous forms redefined modernism in thrillingly sensual terms. The collections present new shapes which incorporate optical illusions, making functional elements appear to float, a selection of trendy "swimintimates" that can be worn not only as swimsuits but also as bodysuits, a new idea of extended intimacy with glamorous looks that allows easy transition from home to an evening out.

Shed light on the brand's design and style inspirations. How do you keep up with the market challenge, given the highly dynamic nature of the fashion industry?

NT: The spirit of our atelier, the precious fabrics that are at the heart of La Perla collections, like the Leavers lace produced on antique looms of Calais and embroideries on tulle, the mission of creating beauty are the basis

>



La Perla sells its creations through a network of flagship stores, shop-in-shops and corners located in the heart of the most important fashion districts, as well as being present in the best department stores and specialised boutiques worldwide.



In the FW' 16-17 collection, we also propose an interesting mix of craftsmanship and technology with innovative creations characterised by precision laser-cut zigzags fused to foundations of tulle and lightweight Lycra.

Can you tell us about the new products that you are looking to introduce in the near future?

NT: Our next collection will represent a key step in the evolution of the brand, so much so that we do not want to reveal anything until we are ready to present it during the Milan Fashion Week in September.

La Perla is soon launching in India. What kind of opportunity does the country's market offer for your brand? How do you plan to grow the brand here?

NT: This is the very first launch of a La Perla boutique in India. For the launch, we have chosen DLF Emporio which is considered the best luxury mall in New Delhi. In our retail strategy for India, we are planning to open, in the next five years, another 3 to 4 stores in selected luxury locations.

The opportunity is to catch the attention of the luxury customers who cannot find our brand and its exclusive products in India even though many of them have known it and appreciated it in their travelling around the world. La Perla is, in an exciting growth phase, building on and expanding its heritage luxury positioning. One of the pillars of this global strategy has been the development of its retail network and the opening of flagship stores in the most important world capitals. It felt very natural to us to extend our footprints to India; it is a market we see very much open to appreciating the quality of our products.

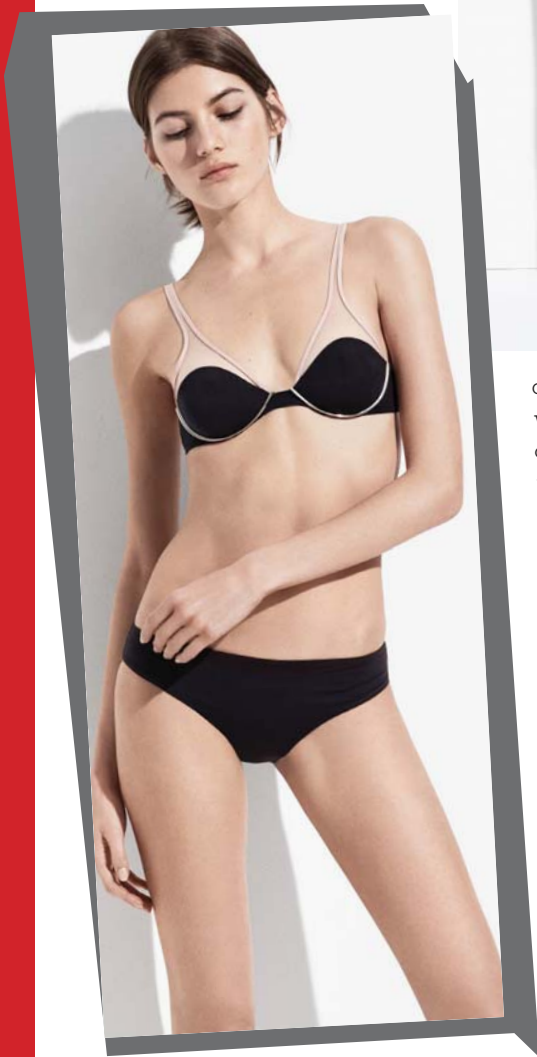


PHOTO CREDITS
 Photographers: Mert Alas & Marcus Piggott
 Models: Valery Kaufman @ The Society;
 Liu Wen @ Elite World/The Society;
 Sasha Luss @ Women Mangement

of our creative work. Every season, we explore new ways to allure our consumers as we have done for the FW' 16-17 working on optical illusions that play on the body.

Take us through your significant innovations as regards the product design and development, production, technology, etc?

NT: One of the most important launch is the Made to Measure service that is available in our flagship stores, a unique opportunity available for a chosen few exclusive creations, which become one-of-a-kind as they are made to measure, sewn entirely by hand, made precious by the use of gold thread and Swarovski crystals.



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The Essence of a Woman



Known for its superior quality and craftsmanship, global luxury lingerie major Wacoal has completed one successful year of operations in India. Operating via a joint-venture with Periwinkle Fashions, the brand presently has two exclusive stores in Mumbai, besides retailing through an online channel. With early success beneath its wings, Wacoal is now looking to fly to other Indian cities and launching its own online store as well.

By Namita Bhagat

Born with a spirit of helping ‘women everywhere feel more beautiful’, Wacoal, a Japanese luxury lingerie manufacturer, began its life in 1949. Known for its superior fit, quality and exceptional craftsmanship, the brand, today, has metamorphosed into a global leader in the luxury lingerie market, with footprints in over 66 countries and regions including North America, Europe and Asia. The brand forayed into India in 2015 by partnering with Periwinkle Fashions, the flagship company of Tainwala Group. Periwinkle has been instrumental in promoting the group’s retailing business in India, and its portfolio includes globally renowned luggage brands such as Samsonite, Hartmann and High Sierra, accessories brand, Accessorize, along with in-house premium ladies handbags and shoes brand Lavie. Wacoal India Pvt. Ltd., is a joint-venture between Periwinkle and Wacoal International Hong Kong Co. Ltd., and is headquartered in Mumbai.

States Sandeep Goenka, Chief Executive Officer, Periwinkle Fashions Pvt. Ltd., “Given our company’s extensive sales knowledge, distribution expertise, and marketing know-how to deal with the Indian market which has original system of custom duty, I feel, we are a perfect partner for Wacoal.”

Market Prospects

The innerwear market in India has traditionally been dominated by unorganised players. However, in the last few years, the organised segment has shown promising growth in both men’s and women’s categories. The lingerie market, in particular, has undergone a transformational phase. Lingerie is no longer regarded as just an undergarment but is worn as a



Lingerie has moved out of the 'basic necessity' bracket and is now associated with a feel good factor. Indian women have come out of the shyness cocoon and are eager to experiment with new varieties, styles, colours and brands. This spur in demand has carved out a potential market for lingerie in India."

-Sandeep Goenka,
Chief Executive Officer,
Periwinkle Fashions Pvt. Ltd.



fashionable article of clothing that can be flaunted. Indian women have become selective and give a greater importance to intimate apparel. Raison d'être of their evolution are many, such as the variety in clothing and dress codes, knowledge about lingerie fits and styles, changing social mindset and growing desire to feel good about oneself. What's more, the well-off like to indulge in luxurious expensive lingerie.

Goenka explicates, "Lingerie has moved out of the 'basic necessity' bracket and is now associated with a feel good factor. Indian women have come out of the shyness cocoon and are eager to experiment with new varieties, styles, colours and brands. This spur in demand has carved out a potential market for lingerie in India." As per him, as women's lingerie is expected to grow faster, brands should broaden their share thereof. However, they also have to vary their product offerings and heighten the fashion quotient.

Current Presence

Starting in June last year, Wacoal India as of now, operates two exclusive stores (EBO), both located in Mumbai. To complement its offline presence, the brand is also building up its presence

via the e-commerce route. Currently available on Myntra, it also plans to launch its own online store. Goenka affirms, "Wacoal stands for 'quality', and the response to the brand has been positive in the market. Customers are aware about the brand's global presence and the uniqueness and are accepting our luxury lingerie brand with ease."

Product Assortment

The brand's product basket for the Indian market is the same as other international markets. It offers an assortment of bra, panty, shape wear and sleep wear. The bra collection ranges from basic, bralette, minimiser, spacer, seamless, wired, non-wired padded, push up, strapless, sports and occasion wear. The collection of panties ranges from briefs, bikinis, thongs, hipsters, tangas and boyshorts.

"Our core target group is women who are sophisticated, elegant and looking for quality comfort. The age group we are focused on is 25+ and women with a higher disposable income, but we cater to all age groups starting from teenagers," Goenka apprises.





Wacoal's designs capture the spirit and epitomise effortless sophistication. The style inspirations are derived from modern femininity, contemporary luxe and uncomplicated florals.

Wacoal being the only brand to offer bras for teenagers, also has a range of everyday wear with a dash of lace and floral prints for the young, fashion conscious, working women. Its sportswear category is well-designed for women looking at comfortable and supportive bra for their activity routine.

Design for Success

Wacoal India is proceeding on the promise of product supply within the Wacoal Group supply chain management system. The brand's strength lies in manufacturing based on integration of its research, planning, production and sales processes. For overseas business operations as well, the group tailors its marketing and product development to each specific country or region, moving to turn out products in order to meet the physiques, tastes and other needs of different women. At Wacoal's Human Science

Research Centre, its research and development (R&D) team has measured the anatomies of over 1,000 women every year over the past half-century.

"The fruits of those efforts are alive and well in our new product development scheme. We consider the single greatest forte of Wacoal is the combination of its ability to engage in such value added craftsmanship and the high quality resulting from that stance," avers Goenka, adding, "Women, who try our products once, do tend to get loyal to the brand due to the comfort of products." Talking about the brand's design and style inspirations, he informs that Wacoal's designs capture the spirit and epitomise effortless sophistication. The style inspirations are derived from modern femininity, contemporary luxe and uncomplicated florals.

Latest Collections

"As the brand prides itself in 'sophisticated sensuality', our new collection features beautiful laces, gorgeous embroidery, sleek satins and a basics comfort range that pushes capabilities in technology while also adding a touch of glamour and sensuality," Goenka informs.

He also shares that the average Wacoal price for these items is ₹2,500 with overall product lineup ranging from ₹1,500 to ₹5,000. The lace collection has gained popularity amongst occasion wear shoppers. The recently



launched Suhada collection made of non-wired silicon padding to provide prime comfort and defined structure too has received a brilliant response. Significantly, the crowd favourite happens to be its basic mold non-wired bra. With a touch of simplicity, this collection of everyday bras provide maximum support and comfort.

Further, with plans to expand its range within all existing styles, the brand is especially looking to launch more styles in the mold and cut-n-sew category. The focus shall be on mold category comprising of t-shirt bra and fashion styles.

Winning Mantra

Notwithstanding its high-end positioning, the brand is quite upbeat on its future prospects in India. Goenka underlines that, "The Indian economy ranks No. 7 in the world. The country's market is one of the most promising retail markets, offering latent appeal to international brands as well, for its rapid growth potential. It also represents a huge untapped market for lingerie. The growing number of working women and the increased share of western wear

in their wardrobe have bolstered the growth. Owing to enhanced exposure, there is an increase in demand for better fits and quality alongside the demand for a wider range of colours, styles and accessories."

Nevertheless, he also acknowledges that the market throws up some challenges too. As per him, a major challenge arises is posed by the unorganised sector. The women's innerwear market is at present dominated by many local Indian brands. Women tend to exhibit a strong comfort factor in buying lingerie from regular unorganised local stores, predominantly due to price. Departmental stores are also popular as they provide range and product displays and also have trial rooms. On the other hand, exclusive brand stores are explored when looking for depth in styles and variety in colours. He also points out that even as the purchase frequency and average spends on innerwear is on the rise, this category is predominantly a 'planned purchase' or an 'occasion-based purchase' category, among Indian women, who tend to purchase and even splurge around such occasions as weddings, anniversaries,

holidays, etc. Though promotions and offers tend to induce impulse purchases, experimentation in terms of styles is most often done when buying for special occasions; and for daily wear, known styles and brands are preferred.

Elucidating how the brand is keeping up with the challenges, Goenka says, "Of late, there has been much innovation in the making of lingerie, and technology has also influenced it. Our fine-quality products are supported by research, and we do customise our products according to the need and demand of the market. We capture the market trends and customer behaviour through comprehensive research and study. Our extensive R&D team is always up to the mark with the market styles. In addition, the distinctive Wacoal approach to consulting services also helps set us apart from our rivals. Appointing engaging store staff is one of our key assets, as they are our sole point of contact to the customers and hence, can understand them better."

Importantly, Wacoal India's current focus is on the right product, presence on digital media, in-store promotions, fashion shows and other undertakings. As Goenka said, "Our main marketing tool presently, is expansion through stand-alone stores."

Going Forward

Following the success of its Mumbai stores, Wacoal is now looking to spread its wings to other Indian cities. Goenka tells more, "We are now heading to Chennai, after which, we are thinking in terms of expanding to Delhi, Bengaluru, Kolkata, Ahmedabad, Hyderabad and Chandigarh. We are targeting to have 75 stores (25 own stores + 50 dept. stores) over the next five years in key cities pan India." He concluded by saying that they will also tie up with various more external e-commerce sites; however, over the course of time, one cannot overlook the in-house online platform.





TRENDS IN SHAPE WEAR

Shape wear is fairly common in the western countries, especially among women. It's even worn by models, celebs and Hollywood stars to achieve the infamous 'hour glass' figure. The demand for shape wear is now emerging in India too. No longer just a women thing, even men are eager to try it out.

Everybody wants to look good. Being slim and fit is one important aspect of good looks; however, not all are endowed with slim body shape or great silhouettes naturally. Many slim people also have to experience a 'flab' phase in their lives at one time or another. The reasons could range from poor eating habits, less active lifestyle, illness, etc., or like in case of women, motherhood. Conscious of their outer appearance, they wish to eliminate all their flab instantly. Here, not a miracle, but an apparel technology in the form of shape wear, comes to their rescue. Shape wear or foundation garment is basically a type of underwear that flattens the wearer's body to give a toned figure instantly.

Shape wear is fairly common in the western countries, especially among women. It's even worn by female models, celebs and Hollywood stars to achieve that 'hour glass' figure. The demand for shape wear is now emerging in India also. There is plethora of brands offering various kinds of this 'wonder' garment.

Apprises Richa Pania, Sales and Marketing Director, Swee, "Shape wear, in India, is still a new concept. The awareness and growth of this garment category in India mostly started

“People are ever more figure conscious and want a quick and easy way to look slimmer, and shape wear helps fulfill their desire. The instant result they give to the wearer is making this segment very popular. Nowadays, all kinds of people, including people from glamour industry, office goers, housewives or college girls, are buying this stuff.”

-Veena Soni,
Founder & Owner, Lace & Me

around 2010. The trend gradually picked up by around 2012, as many major players started entering the market.”

“The shape wear category in India has grown remarkably in recent years. I have been selling them since year 2000. It started to draw significant attention from 2011 onwards. When we advertised in the print media at that time, we got a huge positive response. Thereafter, we also started promoting on digital medium, via TV commercials on various shopping channels. Today, every e-commerce website and almost all television shopping channels give a good focus to this category,” states Veena Soni, Founder and Owner of Lace and Me.

Agreeing that the country’s shape wear market started trending about six years ago, Dermawear Business Development Manager, Rezon Lopes tells, “There was an existing need in the market for such products which was initially catered only by Chinese products. Sensing the potential trend, several local and international brands forayed into the market.”

Demand landscape

With time, people are increasingly accepting shape wears. “People are ever more figure conscious and want a quick and easy way to look slimmer, and shape wear helps fulfill their desire. The instant result they give to the wearer is making this segment very popular. Nowadays, all kinds of people, including people from the glamour industry, office goers, housewives or college girls, are buying this stuff,” notes Lace and Me’s Soni.

It’s not practical for everyone to work out every day or diet to



maintain body shape; hence people are looking for alternatives in slimming, says Lopes at Dermawear. Pania from Swee, as well affirms the trend. “The reception of shape wear is growing rapidly in tier-I and tier-II cities, due to the increasing awareness and knowledge about the product,” she observes.


A propos the market segmentation, Lopes states that the category is still maturing, so it’s difficult to segment it. The consumers are, at present, understanding the functionality. As they become more appreciative of it, they will look for more variety in terms of segments. “However, the amount that most consumers are willing to spend to get a hang of the product is low; therefore, the products with economic pricing are the best selling products,” she tells. Soni also affirmed that economy is the fastest selling category, “We have different kinds of products in shape wear. Even as we are garnering sales from all price segments, the economy segment, in particular, is getting good sales.”

Product range

According to Pania (Swee), their brand caters to all segments. Starting from basic seamless collection for daily makeover, they also offer seamless hooked up collection and the gem shape wear collection which is a

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“Women in the age group of 25 to 45 are more into shape wear. Women use this foundation clothing as daily use item since it provides them with a perfect makeover every day.”

-Richa Pania,
Sales & Marketing Director, Swee

corporates, and women post delivery are more inclined to try them.

Acknowledging that demographics and socio-economic factors are critical to the category consumption, Pania informs, “For this reason, we offer a complete range of shape wears that caters to different segments and classes of the consumers.” She further tells that the women in the age group of 25 to 45 are more into shape wear. Women use this foundation clothing as daily use item since it provides them with a perfect makeover every day.

designer collection. Every range has got its unique features, says she and goes on to add that their company uses wicking technology for sweat absorption in all shape wears. Also, they have power nets for targeted compression, whereas the seamless collections make sure that the comfort level is at its best.

Soni (Lace and Me) also apprises on their product offerings that includes a wide collection of corsets, tummy shapers, thigh shapers, tummy control belts, tummy control panties and full body shapers that come in varying quality and price range. She also informs that they use advanced manufacturing technology to bring high quality products. Different fabrics are used for different products which are normally spandex, cotton or polyester mix fabric.

According to Lopes (Dermawear), ‘short styles in economic range’ are presently trending on top in the category. Pania lists ‘trendy shape wears with high-end comfort level’ as the current favourite product while Soni feels that Indian consumers are mostly focused on ‘tummy shapers’ range.



According to Soni, earlier, the consumers mainly came from Class A and Class B cities. Now there is spurring demand from Class C cities as well. Growing economy and increasing purchasing power favourably impacts the growth of the shape wear market. She also highlights that although the market build up began with women, but now men are also giving much attention to this category.

Pania and Lopes as well notify the trend that shape wear is no longer just a women thing. “As of now, shape wear is more popular with women as compared to men. It is now gaining acceptance among men also,” says Pania. “Shape wear is more popular among women. However, men are also gradually taking to the idea and are eager to try it out,” says Lopes.

Market prospects

It is noteworthy that shape wear consumption in India is influenced by various demographic and socio-economic factors. “Yes, socio-economic factors do affect the consumption,” quips Lopes. She shared that their survey shows that educated and people living in metro cities are more conscious about the way they look. Hence, most of the consumption comes from metros. Further, teenagers,

Winning mantra

Although shape wear has already presented itself as a promising innerwear segment in India, but it still has a long way to go! As per Pania, the main market challenge is that shape wear as yet has not gained its due recognition and acceptance. Another big challenge is the lack of awareness among the bulk of prospective consumers.

“Shape wear is slowly but surely getting popular. The consumer response, by now, has been quite encouraging and the category is growing at a steady pace pan India.”

-Rezon Lopes,
Business Development Manager, Dermawear



Educating the customer is the major challenge. The customer needs to know about selecting the right product as per the requirement and selecting the correct size as per body type. As the category is still nascent, the customers are not aware about the products and the variety that is available, feels Lopes.

Soni opines that the heavy online discounts are a spoilsport for the category prospects. She rues that some online vendors sell low quality products or fake products by using the imagery of established brands which not only brings a bad name to a brand but also shakes the buyer's confidence in the efficacy of product itself. Quality is very important for this product category, she asserts, adding, it's a slow game but the product will eventually win the consumer confidence.

Perhaps, special packaging with special focus on product attributes communication, can also help boost the know-how about the product. Lopes from Dermawear apprises that the packaging has to be self-explanatory and educative in itself. We highlight the important attributes on the front side of packing, especially the points that make the product different from others. We also include an FAQ card with every box that has all the basic queries answered.

We have introduced a very special high quality packaging for our new collection so that women can easily preserve the packaging and store the product for long, informs Swee's Pania. Soni at Lace and Me, also acknowledges that good packaging does matter; although she prefers to focus more on the product itself. As per her, it is the product quality which speaks at the end.

Getting ahead

Exhibiting every sign of growing awareness and rising demand, shape wear has already presented itself a promising sub-category in the booming Indian innerwear market. At present, shape wear products are largely retailed through brick and mortar lingerie stores, online stores and teleshopping platforms.

Lace and Me's Soni reminisces that till a couple of years ago, very few elite shops used to stock shape wear. "The scenario has changed dramatically and today, we see almost every big or small store selling them." As per her, the category is doing well in both channels — online as well as offline retail. Seconds Pania from Swee, that shape wear is now gaining a strong foothold in the Indian market. She, however, also maintains, "Although the product is available in most lingerie outlets, there is still a scope for it in the regular clothing stores." Dermawear's Lopes concludes by saying, "Shape wear is slowly but surely getting popular. The consumer response, by now, has been quite encouraging and the category is growing at a steady pace pan India." Shape wear is not just a fad but is here to stay, echoed the trio!



MISSION 100 EBOs

C9 SWINGS FORWARD ON SEAMLESS TECHNOLOGY

Pranal Modani, Director, C9, bets on the vacant seamless category and offers plush, sensibly priced products within a new aspirational brand, Channel Nine, in 2015.

By Gurbir Singh Gulati



-Pranal Modani,
Director, C9

“The active wear segment has grown as a result of an increase in income levels as well as growing health consciousness. Those engaged in activities like gym, yoga and various sports, have become highly specific about the perfect attire. They prefer to wear specific wear meant for active lifestyles. Thus, innovations and value additions by the apparel giants make for this growth in aspiration to own the right garments.”

Modani shares his experience and the expanding nature of the women’s seamless garment category which represents a considerable growth area in the apparel industry. He shares insights on the important developments in the market and outlines Channel Nine’s success story in an exclusive interview.

EXCERPTS FROM THE INTERVIEW

Tell us about the Sangam Group and its recent foray into seamless garment with its brand C9. You have made significant progress now, but I am sure, you came across myriad challenges in the process; could you tell us about these?

Sangam India Ltd. is a leading business conglomerate known for its strong business values and principles. Born of humble beginning in the year 1984, the group has strong foundations across various industries of textile, steel, real estate, infrastructure and power and is renowned for its zest for innovation and leadership. In its latest initiative, it brings forth an innovative concept and inspires a new culture by setting women of today free from uncomfortable side seams, thereby giving them unrestricted freedom of movement. C9’s range not only feels light and is extremely versatile in its use, but also offers a liberating experience because of its 4D stretchability. As for any brand, we also face teething concerns from time to time, but we believe strongly in our brand and also are confident about surpassing challenges through our unique offerings.

Share insights about the concept of seamless garment. How does it work and what is your USP? Also, highlight the back-end processes which have made C9 a brand with a difference.

Seamless garment technology eliminates the process of fabric laying, cutting and sewing. By eliminating the cutting and sewing process, it provides an opportunity to save time and provide garments that are preferable for durability and functionality. Our USPs are fluid, flexible, fashionable and tag free. C9 has installed 36 circular knitting machines imported from Santoni, Italy, the world leader in seamless knitting technology, and has an installed capacity to manufacture 10,000 pieces of seamless garment a day. The huge potential and performance capabilities of these machines come from the technology that



INSIGHTS INTO THE LEISURE WEAR AND INNERWEAR SEGMENTS IN INDIA AND ITS GROWTH

The number of women who work today, has increased manifold and they live a financially independent and carefree life. Comfort and flexibility in apparel are their top priorities. Smart casual wear is quickly replacing the traditional sari and salwar kameez in wardrobes throughout the country. C9 positions itself well in this zone. In innerwear, the premium and super premium segments are advancing as a result of a consumer shift from economy. There is also a huge change in the mindset of women today, with regards to innerwear, with greater awareness and consciousness resulting in higher spends in this category than before.

enables them to shift easily from one product category to another. Seamlessness was earlier just considered for innerwear, but now has evolved into other forms of apparel as well. In addition to the technology, our design team adds finer details to the garments to cater to the sensitive Indian consumer who is looking for the latest styles with an Indian touch.

Tell us about the categories that you are present in and your product portfolio. How would you define the target audience of C9?

Within the three ranges, the apparels on offer include fashion wear (leggings, tops, flat pants, capris, t-shirts), innerwear (shape wear, sports bras, seamless panties, camisoles, tube bras, etc.), and active wear (leggings, cycling shorts, yoga apparel, t-shirts, track pants, capris, tank tops, etc.). Our core target group lies within women of 18 to 35 years age.

In your business sphere, how have you positioned your brand vis-a-vis other industry brands?

C9 intends to make a cumulative impact on the female fashion wear industry through pan India reach, and an unparalleled visibility.

The garments are extremely versatile; whether worn for a morning walk or a casual evening with friends, they ensure that the wearer doesn't look out of place. And the price points are relatively reasonable too, as compared to the industry.

We position our brand for the woman who is on the move and dons multiple roles in a day. We are buttressing our retail mapping through multi-brand outlets and large format stores. We have also launched our first flagship store at Lokhandwala, Andheri (West), Mumbai.

You are predominantly present in the leisure wear, active wear and innerwear in the women's segment. Would you introduce any other products under this segment? Tell us about any exclusive product launch or new developments which you have planned for your brand.

We constantly evolve our collection and this is primarily possible as we have our manufacturing unit in Bhilwara, Rajasthan, which is a hub of fashion creation.

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With a diverse design team that churns out inspired designs for each fashion season, we intend on introducing different designs each time. We have recently launched the Airwear line of products that offers inimitable comfort and moisture management, which keeps the user fresh all day long. Epitomising a fresh and free look with elegance, Airwear has been our latest addition. In the future we may foray into other categories as per the market trends and with our integrated setup, we are confident of adapting to the changes with short lead times.

Autum/Winter 2016 is here. Please tell us about the new styles, colours, fits, fabric, themes, etc., for the season.

The Airwear range comes with benefits like design and style, comfort, durability and support and fit, owing to the specially engineered products. Every season would be a unique theme based collection and would be inspired by international flavours in style and fashion. E.g., our Spring/Summer '16 was governed by urban landscape of Utopia. The upcoming Autumn/Winter '16 will be inspired by the impact of Zen living, stories from Indigo diaries and the upliftment of pop culture. The guiding theme of each season will give the Indian woman a new experience of dressing.

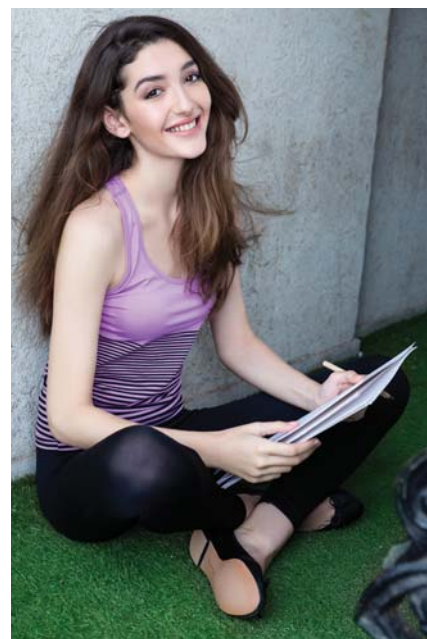


Tell us about the key growth drivers in the active wear segment in the next 3 years.

There has been an accelerated growth in the active wear market and it is poised for a strong growth over the next few years. A booming level of disposable income coupled with a shift in consumers' attitude to health and fitness, trends, online merchandising, and positioning of lifestyle are some key factors. The youth, today, also form a huge market as they govern their own choices. With the increasing consciousness towards health and growing popularity of sports in India, people are adopting a more active lifestyle which trickles down to focus on the gear and apparel they are in touch with.

Tell us about your retail network. How many EBOs, MBOs and LFS do you cover?

As a retail outlet, we have recently launched our first store in Mumbai at Lokhandwala market. In the current fiscal, we will move to tier -I and -II cities with about 10-15 more stores. We are



currently available at about 750 MBOs and have also tied up with the Future Group.

What are your retail expansion plans for the next 2-3 years?

C9 plans to open another 100 EBOs in the country in the next 3-4 years while continually expanding our presence in premium MBOs and LFS chains. Our marketing plans aim at bringing C9 on a competitive edge versus other players in the market.

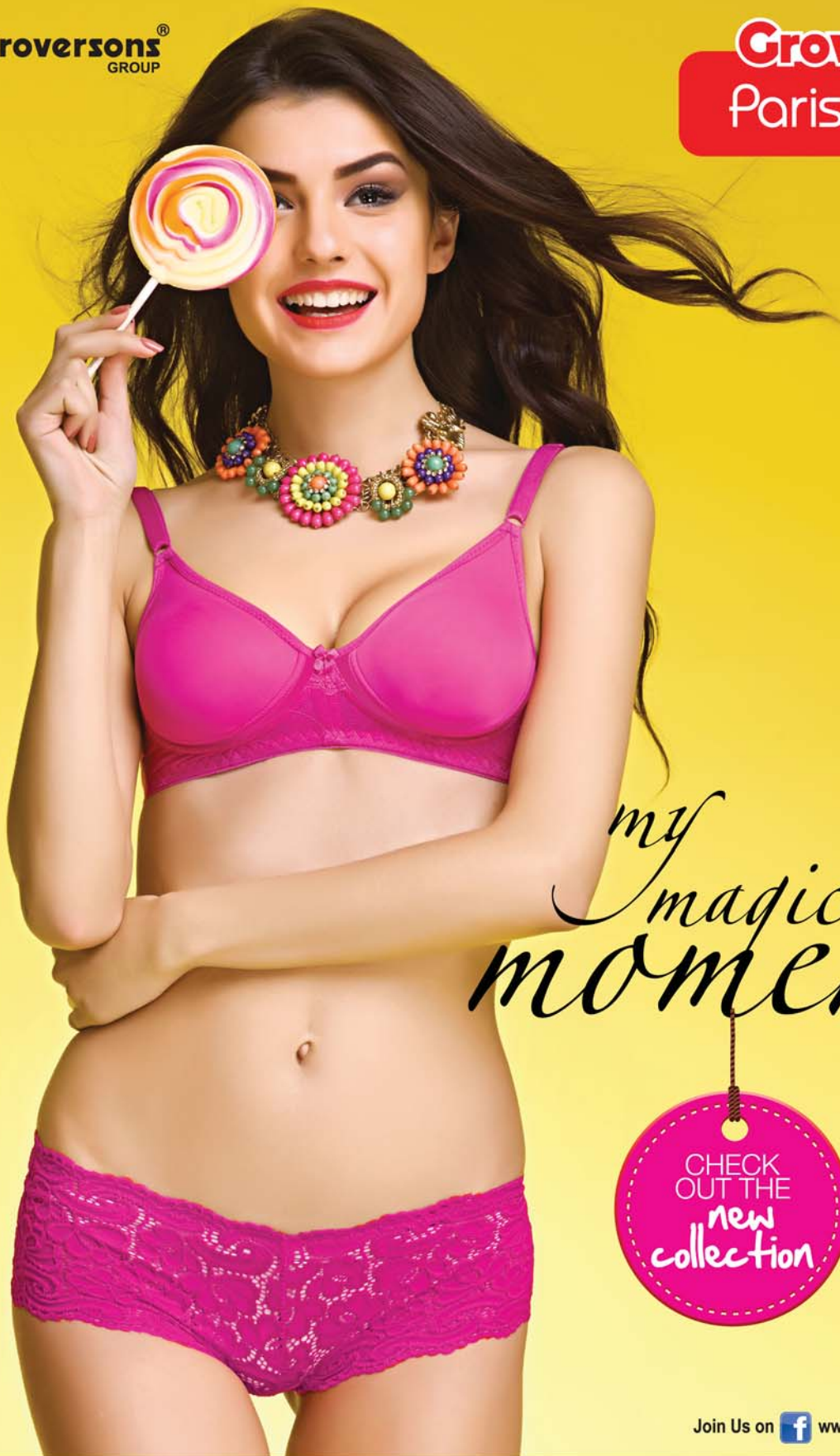
Are you online? Please share the progress which you have made in this sphere.

Yes, we have our very own e-commerce portal www.c9fashion.com and are available on other e-platforms like Myntra, Jabong, Amazon, Flipkart, Snapdeal, Voonik, etc. Users are still getting used to the brand and we are seeing a paced growth every month.

What about exports?

As of now, C9 is only available in India but we are always exploring new opportunities and markets.





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**PREMIUM
LINGERIE**



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enables skin
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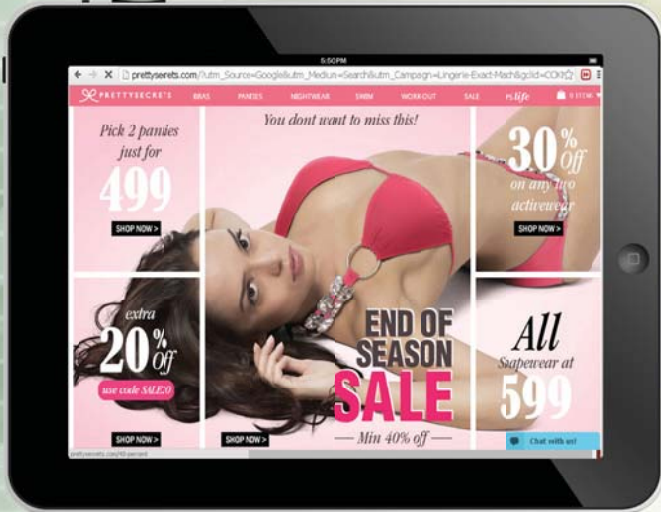
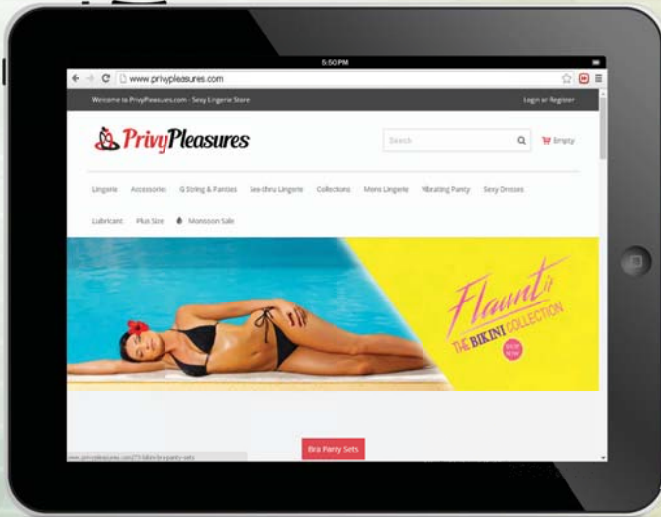
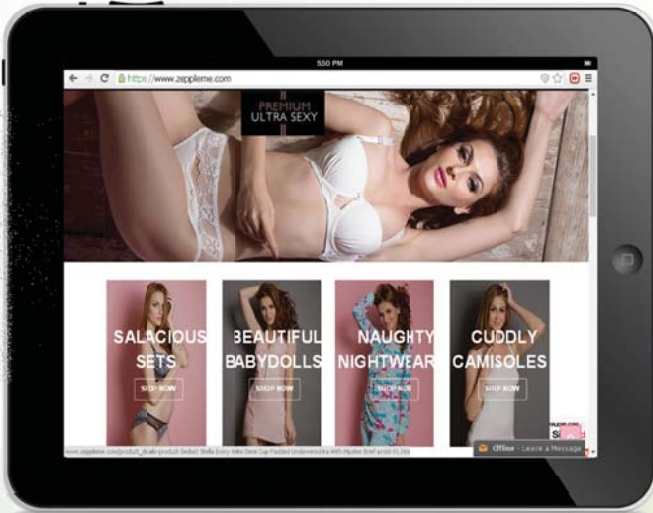


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WHO'S LINGERING ONLINE TODAY?

THE SHY, THE UNAWARE
& THE BUBBLY

By Bharti Sood

Once upon a time there were three Indian women innerwear customers...

There was Ms. Shy who was totally not at ease with either what was being unscrupulously hustled down to her, or disgusted by the way it was being. Shockingly, for years, women innerwear stores had a majority of male salespersons. Duh!!

Next there was Ms. Unaware, a woman customer who was not sure about what she needed or what perhaps she wanted, and had no one to discretely ask.

And then, there was Ms. Bubbly, who in a market of whites, blacks, greys and creams, just didn't get the stuff that was good enough for her. Oh we forgot red. Red was there too.

The Indian women's innerwear market was basically either Not Good, Very Bad or just Plain Ugly!!!

And, on the other side, innerwear was no longer regarded as merely an undergarment. It had already become a fashion statement. Indian consumers were willing to come out of their cocoons and experiment with new varieties, styles, colours and brands.

It was another classic mismatch where the Indian customer was, but Indian retail was not ready.

And then perhaps like an answer to her dreams, the online innerwear retailers arrived.

The online platform led by its first wave of progressive e-retailers has provided women a better environment to purchase lingerie of their choice. They came with a clearer retail vision. According to Richa Kar, CEO of the blockbuster Zivame.com, "Zivame was conceived with the idea of offering an intimate lingerie shopping experience to woman. The category had evolved from whites, blacks and nudes. Women were ready to invest more on themselves and their needs." Zivame means "a radiant me".

The Women's Innerwear Market in India

Indian women have whole heartedly accepted lingerie as part of their lifestyle and are gradually opening up to explore online lingerie portals where they can find privacy and variety. The Indian women's innerwear is a huge market. Karan Behal, CEO, PrettySecrets.com, states that, "The Indian lingerie market is currently at \$2.7 billion and is growing at a CAGR rate of 15 percent and is expected to reach \$4.4 billion by 2019." Richa Kar also avers closely with Karan's assessment. She feels, "The Indian lingerie industry is pegged at \$3 billion currently, and is expected to grow further." Vijyeta Kharbanda, Marketing Head, Zeppleme.com, optimistically adds that, "Innerwear online shopping has huge potential

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"The advantage of shopping online is the privacy that one gets while making their purchase. The online nature removes the barriers of shelf space, giving woman the access to variety in terms of styles and sizes."

-Richa Kar
CEO, Zivame.com



"Innerwear online shopping has a potential to grow in the near future. According to our research, we expect the innerwear market to grow at a faster pace in the coming future as we expect individuals to gain more knowledge in this area for purchasing online."

-Vijyeta Kharbanda
Marketing Head, Zeppleme.com





“Due to social reasons, one often feels shy to ask for a pair of sexy lingerie or something exotic in an offline store. An online store makes it all so easy and solves this problem.”

-Bhupendra Jagtap
Founder & CEO, PrivyPleasures.com



“When it comes to online shopping, getting the right size can be a bit confusing for the customer. In order to clear that confusion, there is a Size and Fit Guide for every product category on our website. We also have a live chat option where the customer can address her query to our customer care representative, who will guide her in addressing the issue.”

-Karan Behal,
CEO, PrettySecrets.com

to grow in the near future. According to our research, we expect the innerwear market to grow at a faster pace in the coming future as we expect individuals to gain more knowledge in this area for purchasing online.” She strongly feels that at present, people are not properly aware about innerwear shopping online.

Buying online vs brick-and-mortar stores

While talking about the first and instant advantage of buying innerwear online rather than from the brick-and-mortar stores, Karan states, “The No.1 advantage is privacy – which is of top most importance when it comes to a category like lingerie. Shopping for lingerie online bypasses any unpleasantness that one would witness in a typical multi brand lingerie retail stores.” Richa Kar backs the genesis thought of Zivame and adds, “The advantage of shopping online is the privacy that one gets while making their purchase.”

Elaborates Bhupendra Jagtap, Founder & CEO of PrivyPleasures.com, “Due to social reasons, one often feels shy to ask for a pair of sexy lingerie or something exotic in an offline store. It is even further difficult to flip through various options, especially when all sales persons are staring at you. An online store makes it all so easy and solves this problem.” Vijyeta feels perhaps even more strongly about the lack of awareness about lingerie shopping. She feels that this is compounded by the fact that the customers, mainly women, are not very friendly in talking about their innerwear issues and problems to the shopkeeper. She adds, “Our research shows that women often buy wrong sizes and are forced to buy whatever product the shopkeeper gives them. Online shopping gives them the advantage to choose their product as per their requirements and needs. If they wish to buy a certain product, they go ahead and commence the

sales, else they choose other products.” Additionally, Richa points out that, “The online nature removes the barriers of shelf space, giving women access to an unfathomable variety in terms of styles and sizes.” Karan also points out the convenience of choosing from a large variety of products at the click of a button. Richa adds that, “Zivame allows a woman to explore various sizes and styles without any hesitation. We empower her with product and category knowledge so that, she makes the perfect choice- this was not common in the category in the past.

A friend to talk to

And as to how exactly this is being done by e-retailers, Richa shares that, “We also offer various forms of consultation- telephonic, chat, website



and mobile size calculator, etc., thereby making her shopping experience extremely convenient and effortless.” Karan adds that, “Our customer care is available to personally address any questions the customer may have whilst browsing the website or via the chat option. Our website is designed in such a way that a customer would feel extremely content at her privacy being respected while she is browsing through the products. They can easily raise their queries to our customer care representatives, who personally guide each customer regarding fit and size or any other product related doubts.”

Choosing the right fit

Elaborating on the criticality of the fit issue, Karan shares that when it comes to online shopping, getting the right size can be a bit confusing for the customer. In order to clear that confusion, there is a Size & Fit Guide for every product category on the PrettySecrets website. “We also have a live chat option where the customer can address her query to our customer care representative who will guide her in addressing the issue,” he said. Vijeyta Kharbanda shares that, “We have a perfect size bra calculator for the ease of our customers. We have facility of online chat with our fit experts who assist our customers to choose their perfect size. Apart from this we even help our customers to ask their questions to our panel of expert doctors and fit expert members of Zeppleme. The questions can be regarding health or fitting issues.” Richa states, “We have launched several category leading customer service initiatives since we started. Fitting is a big problem when it comes to bras, and we offer a bra size calculator on our website which helps women to determine their right size. Another interesting service that we have come up with is our Fit Lounge in Bangalore where our fit experts help women identify their right size. Also, each of our products has a detailed description and imagery that helps our customers make an informed

purchase.” And now taking this experience offline, Zivame has also launched physical stores that offer a personalized lingerie shopping experience. “Our highly specialized fit experts are available at the stores to help ladies find the right fit.”

Discrete packaging too

Richa states that Zivame products come in a pretty pink #BoxofSecrets which is discreetly packaged in a grey nondescript outer packaging to protect the customer’s privacy. Bhupendra Jagtap, Founder & CEO of PrivyPleasures.com says, “In order to maintain privacy of our customers, all our orders are shipped in a discreet packing without mentioning the name our website or any kind of branding on it. Our invoice is also discreet as our company name is different than the brand name.” Vijeyta explicates, “Being an Innerwear product, privacy of the customer is our top priority. To



make the customer at ease, we need very simple informational inputs from the customer. We use the information internally to make the working easier.

We at Zeppleme do not encourage or disclose any information of the customers at any point of time.”

Taking the privacy issue further most brands have zero questions asked returns policies but with clear return policies.

Exchanges and returns

On the slightly different return policies in lingerie as compared to other apparel Karan explains that, “In the rare case that the ordered products do not fit the customer right, we either send a replacement product based on availability and preference or process a refund or a credit note upon receipt of returned products. Panties, shape wear and accessories are not eligible for returns for hygienic reasons.” Bhupendra Jagtap, Founder & CEO of PrivyPleasures.com shares that, “We offer easy exchange and no question is asked during return of any product.

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Due to hygienic reasons we do not offer exchange on panties." Fair enough! PrivyPleasures.com do not face this issue of size and fit as their products come in free size. Informs Bhupendra, "Most of our products are free sized with stretchable material and often come with adjustable hooks or ties."

Pricing

While discussing about the pricing of their products, Richa shares that, "The category has evolved from whites, blacks and nudes. Women today are ready to invest more on themselves and their needs. They are ready to spend approx. ₹1200 per piece as opposed to ₹200-300 that they used to spend earlier." Vijyeta closely agrees that, the popular price bracket is ₹500 to ₹1000. Bhupendra feels that the popular price bracket for innerwear range among his customers is ₹1000-₹2000. It's as much as what better than average jeans go at.

Is online innerwear dominated by women shoppers?

Innerwear is a highly online-friendly category amongst women who like to shop from privacy of their home. Richa strongly feels that the online innerwear shopping is dominated by women. She shares that, "Men constitute about 7 percent and women constitute the remaining 93 percent." Karan agrees, "The innerwear shopping is quite dominated by women where women's lingerie holds ~53 percent share while that of men is about 47 percent." Vijyeta Kharbanda, on the other hand, feels that online innerwear market is not dominated by women. "There is a big percentage of men who buy innerwear online these days," she says, and meanwhile Bhupendra states that, "Being an exotic lingerie store, PrivyPleasures.com is equally visited

and shopped by both men and women." He proudly adds that, "We offer men's sexy underwear which you will not get anywhere else in India".

The Tier-II and Tier-III cities are calling

Delhi, Mumbai, Bangalore, Chennai, Kolkata and the big cities have had it good but most online lingerie portals hold the edge in the latent potential of small towns. According to Karan, "The potential of these markets is only growing with the growth of marketing and ways of disseminating information, improved supply chain capabilities, providing easy payment options such as COD, and offering coupons and discounts are all factors that are leading to the non-urban dweller increase his/her consumption habits." States Vijyeta, "There is big potential of tier -II and -III cities in innerwear but according to our study the tier -II cities are more ahead in online shopping of innerwear these days." Bhupendra agrees that there is a great potential of tier -II and -III cities in innerwear, but it would take time.

Use or abuse?

The rise of online (innerwear) retailing in India has made it a lucrative launch pad for international innerwear brands into India. We asked the online innerwear retailers whether they are used by international brands till only such a time that they launch their own brick and mortar stores or online operations or will this foster good long term partnerships. Vijyeta felt that, "This is unpredictable as market is growing and if people get quality product at reasonable prices in India of an Indian brand online or offline then it can be difficult for international brands to setup a place in Indian market". That was brave of her. Bhupendra was clear "They will come on their own, once their brand becomes visible in India." And Richa Kar was silent. No comments. But, we hope she was thinking that "Like hell!!! I am already going global as they try going Indian."

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A woman with long, wavy brown hair is wearing a white lace bra and matching white lace underwear with small pink bows. She is looking down and to the left. The background is a soft-focus indoor setting with a vase of white flowers.

FASHION

RETAIL

TOP INNERWEAR BRANDS IN INDIA

FOCUS:
BEACHWEAR
TEENS' & KIDS' INNERWEAR
LOUNGE WEAR & SLEEP WEAR

Contents

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FASHION RETAIL

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CATEGORY FOCUS

THE BEACH COMPANY: FUN IN WATER

Imagine a brand for all those who love water. Harshad Daswani, Founder, The Beach Company, shares insights on the brand's collection and future plans.

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CATEGORY TALK

SOAK IN CHIC, EFFORTLESS SOPHISTICATION

Images BoF got into a candid tête-à-tête with renowned fashion designer Nidhi Munim—a rare Indian designer that creates swimsuits.

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CATEGORY FOCUS

TEENS IN FOCUS

The Indian teen innerwear market is bursting with opportunities and several brands are coming up with ranges exclusively designed for the teens, which focus on support, shape and comfort.

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CATEGORY TALK

KIDS INNERWEAR: ZERO AND SIMPLI

Two renowned name in kids innerwear, Zero and Simpli are making waves in kids innerwear. Director, Pradeep Arora, shares insights.

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ORGANIC

DIGITALLY CHIC: ORGANIC INNERWEAR

Neerja Lakhani, CEO and Founder of India's first premium organic lingerie brand 'Inner Sense', speaks to Images BoF.

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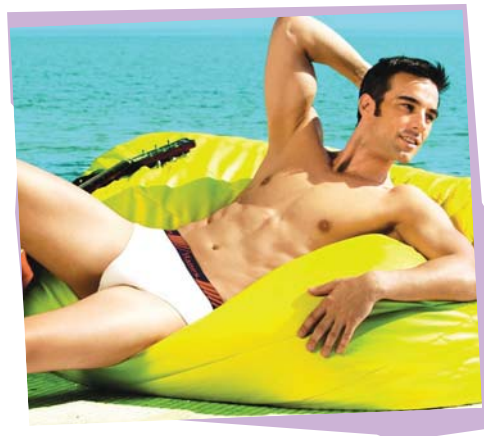
CATEGORY WATCH

LOUNGE WEAR AND SLEEP WEAR: UNTAPPED MARKETS

Lounge wear and sleep wear are gathering momentum with the 'looking good' culture not being restricted to just outdoors but indoors as well.

Pg No.125

Fashion Retail



RETAILER

FOUR DECADES OF LINGERIE SELLING EXCELLENCE

Amrut, a store in the western suburbs of Mumbai, has witnessed four generations of families coming to the store for lingerie shopping. Rajiv P. Shah, shares his retail success secrets.



Pg No. 126

MEGA BRAND

THE INNER POWER!

Page Industries, the exclusive licensee of Jockey and Speedo brands, is credited to have revolutionised the Indian innerwear industry in many ways. A look at the power house.

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MEGA BRAND

HANES: SLIP INTO CHIC COMFORT

Images BoF reports on whats latest with the US-based global mega brand Hanes which operates in India in partnership with Arvind Lifestyle Brands.

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BUTTERCUPS.IN

The online innerwear brand, Buttercups was launched in 2009. Initially, owing to lack of knowledge among consumers about ideal lingerie and perfect fit, the business model was difficult to pursue. This led the brand to set up ABTF, India's first bra fitting app in 2013. This app also helped the brand to understand how to take the offline fitting experience online. Today, they have two fitting rooms in Bengaluru, where expert-fit-specialists help customers to find their perfect fit.

Core Strengths: With over eight years of extensive experience in the Indian lingerie space, the brand's strength lies in their deep customer insights. The experience has been gained from 3,000+ fittings on females and it gave the brand a great understanding of the need of Indian women.

Focus Customers: The brand's target audience includes women in the age group of 28 years and above. The women belong to the urban class from tier-I cities. They recently launched a new range which caters to the pre-teens, in the age bracket of 9 to 12 years.

Primary Markets: Top metro cities remain their biggest contributors. However, they feel that the interest they are receiving from non-metro cities cannot be ignored too. They have witnessed a significant rise in demand from these locations in the past six months, which was previously restricted to less than 5 percent of their overall business.

Top Most Innovative Products in the Collection: 'Sticky', which is a double edged magic tape. It is extremely thin and fabric friendly and helps to cover peeking gaps in clothes. '3-part bras' like Nell-and-Divine, provide full coverage and give great support and shape and 'seamless bottoms', which are constructed with no visible stitching for zero panty lines. The materials used are super soft poly and feel like a second skin.

Plans Regarding New Product Range (Category Expansion): Buttercups.in is planning to launch a new collection in October and November, which will focus on everyday comfort but will still feel and look fashionable.

Plans for Exploring New Markets: Buttercups.in is planning to expand to Mumbai, Delhi, Chennai, Hyderabad and other major tier-I cities. Currently, it has two fitting rooms and aims to open 15 more in the next two and 30 over the next four years, across 10-12 cities.

Progress Through Online Retail: According to the brand, online shopping for intimate wear has created a paradigm shift in the way lingerie as a category is perceived. While the customers are conscious of the necessity, the traditional means of shopping makes it unattractive, leading to hasty purchases. Online lingerie shopping has opened doors to address the problem of 'experience' in the comfort of privacy.



THINGS THAT SETS BUTTERCUPS.IN APART:

Product:

The products, as competitive as any other European luxury lingerie brand, have been made with a lot of innovation in design and style to suit Indian body types.

Fitting experience centres:

The brand believes that a bra fitting is an intimate affair and ensures that women are made comfortable. The fitting rooms have "fit specialists", who are trained to help women discover their right bra size and perfect fit through a series of measurements. The specialist then recommends styles suited specifically to complement the customer's unique body shape.

UNIQUE ONLINE QUIZ

Educative selling proposition:

Everything from fitting rooms to quiz and to website, is educative. Their focus is to empower women with knowledge, so that women can make more informed decisions when they buy intimates.

Price Range

Spring Collection: ₹999
Vintage Collection: ₹1,795
Accessories: ₹395
Teen Range: ₹200



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PRETTYSECRETS.COM

Prettysecrets was launched in 2012. Headquartered in Mumbai, it was formed to inspire the new breed of Indian women. The brand's mission is to deliver superior quality lingerie as well as give its customers access to a product which was previously unavailable in the market.

Core Strengths: A relatively young brand, it offers functional and comfortable innerwear range that rank very high on elements of fun and sexiness. Its core strength lies in being competitively priced when compared with other brands. This makes the brand far more accessible to its target group of young independent women.

Focus Customers: Majority of the brand's customers are women between the age of 20-35 years. They belong to Sec A and B and shop online. These customers believe that lingerie need not be boring. Also, men who buy products for gifting purpose account for 15 to 20 percent of the net sales.

Retail Presence: Prettysecrets.com is present in 120 stores (approx.) in Maharashtra, Delhi and Punjab. Their plan is to grow this number to about 250 by this year end. Moreover, it is capable of serving 19,000 pincodes across the country.

Product Range Expansion Plans: The brand plans to go beyond the regular product offering by bringing freshness through new themes and collections. They want to bring new collection every season while strongly focusing on their strengths, i.e. bright fun colours and prints.

Top Selling Innerwear Categories: Bra (convertible bras, t-shirt bras, seamless bras, push-up bras), panties (like G-strings), seamless innerwear and value packs.

Top Contributors to Sales: Mumbai, Delhi NCR, Bengaluru and Hyderabad.

Performance of Tier -II and -III: Around 55 percent of their customers are from tier -II and -III cities. According to the brand, with selective target strategy, this number can increase up to 70 percent over the next six months time.

Future Plans: The brand is young and aspires to deliver value. They are proceeding towards being the largest lingerie brand in terms of product assortment and constant endeavour to innovate and develop products to upgrade the lingerie market and their customers' expectations. They have been achieving 75 percent growth since the last three years and plan to grow by 125 percent over the next three years.



Retail Presence:
120 points-of-sale

Average orders placed by a customer:
2.7 units per order

CAGR (last 3 years):
75%

Price Range

Brassieres: ₹549- ₹1,199
Panties*: ₹299- ₹1,199**

**(incl. value packs) ** (pack of 5)*



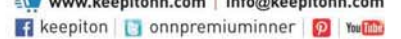
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PRIVYPLEASURES.COM

Launched in 2011, PrivyPleasures from Outbox Retail Pvt. Ltd., is an exclusive online lingerie shopping store in India featuring an impressive collection of erotic and sensual lingerie sets and accessories to be used for special, intimate moments.

Core Strengths: PrivyPleasures only deals in original brands. What is seen at the store is what one gets. All products are original with actual product images and not counterfeit.

Focus Customers: The brand caters to both men and women between the age group of 25- 35 years living in metro cities.

Product Portfolio: The site offers various unique products and international brands which cannot be found in most lingerie sites and stores. PrivyPleasures offers role play costumes, teddies, sexy bikini sets, body stockings and baby dolls. It also offers various fetish accessories like bondage bra-panty sets, sensual babydoll night wear, hot G- string and bikinis, vibrating bullet panties with remote and more. Another highlight feature are the bra-panty sets made up of just jewellery. PrivyPleasures also offers men's erotic undies and lingerie as well.

Innerwear Share in Total Product Portfolio: Innerwear constitutes of about 80 percent of PrivyPleasures's total product portfolio.

Top selling innerwear brands: Outbox Retail Pvt. Ltd., has its own white label PrivyPleasures. Other than that it also has brands like Hustler, Elegant Moments, Magic Silk, etc.

Top selling innerwear product categories: Panties, baby dolls, adult costumes, bikinis and gowns.

Retail Presence: The brand serves all the states and union territories in India. They have shipped their products from Andaman and Nicobar Islands to various North Eastern states. Though the main focus is on the Indian market, but the brand also caters to several gulf countries and neighboring countries around India. The brand's primary markets are Mumbai, Pune, Delhi, Bengaluru and Chennai.

Performance of Tier -II and -III Cities: About two-three years ago, the brand was getting very few orders from tier -II and -III cities but this year, there has been a consistent increase in the numbers.

Sales Growth: In the last 3 years, the brand has witnessed 300 percent growth in sales.

Online Sales: Orders worth more than ₹2,500 are almost regularly placed by customers online. The customers usually re-visit the PrivyPleasures store twice a year as the brand deals only in exotic lingerie and not the daily wear kinds.

Future Plans: The brand is aiming for a 300 percent growth during the current financial year. The company is also planning to launch its own brand within next three months.



Share of innerwear in total
product portfolio:
80%

Price Range

Men

Briefs : ₹399- ₹1,890

Women

Panties : ₹199- ₹1,300

Others : ₹850- ₹2,999





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ZEPPEME.COM

Launched in 2015 by Muffin Clothing Pvt. Ltd., Zeppleme.com is committed to creating beautiful, high quality and perfectly fitted lingerie at a great price for everyday comfort and style wear. The brand's mission is to satisfy its customers by offering them the best products and services through continuous innovation, adaptation and upgradation.

Core Strengths: Zeppleme provides a great fit, amazing quality and stylish designs for everybody at a wallet-friendly price. With an aim to be one of the leading lingerie brands in the Asian region, the brand aspires to create lingerie that makes women feel sexy without sacrificing on comfort.

Focus Customers: Zeppleme's core clientele encompasses the modern women who not only wants to look good with stylish fits but also want comfort at the same time. The Zeppleme online shopping store offers a vast range of product lines for every woman.

Retail Presence: The company serves over 7,000 pin codes all over India including most remote areas. The brand's primary markets are Mumbai, Delhi, Hyderabad, Bengaluru and Kolkata.

Product Portfolio: Zeppleme's 'Seduct' offers a vast collection of lingerie for every occasion. Understanding every need of women, it features a collection for every stage of life of a woman. Right from the teenager who is just beginning to use a bra, the college girl hitting the hottest nightclub, the bride on her honeymoon, to the lady on her way to motherhood, there's something for everyone.

Top Selling Innerwear Product Categories: Demi cup, non padded cotton bras, cotton panties, babydolls, padded and underwired bras attract most of the customers.

Performance of Tier -II and -III : According to the brand, they have performed excellently in tier-II and -III cities and are soon expecting greater response and increased demand that shall match up with the level of tier -I cities.

Sales Growth: The sales have gone up as compared to the initial stages. More than 8-10 transactions take place per day on the e-shop of the brand. There has been a static growth since the beginning.

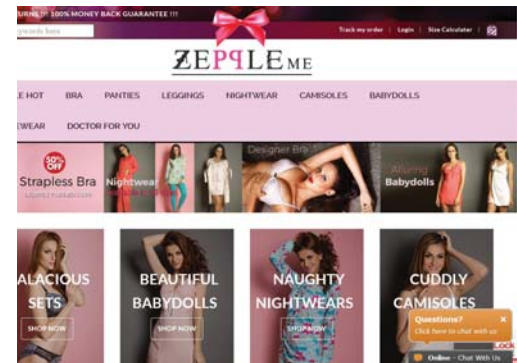
Online Sales: On an average, customers' order range varies between ₹1,000 to ₹1,500. Generally, Zeppleme has customers who revisit for orders and the customer flow is expected to increase in the coming future.

CAGR Growth & Future Plans: Zeppleme has been having a static CAGR growth since the store was started. The brand aims to be the leading lingerie brand in the Asian region.

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Share of innerwear in total product portfolio:
80-90%

Price Range
Brassieres : ₹200- ₹1,200
Panties : ₹150- ₹400
Others : ₹400- ₹1,100



ZIVAME.COM

Headquartered in Bengaluru, India's premier online lingerie store Zivame was launched in 2011. It is a leading online retailer of women's intimates, offering a versatile collection for every stage in a woman's life. Known for its exclusive designs, best prices and a perfect fit, Zivame provides innerwear ranging from everyday essentials to high-fashion styles in every size.

Core Strengths: Zivame focusses on close to skin categories ranging from bras, briefs, shape wear, night wear, easy-wear, swim and beach wear and intimate lingerie accessories. Its online presence provides women access to variety and privacy, the two top priorities while shopping for women's intimates. To add to it, its user-friendly interface, easy return policies and it's active online lingerie sorority makes the shopping experience convenient and indulgent.

Focus Customers: The target audience of the brand are stylish women and Zivame aims to provide them with a unique shopping experience for their lingerie needs. The brand understands every woman's changing needs and offers a wide collection to suit her evolving lifestyle. Another attraction of the brand is the lingerie hotline from where customers can get customized lingerie solutions from their fit experts.

Innerwear Share in Total Product Portfolio: Currently, innerwear forms the core of the brand's product basket. However, Zivame is also planning to expand the merchandise across other categories.

Product Portfolio: Zivame offers a vast variety in beautifully crafted bras, panties, night wear, shape wear, swimwear and sportswear.

Top Selling Innerwear Product Categories: Fashion Bras, every day or t-shirt bras, saree shapewear, sleep bras and velocity sports wear.

Retail Presence: Zivame has retail presence across the country because of the burgeoning internet penetration and it ships to across 22,000 pin codes in India. Zivame predominantly retails in markets of New Delhi, Bengaluru, Mumbai, Pune and Kolkata, which have maximum sales. Its international presence encompasses about 280 countries across the globe.

Expansion Plans: The brand aspires to create the best technology driven lingerie shopping experience for every Indian woman. Many new products are being created and added under the brand Zivame to create a greater impact. The focus is to fill all the need gaps and give consumers access to a variety that they have never been witnessed before.

Performance of Tier -II and -III: While e-commerce is still growing in urban markets, Zivame sees exponential growth coming from tier -II and -III cities, with the brand touting tier -II markets to be as progressive as tier -I markets.

Progress Through Online Retail: Zivame sells close to 4 bras every minute and gets 3,000 orders a day through it's e-shop. The sales have shown an increase of 150 percent on year on year basis in the past three years. The customers are seen re-visiting and shopping on the brand's website, which has a higher retention rate as compared to other platforms.

Penetration:

22,000 pin codes

Price Range

Women

Brassieres : ₹150- ₹3,000

Panties : ₹150- ₹600

Shape Wear : ₹650- ₹7,000

Swimwear : ₹1,500- ₹3500

Easy Wear: ₹275- ₹2,500

Night Wear : ₹350- ₹2,300

Lingerie Accessories:

₹200- ₹3,000

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THE BEACH COMPANY

FUN IN THE WATER!

The Beach Company is for all those who love water. The brand's present product basket comprises of swimming equipment and pool toys, exclusive aquatic fitness training gear as well as trendy swim wear and fashion to wear at a pool, on the beach or at a holiday resort. In a short chat with Images BOF, Harshad Daswani, Founder, The Beach Company, shares insights on the brand's collection and future plans.

When thinking of a holiday on a beach, one often dreams of a swim wear that feels sexy, glamorous, flirty and fun. Something that really fits in well, in inspiring colours and styles that make your days on the beach more comfortable and fun filled. The Beach Company is a vibrant swim wear and beach wear lifestyle brand for the style savvy.

About The Company

Launched in 2014, The Beach Company is a medium-sized company based in Mumbai, and is India's most popular and largest online retailer of swimming and beach holiday products for women, men, and children.

Offering a vast gamut of fun, fashion forward and an innovative range of swim and beach wear, The Beach Company offers all the summer essentials from an array of fashionable bikinis, one piece swim suits, cover ups, to an extensive accessories collection. All products are created with superior quality fabrics and ensure an impeccable fit and quality. Bold statement marine prints, contrasting textures and eclectic colours reflect the brand's philosophy.

Says Harshad Daswani, "Our company is India's largest online retailer of swim wear and holiday fashion. We are a specialised marketplace and



Harshad Daswani,
Founder, The Beach Company

offer more than 20 international and domestic designer brands. Our private label 'TBC' makes affordable beach wear and our mission is to change the way India approaches the water."

Furthermore, he added, "Beach wear has transformed itself. Earlier it was simply a cover up, but now it is a fashion wardrobe essential with products ranging from dresses, skirts, kaftans to designer sarongs to be worn from the beach or the pool side straight to the dinner".

He said, "Traditionally, beach wear was all about sarongs and embroidered kaftans. Today, it has evolved and encompasses all aspects of a holiday wardrobe, from sunglasses and flip-flops to towels and resort dresses."

Beach Wear Market in India

Talking about the current demand for beach wear in India and its potential, Daswani said, "India is a niche market, and unlike lingerie, it is not need-based. So, though the potential exists, the holiday destination infrastructure has to first grow. For instance, we only have Goa in India

as a beach state. Our government must develop more coastal beach hubs - be it at Puducherry, Odisha, Kerala or even Gujarat which have some lovely stretches of white sand."

Product Portfolio

The collection at The Beach Company presents an exclusive range of beach wear and sarongs, swim wear and swimsuits, flip flops, havaianas, beach bags and hats, swimming goggles and swimming caps, sunblock, snorkels and masks, sunglasses, swim training gear, technical and competitive swimsuits, hand paddles, kick boards, learn-to swim kits for kids and adults - a wide range of floats, inflatables, and pool toys, children's swim wear, etc. The Beach Company's latest collection brings in some fresh looks with fabulous new beach wear comprising of swimsuits and bikinis, flip flops, beach bags, swim floats, pool toys and games and swim equipment.

Preferred Fabrics

The Beach Company uses natural fibre for beach wear for men and women. Reiterates Daswani, "Cotton is our first choice, but for price points, we also use a lot of chiffon polyester to give a nice flow to the garment."

Most Admired International Brands

Shares Daswani, "I think, internationally, Speedo is the largest and most respected. Their keen eye on price, sleek design and brand sponsorship has helped them penetrate every market globally. In India, we help retail swim wear by designers Shivan & Narresh, India's first luxury swim wear brand, who have also contributed to the market in India for beach wear."

New Beach Wear Collection

The new collection at The Beach Company is inspired by nautical and marine prints. It features a collection of flowing maxi dresses so that women can go straight from the beach to the bar effortlessly and also maximize the value of their holiday wardrobe. While discussing the popular elements/embellishments in designs, Daswani points out, "This season is all about lace and tassel embellishments. We are also adding design elements such as multi-head embroidery to add to the range."

Future Trends

When asked about the top future trends that would emerge in inner wear for men and women, Daswani opines, "Well, we are a swim wear brand, so from the viewpoint of swim wear, we think high-waisted bikini bottoms are going to continue. We would like to see emerging designs in vintage styles too. Further, with growing fitness levels, I think monokini styles, plunging necklines and bolder colours will emerge."

Retail Presence

The Beach Company currently has over 30 points-of-presence, including selling on its own website, other leading e-commerce partners, and shop-in-shops across South India. Informs Daswani, "We have recently also started operations in hotel spas where people can purchase our accessories."

Expansion Plans

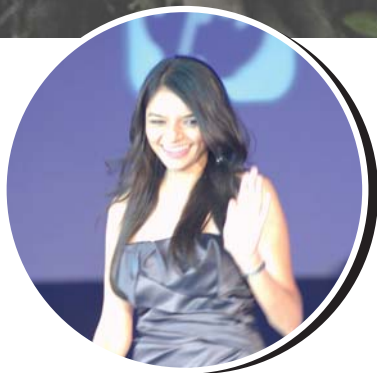
The Beach Company is planning to expand its presence. Says Daswani, "We would like to open our flagship store in Panjim (Goa) and develop franchisee models in Bengaluru before looking at a larger growth option offline. Online, we will move to add multiple brands in the swim and beach space taking our SKU count to 25,000 by the year end."



SOAK IN CHIC, EFFORTLESS SOPHISTICATION

Images BoF got into a candid tête-à-tête with renowned fashion designer Nidhi Munim, who is one of the rare Indian designers to dive into the world of swimwear. Her eponymous brand, catering to women, is making waves in an otherwise niche Indian luxury swim and resort wear market, besides storming across to foreign shores.

By Namita Bhagat



Nidhi Munim,
Designer

“The demand has been spurred majorly by the growing population of Indians holidaying and honeymooning on beach or resort destinations. They want to make the right choices for dressing. Also, the growing number of destination weddings has seen a rise in the demand for this category.”

Nidhi aspires to make swimsuit, a must have in Indian woman’s wardrobe. Her designs are deeply influenced by Indian culture — modest feminine cuts, bold colours and handcrafted designs, providing women with confidence and a feel of luxury and comfort. Her brand presents a luxe one stop destination for swim and resort wear. It offers a sophisticated line of swimwear with a hint of risqué whereas the beach dresses exude ease and élan. The brand has been associated with several eminent platforms such as Kingfisher Supermodels, Femina Miss India, MTV Splitsvilla and Karan Johar’s Lakme School of Style. Apart from been donned by celebrities like Deepika Padukone, Ileana D’Cruz, Sunny Leone, Esha Gupta, Nargis Fakhri and others, the brand has also styled celebrities in many iconic Bollywood movies.

Tell us a little bit about yourself. How did you get into design, and that too, swimwear?

Nidhi Munim (NM): I have always been passionate about art, music and culture. It continues to inspire me. Swimwear allows me to amalgamate Indian art and fashion. It’s exciting to interpret an illustration and watch it come alive on the runway and make its way into people’s wardrobes. The process of translating our beautiful Indian cultural crafts into fashion, keeps the thrill going.

When was your brand launched? What is its USP?

NM: Swimsuits in India have either been too plain or too embellished. There is no fine balance in between. I felt that there was a need or a void that needed filling up, and thus, launched my own brand in 2012. The USP of my brand has always been Indian prints on swim wear with 100 percent tummy tucker fabrics.

What all products do you offer? Who is your core target clientele?

NM: We offer a variety of swimwear, beach wear and resort wear specially made for the Indian women's body type. In addition to an array of bikinis, monokinis and swimsuits, we also have equipment blouses, hand-painted dresses and vintage kaftans. We don't target markets like other companies do, we target people! We focus on every unique consumer and we let them decide how and where they would like to wear our products.

Share your overview of the swim wear market in India. How do you think the consumer perceptions and attitudes towards swimwear have evolved over the last few years?

NM: Indian women probably have the most suited body type for swimwear,

whether it's a one-piece maillot, a two-piece bikini or a daring trikini (one piece with cut outs on the waist). When I first started the brand, the industry was non-existent. Women didn't have access to brands for this category, unless they travelled abroad, and in India, they got swimsuits at a pocket burning price. We wanted every woman to afford the luxury of a beautifully designed swimsuit at a premium price.

Coming to 2016, Indian women have now become aware of their unique body-type and its nuances while shopping for swimwear. Also, they're more confident in embracing this category. The demand has been spurred majorly by the growing population of Indians holidaying and honeymooning on beach or resort destinations. They want to make the right choices for

dressings. Also, the growing number of destination weddings has led to a rise in the demand for this category.

Tell us about your business model. How do you market and retail your brand in India and overseas?

NM: The core of our brand is to create super loyal customers who will refer their friends and family members. We are present on various online stores and also in offline retail. We have exclusively tied up with Shoppers Stop and have partnered with some prestigious hotels and resorts like Taj and Accor group. The brand is distributed in over ten countries.





You are into high-end segment. So, what kind of scope does the Indian market offer for your brand? What about the challenges?

NM: India has been a very welcoming market. Indian women feel more comfortable to know that they have a brand that understands their body type and taste. About 60 percent of our revenue comes from Asia and the balance 40 percent from Europe. I think what has worked in our favour is that we know our audience and we deliver what they need.

Shed light on your design and style inspirations. How do you keep up with ever dynamic fashion trends?

NM: Simplicity is the ultimate sophistication. We keep it classic and customers love it! We don't overwhelm customers with too many choices, parameters or options. Even the products themselves are classic uncluttered designs.

Brief us on your latest collections and their highlights. Which products are being well-liked, and what's your favourite style?

NM: My new collection "Sea Star" is inspired by the mysterious underwater world: the oceanic blues, the warmth of the sun rays, beautiful pearl embellishments and mermaid like silhouettes with braiding and strappy detailing. The form and movement of corals is depicted through vibrant prints. We have also launched an innovative collection of draped swim dresses for the Indian body type. The key features are 100 percent tummy tucker fabrics, with special attention given to details and comfort.

Any design which offers comfort and good buying experience leaves a long lasting impression in the customers' mind. Mesh bandaged swimsuits are most liked by our consumers because of its tummy tuckering feature. My favourite style has always been a classic sweetheart swimsuit which is a timeless must have for every woman's wardrobe.

Can you share any key innovations in terms of design and development?

NM: We have introduced mastectomy collections for breast cancer survivors. We are constantly innovating designs to create consumer delight! More than design, it is our brand's emotional connect with the consumer that keeps us growing.

What, according to you, is the next big trend to watch for?

NM: This year the holiday and honeymoon wardrobes will see the return of the glamorous '60s with surreal prints and a colour palette of blues, ivory, teal, pink and emerald green. The emphasis is on textural details, flounces and fringes. Resort wear will see the return of the summer dress in a printed voluminous version. Swimwear will go more daring with cut-outs.

Describe your marketing strategy. How do you plan to grow your brand further?

NM: We work on a unique value proposition - which is 'out of the box design' and 'good packaging at a premium price'. We have now enlarged the umbrella to preteen swimwear and plus sized swim and resort wear. Moreover, we are also propelling the retail wing of the company to open more shop-in-shop destination stores in partnership with hotels and resorts in India as well as internationally.

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TEENS IN FOCUS

The Indian teen innerwear market is bustling with opportunities. Today's mothers are focusing on educating their daughters on the benefits of wearing the right innerwear from an early age. Various brands are coming up with a range, exclusively designed for the teens which focuses more on support, shape and comfort.

By Bharti Sood

Teens are very particular when it comes to what they like and what they don't like. They are more health and brand conscious and more aware of what is good for their body type.

Demand in pre-teen or teen innerwear

Talking about the demand, Arpita Ganesh, Founder and CEO, Buttercups.in, shares, "Yes, we have definitely seen a growing demand as very few brands cater to this segment. Currently, the innerwear market lacks understanding towards the need of pre teens or teens. Having realised this gap, we created a teenage range known as Little Women. Our 'Little Women' range helps to remove awkwardness associated with the first bra experience and it was designed keeping in mind the needs of girls aged 9 to 12 years." Jennifer Kapasi, Head of Operations - India, Triumph, also affirms, "There is a major demand for this category, as in India, this is a segment that is severely neglected. Until recently, the Indian consumer was not aware of the health aspects of lingerie and how wearing the right lingerie not only impacts how you look but also how you feel. With growing education levels and exposure to urban lifestyles, the demand for special teen-oriented bras has emerged."

Role of parents in innerwear purchase for their children

Today's parents are very conscious of what their child wears from an early age. Arpita feels, "Indian buyers have evolved tremendously in terms of increase in consumption of quality



“There is a major demand for this category as in India this is a segment that is severely neglected. Until recently, the Indian consumer was not aware of the health aspects of lingerie and how wearing the right lingerie not only impacts how you look but also how you feel. With growing education levels and exposure to urban lifestyles, the need for special teen-oriented bras has emerged.”

-Jennifer Kapasi
Head of Operations - India, Triumph



“Yes, we have definitely seen a growing demand as very few brands cater to this segment. Currently the innerwear market lacks understanding towards the need of pre teens or teens. Having realised this gap, we created a teenage range known as Little Women.

-Arpita Ganesh,
Founder & CEO, Buttercups.in



products. Today’s parents, especially mothers, are focusing on educating their daughters on the benefits of wearing the right bra from an early age. Having gone through the whole process themselves, they understand the awkward phase every girl has to go through. Mothers are now actively looking out for bras that are comfortable and supportive for their daughters, so they don’t have to struggle through this phase of life.”

“Every family has its own dynamics when it comes to talking about highly personal subjects. Some families discuss puberty and adolescence openly without any shyness. In cities, people are starting to shed their inhibitions and are coming out of the ‘awkwardness’. Mothers actively take part in helping their daughters choose the right bra. Triumph also helps their young consumers find their first one with our ‘Tween collection’ which has bras for girls who are just coming of age,” opines Jennifer.

Communication strategies

Various brands adopt different promotion strategies to educate and inspire the young consumers. Some lay focus on the sex appeal of their product while some talk about the fit or youthful glamour.

Avers Arpita, “When it comes to marketing, Buttercups, as a brand, has always adopted a personalized approach. One of the unique methods we used was to introduce a special page, on our website, that answers all the questions mothers might have, about the intimate wear needs of their daughters. We also curate a “five step guide” that helps pre-teens enjoy their first bra experience. We work closely with tweens and their mothers having regular interactive workshops and events to help educate young girls have a comfortable first bra experience. We are also planning to work with schools to have workshops for young girls there.”

Says Jennifer, “Last year, we launched a successful campaign for the launch of our ‘Tweenage’ bra collection. We took

>



the route of speaking to the mother and educating her on the reasons why she should opt for a beginner bra for her growing daughter. The campaign which was launched both in print and digital media did not feature any model wearing the product. Instead, we wanted to focus on the bond between mother and daughter. Through various informational leaflets, and posters, we educated the mothers about why it is important to wear a beginner bra, how to find the right fit and the correct manner to wear a bra."

Market at a glance

The Indian teen innerwear market is teeming with opportunities. While shedding light on the market trends, Arpita says, "The market is completely untapped and while there is awareness, there are no brands to back the awareness. Getting teens the right first bra experience is an essential thing and with mothers getting conscious of this, the opportunity is very large." Continues Jennifer, "It is a niche category that will see growth along with the lingerie sector as a whole."

Latest trends

"The latest range comprises of the 'Nymph' (bralette) and 'Aura' (bottom wear), in fresh and happy colours like

cotton candy and mint. This collection was specifically designed keeping the pre-teen tastes in mind and is highly relatable to the age group," informs Arpita.

Jennifer announced that Triumph had recently introduced a new tween bra collection for beginners. She adds, "It is a specially designed youthful collection, made from natural cotton for a simplistically modern, super reliable and super comfy choice."

Adds Arpita, "I would describe the current top trend in teen innerwear as 'sporty chic'. Tweens, who haven't hit adolescence yet, are generally not that comfortable with their bodies. They are not comfortable with more glamorous styles and look for more sporty, comfortable and fun styles. Comfort is a big factor, as most lead an active lifestyle and need innerwear to cater to that."

Product range for teen innerwear

The product range designed for the teen segment focuses more on support, shape and comfort. Opines Jennifer, "This series is specially designed and crafted for school girls and teenage girls. It is perfect for those in-between years and the unique design provides low to medium support, while the double layer provides a smooth shape and reduces transparency. This collection gives young girls design options in the form of crop tops, bandeaus and soft-cup bras, in vibrant youthful colours."

Future trends in teen innerwear

While talking about the trends that will emerge in the future in teen innerwear, Arpita feels, "The 90s are making a big comeback and pre teens are highly influenced by current trends. Tweens look for bright and happy colours like lemon, peach, mint and prints. I predict teen innerwear with more florals, tie dye and sporty graphics in the coming seasons."





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KIDS INNERWEAR: SUCCESS STORY OF ZERO & SIMPLI

A renowned name in kids innerwear, Zero was launched in 1990. The Kolkata-based brand received a lot of appreciation for its 100 percent cotton range and launched another brand, Simpli in 1998. In an exclusive interview with Images BoF, Director, Pradeep Arora, shares his insights on the kids' innerwear market.

Tell us about your latest collection.

We have introduced stripes, auto stripes, bright colours and all over prints. We cater to 18-24 month old kids and do not want to make our products very expensive. Our focus is more on artistic innerwear than putting characters on top.

Our latest collection comes in various colours, e.g., from very light pastels to light-medium, medium, medium-deep and deeper shades. We are offering in such a manner to cover the entire market. For example, in south, customer demands deep bright for their kids. We cater to the tastes of the entire market.

Did you witness any major change in demand in kids' innerwear?

We keep introducing changes as per international trends. We have our R&D working throughout the year and we



launch new collections from time to time. We bring in new colours, use new fabrics like 32 gauge, 40 gauge in cotton to improve their texture. At times the customers do not identify these changes. They just feel the product or see and like it, and that's it.

What are the challenges in manufacturing for kids innerwear?

When we launched our first brand, 'Zero', there was hardly any brand in the kids' innerwear segment. Today, there are more than 200 brands. So one has to constantly improve the fabrics, designs, patterns, stitching and also perform within the price-line.

What are the most popular fabrics other than cotton for kids innerwear?

We are the only brand using 100 percent cotton in the kids innerwear segment. We have experimented with other fabrics like modal, bamboo, etc. But the core 90-95 texture we are used to and the wide range we are able to offer in cotton, is missing in other fabrics.

Other brands try non cotton fabrics like sandwich, which has cotton on one side and polyester on the other. But for babies and infants, for whom we cater to, we find cotton is the best fabric.

What are the popular designs in kids' innerwear?

We offer a full range in kids' innerwear

in various colours. 25 percent of the range comes in pastel shades, 25 percent in medium shades, 25 percent in medium and deep shades and the rest in deep shades like navy blue, red, gold, etc.

Kids innerwear is a functional product. It is more about basic cuts and designs. It is basically a bloomer or a slip. A cut here and there, or a change in the shape a bit or the piping, but the basic shape remains the same.

How important is character licensing in kids innerwear range?

Cartoon characters and super heroes like Doremon, Chhota Bheem, Dora, Avengers, etc. do attract kids but only 1-2 percent of the kids apparel has characters. In India, the kids' apparel manufacturers are not utilizing their licence for using these characters, nicely. They simply put the characters and sell the garments as goods. Whereas, abroad everything is put together so beautifully that one feels like buying the piece.

When people approach us for a licensing deal, we refuse as using characters would increase our product price by 15-20 percent. Licensing agreement would require a fee and would put my company under pressure to meet the targets.



"Kids innerwear is a functional product. We offer a full range in kids' innerwear in various colours like pastel shades, medium to deep tones, etc."

-Pradeep Arora
Director, Zero & Simpli



DIGITALLY CHIC ORGANIC INNERWEAR

Neerja Lakhani, CEO and Founder of India's first premium organic lingerie brand 'Inner Sense', speaks to Images BoF about selling an innovative concept through online portals and how she has managed to bridge the gap between healthy and chic lingerie.

By Sunayna Gupta

Tell us about your brand Inner sense. When and how the idea of organic innerwear was conceptualised?

Neerja Lakhani (NL): Being a NIFT graduate in Fashion and Apparel, we were always taught to design and create apparels that offer a practical solution to a problem. Keeping this in my heart, I had inclination to design something that has sustainability with an eco-friendly attitude. With passion of creating a brand that is fashionable yet eco-friendly, my dream was conceptualized in May 2013 with the brand name 'Inner Sense'. I had a prior experience of working with an organic/eco-friendly brand; Abhishek Lodha is my business partner.

As we see, the market is full of innerwear brands that are trying to sell trends, but at the base of trend-based clothing is the hard reality of sweat-shops and exploitation of labour and/or farmers (in case of cotton clothing). Easily available stylish and shiny lingerie may look attractive, but their fabric is harmful to wear as innerwear, since they don't breathe.



Neerja Lakhani,
CEO & Founder, Inner Sense

In the age of women empowerment, today's women are highly conscious about their appearance, personal health as well as the health of the environment. To make innerwear look stylish yet be eco-friendly and anti-microbial, I came up with an innovative lingerie line that is breathable and hygienic.

How is organic innerwear different from other innerwear products?

NL: Organic innerwear is an intelligent combination of style and comfort. Anti-microbial, anti-static, super hygienic, temperature friendly, extra soft and odourless are specified features of our products. They are good for the skin as well as the environment.

Our brand is different because it has used a unique blend of environment-friendly organic cotton and anti-microbial bamboo fibre to come up with innerwear that is hygienic and makes sense - that's why I named it Inner Sense!

The fabric of our lingerie line is smooth and very soft due to presence of a natural component called pectin, found in the bamboo plant. This component makes the fabric very comfortable to wear as daily-wear lingerie.

The cross-section of the organic fibre has micro-gaps and micro-holes that promote air circulation between the fibres. This makes it naturally moisture wicking. In fact, the fabric also protects your skin - the fibre is naturally anti-bacterial and anti-fungal, so you can forget about body odour woes.

What are the advantages of using organic innerwear?

NL: Organic anti-microbial innerwear is good many-folds. It safeguards the health and economical interests of farmers and their families as they are not exposed to harmful effects of carcinogens, and get a premium price as compared to the conventional cotton production. It is also good for the environment as no pesticides and insecticides are used in its production. It is best to wear closest to skin as it is 3 times more breathable than its cotton counterpart and has anti-odour, anti-bacterial and anti-static properties, making it perfect for tropical weather, summers or in general, for comfortable all-day wear.

What product categories do you offer under the brand Inner Sense and what is their price range? Are your products priced higher because it is organic?

NL: As of now, we offer two broad categories: brassieres and underpants. We have kept the pricing of all our products highly competitive and affordable for the consumers. The bras are priced between ₹359- ₹1,599 and underpants from ₹189 to ₹299. We take pride in being India's first premium organic lingerie brand, yet our products' prices are at par with a premium segment lingerie brand.

What is the percentage of sales coming from each category?

NL: The total percentage of sales can be divided into: Brassieres - 65 percent, Underpants - 35 percent.

What customer profile does your lingerie brand target? How is the customer response and review to your experimental concept of organic innerwear?

NL: Inner Sense's target customers are women of every age, from medium to premium income group who are quality conscious. When it comes to lingerie, today's women are extremely discerning and sensible to choose what is best for her.

Right from the inception of our lingerie brand, we have been getting raving reviews on all the online portals we are present in, about how buttery soft our fabric feels and how much better it is to wear our breathable innerwear as compared to polyesters and nylons.

Which according to you is the fastest moving category in women's organic innerwear? Also let us know about your latest collection.

NL: The underpants are the fastest moving category, reason being, once a woman wears Inner Sense underpants, she can immediately understand what was missing in the earlier products she was using. The latest Inner Sense lingerie collection is all about being sexy while still using the core material of organic innerwear which is good for the wearer. The styling has been kept fresh and contemporary with design aesthetics having global appeal. We have also introduced lacy brassieres which are lined by anti-microbial layer, so it's a win-win collection.

Share your views on the consumer buying behaviour online in intimate and personal category. According to you, which are the best performing cities in terms of sale?

NL: Customers, women in particular, are increasingly trusting the concept of purchasing lingerie online. Reasons being, ease of browsing, comparatively larger collection right, greater



availability of varied sizes online, no hesitation of asking the store guy about different styles and/or sizes being able to buy from the comfort of home. Women have all the access on their finger tips. Also, easy return policies make it a foolproof purchase experience.

Tier-A cities like Mumbai, Chennai, Kolkata, Pune, New Delhi, Bengaluru, etc., are the best performing cities when it comes to sale.

What are the major challenges that you face in running online sales platform in category of organic innerwear?

NL: We have been getting overwhelming response online from the customers, but still many people are fairly unaware about the concept and advantages of organic or anti-microbial innerwear. So, educating the consumers about the same is a challenge.

What trends have you witnessed in past 5 years in terms of innerwear for women?

NL: Women are more aware of their sizing and do not hesitate experimenting with new styles. Shopping for lingerie is not a taboo anymore as it was earlier. Innerwear now has a legit place in a woman's wardrobe. Overall budget too has gone up in the last 5 years. Online shopping of lingerie is rapidly catching up due to increasing number of working women in India.

Do you have your own website? On which other e-commerce websites do you sell?

NL: Yes, we sell on our own portal www.innersense.co.in and we are also available on all major e-commerce sites including Zivame, Jabong, Myntra, Amazon, Snapdeal, Paytm, Limeroad, etc. We offer online discounts time-to-time and combo packs that evoke more sales and greater profits.

What is the most common problem faced by consumers in India while shopping online for innerwear? What steps have you taken to tackle the problems?

NL: Trials are not possible at the time of online shopping. So, women who are not aware of their perfect sizing or need assistance in choosing their size, do face problems in buying innerwear online. We are soon planning to open fit lounges to get women access to the fitting experts and have an assisted shopping experience.

Instead of EBOs or MBOs, what made you choose online platform for selling organic innerwear?

NL: Online shopping is the call and need of the hour. Each day, an

increasing number of people are turning towards online platform for shopping right from luxury goods to basic amenities. Selling organic innerwear online gives us a faster and wider reach to the target market.

What are your future expansion plans?

NL: Our future expansion plans would be in terms of increasing width and depth in products and categories. We already have sales points in countries like U.S., UK and Malaysia. Expansion plans include being available globally.





LOUNGE WEAR AND SLEEP WEAR

AN UNTAPPED MARKET

Lounge wear and sleep wear, as a category in India, is catching a tremendous momentum with the 'looking good' culture not being restricted to just outdoors but indoors as well. With e-commerce promoting this as a separate category, we see active shopping for lounge wear/sleep wear taking place and the market is witnessing established innerwear brands expanding their portfolio to launch their collection.

Amplifying the context for the story, Aditya Marwaha, Marketing Director, Kanvin, shares, "Earlier people used to mix and match their night wear or lounge wear as they were not aware about the existence of a separate category. Today, this category has become a lifestyle statement. Lounge wear/sleep wear today is practical and comfortable. Since a decade, the sleep wear market is emerging quickly as a fashion segment, and has seen enormous growth."

Antra Lodha, Creative Head, Floret, adds, "This is a growing sector and today, we see lingerie retailers focusing on this market keeping in mind the potential it has. The demand for lounge wear and sleep wear is growing in the country." Lodha, though, feels that the market demand is under met with not many players in the category hence making it all the more reason for brands to enter this segment with their collection. She shares, "The opportunities are great, there aren't too many players in this sector yet, and if done right, the niche is quite ready to be captured."

Besides the online push, another reason for this category showing a good momentum is because of people holidaying much more frequently than before. As shared earlier, the 'looking good' culture is making people more and more conscious of how they dress indoors as well as outdoors. Elaborating on the reasons for growth, Lodha shares, "The existing consumer is now involved in multiple activities throughout the day, and with the range of products and knowledge now available online and through the media, they want specialized products, in terms of fabrics and silhouettes, that suit their specific needs."

Marwaha is optimistic of this category but would like to see some relaxation on taxes. On a concluding note he shares, "The future is bright for all categories if the competition is healthy. However, as this category is price sensitive, applying government excise has increased the burden on price."

COLOURS AND STYLES TRENDING IN THIS CATEGORY

Nautical blue, cabaret pink along with the basic colours that run the year round. The primary objective of lounge wear/sleep wear is comfort, therefore, the current top trends include: comfortable silhouettes, girly colours and combinations, abstract geometric prints.

- Antra Lodha,
Creative Head, Floret





Ravji P. Shah (Left) at his Andheri West Amrut Outlet

FOUR DECADES OF LINGERIE SELLING EXCELLENCE

Amrut, an exclusive lingerie store by Ravji P. Shah, in the western suburbs of Mumbai, has come a long way. It has witnessed four generations of families coming to the store for lingerie shopping. Shah shares about its relationship with the customers and their preferences.

By Zainab S Kazi

The year was 1975. Lingerie back then was not something women would easily talk about and shop for without any inhibitions. Exclusive shops dealing in women's undergarments were a handful, not more than five to be precise. Either there was no demand hence less supply or vice versa, but the fact remained that lingerie shopping was confined to local department stores. Rajiv P. Shah, decided to take the plunge into opening an exclusive lingerie store at one of the busy western suburbs of Mumbai. The store was called Amrut. We speak with Shah to know about his journey in this category.

The Journey

"We were into the business of selling readymade garments for children, from where we also sold women's undergarments. That was our own store. I was 25 then. A shop adjacent to ours was available for rent. It was a small space but big enough to open a lingerie store. In fact, there was nothing else that I could think of, keeping in mind the size of the shop." Shah recalls how the shop was a success from day one. On the first day, he managed to cash in ₹300 worth of sales. Adding further on the journey, he shares, "My relationship with my customers from my earlier shop (children's wear) was very strong. These were the same customers who would now do their lingerie shopping from my new store. Word of mouth led to women coming in from every nook and corner of the city. For five years, I single handedly managed my entire store and then in 1980, one of my old sales staff from the children's store joined me. In 1981, we went on to expand and opened one more store that dealt in men's undergarments and then, there was another women's lingerie store we opened in Andheri West. Both these store are in partnership with a friend of mine."

Understanding the Customer

For Shah, customer service is akin to worship. The enthusiasm with which he talks about his customers can leave you spellbound on the commitment he has towards them. No wonder, he has four generations of families coming to him for lingerie shopping. His clientele spreads across the shore as well, where women from abroad on their visit to India, pick their year's stock from him or call for it through family and friends. Every month, he visits Gujarat to pay respect at one of the temples there and every month, he receives customers from the outskirts of Mumbai enroute Gujarat, who call him to place their order. He shares with them the pick up point and they drive down to the highway to pick their parcels.

Money Back. No Questions Asked

We spoke about making goods available to the customer at their convenience and as per their need; but what is most striking in his customer service is the 'no questions asked policy' either for

returning or exchanging lingerie. This is applicable to goods purchased even six months before the customer decides that it was a wrong choice for her. And this policy isn't replicated keeping the e-commerce trend in mind. Since day one, Shah decided to ensure that no customer was left with an unhappy experience shopping at his store. He shares, "We have no qualms in either returning the money or exchanging it as per the customer's wish. For us, what matters is her trust on us."

Educating the Customer

With a clientele that has been loyal to him since the day he opened his store, Shah does his bit to educate his customer on the dos and don'ts of lingerie shopping, especially for brassieres. He strongly advocates the use of non-padded cotton bras. Though, he is quick to share that the generation today is all for padded brassieres and it is difficult to explain to them the hazards of it. He shares, "I do my job of giving them good options. But when they are adamant on the brands they want, I give them their choice."

At Amrut, you will not find any brand boxes being displayed. All of the brands are kept in shelves in single packs. In his 41 year journey, Shah says, he has never patronized any brand. For him, it is the quality and price point that matters the most.

Favourites

At par with the changing demand dynamics of today's shopper, Shah still feels that the old time brands are the ones that are truly serving the customer right - giving them price as well as quality satisfaction. He minces no words in saying that majority of the international brands are overpriced. "How much of cloth actually goes into making of a brassiere and panty? I see no reason why the price of the same should run in thousands," says Shah.

Libertina remains to be his all time favourite brand as it is apparent from the conversation we had with him. He shares, "A customer who's first bra has been from the brand Libertina, shall never switch to any other brand. We have had customers shopping for Libertina from us for years and at times, they do get tempted to indulge in other brands. We tell them that they would not be comfortable in the same but because we do not want to disappoint her, we allow her to choose her pick. But trust me, they return the product within a few days to exchange the new pick for Libertina."

On Trade Shows and E-Commerce

For Shah, trade shows really do not matter much, as he has brands coming to him with new samples to find out if they would do well in the market. He shares, "My understanding of the lingerie market is extremely deep. I do not find any reason for these international trade shows. Those in the industry know all about the suppliers and vendors. The basics are extremely well met. I see trade shows as a medium to lure the retailers to stock things that are just appealing to the eyes. How much of these fancy lingerie actually sells, I really do not know."

On the e-commerce bit, Shah is quick to share that it is a medium to make customers lazy to go out and shop. For him, extending a personal touch to the customer is very important and e-commerce deprives the customer of the same.

To conclude, we asked Shah his take on having brands open their EBOs and he was quick to share, "EBOs, in this category, is a complete no-no. You cannot have just one brand sufficing the need of a customer. In lingerie, no brand can have a maximum share of the customers and any brand that decides to open an EBO isn't doing a wise thing."



INNOVATION

Along with the brand Tulip, which was launched more or less at the same time, Shah opened his store. The duo went ahead to work on customizing bras for women suffering from breast cancer. A customer request led Shah to work on this and he shared the requirement with Tulip. Today, there are quite a few players who have entered this category but back then in the 70s, it was Shah's commitment to serve his customer that led him to work on a design that would be apt for a cancer patient.

THE INNER POWER!

Page Industries, the exclusive licensee of Jockey and Speedo brands, is credited to have revolutionised the Indian innerwear industry in many ways. The company brought elegant, classy underwear from Jockey to Indian closet at a time when innerwear was regarded as just a basic necessity.

By Namita Bhagat

Page Industries Ltd., is one of the leading and most respected innerwear companies in India. Established in 1995 in Bengaluru, the company is an exclusive licensee of Jockey International Inc., (USA) for manufacturing, distribution and marketing of the Jockey brand in India, Bangladesh, Sri Lanka, Nepal and the UAE. It also has inked an exclusive licensing pact with Speedo International Ltd., (UK) for the manufacturing, marketing and distribution of the Speedo brand in India.

Page Industries, also known as Jockey India, has been a trailblazer in its own right. It not only has brought iconic innerwear brand Jockey to the country, but has also helped place innerwear as a significant clothing item in the Indian closet. Jockey was launched in India in 1995 and being a premium brand, it gave the locals, a taste of classy and elegant underclothing. The brand also revolutionised the innerwear industry of those days by establishing an organised and extensive network of distributors. In fact, it was the first innerwear brand in India to set up exclusive stores across the country.

Today, Jockey has become a dominant player in the innerwear category. Swimwear brand Speedo too has met with notable success in the country. It came to India in 2011.



Market Presence

In India, Jockey sells through a network of exclusive brand outlets (EBOs), multi-brand outlets (MBOs), large format stores (LFSs), traditional hosiery stores and multi-purpose stores. By the end of FY 2016, the brand's presence covered 1400+ cities and towns. Its EBO network comprised of 265 doors, including 82 authorised franchisee outlets and seven Jockey EBOs, catering exclusively to women customers. Additionally, the company also has a couple of Jockey EBOs in the UAE and Sri Lanka. On the other hand, Speedo ended the fiscal year with presence in 1060 stores including 146 large format stores across 106 cities and nine EBOs.

Product Portfolio

Both Jockey and Speedo primarily cater to the premium consumer segment. While Speedo is focused on swimwear and swimwear related equipment, Jockey's offerings include a broad array of innerwear, leisure wear and active wear.

Jockey men's innerwear collection includes bottoms (regular/boxer brief,

trunks, boxer shorts) as well as tops (inner t-shirts, vests, muscle vests, sleeved vests). Men's outerwear range also has a variety of bottoms (boxer shorts, shorts, lounge/track pants) and tops (jackets, men tank tops, polo t-shirts, etc). Socks too are available for them. For women, the brand offers an extensive innerwear range of bras and panties. The bra range includes cami, push-up, padded, underwire, seamless, sports, beginners, etc., whereas the panty range consists of bikinis, boy legs, hipsters, long legs, etc. Besides innerwear, other women's products include camisoles and tops, outerwear bottoms (boxer shorts, capris, leggings), shape wear and socks. The kids' (boys) range has items like briefs, t-shirts, vests, trunks, shorts and boxer shorts. Further, besides thermals for men, women, boys and girls, Jockey also sells towels.

Latest Collections

Jockey, of late, has introduced various new and innovative products into its portfolio as in:

POP Colour for Women

The brand's POP Colour innerwear range celebrates the confidence, positivity and enthusiasm of today's young woman. To complement a young lady's bold attitude, her experimental nature and trendsetter mindset, the collection features super combed cotton elastane stretch fabric with trendy neo trims and fashionable prints that fire the imagination of young fashionistas.

USA Originals for Men

This collection for men is a tribute to the Wild West American heritage of Texas and draws inspiration from textures, monograms and motifs of iconic sports teams. It offers half sleeve polo t-shirts in solids and stripes, crew neck graphic tees and slim fit lounge pants which are all made of super combed cotton, rich fabric, oxford tape reinforcements and the authentic Jockey USA Originals label and graphics. The range is targeted at the casual yet confident, ambitious yet unpretentious young men who are trendy, upwardly mobile and keen to project their confident self before the world.

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USA Originals for Boys

This collection for boys caters to the age group of 7 to 8 years, 9 to 10 years and 11 to 12 years. Comprising briefs, trunks and vests for innerwear and boxer shorts, knit shorts and t-shirts for lounge/leisure wear, all the three collections are made with 100 percent super combed cotton soft fabric. All the silhouettes flaunt the authentic Jockey Originals design. The collection seeks to revolutionise the boys range and make Americana inspired clothing a rage among young boys.

International Collection for Men

Jockey's International Collection for men comes in Tactel and Pima Cotton. This innerwear collection targets self-assured, fashion-savvy, technology driven, eco-conscious men. The silhouettes in Tactel are made of soft, premium, luxurious, elastane fabric with an ultra soft, metallic looking like waistband. These garments are light, breathable, eco-sensitive, and three times stronger than fabrics made with other fibres. They are known for their soft and quick dry qualities. The silhouettes in Pima Cotton possess the supersoft hand feel and ultrasoft engineered waistband, trait of widely acclaimed extra-long staple (EPS)

cotton, grown in very limited quantities in very few countries. They are better and finer than normal cotton, have more strength than normal cotton fibre, with elastane stretch that improves fit and comfort.

Winning Mantra

Jockey enjoys strong brand equity and image in India and Speedo's prospects also seem fairly bright on account of the country's fast evolving market for both swimwear and swim gear. In order to cater to growing demand, Page Industries has been focusing on expanding its production capacity. It has 13 state-of-the-art units spread across the state of Karnataka. Striving to satisfy consumers with the finest products, the company endeavours to ensure that both brands have products that are 'best in the market' in terms of design and style, fit, comfort and quality.

Jockey's exclusive stores showcase the range and depth of all its products and facilitate the brand to connect with its customers. The company now has also launched Jockey EBOs in a new international retail format. The new format stores are located in prime locations across shopping malls with high footfalls. Each of these outlets has a modern, contemporary 'look and feel' in

terms of interiors, designs, ambience and product displays. They have dedicated sections for men's range and women's range for different product categories. To enhance reach of its products, the company has launched its own B2C e-commerce channel and also partnered with several popular online retailers.

Page Industries is also working towards taking brand Speedo to the next level of consumer connect so as to increase its market share and profitability.

Moving Ahead

The company plans to open many more exclusive stores of Jockey in new international retail format. For Speedo also, the company is quite hopeful that it has the potential to become the most sought after swimwear brand in India.





HANES

SLIP INTO CHIC COMFORT

US-based Hanes, founded in 1901, is one of the largest apparel essentials brands in the world today. Admired for its superior comfort, relevant styles and high quality products, this global mega brand operates in India in partnership with Arvind Lifestyle Brands, its exclusive licensee, to manufacture and market its premium innerwear and leisure wear in the country.

By Namita Bhagat

Founded over 110 years ago, US-based Hanesbrands Inc., is a manufacturer and marketer of leading everyday basic apparel under some of the strongest apparel brands in America, Europe and Asia, as well as in Australia and South Africa. Its iconic innerwear and active wear apparel brands found in the US and elsewhere include Hanes, Champion, Playtex, Bali, Maidenform, JMS/Just My Size, Wonderbra and Gear for Sports. The company also boasts of several dominant national and regional brands outside the United States. Hanes, the flagship brand of Hanesbrands Inc., has been in India for quite some years now.

In 2013, Bengaluru-based Arvind Lifestyle Brands, a part of Arvind Limited, acquired Hanes' India operations by signing an exclusive licensing agreement with the brand to manufacture, distribute and sell its innerwear and leisure wear in the country. The partnership with Hanes also marked Arvind Lifestyle's entry into the thriving market of branded intimate apparel. The brand is today available in key markets and also many upcountry markets through a robust pan India distribution system which has evolved over the years.

The USP

Hanes has a long history of innovation, product excellence and brand recognition. It had revolutionised tagless t-shirts and underwear, and also invented the sports bra and the stretch-



The brand has a large target group in terms of consumers. The core focus, however, is on the young Indian consumers. While there are classic styles which form the base of the brand offering and cater to adults who are looking for everyday product, new launches are made keeping in mind the demands and expectations of the younger audience in the age bracket of 20 to 30 years.

cup t-shirt bra. Hanes is a brand that guarantees the basic need of comfort, which is the most important aspect of innerwear. The brand idea is: 'look good and feel comfortable'. Hence, the focus is always at product innovation and development to make a smart, good looking product which will ensure that the consumer feels comfortable all day long.

Seizing the opportunity

The branded apparel in India has witnessed an unprecedented growth over the last few years while the innerwear category has also grown by leaps and bounds. The discerning consumers are forcing the brands to constantly upgrade their product offerings. Hanes too is leaving no stones unturned to cater to this growing demand and secure its market share.

Product range

Positioned at the premium end of the market, Hanes' product basket for India consists of innerwear and leisure wear for men and women. The women's category has a variety of products such as bras (molded, underwire, underwire non-padded, strapless, sports, t-shirt bra, etc.); panties (bikinis, hipsters); basic camisoles; t-shirts and shorts. In the men's category, the product offerings comprise vests, briefs, trunks and sports trunks, boxers, shorts lounge pants, track pants, t-shirts, etc.

Today, innerwear, which is a necessity product, has also transitioned into a fashion statement as consumers are looking for brand equity and quality in each and every piece of garment they wear every day. The growing youth population, which is aspirational and demanding, has ensured that companies have had to keep up the brand imagery and product innovations and offerings. Acknowledging this, Hanes as well ensures that there is constant innovation in fabric qualities, elastics and accessories as well as the style quotient.

The brand also lays utmost importance to product design and development. The consumer today who is looking to constantly experiment and try new products is usually a college student or a first jobber. Therefore, the brand's endeavour is that designs and styles are in line with current trends in the fashion world. What's more, besides design and look, fit is also based on the

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target group's habits and likes with comfort being the focus.

Winning mantra

In its home market, the United States, Hanes sells more units of intimate apparel, male underwear, socks, shape wear, hosiery and t-shirts than any other company. This iconic brand has withstood the test of time, riding on its continuous focus on chic, stylish and comfortable products combined with the understanding of evolving consumer tastes.

Vis-à-vis product development, in India also, the brand undertakes intense market research at the retail outlets to understand the consumer preferences. The products are developed and designed keeping the Indian consumers in mind. Focus is given to the fit of the garment which is further strengthened by the use of premium quality fabric and trims.

As a brand, Hanes has been working throughout to improve the look and feel of products. Not long ago, the company had launched the 'concealing petals' range of bras which was well-accepted and had an extremely successful launch in the Indian market. However, the brand doesn't seem to be overly worried about the market challenge as far as designs and styles go. Perhaps, the rationale behind this is that innerwear is bought about once in 3 to 4 months, hence there isn't a need to chase fashion trends as it happens in apparel. The need in terms of fashion is more in line with the broad likes and needs of the target consumers. A few examples of the consumer preferences: mid rise/low rise products, modal or brushed fabrics, softer and premium elastics, etc. Significantly, the brand envisages a strong growth opportunity in the women's innerwear segment which is growing rapidly.

Moving ahead

Apart from increasing Hanes points of sales across India, Arvind Lifestyle is also looking to bring in new products besides adding more styles to the brand's existing product range. Reportedly, they are planning to launch new styles in the premium category of men's innerwear. As for the women's range, there are many interesting products in the development stage, and the company expects to launch them by early next year.



Hanes is a brand that guarantees the basic need of comfort which is the most important aspect of innerwear. The brand idea is: 'look good and feel comfortable'. Hence, the focus at product innovation and development is to make smart good looking product.





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AMANTÉ

Launched exclusively in India in 2007, Amanté is an international intimate wear brand, which offers comfort, fashion and sensuality to the modern Asian woman. The brand is South Asia's largest supplier of niche intimate wear.

Core Strengths: Amanté is a part of MAS Brands, which is a subsidiary of MAS Holdings. MAS Holdings embodies 25 years of excellence held by the conglomerate in intimate wear manufacturing. The brand has a fully integrated supply chain and design offices in New York, London and Hong Kong, which offer a premium products set to the latest international trends and styling.

Product Portfolio: Amanté is a premium international intimate wear brand which offers a wide range of lingerie, sleep wear, swimwear and active wear.

Focus Customers: The brand's target audience comprise women between 22 to 45 years, who are now more exposed to international fashion trends and do not make decisions solely on fiscal values, but rather on their requirements and preferences.

Primary Markets: As is the case with any premium brand, their primary markets are metros and mini metros. Also, the brand is present pan India with over 1,000 doors.

Latest Innerwear Collection: The latest collection is themed, 'cozy by nature'. It offers everyday cotton innerwear in light colours and prints. The comfort of cotton is offered in modern silhouettes of multiway and push-up, along with padded wired and non-wired products.

Top Most Innovative Products: They have introduced fashionable silhouettes of push-up and multiway cotton innerwears. The collection received an instant connect with the consumers, as it understood their preference for fabric with a modern outlook. Similarly, their collection "floral romance" is another innovative range. It is a daily t-shirt bra and has the magic of lace in a 2mm padding, which offers a combination of utility and femininity.

Plans Regarding New Product Range (Category Expansion): They have recently added a wide range of offering in the swimwear, active wear and sleep wear range. It is available exclusively at their stores and in-house portal www.amantelingerie.com. This gives a competitive edge to their consumers to shop from company-owned platforms as a single complete destination for intimate wear.

Plans for Exploring New Markets: The brand is expanding in all major markets and will be reaching 20+ exclusive outlets by 2017.

Progress Through Online Retail: The brand's sales through online retail has grown five times in the last two years.



IMAGES Business of Fashion

Share of innerwear in total product portfolio:
90%

Retail Presence:
EBOs- 4; MBOs- 8,000; LFS- 250+

CAGR (last three years including 2015-16):
50%

Price Range
Brassieres: ₹545- ₹1,195
Panties: ₹445- ₹895
Others: ₹945- ₹2,995



MACHO

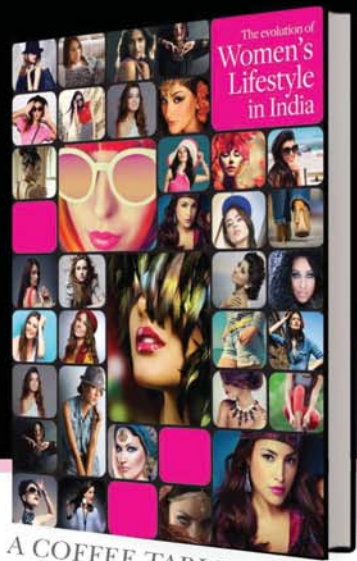
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The evolution of Women's Lifestyle in India



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A lot has been studied about India post 1990 – the era of liberalization, but very little on the impact that it has had on women's lifestyle in India. The emergence of new jobs, new avenues, new ways of earning and spending, and increased awareness has led to dramatic and unmapped changes to women's lifestyle in India.

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Launching this Diwali

With India poised to be the world's biggest market can we afford to miss our better half? As of today, there are very few women's brands in India of substantial scale but the opportunities are immense. Very recently the category has received some traction, with some brands and retailers launching, or planning to launch, women targeted business concepts. We believe that it will be a huge opportunity loss and a disservice to the greater Indian dream if the subject is not studied.

The Images Group, therefore, proposes to create a first ever book on, and titled, **WOMEN'S LIFESTYLE IN INDIA**.

- The book will trace the evolution of women in India as a **gender**, as an **earning-group**, as a **shopper** and as a **consumer**.
- It will map and size the **women's retail market** in India.
- The book will look at their **consumption behavior, shopping trends, influences, triggers and barriers**.

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“The brand, for the past eight years, has been colorful and bold for the young-at-heart customers. The brand showcases styles for every mood, thought and occasion that not only compliment the outfits but also accentuates her form”

-Peeyush Saxena
National Sales Head, Bw!tch

BW!TCH

Bw!tch, as a brand, is strategically fashioned to solely conform to the changing preferences of the modern woman. As a young and vibrant innerwear brand, it offers a concoction of aesthetic and functional choices and has over the time emerged as one of the most sought after luxury brand amongst young women throughout the country.

Core Strengths

Bw!tch holds its presence as a part of Genesis Colors, which was inceptioned in the year 2001 with an aim to create a global fashion conglomerate that adheres to the likes of international fashion houses. Genesis Color's repertoire includes industry majors like Armani Jeans, Bottega Veneta, Canali, Coach, Paul Smith, Emporio Armani, G-Star Raw, Jimmy Choo, Michael Kors, Tumi, etc.

Created in the year 2008 as a seductive, fashionable and sexy lingerie brand aiming at the independent women who are far more experimental in their choices, the brand has successfully established itself as one of the most desirable brands in the luxury inner-wear segment. The brand believes that lingerie is beyond a piece of garment; it is an extension of a woman's persona.

Peeyush Saxena, National Sales Head, says “The brand, for the past eight years, has been colorful and bold for the young-at-heart customers. The brand showcases styles for every mood, thought and occasion that not only compliment the outfits but also accentuates her form”

Product Portfolio

The unique styles that highlight the brand are Wow and Foster. Wow encompasses a technically fabricated range of shape enhancing push up bras and Foster is a collection of four sectioned bras featuring wide straps and full cups for extra support and comfort aimed at the plus size women.

The brand encompasses a pleasing collection of bras, panties, night wear, shape wear and swimwear in a profusion of aesthetically rich colours from bubblegum pink, lilac, shiny blue, sage green, roman gold along to subtler shades of mushroom, sweet rose, old rose and asphalt, in a variety of style options, fabrics and cuts offering sheer delight.

Retail Presence

Saxena shares, “The brand is retailed through more than 450 MBOs. We have partnered with large format store like Shoppers Stop, Lifestyle, Pantaloons, Central, etc. Among online players, we are available on Amazon, Jabong and Myntra. Also, we have exclusive brand outlets at strategic locations across the country.”



DERMAWEAR

Launched in 2008 by C P S Shapers Pvt. Ltd., Dermawear's shape wear are a collection of compression garments made of specially designed skin friendly, blended four way stretch fabric that provides instant fashion benefits as well as long term medical and therapeutic benefits.

Core Strengths: All Dermawear products are handcrafted and are made from a skin friendly fabric which is blended with cotton and spandex, and is ideal for the Indian weather conditions. The fabric is highly breathable, double or triple layered to provide a customised compression effect in the critical body areas like hips, thighs and abdomen. All production and processing is done in-house which makes it possible for the company to have control over quality.

Focus Customers: The brand's core customers are aged between 16-50 years, the educated class living in the metros.

Product Portfolio: Dermawear offers products from abdomen shapers to full body shapers for both men and women. The products are majorly available in skin, cream and black colours. Being a shapewear specialist, innerwear constitutes 100 percent of its total product portfolio.

Primary Markets: The company, CPS Shapers Pvt. Ltd., has a wide network of distributors across all major Indian cities. The brand is present in the retail outlets on pan India level, however the major sales are from all the metro cities.

Retail Presence: Dermawear is present in over 5,000 retail outlets across India. The brand is also present in the international market.

Plans for Exploring New Markets: The company plans to target tier -I and -II cities as it sees a lot of potential there.



Retail Presence :
5,000 POINT-OF-SALES

Price Range
Men: Others: ₹550- ₹750
Women: Others: ₹480- ₹1,800

DOLLAR BIGBOSS

Kolkata based brand, Dollar Bigboss is probably the most renowned name in men's innerwear in India. The brand, launched by Dollar Industries Ltd., offers men's premium innerwear, which include vests, briefs and trunks. They recently introduced a range of gym vests for the fitness conscious youth.

Core Strengths: The core focus of the brand is to provide quality product at an affordable price to their customers.

Focus Customers: The brand targets families, whose income is ₹10,000 and above. Their focus customers are male, who aspire to wear international brands but can't afford it. Dollar Bigboss innerwear offers quality products at an affordable price to their customers.

Product Portfolio: The product range consists of Dollar Bigboss premium vests, sports vests, fashion trunks, premium trunks and premium briefs.

Latest Innerwear Collection: They recently introduced trendy trunks, which are made from micro-modal fabric. The fabric is one of the finest and softest fabric available for innerwear at present and hence guarantee unmatched comfort. Also, the brand has added some fresh shades like mesa rose, orange, air force blue and so on.

Top Most Innovative Products: According to the brand, every product is different and unique. For example, Glo brief is one of them. It is made from 100 percent combed cotton and offer qualities like odour-free, anti-bacterial, etc. It's body-hugging, super soft signature waistband and a wide range of colours makes it more distinctive from any other product.

Plans Regarding New Product Ranges (Category Expansion): Innovation and style go hand-in-hand at Dollar Industries Ltd. The brand introduces and launches new and improved version of the products every season based on global fashion trends and customers' demands.

Primary Markets: The brand primarily targets urban cities, but it also markets their products in rural cities. They are present in over 80,000 multi-brand outlets across India. They also have plans to open exclusive brand stores soon.

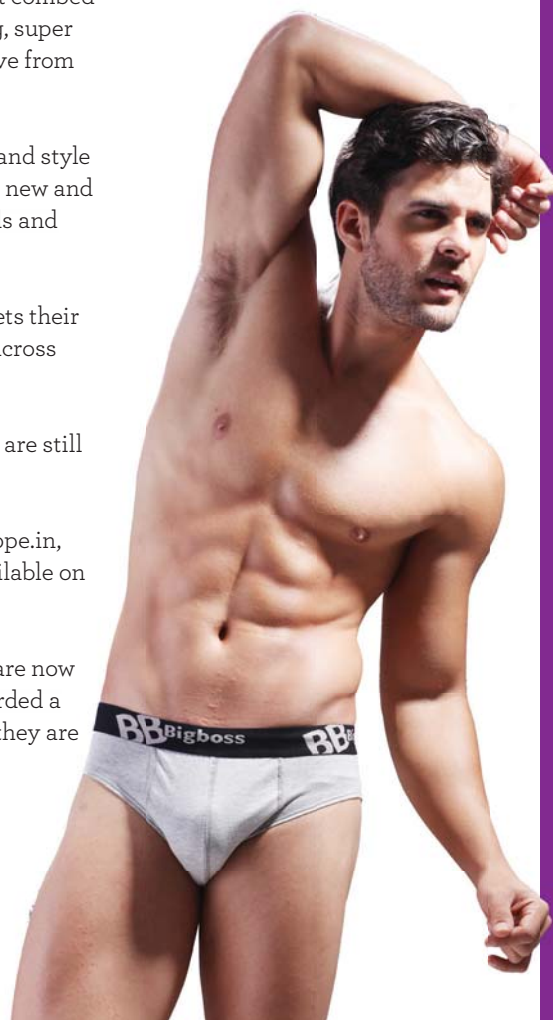
Plans for Exploring New Markets: Though, they are present pan India, they are still exploring new markets in rural regions.

Progress Through Online Retail: They have an e-retail site, www.dollarshoppe.in, where they sell various products. Other than this, their products are also available on popular online sites like Snapdeal, Amazon, Flipkart, Ebay and Voonik.

Future Plans: This year, the brand achieved a turnover of ₹830 crores. They are now targeting to reach ₹1,000 crores in the coming financial year. The brand recorded a CAGR of 12.85 percent in the last three financial years. In the coming years, they are expecting 15 to 18 percent growth.

Share of innerwear in total product portfolio: 100%
Retail Presence: MBOs- 80,000
Turnover (FY 2015-16): ₹830 CRORES
CAGR (last three years including 2015-16): 12.85%

Price Range
Men's range
 Vests: ₹104- ₹200
 Briefs: ₹90- ₹120
Women's range
 Brassieres: ₹70- ₹110
 Panties: ₹70- ₹90
Kids range
 Boys range: ₹90- ₹185



FLORET

Floret is one of the oldest brands of the K C J Lingerie Pvt. Ltd., providing high quality lingerie and loungewear solutions since 1995.

Core Strengths: Floret is known for its fashion forward, irresistible styles in bright colours. 'Floret' means a tight bunch of flowers that make up a bigger composite flower. They feel a woman is like a flower and Floret makes her feel beautiful and confident.

Focus Customers: The brand is well accepted for its fashion forward style and quality by the Indian middle class and lower middle class women.

Product Portfolio: Floret manufactures a vast range of high quality products, which include - bras, bra sets, camisoles, night wear, lounge wear and active wear.

Latest Innerwear Collection: The latest collection is themed 'Pep Up!', and is exclusively designed for the confident youth of today, who likes to take their own decisions and do not like to settle for anything less than the best. This is a collection designed to 'PEP things UP!'

Top Most Innovative Products: They have introduced 3023, a lacy minimiser bra with a soft luxurious feel. Most minimisers available in the Indian market are usually made of rigid fabric and are quite uncomfortable to wear all day long. Floret's lacy minimiser is made of light, breathable fabric, which makes it extremely comfortable to wear around the clock. The cups have full coverage and are molded to give optimum support and reduce projection.

Plans Regarding New Product Range (Category Expansion): They plan to introduce new products in the 'Pep up' range every few months. They already have the following products in the pipeline: a lacy minimiser style available in 3-fashion colours, an underwire padded style available in 3-basic colours, a padded style in 3-original floret prints, a padded lacy style in 3-fashion colours, a non-padded low neck print bra and a t-shirt bra with contrast trendy trims.

Primary Markets: The brand is present pan India and has a good hold in all the metro cities.

Progress Through Online Retail: Online retail opened a completely new avenue for the brand. The brand witnessed that often the styles required online were very different from what was retailed offline. This called for an increase in the product range and also helped them increase their product visibility.

Retail Presence :
EBO- 1; MBOs- 8,000; LFS- 3
CAGR (last 3 years): 18%.

Price Range
Brassieres : ₹109- ₹499
Others : ₹299- ₹699



GROVERSONS

Established in 1953 by Late C L Grover, Groversons is one of the oldest lingerie manufacturers in the country. The company launched Paris Beauty, their maiden brand and this has since become the flagship brand of the company. Headquartered in New Delhi, the company has a production capacity of 20 million pieces a month. They market and sell a wide array of product under different brands.

Core Strengths: Groversons is the first lingerie company in India to get ISO9001:2008 certification. They are one of the largest manufacturers of lingerie and intimate apparel in the country, with 1,25,000 sq.ft. state-of-art manufacturing facility. Employing over 1,500 people directly and 700 indirectly, the company has a wide range of products and a strong distribution network across India.

Focus Customers: The company targets discerning women between 18 to 50 years through their various brands.

Product Portfolio: The company caters to customers through various assortments of brands like, *Paris Beauty*, which is their flagship brand and one of the oldest lingerie brands in the country. *Sparsh* is a sub-brand of Paris Beauty, which focuses on a plus sizes. It is also one of the first brands to introduce the cup size concept in the country. *Poems* is an active wear collection of Paris Beauty and offers sports bras, panties, slips, camisoles, etc. *Winta* is a thermal wear brand and offers collection for men, women and kids including infants. *Miss-T* is a premium brand that focuses on changing trends and offers wonderful range of bras and panties. *Super Girl Bra* is their latest launch and targets the younger generation.

Primary Markets: Though the brands have presence pan India, however they are considerably strong in the North, followed by the West and East. They are growing at a good pace in south India. Having around 400 distributors in different parts of the country, the company's products are available at over 15,000 multi-brand outlets. They also have global presence in the Middle East countries and in New Zealand.

Latest Innerwear Collection: They have launched a bridal collection focusing on the young customers' demand and seeing a gap in the market for good bridal lingerie. They have also introduced various new styles in the plus-size segments, increased the cup sizes and colours, under their Sparsh range. Under their Paris Beauty range, they have introduced various padded products like heavy padded bras, light padded bras, spacer bra, etc., in a large spectrum of colours, prints and fabrics.

Plans for Exploring New Markets: They are expanding very fast in the markets of South India. With a great market feedback and support, they believe that they will be able to dominate the market in two years.

Progress Through Online Retail: They have set-up their own e-commerce portal, which is giving a good response. Besides, they are also present on all other e-commerce sites and earning good business on online sales.

Future Plans: Groversons is aiming to cross ₹300 crores in the next three years. They also aim to increase their growth rate by 30 percent in the next 2-3 years.

Retail Presence :
MBOs- 15,000;

Price Range

Men's range

Thermals: ₹400- ₹700

Women's range

Brassieres: ₹200- ₹850

Panties: ₹100- ₹300

Thermals: ₹400- ₹700

Kids range

Girls: ₹200- ₹350



KOTHARI

Established in 1947 by Kothari Hosiery Factory Pvt. Ltd., Kothari is a renowned national brand which manufacturers mercerised vest and briefs. The Kolkata-based knitwear brand is also famous for their thermalwear.

Core Strengths: The main strength of Kothari is their integrated manufacturing capability—from knitting to finishing—everything is done in-house.

Focus Customers: Kothari manufactures a variety of vests and briefs to cater to the needs of every segment of the market. Their focus customers are primarily from tier -II and -III cities.

Product Portfolio: Their present product portfolio includes vests, briefs, ladies innerwear, winterwear, bedsheets and knitted garments (such as t-shirts and Bermudas for men, women and kids), among others.

Primary Markets: Their primary markets are tier -II and -III cities in Uttar Pradesh and Bihar. These markets see high volumes at competitive prices. Since they are manufacturers, they do not have much presence in physical stores like EBOs, MBOs, etc.

Latest Innerwear Collection: They have introduced a new collection in their vest range. According to the brand, the innerwear collection will re-invent the definition of comfort in this segment. The new collection will be promoted through the themes 'Freedom' and 'Mission'.

Top Most Innovative Product: The top most innovative products in their portfolio are the 4-way stretch spandex leggings and panties under their brand, 'Estia'. They have plans to introduce spandex briefs in the men's segment too.

Plans Regarding New Product Range (Category Expansion): The brand regularly launches new products under all their segments and are currently focusing on launching briefs in spandex and vests with finer counts.

Plans for Exploring New Markets: They are currently focusing on strengthening as well as consolidating their position in the current markets before exploring new markets.

Progress Through Online Retail: The brand feels, online retail is a growing segment. They also believe that this segment will play a major role in the future.



Price Range

Men's range

Vests: ₹123- ₹272

Briefs: ₹95- ₹150

Women's range

Panties: ₹50- ₹122



LUX COZI

Established in 1957 by Lux Industries Ltd., Lux Cozi is one of the top players in the men's innerwear market. With a strong presence in the mid-to-economy segment, it is a 'value for money' brand, which offers great comfort and style at a very affordable price range.

Core Strengths: The brand believes in presenting uncompromised quality at pocket friendly prices. From the beginning, they have been providing the best quality products to their customers. If economical price is their USP, then the pan India distribution network is their core strength, which has them in achieving the colossal position that they enjoy today.

Product Portfolio: Lux Cozi proudly boasts a product portfolio of 100+ innerwear products catering to men, women and kids. The company produces vests, briefs, boxers, spaghettis, thermals and panties available under prominent brands like Lux Cozi Innerwear, Lux Bigshot, Lux Venus, Lux Cottswool, Lux Inferno, Lux Classic, Lux Mozze and Lux Karishma.

Focus Customers: Lux Cozi is a 'people's brand'. Their core consumers include discerning value oriented customers who believe in paying for the quality offered.

Primary Markets: Headquartered in Kolkata (West Bengal), Lux Cozi enjoys wide presence in North, East and West India. Their dealers, distributors and marketing agents are widely present in the areas to penetrate further in the markets. Since, their presence in South India is not as strong as the rest of the country, they are planning to come up with strategical plans to expand and grown their consumer base there.

Latest Innerwear Collection: Lux Cozi launched Lux Cozi Glo collection, a range of premium and ultra-soft innerwears targeting the style-oriented youth. The florescent colour waistline stands out and the fabric is exceptionally soft.

Top Most Innovative Product: Lux Cozi Glo collection comprising briefs, boxers and vests. The new product line boasts of 'cotton-modal', a premium technologically advanced fabric that which enable consumers to enjoy an ultra-soft breathable material all day long at an affordable price.

Plans for Exploring New Markets: Continuous product quality enhancement and improvisation in promotional activities are the few steps with which they are planning to foray into the South Indian markets.

Progress Through Online Retail: Online retail is the "most impactful" medium to connect with the generation-Y. This medium is easier and more accessible for new customers, it makes a brand more familiar and recognizable for existing customers. In line with this, the company has partnered with all major shopping sites like Amazon, Flipkart, Snapdeal, Jabong, etc.

Future Plans: The company aims to double their turnover to up to ₹2,000 crores in the next 5 years. They also plan to focus on further expansion in the coming years and bring in more innovation in products.

Share of innerwear in total product portfolio:
100%

Retail Presence:
4,50,000 POINT-OF-SALES

Turnover (FY 2015-16):
₹940.86 CRORES

CAGR (last five years including 2015-16):
12.56%



MARKS & SPENCER

Marks & Spencer was launched in India in 2001 and currently has 56 stores in India in 25 cities. In April 2008 the company formed a joint venture with Reliance Retail to form Marks & Spencer Reliance India. The company opened its first standalone M&S Lingerie & Beauty store in Mumbai in April 2014. The second store was opened in Jaipur in 2015 and the third one in Kolkata in 2016. M&S in India is one of the most popular lingerie destinations for customers.

Core Strengths: The brand offers affordable, high quality, comfortable innerwear for women that encompasses fully machine washable lingerie, including silk. Another special feature are the specially trained customer assistants that aid customers get the best bra fit

Focus Customers : The brand targets women from all age groups.

Product Portfolio: The product range includes t-shirt bras, strapless bras, maternity bras, push up bras, multi-way and memory foam bras to embellished products with silk, lace and embroidery and coordinated collections. They come in extensive choice of sizes. Bra sizes from 30B to 44G. Knickers and sleepwear are available from size 6 to 22.

Latest Innerwear Collection: The latest Summer 2016 lingerie and sleep wear collection includes all things delicate and feminine; from contemporary essentials to beautiful soft plush fabrics, sheer and lace finishing's across a wide spectrum of colours from romantic blush to bold colour clashes.

Marks and Spencer's Magic Shapewear include Waist Sculpt™ and Ultimate Magic Secret Support™ shapewear. The Perfect Fit Memory Foam Bra moulds well and creates a smooth and natural shape. Bodysensor™ tights is another key trend, designed to keep one warm when it is cold and cool when it is warm.

Top Most Innovative Products: 'Perfect Fit' everyday bra, is wonderfully soft and comfortable with revolutionary memory foam that moulds to your shape. The 'Youthful lift' uses a 3D moulding technology and a support panel in the side of the cup to provide lift and support. Bonded wings give a smooth finish. 'Smoothlines' is a comfortable bra designed with a no show infinity edge to the cups to make it invisible under clothes. 'No VPL Knickers', an innovative line of no visible panty line knickers, are laser cut to give a smooth outline and stretch in all directions for comfort. The 'StayNEW™' technology used reduces bobbling and color loss, ensuring a longer shelf life of all the products. 'Invisible Shaping' is a super lightweight control fabric with Cool Comfort™ technology. It smoothens and shapes all over for the perfect silhouette.

Primary Markets: M&S has presence in 25 cities in India. The company showed a sales growth of +15.5 percent in India in FY 2015-16.

Progress Through Online Retail: The company has been retailing its products through leading online platforms like Myntra and Flipkart since November 2015.

Pricing
Knickers : ₹125
Bra : ₹799



RED ROSE

Established in 1974 by Chandulal Vora, Red Rose is an esteemed innerwear brand. Today, Red Rose has carved a niche for themselves in the Indian lingerie market. The brand's success mantra is the Vora brothers' constant pursuit for excellence, and their unmatched price structure aimed at the price conscious Indian women.

Core Strengths: With qualities like strict standards, in-depth understanding of the product line, varieties in terms of fabric and design, affordability, etc., the brand has stood the test of time.

Focus Customers: Red Rose aims two sets of customers; firstly, the age group of 30 years and above and secondly, the 18 years age group.

Product Portfolio: They offer a wide array of products under innerwear, night wear, lounge wear, shape wear, bathrobes and health-care accessories.

Primary Markets: The brand has a pan India presence. They are strong in markets like Gujarat, Maharashtra, Karnataka, Tamil Nadu and Andhra Pradesh. Their secondary markets are Kerala, West Bengal, Madhya Pradesh and Rajasthan.

Latest Innerwear Collection: The brand has launched a 'touch collection', which is a premium panty range. The collection focuses on ultra soft fabrics, vibrant prints and colours for those who understand that innerwear is no longer an essential but a fashion product. They aim to fill the wide gap in the Indian lingerie market which has been demanding new and different prints and designs with the softness of modal and lycra yarns.

Top Most Innovative Products: Products like soft-band briefs, period panties, etc., are their most innovative products. They understand the anatomy of a fit and work closely in giving this throughout their products. Hence, according to the brand, offering proper fits is their most innovative quality.

Plans Regarding New Product Range (Category Expansion): They are concentrating on their existing product portfolio and would strive to give new patterns and design range.

Plans for Exploring New Markets: The brand has plans to expand their business in North India. Similarly, internationally they are looking at expansion in the Gulf countries. Also, they want to open exclusive outlets and aim to partner with leading MBOs and open shop-in-shops.

Progress through online retail: The brand shares that they are present in around 20 online market places. The popular ones are Amazon, Myntra, Flipkart, Jabong, etc.

Future plans: The brand recently clocked a turnover of ₹35 crores. They believe in growing in an organic way with an average growth rate of 25 percent year-on-year. The brand shares that they want to maintain this growth in the years to come.



Share of innerwear in total product portfolio: 75%

Retail Presence: MBO- 4,000

Turnover (FY 2015-16): ₹35 CRORES

CAGR (last five years including 2015-16): 25%



TRIUMPH

Triumph was started in Germany in the year 1886 and currently enjoys a presence in over 120 countries. The brand entered India in March 2002 and has a strong presence across all sales channels.

Core Strengths: The brand's products are modern and fashionable and at the same time stands up in functionality. What characterises Triumph is the drive to be the best-in-class in all aspects of its business.

Product Portfolio: Triumph has a variety of collections ranging from beginner bras to mature favorites. The company offers a wide range of underwear, lingerie, sleep wear and swimwear, fusing excellent quality in workmanship, unrivalled fit and the latest in fashion design.

Focus Customers: The brand targets women of all age groups. With the growth of its e-commerce website, Triumph has been able to reach out to its consumers from various parts of the country.

Primary Markets: Starting in July 2002, Triumph initially commenced operations in the 6 metros and has now expanded its distribution across 52 cities in India. Triumph's products are available at the national chain stores as well as leading retailers in these cities.

Latest Innerwear Collection: The Smooth Cup collection is the latest addition to its product folio. The bras and briefs have lace panels in vibrant citrus shades hugging you all over. The bras come with a stylish back hook design that converts the straps from the classic to cross-back with a simple click.

Top Most Innovative Products: They have introduced a Magic Wire bra with a new cup design, featuring a soft, flexible built-in silicon wire. This provides all the support of a traditional metal wire, without any discomfort or digging in pressure that often occurs with the standard under-wire bras. Triaction is a non-wired sports bra with removable pads that provides support, control and a comfortable fit during exercise. Its racer-back design with moisture absorbent mesh fabric at the back provides ease of movement and a dry feel to the wearer.

Plans Regarding New Product Range (Category Expansion): Triumph aims to be India's number one lingerie brand and the one that no woman can do without. To do so they feel they will have to focus on higher consumer education in tier -II and -III cities, strengthen their retail channel to offer a more premium shopping environment, build up their luxury and niche segments and focus on integration of online and offline shopping experience and operations.

Primary Markets: Triumph has penetrated into the Indian market with a strong presence throughout all sales channels. They have a direct supply in over 75 cities with more than 100 points of sale along with a flourishing online platform.

Top 5 Retailers: Shoppers Stop, Westside, Central, Lifestyle and Pantaloons.

Progress Through Online Retail: Triumph is present on all the leading e-commerce portals in India such as Amazon, Zivame, Myntra, Flipkart, etc. With the help of online retail, scores of Indian women now have access to Triumph lingerie with ease and privacy.



TT LIMITED

TT is a 50 year old brand selling all over India and even abroad. It has become a household name in innerwear in the country. The brand's main motto is value for money and customer satisfaction.

Core Strengths: A vertically integrated unit and quality focus blended with years of experience.

Focus Customers: TT Brand originated in 1970 as a men's innerwear brand. It slowly spread to include women and kids innerwear and caters to its targets spread all over India.

Primary Markets: The brand is selling in 62 countries across the globe and all across India.

Product Portfolio: TT offers a wide range of innerwear, winter wear, sportswear, casual wear and other clothing options and accessories for men, women and kids at affordable prices.

Latest Innerwear Collection: At TT Limited, innerwear is a constant rolling collection and not season specific except for winter thermals.

Plans Regarding New Product Range (Category Expansion): Rolling out new products, styles and colours is a constant feature at TT Limited.

Progress Through Online Retail: TT feels that online retail has a tremendous potential. They have their own online store and are also selling across all major e-commerce sites. So far, just 1 percent turnover comes from online sales and the company plans to increase it within a year.

Future Plans: The company witnessed a turnover of about ₹700 crores and they look at growing at 20 percent per annum. The CAGR over the last 3 financial years has been 15 percent and the company is now aiming for 20 to 25 percent in the next 3 years.

Share of innerwear in total product portfolio: 80%

Retail Presence:

EBOs: 30; MBOs: 50,000; LFS: 10

Turnover (FY 2015-16): ₹700 CRORES

CAGR

(last three years including 2015-16): 15%

Price Range

Men

Vests : ₹60- ₹140

Briefs : ₹90- ₹160

Women

Brassieres : ₹50- ₹150

Panties : ₹50- ₹150

Kids

Boys: ₹50- ₹150

Girls: ₹50- ₹100



TUNA LONDON

Mumbai-based innerwear brand, Tuna London was launched in 2004. The brand was positioned to fill the dearth of quality innerwear in the market, especially in the case of innerwear fabrics and embellishments. Apart from innerwear, the brand has also diversified into athleisure. As of now, only the men's range is available although Tuna London plans to introduce the women's range soon.

Core Strength: Tuna London is a premium innerwear brand that offers unmatched quality. Their strength lies in the treatment of the fabric they do in-house. For example, the different washes and the finishing of the fabric such as mercerised wash, silicon wash and bio polish.

Product Portfolio: The brand offers vests, underwears, trunks, boxer shorts, pajamas, t-shirts and athleisure for men. They have recently launched the women's range and it will soon be introduced commercially.

Focus Customers: Their focus is on customers in the age bracket of 16 years and above. Basically, they cater to customers within the age bracket 16 to 40 years. Since, the brand leans towards the premium spectrum, their customers are basically high income individuals, mostly from metros and bigger cities.

Primary Markets: Though the brand has a pan India presence, they primarily caters to metros and tier -I and -II cities. They have tied up with more than 100 multi-brand stores in these cities.

Latest Innerwear Collection: The latest collection is characterised by funky colours and features a variety of contemporary patterns. At present, the brand is focusing on their women's range. Recently, they have introduced—big and tall, an innerwear range of bigger sizes such as XXL, 4XL, 5XL, etc. According to the brand, they are experimenting with bigger sizes and wants to see how the market responds.

Top Most Innovative Product: In terms of innovation, they have launched women's track pants with very innovative designs. They are also introducing innovative t-shirts for women, which can be worn on a regular basis, e.g., when going out for gym or yoga as well as casualwear.

Progress Through Online Retail: The brand is retailed through all major online portals such as Myntra, Amazon, Flipkart, Ebay, etc. The response has been good so far and a good chunk of the sales comes from online, which accounts to around 40 percent.

Future Plans: With new categories added in the product range, the brand aims to achieve 200 percent sales growth in the coming years.



FASHION CREATION



23RD
HONG KONG
FASHION WEEK

TOP
INTERNATIONAL
FASHION TRENDS IN
**WOMEN'S
INNERWEAR**

REPORT:
**SOCKS &
THERMALS**

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FASHION CREATION

Category Focus

SOCK-O-MANIA: SOARING HIGH

Forget a decade, even a couple of years back, no one would have imagined exclusive stores for socks brands in India. Today we do. We speak with key players to unravel this magic.

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THERMALS GETTING TRENDY

Like its peers in innerwear, thermal wear is also becoming stylish by the day. With holidaying booming as a lifestyle activity the demand has not only made brands expand their range but add innovations too.

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Fashion Trends

TOP INTERNATIONAL WOMEN'S INNERWEAR FASHION TRENDS

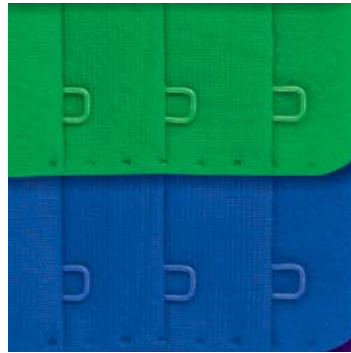
It's all about flashing that peek of lace, or flaunting those straps. We bring you some of the underwear and lingerie trends you'll be seeing more of.

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GODDESSES INSIDE OUT

The heiresses to Madonna's conical bras and corsets are here and are sparking off trends. Underwear-as-outerwear is back. We take an "outside" look.

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Trims & Accessories

KINGSWAY INDUSTRIES: LONG STANDING REPUTE

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ARROW TEXTILES LTD.: THE LABEL SPECIALIST

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Fabrics

TRIENDO IMPREX PVT. LTD.: THE FABRIC SPECIALIST

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SABEENA FABRICS: A UNIQUE SELECTION OF FABRICS

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Fashion Creation



FAIR REPORT

THE 23RD HONG KONG FASHION WEEK: SPRING / SUMMER

HKTDC's Hong Kong Fashion Week show featured over 1,200 exhibitors from 18 countries and attracted more than 13,000 buyers. A report.

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NEXT SECTION SPORTSWEAR INTERNATIONAL

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Anti Skid Hangers



Quality is not an act, It is a habit

With many wise minds and expert hands behind it, KKPL is committed to manufacture finest hangers with highest quality standards to enrich lifestyles. We aspire to further become one of the strongest brands in the hanger manufacturing industry while opening new horizons of innovation and concepts in it .



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SOCK-O-MANIA

SOARING HIGH

Forget a decade, even a couple of years back, no one would have imagined exclusive stores for socks in India. Today, we have brands with exclusive socks stores in the country. This fact alone accentuates the potential for socks in the domestic market. We speak with players in this category to find out more.

Who really looks at socks? Well, may be no one but socks have come out from the closet of being a no-one in the category of clothes. From superman printed to those in funky florescent shades, the category of socks is getting bolder and more and more creative. Harsh Saraf, Business Development Head, Supersox, shares, “The socks market in India has been an ignored segment for quite some time; but over the last decade, we have really seen a transformation in this market. Suddenly socks, as a category, has started getting noticed and consumers have shifted from boring black socks to socks high on quality and design. This is probably the reason why the industry on the whole, has seen growth and is being taken seriously at the retail level. Today there are many brands that are ‘socks only’ or brands with their core focus on socks.” Ayesha Dadyburjor, Director, Lord Walker, makes a valid point, “The growth of the socks market has been exponential in the last decade. Socks have shifted from being a necessity to a fashion item.”

Brands Speak

So what do socks brands make? Socks of course! But then, these brands have taken socks to another level altogether. To hear it from Saraf, “Since we are a leading socks only brand, we make sure we cover all categories of socks – so we have socks for men, women, kids, babies and a new-born right from the age of a month. We also

cover all our customer's needs - so we have socks for schools, casual, formal, office, sports, party and winter wear. Our prices start from as low as ₹50 a pair for kids and go all the way up to ₹500 for our Royale collection which is our most premium collection of socks that are of the same quality we export to Italy. Our fastest selling socks are our loafer socks, which are very unique; we have imported specialized machines from Italy to make these socks and are the only manufacturers in India who offer these 100 percent seamless socks. These socks have absolutely no bulging seam on the toe portion, due to this unique feature the user does not feel itchy or any kind of irritation near his toes while wearing these socks. These socks are worn when sporting moccasins or loafers. They stay hidden in them and are not seen from the outside; hence we call them 'invisible socks'."

Dadyburjor shares about her brand, "The brand caters to all categories which include socks for men which they can wear for their work, casual outdoors, sporting activities and also a range of party socks. For women, we have thumb socks, ankle and full length socks and for children, the range comprises of school, socks and fashion socks." Vineet Bhatia, Proprietor, Marc, talks about the range at Marc, "We cater to men's, women's and kids wear range where we have sports socks, formal socks, ankle socks, cotton socks, and woollen socks. Men's and Women's cotton spandex ankle socks are our fastest selling products."

Market Dynamics

The Indian consumer is spending on his/her pair of socks and

brand consciousness is also creeping in. Though expensive, the consumer automatically compares the rate of the home grown brand to that of the international brands and that does become a challenge for the Indian brands. Saraf explains this further, "I think most Indian consumers are very brand conscious and prefer to pick up products of International brands. So, this has always been a challenge for domestic brands like us, but we keep innovating and try and give our consumers new and unique products, many of these specialized products are not offered by International brands and that's how we manage to create our base of loyal customers." On whether the retailers take this category seriously or not, Dadyburjor shares, "Socks are required by almost everyone. Consumers are now purchasing socks for different occasions hence retailers do give enough space for socks." Having said that, the category is facing a problem due to the spread and reach of the unorganized market where socks are sold at a much cheaper rate.

According to Dadyburjor, from their collection, they witness a lot of movement in full length and the casual range. She elaborates, "Lord Walker's (LW) full length business and casual range of ankle socks are highly popular. The soft combed cotton, elastane plaited top welt, reinforced heel and toe make LW socks very comfortable." The LW range is made up of 78 percent cotton, 20 percent polyamide and 2 percent elastane that makes these socks very comfortable, durable and provide shape retention for ever.

Saraf talks about the movement witnessed at Supersox, "In terms of comfort, mercerized cotton socks are definitely the best quality socks for daily wear. While this is the norm all over the world, in India, many customers/retailers feel these socks are polyester based socks, due to their

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fine quality and luster. Apart from this, we have many specialized socks that perform specific functions like our anti-slip socks for kids, our blood pressure socks for low blood pressure, etc.” On the material and blends, he reveals, “Most of our socks have premium-combed cotton that comprises 70-80 percent of the socks. A common misconception among consumers is that socks must be 100 percent cotton. But, to allow the socks to stretch and to make them of good quality, we have to put a certain amount of nylon/polyester and spandex. We have taken many initiatives to educate the customer on these aspects – so they can make an informed decision while purchasing.” At Marc, 70 to 80 percent of their range comprises of cotton socks.

On the design inspiration and innovation at Supersox, Saraf shares, “Our design team is a young lot; they are well travelled and stay abreast with international fashion trends. They take inspiration from everyday objects that add to the quirky sense of style in designing our socks. We have socks with cycles, hats, whales, snooker balls, puzzle pieces and a lot more fun stuff dedicated to each customer segment. We also have embellishments like lace, buttons, studs and embroidery motifs on our socks.

Material Magic

The category has not just seen an expansion in terms of style and colours,



but the socks have seen innovation in terms of the fabric used as well. Dadyburjor shares, “Anti-bacterial treatment in sports terry socks to give day-long freshness, diabetic socks to give extra comfort to people suffering from diabetes and obesity and fragrance socks to give joy to people with smelly feet are some of the innovations we have at LW.” She further adds, “We make a variety of designs from simple business motifs to intricately designed colourful pattern socks. We use different techniques to give texture and add on anti-bacterial and fragrance washes.”

Bhatia too has a range for diabetic people. He shares on the innovations at Marc, “Health socks with nano technologies, specially for diabetic people is a part of our range.”

Saraf talks about their contribution in the category saying, “The most innovative socks we have developed is called the ‘Challenge’ collection. These socks are designed and patterned with 14 different colours and have no thread cutting on the inner side of the socks. This means there are no loose threads at all, also your nails or sharp corners can’t get stuck inside the threads like they do in your regular pairs of socks and you get the most comfortable fit ever around your feet. These socks are so unique that we have actually challenged our retailers to find any other manufacturer who could make socks like these.”

Future Calling

With socks brands concentrating wholeheartedly in developing newer styles and technology for socks, the category is interesting, to say the least. On the trends that are expected to emerge in the future in socks for men, Dadyburjor shares, “Loafer socks, formal ankle socks, health socks, technically advanced sports socks



and innovations in designs in fashion socks are something we can watch out for. And in the women’s range, it would not be just show socks, but socks with embellishments and health socks.” Saraf shares his views, “Men will opt for trendy designs over solids. The quality conscious will opt for mercerized cotton socks over combed cotton. Seamless toe socks will become almost like a necessity. We could see a demand for custom made and personalized socks. Socks will be as important as ties and pocket squares, as a medium for men to express themselves. And in the women’s category, there is an increase in demand for thumb socks, which can be worn with slippers, knee high socks for women wearing boots in the north and for functional socks such as yoga socks. Our special ‘Air’ socks, which provide better air circulation and therefore reduce sweat, should become more mainstream. Neon and bright coloured socks too will be in great demand.”

To Conclude...

Socks, as a category, are growing and for brands to explore the possibility of having a shop-in-shop at retail stores will only help the category to grow further. As Saraf wonderfully puts in, “Yes. The SIS format will certainly work. As the saying goes ‘Jo dikhta hain, woh bikta hain!’”





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THERMALS GETTING TRENDY

Thermal wear is a part of the innerwear category and like its peers, it is becoming stylish by the day. With people holidaying more often to colder destinations, the demand for thermal wear has grown which has not only made brands expand their range but add innovations too. We take a look at the current trends.

By Zainab S. Kazi

Sharing quick market dynamics for thermal wear in India, Kuntal Raj Jain, Director, Duke, shares, “Thermal wear has evolved to be a part of the fashion category today. The growth is about 20 percent as a whole. The colours and styles for thermal wear have evolved but without compromising on its core of extending warmth and comfort to the wearer. Traders and manufacturers have seen a clear shift from their target audience in North India, who now prefer thermal wear rather than woollen wear. Demand in North India is rising and also is reaping well in eastern markets. Currently, men’s wear is the biggest segment of the apparel market, however, kids wear and women’s wear are growing faster than men’s segment. In kids wear, the range for girls has the highest growth rate. Innerwear has graduated from being just a functional category to a category that offers additional fashion quotient. Today, thermal wear has become a brand conscious category.”

To talk about Duke, the brand is one of the leading players in this category. Jain elaborates, “We present largest range of thermal wear which is fabricated with the help of finest grade fabrics and advanced stitching machines in compliance with set industry standards. These thermals are recognized for perfect stitching, softness, colour fastness, skin friendliness and durability, thereby widely demanded in the market. The collection is lightweight and it is designed to keep the wearer not just warm, but adjust itself to help



manufacturing facilities feature state-of-the-art machineries and equipment supplied by world class Juki, Fuku Hara, Pegasus, Yamato, Brother, Barudan, Stefab, Ramsons and others. The embroidery section is fully computerized. By using high quality fabrics and the best pattern technology, we are able to deliver stunning fashion at affordable prices.”

Aditya Marwaha, Marketing Director, Kanvin, talks about his brand, “The ladies thermal wear range is trimmed with exquisite stretch, lace and is designed in edgy style, flattering fits and exciting colours. We have the widest range of styles for women’s thermals in India which include thermals in string, camisole, sleeveless, sleeveless extra long with slits, short sleeve, long sleeve, long sleeve extra long with slits, short vest, long pant, semi-long pant and short pant. As for the men’s range, they are made from a blend of fine fibres with CPS technology. The polyfill yarn is filled in 2 layers of extra soft fibres. Trims are added with elastane for improved fit.” The brand has also introduced new “P” knit thermal range for men. With cotton modal on both sides and polyfill filling, this new range is made from very fine fibre. These can also be used as undershirts. The range they have for kids wear too is made with super soft fibres.

The players in this category are aware of the fact that the sale of thermals is seasonal, hence their expectations from retailers isn’t too high. Though during winters, with demand at its peak, retailers give top priority to it. To conclude, Jain opines that the future for thermals rests with how fashionable they can get.



control excessive sweating, should the temperature change. We use this unique “Quilted Thermal Insulation Technology (QTIT)” and special Hollow Fibre. This helps to retain the body temperature and keeps the wearer warm even in freezing conditions.”

Adding Innovation

Just as in any other categories, innovation is what differentiates one brand from the other. In thermals though, one would think that innovation is only restricted to the colour and perhaps adding anti-bacterial feature to the fabric. But players in the industry are going a step forward to innovate when it comes to style, thus making thermal wear appealing.

Jain talks about how Duke collection places strong emphasis on intricate craftworks and mirror finishing with great alacrity. He reveals, “Our in-house knitting, dyeing, mercerizing, finishing, compacting, garment printing, embroidery/ printing and



“Thermal wear has evolved to be a part of the fashion category today. The growth is about 20 percent as a whole. The colours and styles for thermal wear have evolved but without compromising on its core of extending warmth and comfort to the wearer.”

-Kuntal Raj Jain,
Director, Duke

A woman with her hair styled in two large, dark, ruffled floral buns is sitting on a white stool. She is wearing a black underwire bra with thin straps, a black lace bodysuit with a scalloped waistband, and black thigh-high stockings with horizontal ribbed bands. She is looking towards the camera with a slight smile.

Top International women's innerwear Fashion Trends

Gone are the days when it was tacky to show off your undergarments. Now it's all about flashing that peek of lace, or flaunting those straps. This also means that there is more attention paid to innerwear with each passing fashion season. And no, we're not just talking about bra-tops as real clothes, although designers like Alexander Wang at Balenciaga, Dries Van Noten and Marc Jacobs, all championed the look, sending bras down the catwalk over lacy t-shirts and under baggy jackets. Bodies, stylish shape wear, sexy sports bras and more, here are some of the underwear and lingerie trends you'll be seeing (or not seeing!) more of, this spring!

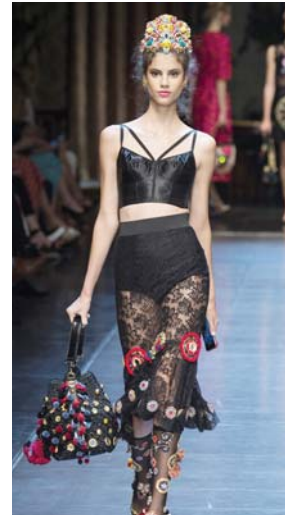
By Aarti Kapoor Singh



It's All About The Bodysuit

Versatile, comfortable and as easy to wear with jeans as it is with a pencil skirt and heels, it's no surprise the bodysuit is still having a moment. Not to mention it can hide a multitude of sins, if you opt for a smoothing, seamless shape wear option. Kim Kardashian started to popularize the use of bodysuits under jeans and skirts a few years ago, and recently, the trend has really taken off. Glamour magazine even coined it as the must-have "piece of the year" for 2016.

Even for those who remain unconvinced by the underwear-as-outerwear movement (slips as day dresses? Pajamas as evening wear?) and won't be wearing a body as a top, it's an essential piece of kit to have in your lingerie drawer and will prove useful under all of those wedding-season outfits.



High-Waist Knickers

Retro is one trend that seems to trickle into wardrobes every now and then. This influence on lingerie this year, means plenty of high-waisted vintage silhouettes on offer to help you unleash your inner Bettie Page. The advantage of these styles is that they provide added support and that enviable wasp-waisted 1950's silhouette popularised by the likes of Elizabeth Taylor, Marilyn Monroe and Brigitte Bardot. Iterated in fifties high-waisters at Dolce & Gabbana (decades-long champions of the fuller knicker) and Burberry, a pair of proper pants visible beneath body-skimming layers is now an established style code for evening wear. Bloomers bloomed on the catwalk at Emilia Wickstead, Dior and Fendi, and big knickers strutted fully exposed at Isabel Marant.

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A "Pert" Silhouette

Lingerie brand Triumph conducted a study that was published by the name 'Female Confidence Report'. They questioned over 6,000 women across Europe and found that many were dissatisfied with the appearance of their breasts, with 55 percent of 30-39 year olds saying, they wanted a perky, youthful lift to their breasts (the pert, natural silhouette is now preferred to the bigger-busomed look of the '90s). "Often, women are looking for plumpness: the kind of look they had in their teens," says Monica Harrington, Product and Fit Expert at Triumph. "This is across the board - including women in their twenties. Women always seem to want the lovely, rounded, pert shape they had."

In response to consumer demand, Triumph has launched its new Magic Boost range of three customised bras to help you reclaim your shape this season: the Lift Up which gives women the rounded, youthful shape they crave; the Push Up which creates a lovely décolletage; and the Shape Up, which provides support and gives a natural, rounded bust look.

The bras are also made without a metal wire (Triumph uses soft touch, flexible wire technology instead, providing the support of a wire without any of the discomfort), tapping into one of spring 2016's trends for wireless bra silhouettes.



Sexy Shape Wear



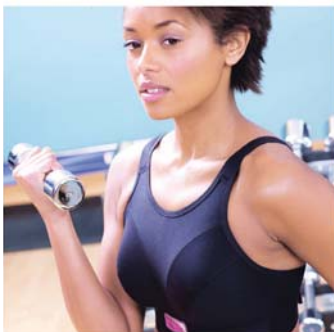
Ganny pants-style shape wear that you can't bear to look at, is definitely a thing of the past. This season, shape wear pieces are better than ever with lace panelling, floral details and mesh inserts. There are plenty of shape wear to choose from in Triumph's new Magic Boost range, like that work-to-weekend underskirt or office-to-evening body. "There's lots of fashionable shaping with beautiful lace," says Harrington. "The idea is about getting a smooth silhouette and the fabrics and technology have moved on so much that we're putting beautiful shaping into lace pants."



Lingerie by Day

With slips draped on top of tees, underclothes are not so undercover these days and will continue to assert their presence. Right from peekaboo to actual lingerie-inspired pieces with slinky silhouettes, are made for going out on the town, not just the boudoir. Alexander Wang, Emilio Pucci, Givenchy, Calvin Klein and Balenciaga were some of the names that really played with couture inspired by lingerie.

Inbal Diror, an Israel-based brand is actually taking the trend to formal evening wear as well. The 'naked dress' trend, popularised by Rihanna, Kim Kardashian, Marilyn Monroe, Kate Moss and Beyonce, is also being tom-tommed by Vera Wang, Naeem Khan and others.



Sporty Chic

As athleisure (wearing athletic wear in real life, even on days when we have no intention of entering the gym) remains a mainstay, adding some luxury accents to jazz up everyday sportswear is au courant. Think mesh panels, abstract prints, brighter-than-bright hues, wrap-around ribbons and lots of straps adorning your sports bra. Sporty-luxe influences like mesh and strap detailing have also made their way into more classic bra silhouettes. With the explosion of the athleisure market in the last few years, sports bra sales as a percentage of total bra sales has grown over 400 percent since 2002. Today's sports bras are designed with look-at-me colours and flirty straps that are supposed to show under your tank top.



Let's talk trends

I'm seeing five major categories for Spring/Summer 2016, some of which overlap with the current Autumn/Winter 2015 season:

- Florals (for spring, of course);
- The colours (mint, gold, orange, coral, yellow, pink) emerald greens, midnight blues, deep purples and fuschia pinks are all on show this season. New looks from Fantasie, Walcoal and Stella McCartney mean you can ditch blacks and greys while still retaining a hint of sophistication;
- The neutrals (beige, blush, brown, black, grey);
- Texture/ embroidery; and
- Sheer/ illusion tulle.





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GODDESSES INSIDE OUT

Attire rocked in the 1990s when Madonna appeared in conical bras and corsets to make a fashion statement and spark a trend. Her Jean Paul Gaultier cone bra changed the world forever. Of late, more and more celebrities have been trudging into the underwear-as-outerwear territory. In fact on almost any red carpet, you'll spot a star in their underwear. Whether we're talking a subtle bit of bra showing under a suit jacket, a bralette instead of a crop top, or a full-fledged panty and bra co-ord with absolutely nothing else, this trend isn't going anywhere anytime soon. But there are a few who can look edgy without looking trashy. Here is a pick, in no particular order, of who has a boudoir good enough to pass off as couture.

By Aarti Kapur Singh

RIHANNA



Rihanna is a big champion of underwear-as-outerwear. Sometimes she looks great, and other times she just looks like she could do with a jacket. Talking of jackets, she seems particularly fond of pairing long jackets when she flaunts lingerie. And she dons men's boxers with equal aplomb.

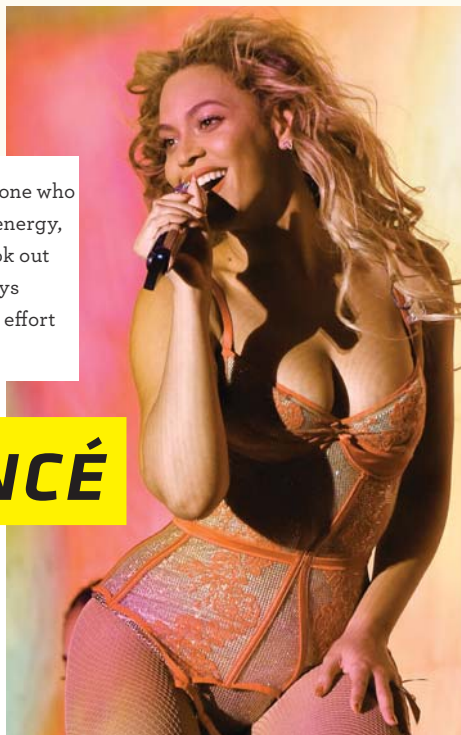
MILEY Cyrus



Miley has been wearing mostly underwear as a habit, as of late. We actually like the look she wore on Letterman, with the red heels and the skyscraper-printed skirt. The colours go great with her hair. The rest of the looks — well, maybe not so much. But Miley has said she doesn't do it to look good or sexy, which you have to have some respect for, I think.

Beyoncé is a perfect example of someone who can even flaunt her innerwear with energy, style, and enthusiasm. She'll pull this look out almost exclusively on stage, but it's always tasteful and you can see the thought and effort behind each attempt.

BEYONCÉ



CHRISTINA *Aguilera*



Christina Aguilera's "Dirty" phase left us with many underwear as outerwear inspiration in the early '2000s as the star seemingly tried to shed the Disney label.



GWEN *Stefan*



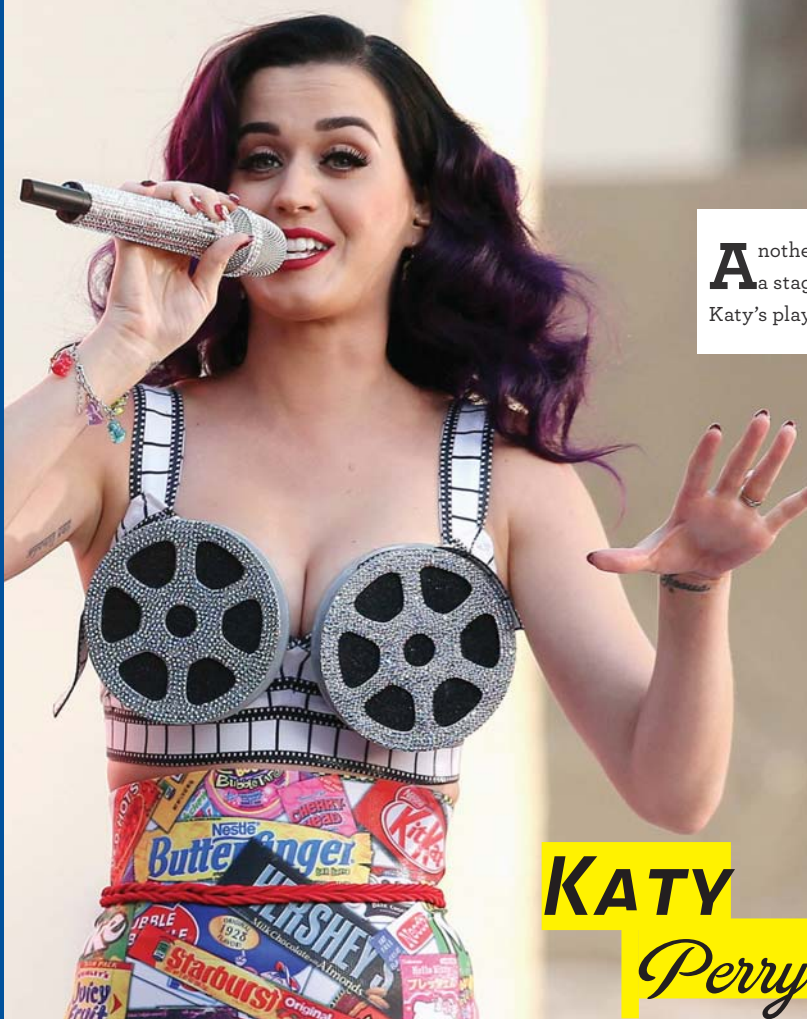
Stefan

Gwen actually rocked the bralet trend long before it became a rage. And even now, she adds edge to the way she flaunts her bra tops — under bejeweled jackets, under cowl neck tops and even more! The singer and designer sported one of her own L.A.M.B creations at an event, and interrupted the asymmetric neckline with a black all-in-one to champion the underwear as outerwear trend.



LILY *Allen*

Lily is another pop star with hits and misses when it comes to this style, but she always seems to have fun with it. Case in point — her look in the air balloon video.



Another pop singer who wears bejeweled bras on stage. For a stage look, it's kind of fun, and definitely goes along with Katy's playful child-like public image.

KATY
Perry

LADY
Gaga



Lady Gaga is no stranger to wearing her underwear on the outside. She's done it many times, with some hits and some misses. The singer-sometimes-actor has adopted the trend as a hallmark of her style.



KIM
Kardashian

Kim Kardashian knows that the underwear as outerwear trend is the best way to flaunt her curves. And it's a good thing, because she looks great. She even manages to add luxe style to the trend.

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KINGSWAY INDUSTRIES

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Just as it is paramount to have the right ingredients to perfectly cook a dish, it is equally important to have the right trims and ingredients, hooks, cups, tapes and other allied elements to tailor an impeccable innerwear product. We talk to Manish Balsara, Director of one of the oldest hook makers of the country, Kingsway Industries.

Tell us a bit about your company.

Established in year 1961, we are a pioneer in manufacturing hooks and eye metal parts for garments. By 1980, we officially became the first company in India to setup dedicated manufacturing plants for hook and eye tapes. With our domain expertise, resources and quality commitment, today we are reckoned as one of the most reputed players of our domain. We manufacture hooks and eye tapes for lingerie.

Could you tell us in details about how important a role these ancillary elements have in the final product?

Hook and eye tapes are paramount accessories of a bra. It takes all the wear and tear of the product when in use. It is the interlocking device which holds the fit and comfort of bra. A good hook and eye, which does not contribute to even 1 percent of the value, could enhance life of a bra and helps in reflecting better image of the brand.

Tell us about the recent innovations that you have developed in terms of technology and product features.

Our products are in line with the latest international innovation. We are armed with cutting edge technology which gives us the flexibility to do any kind of hook and eye tapes. We manufacture products from internationally sourced material and maintain all necessary standards of manufacturing, deriving all products at above par quality. We have been supplying only premium range of products and have successfully maintained consistency as compared to erratic cheap Chinese imports.

Which innerwear brands are your key clients?

We supply to a large spectrum of lingerie manufacturer in India and in all these years, have worked with all major brands in Indian Market.

Are there any trims and accessories product categories that India excels in and is a world leader?

We do not see any product category competing in international markets. The industry is at primitive stage and have neither encouraged nor promoted substantial local manufacturing which is building blocks to cater to international market.

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ARROW TEXTILES LIMITED

THE LABEL SPECIALIST

“Our labels define the brand of a garment; so its importance is self explanatory,” says Sudhir Berry, General Manager, Sales, Arrow Textiles Limited, talking about about his brand Arrow. Excerpts from the interview.



-Sudhir Berry,
General Manager, Sales,
Arrow Textiles Limited

Tell us a bit about your company.

We started off as an elastic manufacturing company in 1985. Weaving being a common factor, we ventured into manufacturing woven labels in 1993 and two years down the line, we started with printed labels. Today, ours is a comprehensive unit with an integrated production line for these trims.

Could you tell us in details about how important a role these ancillary elements have in the final product?

Our labels define the brand of a garment; so its importance is self explanatory. In case of innerwear, elastic plays a major role — the quality of the elastic used is directly proportional to the comfort of the garment.

Tell us about the trims and accessories you manufacture for the innerwear industry.

We manufacture woven elastics (plain, jacquard and printed), rigid tapes (gross, grains, twill, etc.,) woven labels and printed labels.

Tell us about the recent innovations that you have developed in terms of technology and product features.

We have done many innovations combining the skills of different machines available in different departments. A very recent innovation is the development of a very fine variety of gripper tape

Tell us about the price points of your products.

We have always believed in value for money prices and hence we our products are very reasonably priced, even though our quality standards are certified by Oekotex and many others.

Which innerwear brands are your key clients?

Rupa and Amul

Do you face any competition from imports?

Imports are less for elastic as it's a bulky item for labels. People do import but the competition is not much.

×



A woman with long dark hair is wearing a sleeveless, floor-length red gown with intricate gold floral embroidery on the bodice. The skirt is voluminous and appears to be in motion. She is wearing large, ornate earrings. The background is a dark, textured wall.

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Fabric is the heart of any apparel and innerwear is no exception. Infact, in innerwear, it is solely the fabric that determines what purpose an intimate wear product is going to serve.

Tell us a bit about your company.

Triendo Impex Private Limited was established in 2010, and is based in Mumbai, India. We are one of the leading manufacturers, importers and exporters of premium quality lingerie fabrics. With sheer dedication, we have been able to bring in tremendous innovations to revolutionize the quality of fabrics supplied to the lingerie industry.

Could you tell us in details about how important a role fabrics have in the final product?

Fabric is the heart of an apparel product. The quality and feel of the fabric on the end users' body gives fabric an all-important role on the final product.

Tell us about the different types of fabrics you manufacture for the innerwear industry.

We specialize in manufacturing nylon/spandex, polyester/spandex and cotton/spandex fabrics. We produce these fabrics in low quantities at best prices, available in all weights, composition and texture as per our clientele's requirement.

Of these, which are your fastest selling products? What are their key attributes?

Nylon/spandex is our fastest selling product. This fabric is manufactured in China utilizing technically advance machines that yields excellent finish on the fabric, giving brands and lingerie manufacturers the apt feel, weight and composition they require for their final product.

Tell us about the price points of your products. Tell us about your most expensive products and what makes them so premium.

The price points of our products are very competitive considering the low quantities we also offer. Our most expensive product is the nylon/spandex fabric because of its high quality and special finish.

Do you have silk and satin in your product basket? Have they now emerged as popular innerwear fabric options in India?

According to our research silk and satin are premium fabrics and hence are very costly, which is not suitable for the Indian market because it goes above the accepted purchase price.

Which innerwear brands are your key clients?

Little Lacy, Extra Life and Lady Care are some of our key regular clients.

Do you face any competition from exports?

We look forward to challenges brought up by our competitors because this is what motivates us to be more innovative and experimental which provides us with vital experience that makes us the best at what we do.



-Joy P Ghosh,
Managing Director,
Triendo Impex Pvt. Ltd.



-Rajesh N. Kewalramani,
Managing Director,
Triendo Impex Pvt. Ltd.



SABEENA FABRICS

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Sabeena fabrics has long been a trusted name in the domain of linen and cotton fabrics. Today, the company is catering to the needs of a long list of reputed clients like Wills Lifestyle, John Players from ITC and many more.

Founded in 1978, the company is a renowned player in shirting fabrics and is a trusted name for its high quality pure linen blends and cotton. What sets Sabeena apart from the scores of other brands is its vast selection of fabrics, which is unsurpassed by its competitors. The company has earned the trust of generations of satisfied customers as evidenced by their continued patronage. With a production capacity running down to 3.5 lakh meters per month, the company is majorly supplying to well known fashion houses like Madura Fashion & Lifestyle, Wills Lifestyle, John Players from ITC and many more.

The company's 90 percent production is targeted towards domestic brands whereas 10 percent is exported to countries like Tunisia, Algeria, Saudi Arabia and Dubai.

Company Expertise

Sabeena Fabrics offers a wide range of qualities in rich and vibrant palettes with linen and its blends. The company has, over the years, mastered the production of linen fabrics and offers exclusive products in the market. The product portfolio also incorporates 100 percent cotton, its blends and yarn dyed fabrics. In the current season, Sabeena Fabrics has focused its collection on new forms of dobbies, checks and stripes. A new breed of solid colours is also being developed in accordance with the latest trends.



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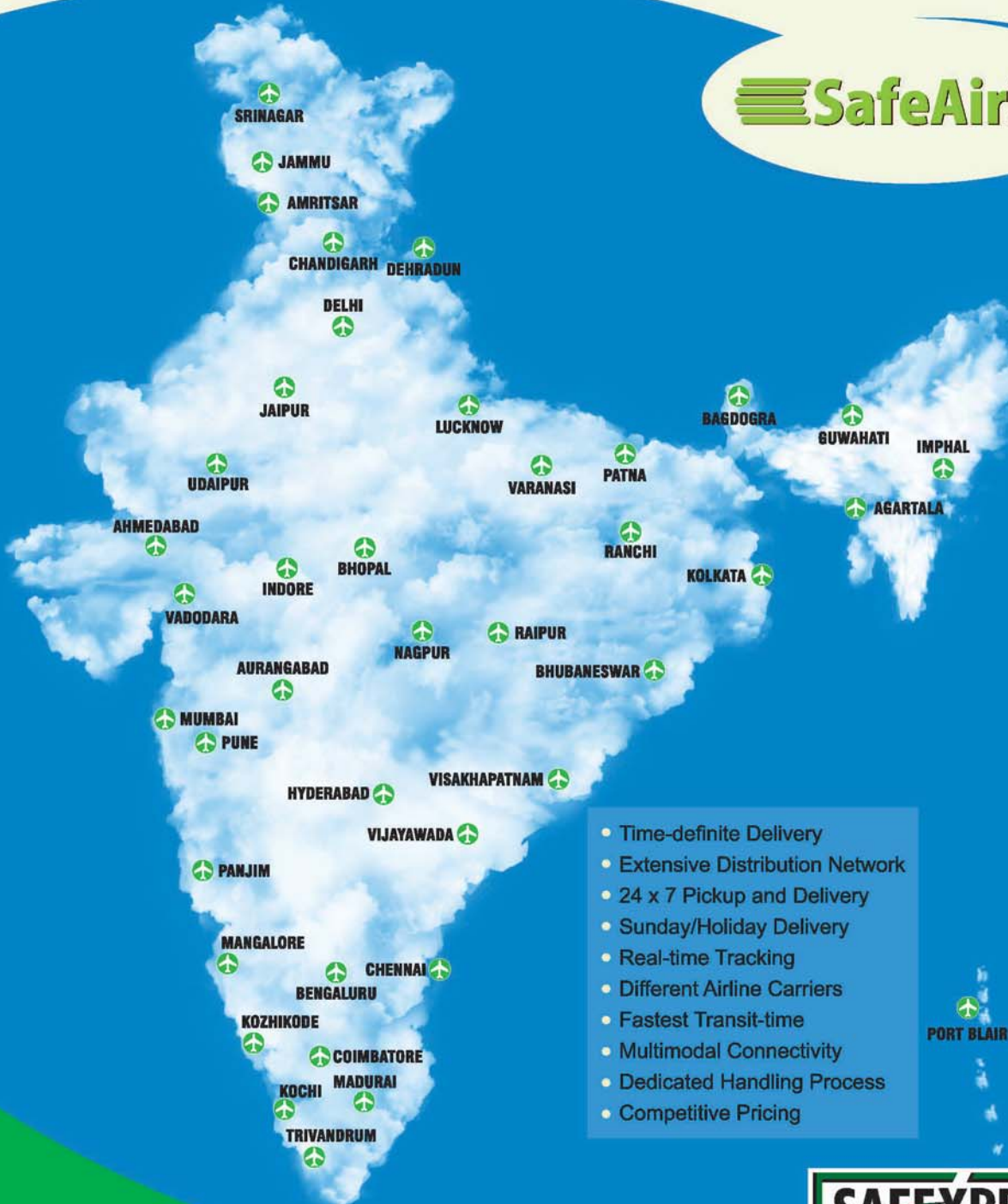
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HONG KONG FASHION WEEK FOR SPRING / SUMMER

23RD EDITION BLOOMS WITH CREATIVE DESIGNS & PRODUCTS

Hong Kong Trade Development Council (HKTDC), featured over 1,200 exhibitors from 18 countries and regions including Bangladesh, Italy, the Netherlands and the Philippines, and more than 13,000 buyers from 68 countries and regions.

By Rajan Varma

The 23rd HKTDC Hong Kong Fashion Week for Spring/Summer, held at the Hong Kong Convention and Exhibition Centre (HKCEC), in July'16 bloomed with colour, beauty and fresh designs reflected in its theme, Garden Breeze. The fair organised by the Hong Kong Trade Development Council (HKTDC), featured over 1,200 exhibitors from 18 countries and regions including Bangladesh, Italy, the Netherlands and the Philippines who participated for the first time, and more than 13,000 buyers from 68 countries and regions. The fair showcased the latest fashions, international brands, garments, fabrics and accessories.

Under the theme “Garden Breeze”, the Fashion Week featured over 20 events including fashion parades, designers’ collection shows, house shows, trend forecasting seminars, forums and networking events. Together, they provided a full spectrum of business insights and featured the hottest designer collections.

THEMATIC ZONES

The zoning of the Fashion Week was based on four broad categories – Apparel, Upstream Supplies, Fashion Accessories and Technology and Business Matching. Fashion accessories were further zoned into bags, gloves, scarves and shawls, footwear, leggings and socks, eyewear, hair accessories and headwear, belts and ties, and embroidery and sewing supplies to offer one stop platform to best catering buyers’ demand. To optimise the sourcing experience of global buyers, four new zones were introduced this year, namely - ‘Fashion Tech’, ‘Footwear, Leggings and Socks’, ‘Knitwear’ and ‘Women’s Wear’.

‘Emporium de Mode’ was a premium section dedicated to promote elegant fashion brands. ‘Fashion Gallery’ gathered a wide array of high fashion items and displayed myriad brand labels. The ‘International Fashion Designers’



Showcase' displayed unique designer collections for potential clients from around the world.

The new 'Fashion Tech' zone featuring high-end printing technology on garments provided a futuristic look at the fashion industry and trends. It showcased the industry's latest digital printing technology and award-winning eco-friendly textile technology. Epson Hong Kong Ltd., showcased a series of cutting-edge digital textile inkjet printers and dye sublimation printers.

Other popular zones included active wear and sportswear, intimate and swim wear, children's wear, men in style, denim arcade and fabrics and yarn. Qualified exhibitors were awarded a "Green Solution Suppliers" insignia on their booth fascia to address the growing demand on eco-friendly apparel.

Six group pavilions were set up to represent the key fashion markets such as the Chinese mainland, India, Japan, Macau and Thailand.

SMALL ORDERS DISPLAY

Responding to the growing popularity of sourcing in small orders, Fashion Week continued to feature the hktcd.com Small Orders Display, featuring more than 100 garment racks, and targeting buyers looking to



source products in minimum quantities from five to 1,000 pieces. hktcd.com Small Orders is a buyer-oriented online sourcing platform creating new business opportunities and flexibility for direct sourcing of quality products in small quantities. It connects global buyers with third-party-authenticated suppliers in a secure sourcing and payment environment without time or geographical constraints.

FASHION TECH ON PARADE

To create business opportunities for exhibitors, a total of 91 overseas buying missions were organised to bring over 5,100 buyers from 45 countries and regions to the fair. These included representatives from renowned fashion labels, mega chain stores and major distributors, including Forward from Russia, HardToFind from Australia, H&M from the Chinese mainland, Jaspal from Thailand, Modas

"Besides raising production efficiency, technology also enables sustainable development of the industry. In recent years, there has been high awareness of sustainable development within the industry. From design and sourcing to prototyping and production, the industry has been dedicated to reducing energy consumption and carbon emission. Responding to this development, this year's fair focused on exploring relevant technologies and assessment tools to help raise the industry's efficiency."

—Benjamin Chau,
Deputy Executive Director, HKTDC



“The Hong Kong Research Institute of Textiles and Apparel (HKRITA) has been working closely with HKTDC to promote research and development of technologies for the fashion and textile industry over the years. Hong Kong Fashion Week for Spring/Summer stands out as an excellent platform for our brand building and for reaching out to both local and international players in the industry.”

—Lydia Fung,
Marketing Manager, The Hong Kong Research Institute of Textiles and Apparel

Gaebelfrom Spain, Tricycle from South Korea, V-Mart Retail from India and World Co. from Japan.

HIGHLIGHTS

New Trends seen from around the world:

HKRITA: INITIATIVES IN TEXTILE INNOVATIONS

The Hong Kong Research Institute of Textiles and Apparel (HKRITA), the award winners at the International Exhibition of Inventions of Geneva, displayed award-winning textile innovations, ranging from a water-saving dyeing technique to an anti-bacterial yarn spinning system. Their projects included a method of turning food waste into biodegradable polylactic acid fibres, and the application of recyclable solvents during the fabric dying process to reduce water consumption by about 90 percent compared to conventional methods.

MATARA: DISCOVERING TRUE BEAUTY

Matara, a young jewellery brand based in Thailand, showcased its signature collection of rings,



earrings, bracelets and necklaces, hand-made by Thai artisans. The earrings were designed with pearls placed inside silver cages, signifying true beauty found within every woman.

MIDOTI: OFFERING AESTHETIC STYLES IN ACCESSORIES

Midoti, a fashion accessory brand founded by Sharons in 2014, launched its ‘Knot Lots Collection’ at the show. The collection featured designer knots made by special application of German technology of soft metal materials weaving.

WAN LI NENG INTERNATIONAL LTD.: LIGHTING UP LIVES

Wan Li Neng international Ltd., displayed LED sneakers with seven switchable light colours and five colour changing modes to match different outfit colour schemes. By easy charging with USB cable, the shoes can glow for



over eight hours, serving as an ideal partner for different occasions.

DIZAYN ETIKET SAN TIC A.S.: INTRODUCING GREEN LABELS

Dizayen Etiket San Tic S.A. from Turkey presented a series of eco-friendly label papers including Forest Stewardship Council (FSC) Certified paper and kraft as well as woven labels made of different materials like organic cotton, bamboo and recycled polyester.

EXCITING EVENTS ON THE SPOT

The Fashion Week also presented fabulous events to offer invaluable opportunities for the young designers to introduce their collections in front of global buyers and industry players.

A series of exciting fashion parades and house shows were staged to highlight impressive collections created by the debut designers and students. The institutions included – the Chinese University of Hong Kong, the Hong Kong Polytechnic University, Technological Higher Education Institute of Hong Kong and Macau Productivity and Technology Transfer Centre.

Young talent shines through International Fashion: On Parade - Fashion Bazaar

A fashion parade was staged on the first day of the fair where following participants - Sunny Concept, C S Fashion Wholesale, Yick F Ind'l Co. Ltd.,



Macao Fashion Parade

The graduation parade of the Chinese University of Hong Kong's School of Continuing and Professional Studies, was held on the second day of the fair.

THEi Fashion Show 2016

Technological and Higher Education Institute (THEi) show on the second day of the Hong Kong Fashion Week displayed an array of innovative and visually stunning collections of the Hong Kong's budding designers.

PolyU MA Graduation Fashion Show

The MA Graduation Fashion Show was one of the highlights of the Hong Kong Fashion Week held on the last day of the fair, showcasing the creative works of selected students in the Master of Arts in Fashion and Textile Design. The students presented a collection of eight original outfits designed under their chosen themes and demonstrated their innovation and creativity inspired by personal visions.

SEMINARS ON THE MARKET TRENDS OF THE FASHION INDUSTRY

Several seminars were held at the fair on the market trends of the fashion industry. Forecasting experts from WGSN and Fashion Snoops led two seminars examining the trends for Autumn/Winter 2017/18 for women's and men's wear during the fair. The international fashion forecaster, Helen Sac, Head of Mindset & Content, APAC, WGSN, unveiled the upcoming A/W '17-18 seasonal trend. Other key seminars covered various hot topics in the fashion industry, such as fashion sustainability and strategies of e-tailing.

New sustainability assessment tools for the industry

A seminar on "Fashion Sustainability - From Product Development to



The Fashion Week also presented fabulous events to add spice to the fair and to offer invaluable opportunities for the young designers to introduce their collections in front of global buyers and industry players.

Chic by R&B Limited, Davreg Fashions Mfg. Ltd. and Lavender Fashion Mfg. Ltd. showcased their collections.

PolyU Intimate Fashion Show 2016

The Hong Kong Polytechnic University also held a lingerie show, - 'The PolyU Intimate Fashion Show' co-organized with the Hong Kong Intimate Apparel Industries Association. The show featured the 12 selected innovative collections of the final year students from the Bachelor of Arts (Honours) degree programme in Fashion and Textiles with Specialisation in Intimate Apparel.

Designer's Collection Show

Several designers including Eric Choong and designers of the Cidi Chanapatana International Design Institute from Thailand, Jo Disaya from Australia and Samantha Giraud from Hong Kong took part in the Designers' Collection Show held on day one of the fair.



Karun Bansal, Consul-Commerce, Political and Media of the Government of India, and Johnny Wan, Director, Exhibitions Market Development, HKTDC inaugurating the India Pavillion.



-Helen Sac,
Head of Mindset & Content, APAC, WGSN

Manufacturing”, co-organised by the HKTDC and The Hong Kong Research Institute of Textiles and Apparel (HKRITA), offered insights into the latest sustainability measurement tools for the fashion industry and technological innovations. Kit Li, Project Manager of Clothing Industry Training Authority and Notes Luk, Consultant at Clothing Industry Training Authority were the main speakers.

Indian Participation at HKTDC

In its endeavour to strengthen its export promotion efforts, The Apparel Export Promotion Council participated in the Hong Kong Fashion Week, with over 40 apparel and fashion accessories exporters from India. The objective of participation was to improve its presence in the existing market and to explore new market opportunities. The India Pavilion was spread over an area of over 500 square meters.



-Kit Li,
Project Manager, Clothing Industry Training Authority

Kit Li spoke on ways to help the industry assess the water footprint of their products, reduce emissions and raise production efficiency. She felt that air pollution was worsening in many parts of the world. Large amounts of water and energy were being consumed and water sources were contaminated during the garment production process. She added that to tackle water shortage in the Chinese mainland, “Activity-based Carbon Footprint Modelling” (ACFM) and “Activity-based Water Footprint Modelling” (AWFM) systems were being adopted to assess accurately the carbon and water footprints of each step of the production process.

The Pavilion was inaugurated by Karun Bansal, Consul-Commerce, Political and Media of the Government of India, in the presence of Johnny Wan, Director, Exhibitions Market Development, HKTDC.



-Janet Cheang,
Founder & Director, PinPoint Consultancy

Tips to stand out your brand in e-tailing era

Branding in the internet era was analysed during the seminar on “Tips to Stand Out Your Brand in E-tailing Era”, the next day, by the speaker Janet Cheang, Founder and Director, PinPoint Consultancy .





-Elavarasu Natarajan,
Proprietor, Scandinavian Fashions



-Rahul Keswani,
Director, MHK Exports Pvt. Ltd.

The India Pavillion witnessed the presence of a total of 40 apparel and fashion accessories exporters from India, who took part in the grand event. The exhibitors showcased the immense potential of Indian textiles and state of the art manufacturing.

Elavarasu Natarajan, Proprietor, Scandinavian Fashions, who was one of the exhibitors, applauded the event and said that it was a good opportunity for them and also facilitated growth in the international space. "We got really good response from the buyers. Earlier, we majorly catered to European clients, but this gave us an opportunity to meet new clients from other parts of the world. Participating in the Hong Kong Fashion Week has helped raise the company's profile," said Natarajan.

Another exhibitor, MHK Exports Pvt. Ltd., too showcased their products at the event and also received good response from the buyers. Rahul Keswani, Director, MHK Exports Pvt. Ltd., said, "We have received enquiries from the buyers and are working on the same." The company's primary markets include Istanbul in Turkey, United Kingdom, Denmark and USA. However, he noted that the number of buyers this year were marginally less.

Thus, there were mixed reviews from Indian players about the response from the fair this year.

China Market Remains Resilient

The Chinese mainland market continues to be a driving force for the Hong Kong Fashion industry. As of 29 Feb 2016, Hong Kong's total exports of clothing and clothing accessories to mainland and Macau rose by 2.2 percent and 8.8 percent respectively to \$1.42 billion and \$504 million. According to HKTDC's research, mainland consumers generally find Hong Kong clothing brands trendsetting, fashionable and tasteful. They are willing to pay an average premium of 36 percent to purchase Hong Kong branded garments. Hong Kong Fashion Week for Spring/Summer served an effective springboard for traders to expand their business in mainland and Asian market.

Keen Interest from Japanese and Korean Buyers

Besides exploring eco-friendly technologies, the four-day fair also created business opportunities for the fashion industry. Japanese buyer Satoshi Miyata, a first-time visitor,

who was looking for new men's wear suppliers, said she met a potential supplier from Hong Kong on the first day, and plans to visit new production facilities in the Chinese mainland and Cambodia later. Meanwhile, Korean online fashion retailer Tricycle also identified two to three potential Hong Kong suppliers at the fair. Tricycle's Team Manager Ju-Mi Hong said that the new suppliers are flexible with order quantities. She was looking to source a large selection of products in small quantities in order to test market demand.

Hong Kong Companies Stand Out With Diverse Silk Products

Despite uncertainties in the global economy, Hong Kong companies continue to stand out by offering a wide selection of products rather than compete on prices. Established in 2002, MsEnvy specialises in silk products and has regularly exhibited at the Hong Kong Fashion Week to promote a range of designs, according to its Managing Director Jun Wong. At this edition of Fashion Week, MsEnvy presented silk fabrics that allow customers to build their own product lines. "We met many buyers and more than ten of them came from Spain, Singapore, Thailand, the Philippines and Japan. We have provided samples for their reference." Hong Kong companies Acumen Company Ltd. and Sun Kee Woollen Knitting Factory Ltd. also drew great interest from buyers at the fair.

Sun Kee Woollen Knitting Factory Ltd. showcased its knitwear and cashmere collections at the fair. "Buyers from Belgium placed orders for cotton and rayon cardigans and those from Russia showed interest in cashmere products," shared General Manager Patrick Lui.



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Pictures Courtesy: Hong Kong Trade Development Council and Rajan Varma.

Report By: Rajan Varma, Images Business of Fashion

IMAGES BUSINESS OF FASHION

09 The SEPTEMBER Issue

OCCASION WEAR & HOME FASHION SPECIAL



\\ ISSUE HIGHLIGHTS

The September issue of IMAGES Business of Fashion magazine is a double-edged sword. As India gears up for the coming **festive season** which will paint the country with colours, lights and joy, there are two things on top of the mind with the Indian lifestyle consumer— refreshing, redefining and perhaps even inventing their personal **Wardrobes**, and changing or redoing their **Homes**.

IMAGES Business of Fashion, September 2016, thus has two focus areas—**Occasion Wear** and **Home Fashion**. In the first part we will study **Festive, Party and Formal Wear**, and in the latter we will study **Home Textiles, Furnishings and Home Décor**, in India.

Within each we will...

- ▶ **Define** and **Size** the retail markets
- ▶ Pinpoint the main **Opportunities** and **Challenges**
- ▶ Present the **Main Trends**
- ▶ Map the **Pioneering Moves** of the Top Players

Being the **1st of the Three Festive Season Issues**, we also preview the **Upcoming Festive Fashion Collections** and **Fashion Brand Launches**. The September Issue is also the **India Retail Forum 2016 Special Issue**.

\\ SPORTSWEAR INTERNATIONAL

- ▶ Latest Vistas in Retailing
- ▶ Smartest New Innovations



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188-201 FEATURE

The Consumer's Victory

The future of retail has just begun and its all about the consumer and his wishes. He's sexy and he knows it- the consumer rules today's world, and we try to understand what it will take to understand him.

1. What Do Consumers Want?

Where and how to get in touch with your customer. Consumers, nowadays, buy clothes to communicate, to adorn themselves, to reward themselves. How successful a company is in identifying and satisfying consumer needs, depend on its abilities and resources. Flexibility, speed and customer focus are the decisive factors in this.

2. How Consumers Can Be Profiled?

Digitization has nearly removed the gap separating retailers from shoppers. This creates huge opportunities for getting to know consumers, not just their wishes but also their girth.

3. What Do Customers Expect?

It's time to think in terms of service as this helps companies ensure customers' loyalty. And here are the most important points to bear in mind: Speed, Individualization, Simplicity, Focus, Know-how, and New Formats.

4. The Gender Difference

The sportswear and athletic sector is the one segment that best exemplifies the difference between the men's vs. women's consumer experience. Expert Consultant Company Value Lab explains why.

5. Tech Innovations

Technologies designed to enhance the in-store experience are coming to the fore, while consumers increasingly rely on shopping apps to source pieces from across the world.

6. Best Case: Coffee

If the fashion world needs a role model for exciting retail experience, there is one with its new extraordinary Seattle and London spots, coffee roaster Starbucks stays a step ahead of consumers, striving for world latte domination



202-205 STORES

Customer Bases

If you think that brick and mortar shopping doesn't thrill consumers anymore, a look at these stores will probably change your mind.

Credits for India Capsule

SPORTSWEAR INTERNATIONAL

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Customer's Victory

THE FUTURE OF RETAIL HAS JUST BEGUN. AND IT'S ALL ABOUT THE CONSUMER AND HIS WISHES.

Text **Julia Mönnich** / Illustrations **Rebecca Haque**

Customers are shopping here today, there tomorrow, and the day after not at all. If they were still buying expensive things and remaining loyal to their brand a little while ago, the next moment they are rushing over to the cheapest discount store. They order goods and send them back, like and spurn, are networked—with everything and everybody—except with my shop or my label. What is happening here?

Retail fashion is under pressure. A retailer in western Germany was even so despairing that he hung the following placard in his shop door: "Customers who are only looking must pay a cover charge." But it does not have to get that bad—if you look at exactly who these customers are, the customers you want to do business with. Consumers—who are they? What motivates them? Where can you find them? We set off on a quest for your customers. At universities and marketing labs, in the digital and real world, in theory and in practice. This search for clues revealed a great deal, but one thing most of all: The prospects

for fashion retailing are nowhere near as bad as is often assumed. That is the good news. The perhaps just as good but slightly more complicated news is this: Business has changed. Rules that prevailed for decades are no longer valid. The result of this, however, is not that we are in a vacuum, a kind of anarchy that has no rules anymore, in which every customer at any time and any place buys something, returns it, evaluates it and loves or hates it. It is simply that there are new rules.

Of course the fashion market has changed. That's neither good nor bad. It's simply the way it is. But if you look more closely at where exactly the changes in the fashion business are taking place, it becomes clear: Design, purchasing, production, sales; A has something to sell to B—all these things may be more efficient, more stringent, more global, but in essence they have remained more or less the same. The decisive changes have taken place at the other end of the chain, with the consumer. Consumers have assumed a completely new role in the overall picture. There really has

been a landslide in the fashion business and the consumer is the element in the whole story that has been dealt new cards.

As a result the traditional approach for addressing customers is not working anymore. In the US, for example, 44% of all hotel guests prefer to check in at a terminal rather than having to speak to hotel personnel, according to Zeit Online—despite the fact that Americans were always regarded by Europeans as a model in terms of service. Today's customers are more powerful, stronger, better informed and more independent. But what do they want? And can suppliers or retailers find out what that is? In this Feature story we want to provide answers to these questions. Because once you've worked out what role consumers are now playing, it's possible not only to respond appropriately, but to establish rules for yourself and your business which make clear what needs to be done—and you'll be certain not to demand a cover charge from your customers.

1. What do consumers want?

WHERE AND HOW TO GET IN TOUCH WITH YOUR CUSTOMER.

Whoever thinks that things are not going so well in fashion because consumers have everything they need in their wardrobes is wrong. Of course we have enough pants and shoes and don't have to freeze, but clothing does far more than just giving us protection from wind and weather. And whoever believes it is enough to magically stir emotions at the POS to get consumers to shop has failed to grasp the essence of consumers. Why? Because customers have needs. In fact, they have urgent and numerous needs. It's only that they are different needs today. Our complex, global, complicated, technological, multi-optional and fast-paced lifestyles produce new and different needs that are at least as urgent. Whether these needs can be satisfied by means of clothing or buying at all is another question entirely. One thing is definite: We believe, or would like to believe, that we can come closer to happiness with a new dress or a new bag. And exactly that is the key to happiness for the fashion business: People who recognize what needs consumers want to satisfy, or possibly are even driven to satisfy, can respond accordingly and put together a range of goods, plan displays, set up lights, train personnel and make dialog possible.

WHAT NEEDS ARE INVOLVED?

Nowadays people buy clothes to communicate, to adorn themselves, to reward themselves. To reduce uncertainty, to protect themselves, to express themselves, to make a point—such as status, belonging or being different—to

realize their true selves. No wonder a survey by the US shopping portal Ebates showed that 96% of US consumers use shopping as a way of making them feel good about themselves. “There are numerous reasons that lead to a purchase,” says Peter Kenning, business administration expert and professor of marketing at the Heinrich Heine University Düsseldorf. In addition to the numerous sociological aspects, there are also psychological and economic aspects, among which value for money is most important. In other words, the explanations of purchasing behavior differ enormously from person to person and also from situation to situation.

What is new and important is that the needs for social recognition and self-fulfillment through consumption have increased. For example, economic geographer at the University of Augsburg Thomas David said to a newspaper that nobody is willing to be average anymore. People consume what they would like to be. Kenning adds: “The shared theme is the desire to be individual.” In the past it was easier to provide what people needed in terms of clothing, for in those days there were certain indisputable must-haves, which fulfilled a social function. Today consumption is more individual and that makes it more difficult—for consumers as well as for those who want to sell them something.

Thus, clothing is a medium for achieving certain desired states. Basically, the needs



are already there before the customer enters a store or clicks on a website. But it also means that a pair of jeans can provide a certain target group with something emblematic to their way of life, or a way for them to stay in tune with the way of life they desire. Can today's consumers even be classified into target groups? Yes. "There are age-specific characteristics that link certain age groups to each other," says Kenning. "Comfort, for example, becomes more important with increasing age. Of course, there are also hybrids, but the bread-and-butter business is target group specific. The group framework exists and the task of the retailer is to filter out what makes the group special." And that is precisely where it gets complicated, because clothing evokes so many different emotions and fashion is also part of personality.

EXPRESSING EMOTIONS

"We say 'my pants' and 'my blouse,' which

is not the case with other consumer goods," says Werner Reinartz, professor of marketing at the University of Cologne. Thus clothing is a very significant aspect of our life that nobody can do without or wants to. But then, how can one figure out what clothing consumers want and for what purpose? That is not so easy. "Consumers differ a great deal in their ability to express their wishes, most preferences remain rather latent and pre-conscious and need to be activated from the outside, for example by watching other people," says Kenning. Preferences are dynamic, which means they can change very rapidly. "If a product matches the current taste of consumers, they are very receptive to it. On the other hand, consumers react more rapidly (positively or negatively) and share in determining the success or failure of a brand," says Jörn Stiller from online retailer Stylefile. As Enzo Fusco of FGF Industries/

Blauer says: "Every country is different, and Italian customers are not like people from northern Europe." Not only does every country tick differently, but every city, every district, every individual person. That makes it all the more difficult for fashion retailing to recognize needs which are genuine or felt to be genuine.

INFORMATION IS ESSENTIAL

To be able to find answers, it is important to know the customers you want to sell to. Know them well. "Information is essential," says Lorenzo Boglione of BasicNet Group. And you only get this by going to where the (potential) customers are. As Elizabeth Sontag, owner of Alison Road with stores in Long Beach and Seal Beach, California, says: "We just launched our website, ShopElisonRd.com, which is going well and gaining more and more customers around the US every day. It's



been a whole new experience developing our online shop, but has definitely helped us reach more customers outside of our brick-and-mortar locations. We are also currently looking into other platforms such as Pinterest and Instagram that now offer e-commerce shopping potential.” Defanzny, for instance, makes constant use of the various channels and utilizes online and offline media events with print products, events, product placements and shop openings. In addition to the classic channels, Timezone makes use of all relevant social media platforms. “By doing this, we focus on extremely genuine and sympathetic communication with our customers, followers and fans. In addition, we participate in event series, such as Timezone Real People Live Sessions, or in the charity festival Peace X Peace now going on in Berlin,” says Sven Schlager. Lorenzo Bogleione of BasicNet Group says: “Retailers have to move in all of these different channels both online and offline, and provide customers with services in order to make their buying experience easy and the brand recognizable in each channel.”

Thus, it is necessary to make use of every imaginable point where consumers congregate. And there are many of those. Of course, you learn a great deal about customers in the conversation leading

up to a sale, as well as the online data trail they leave behind. “Online consumer data proves invaluable to us when we are planning new collections, as we can see exactly what is working well for us in different territories across Europe, what customers are searching for and exactly where in the world there is demand. The same data also helps us identify new retail opportunities, as we can see where our emerging markets lie,” says Sam Bloor from Edwin Europe. Enzo Fusco from FGF Industries (Blauer) also feels that: “Through careful scrutiny of e-commerce data we can understand what customers really want.”

The effort and costs resulting from evaluation of online data are no longer regarded by sellers as an impediment: “Today, the budget is simply part of costs, as was the rent for a traditional store at a top location,” says Pascal Gerstenlauer of Defanzny. And numerous fashion professionals—in physical retail as well as online—regard the opportunity offered by the Internet for making contact with consumers a huge benefit: “It’s actually easier to reach and connect with consumers today. With all the social media platforms we have at our disposal, we are easily able to locate and reply to any questions consumers may have, for instance. This means we’re setting the bar high for our customer service, but this can

only be a good thing as we consider this part of the business a very important one,” says Sebastian Westin of Scandinavian retailer Sandqvist. Bloor of Edwin Europe adds, “It’s true, the consumer now has much more choice when it comes to online and offline opportunities, but if anything, it has made it easier for us connect with them. We receive questions on a daily basis from social media channels, which ultimately result in the consumer visiting a retail store or making an online purchase. In the past, the consumer never had access to the immediate information that is now instantly available.” Schlager of Timezone says, “Precisely the unfiltered feedback on our products is extremely valuable and we attach considerable importance to this direct communication with the customers.”

These examples show that very versatile, dynamic, interactive communication is required to reach consumers today. Social media is a tremendous help for communicating with them and identifying their needs. Social networks are also promoting the individualization of fashion, for on these platforms there is strong orientation and networking of individual groups. For example, within a very short period of time certain labels and looks can be given very good or very bad reviews. But success is not found by every retailer



via social media, for all retailers should ask themselves how good a fit social media really is in the context of the retailer and its customers. For it is not efficient for every shop to lose itself in the vast space of the Web—a private shopping dinner is sometimes more effective than a YouTube channel.

UNDERSTAND THE ENTIRE BUYING CIRCLE

The fact that things are disputed, praised, liked and put down in the social networks, and done so at a speed which no retailer in the world can respond to well, has a decisive consequence: The pre-purchase situation, i.e. everything that happens BEFORE a customer puts something in the virtual or real shopping basket, is becoming more and more relevant. For this reason, retailers ought to become involved there as much as they can. Consumers are no longer taking any notice of the distinction between physical retail and online. “We are no longer dealing with digital shopping locations, but with digital consumption,” says Werner Reinartz of the University of Cologne. “The key to success in retailing lies in understanding the effects of digital technologies on the purchasing behavior of consumers across the entire sales process.” That means, long before a T-shirt changes hands. Reinartz goes even further: “Shopping will become a kind of permanent background activity that can be carried out anywhere and at any time. The steps in the buying cycle are merging with the life of the consumer—in real time.” Then how is it possible to recognize the many, oft-latent needs of consumers? There are so-called “early warning signs,” says Kenning, who uses privacy as an example: More people want more privacy, more hominess, more withdrawal. This manifests itself in very different settings such as the success of German supermarket chain Edeka’s

THE PRE-PURCHASE SITUATION, I.E. EVERYTHING THAT HAPPENS BEFORE A CUSTOMER PUTS SOMETHING IN THE VIRTUAL OR REAL SHOPPING BASKET, IS BECOMING MORE AND MORE RELEVANT. FOR THIS REASON, RETAILERS OUGHT TO BECOME INVOLVED THERE AS MUCH AS THEY CAN.

commercial “Coming Home.” The first thing is to recognize this. Then it has to be communicated to designers: What would a piece of clothing look like that satisfied the desire for privacy? From what material should it be made? What about its shape?

However, successfully recognizing and reacting to the needs of consumers can also take another form: “Our consumers make sure they buy products that have been produced under good working conditions and are made according to sustainable principles. They demand brand transparency as well as long lasting, high quality products,” says Sandqvist’s co-founder Sebastian Westin. The range of goods is adjusted to reflect this. For example, Sontag, owner of Elison Road in California, says: “Our consumers have changed a bit through the years in that they are willing to spend a little more on their accessories that will be a staple in their wardrobe, as long as they can get a good deal on their clothing. In addition to that, our consumers seem to be more comfortable in taking more risks with their fashion.” Sontag has reacted to this and added a more exclusive level to the product range: “We are now offering higher end accessories along with our less expensive accessories for customers who would like to invest a little more in well-made, handcrafted bags, shoes and jewelry to go with their ever-changing wardrobe. We have also started carrying a group of name brand shoes, including Toms, Dolce Vita and Chinese Laundry.”

RELEVANCE IS DECISIVE

How successful a company is in identifying, implementing and satisfying

consumer needs depends on its abilities and resources. Flexibility, speed and customer focus are the decisive factors in this. Equally important is setting yourself apart from the competition—this can be achieved digitally, on the one hand, but also in terms of the goods. In any case, what is important is that retailers today cannot be people who want to move product quickly. Consumers notice this and don’t like it. “The advent of online has changed everything. Today consumers—especially younger consumers—know exactly what they are looking for and enter a store showing a photo from their cellphone and saying: ‘I want this.’ They are not looking for anything else apart from that. If in the past it was possible to offer something else or show them an alternative in terms of similar model or different color—and eventually also encourage them to buy some additional product that could match their purchase, now they simply want that and if they don’t find it they leave the store,” says Tommaso Pecchiolo of Gerard Loft. Bloor adds: “Our consumers are now a lot more educated than they used to be with the majority doing their fact-finding before making a purchase. They research fabrics, fits, price and even other brands.” In other words, cajoling customers into getting something that the retailer wanted to get rid of does not work anymore. Instead, however, it is possible to make something else even more important possible for consumers: Orientation and personalized solutions in a complex and confusing world. As Stiller of Stylefile says: “Relevance is decisive.”

'The customer has won'

MARKETING PROFESSOR WERNER REINARTZ EXPLAINS HOW TO APPROACH CONSUMERS THE RIGHT WAY.

Interview **Julia Mönnich**



Anyone who thinks it is possible to satisfy the demands of our digital society and expects to be able to address customers with various efforts and gain their loyalty easily is wrong. Of course, all retailers have to constantly improve their businesses to be perceived as up-to-date. We asked Werner Reinartz, marketing professor at the University of Cologne, what that actually means.

Today “improve” in terms of retail mostly means being technically better equipped. But in your opinion with efforts like this, retail is missing the core of the problem. Why?

The reality of the situation looks like this: The fashion market is brutally saturated. The price of individual articles continues to fall, the number of items sold is increasing and the seasons have been uncoupled. The result is the devaluation of fashion and the consumer has become conditioned to it. At the same time, products and consumption are diffusing ever more strongly into the life of consumers and consuming goods approaches the status of a need.

Will it only be possible to reach customers virtually?

Instagram is playing a key role in fashion and

doing so at a high level of quality: Service, the domain of physical retail, is being gutted because the Web is offering comprehensive information quality; a business or salesperson cannot possibly have access to all the information that the Internet provides. Earlier physical stores were the only source of information and they easily turned that into revenue sales. But with the advent of the internet the trend is fading away.

Do customers need stores at all anymore?

There are three important reasons why physical retail will continue to exist: First of all, it is about touching and feeling the product, visualizing, trying on and testing. That is a huge advantage for stores. Secondly, service there is giving advice and personalizing and that happens in stores. And third, availability—customers can take home what they shop for at once.

Doesn't online retail already offer that, too?

Online businesses have caught up considerably when it comes to service and availability. Specialist retailers always emphasize their good service in the store, but they have to face up to the reality: If their service staff is busy stocking shelves, that is not much help, and no amount of well-intentioned curating will help either.

Do consumers want a different kind of service?

An availability check is important. The need to hold the product in your hands, the need for certain fits and the feeling that you are paying a reasonable amount—that has not changed.

How important are brands to customers?

Brands continue to be key. They provide orientation, convey values and promote identification. The ability of a brand to enter into a dialog with its clientele is important.

How then can fashion companies get their message across to consumers?

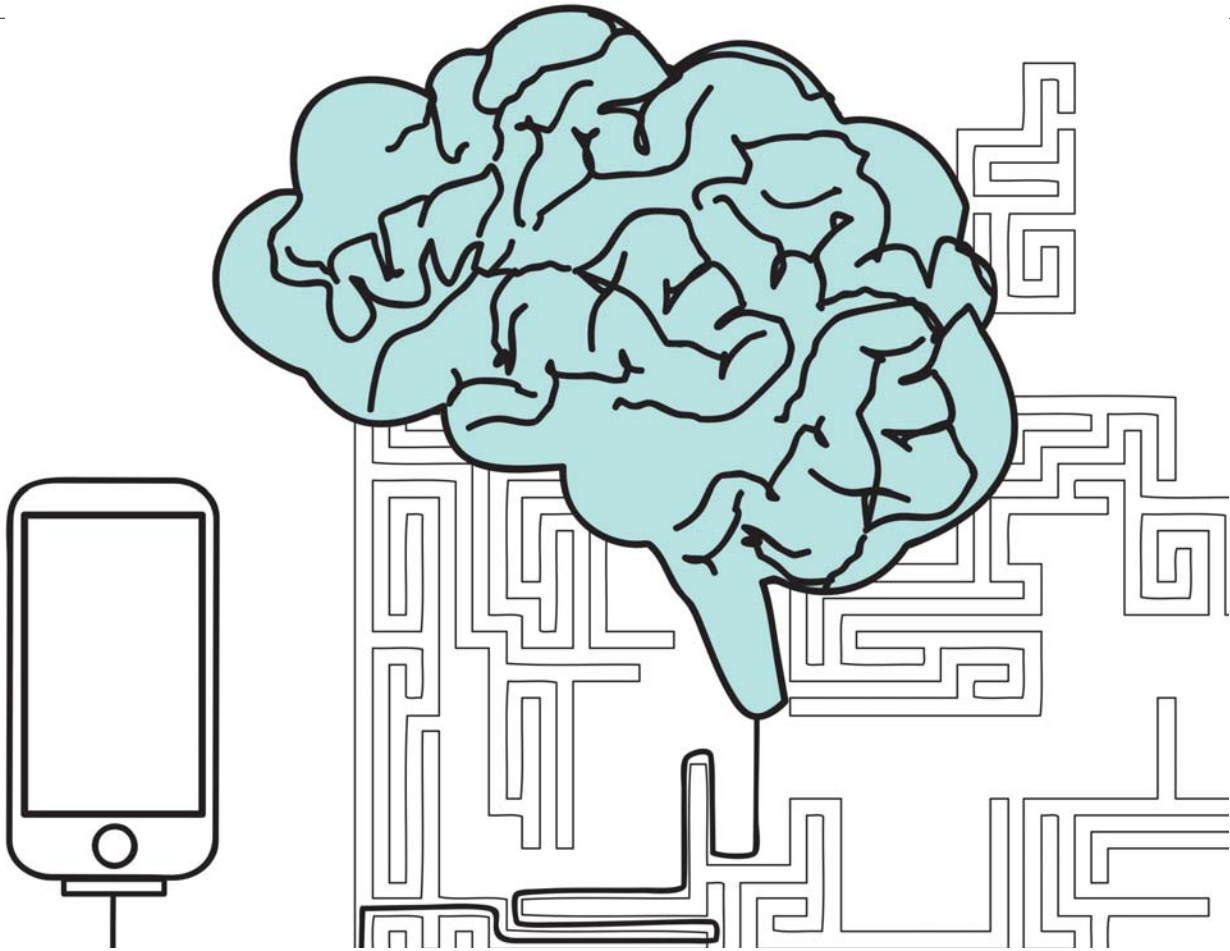
By being increasingly more relevant in the life of the consumer. And that is no simple question. Because there are many ways to get in touch with consumers. The question is how strongly a brand or a retailer is actually fixed in the mind of the consumer? And how hard or easy is it to get into contact with the brand or retailer the moment the need emerges?

This requires that customers know they need a new product. But how do I get through to those who do not know yet?

Earlier you could blast your message out in print or as a TV commercial. Now things have become far more complex. Example, I own a running app which logs my workouts and analyzes my best efforts. After a certain number of kilometers, it says: “Have you checked your shoes lately? Are they still okay?” This shows that the app is much closer to what is happening and what is beneficial to the consumer than any salesperson ever was. Generally speaking, new media and social platforms have taken on great importance in addressing customers.

What role do consumers play today?

Earlier, companies were the ones broadcasting their message and customers were the audience. Now there is one more factor involved: the immediate and extended social setting. Online ratings, today, play a tremendous role in the purchasing process. Debates, discussions and brand awareness take place in that setting. Because the topic of product ratings have such a high degree of relevance, service quality becomes especially important because customers have a very powerful tool for applying pressure available to them. That's why all processes must be considered from the consumer perspective and not the other way around.



2. How consumers can be profiled

DIGITIZATION HAS NEARLY REMOVED THE GAP SEPARATING RETAILERS FROM SHOPPERS. THIS CREATES HUGE OPPORTUNITIES FOR GETTING TO KNOW CONSUMERS—NOT JUST THEIR WISHES BUT ALSO THEIR GIRTH.

Text **Julia Mönnich**

All the data which users leave behind when online are puzzle pieces from which a picture of every consumer can be constructed, including their wishes, needs, preferences and dislikes. All of this data can be used more efficiently—for identifying trends, making forecasts, for all kinds of things—because the more data the (potential) customer leaves behind, the more efficiently and accurately these so-called learning systems work. And over time, small companies and even individuals can affordably collect data and evaluate it. Forecasters say: Just as there is now no longer any area worth mentioning—neither privately nor in public—which can do

without the Web and computers, there will also be no areas—neither private nor in the public sphere—where artificial intelligence will not be at work. At first such a scenario may be off-putting, but in the foreseeable future we will definitely stop noticing. The fact that machines are taking the place of humans is something we have known since industrialization—especially for hard physical labor at the time, and now, in the future, for things which were otherwise thought of by people. In the fashion business, too, machines will calculate supply and demand, optimize customer service and even assist in design. For example, autonomous, self-driving trucks can lower logistic costs and intelligent

software has the job of presenting and describing products at an online shop. Now things are still working like this: The retailer computes the demand for jeans and tops, what is selling well, sells out quickly and what is not selling at all and drags down revenues and takes up store space. Now, the person who has the data available and knows the shopping history of every person who searches for a given brand and buys it, and also knows the data of the competition, can minimize the number of wrong decisions which cost money. He or she can adapt the online presentation of the products and how they are displayed in the store, as well as gear the entire stock list and retail prices

to match the preference of customers. Systems like this can calculate the colors, patterns and sizes for consumers in certain regions, cities and even city districts and make trends and microtrends visible. In a sector as trend-driven as the fashion industry, reliable forecasts are worth a lot of money. The Otto Group label Edited is one example of what a business like that could look like.

By using artificial intelligence, the company is able to determine what customer will buy what amount of an item in what color and size at a given location. Is that terrific or horrific? We do not know the answer. One thing is definite: Scenarios like that are possible. Because learning systems already exist which are able to constantly adapt, change or optimize their results at the input of new data. At Zalando, for example, algorithms determine what look, what garment and what label could be the next focus of shopper interest. These learning systems are able to make personalized offers to customers. "Click behavior is different in every country," says Nuzhat Naweed, head of mobile product and engineering at Zalando Technology. Some customers stay longer on one page, some add more items to their wish list, some look vertically, some horizontally. What is important is conveying to customers: This offer is only for you! The customer should be feel as if "my feed will learn and gets better and better," says Naweed.

But don't be celebrating too soon: The philosopher Roberto Casati, for example, said in an interview with German marketing magazine Brand Eins

that these machines are ideally suited for completing routine tasks. "They operate mechanically; they get input and calculate an output." You cannot call this knowledge and learning. He says that machines can provide assistance to people in decision making, but no more than that. His example: "You can work out digitally using a Wii, but we still have to do the sports activity ourselves." Tommaso Pecchioli, owner of Gerard Loft, Florence, is also skeptical: "In general I think this technology has, on the one hand, helped us, while on the other it also creates problems because the personal relationship with the retailer, advice, comment and support will be missing more and more. I cannot believe that a computer can provide a customer with all this."

That is why it is well worth looking at what exactly is meant by the concept of "consumer neuroscience." This fairly recent interdisciplinary area combines neuroscientific methodology with theories and knowledge from consumer research. Peter Kenning, professor at the Düsseldorf Heinrich Heine University, business management expert and author of the textbook *Consumer Neuroscience*, explains that the learning systems described above always rely on historical data. Consumer Neuroscience on the other hand is concerned with what will take place in the future. A clearer understanding of consumers can be gained by observing their behavior (see interview on p. 112). Until now it has been a very cost-intensive method, but it is only a matter of time until investigations like that also go down in

price. And customers are also getting equipped, downloading apps which tell you things like what is sustainable, inexpensive or meaningful to buy and what is not when you are in front of the supermarket shelf.

We do not know to what extent these things will interfere in our lives.

That is not because of technological advancement: it goes on and on. However, it is safe to wonder if, for example, politics will back all developments and allow the free market to dictate rules. One example is personalized pricing. The German Ministry of Justice and Consumer Protection is already getting ready to oppose an approach with customized pricing.

And there is one more aspect worth thinking about: Once again all these measures are geared to efficiency and the mass market and intended to be sold to more and more people—there are just different, more efficient tools available for handling large numbers of customers, data and clothing. That can work, as long as the consumer doesn't notice it. Because the consumer is after individuality and definitely looking for a dash of incalculable risk and daring every now and then—at least in fashion.



In the heads of customers

ARTIFICIAL INTELLIGENCE IS ALL WELL AND GOOD. BUT IT REALLY GETS INTERESTING WHEN INTERDISCIPLINARY RESEARCH LIKE PROF. DR. PETER KENNING'S COMBINES MARKETING KNOW-HOW WITH KNOWLEDGE FROM THE FIELD OF NEUROSCIENCE.

Interview **Julia Mönnich**



Peter Kenning has a professorship in business management, with a major concentration in marketing, at the Heinrich Heine University Düsseldorf, and is chair of the coordination committee of the network consumer research of the German Federal Ministry of Justice and Consumer Protection (BMJV). His most recent publications focus on, among other subjects, sustainable marketing management and service innovations in retailing.

What is consumer neuroscience capable of?

These methods allow us to better understand and predict customer behavior. For example, the success of an advertising campaign can be determined with 80% accuracy based on the reaction in only a few areas of the brain. The application of this method in the real world is therefore very promising.

Is this meaningful for the fashion business?

Theoretically, yes. The methodology not only allows the behavior of individuals to be predicted but also the response of customer groups to certain marketing campaigns.

Everybody is talking about systems that learn from customer behavior in the past. Is there no use for that?

Such systems differ greatly from neuroscience. Learning systems observe customers but often do not explain why a customer behaves a certain way. But what if the market changes? At that point you need at least a theoretical basis and have to know what factors affect customer behavior. We now have new methods available which allow these factors to be detected.

How elaborate are investigations like these?

The use of methods from neuroscience in market research can be quite meaningful from the point of view of effectiveness but it involves considerable cost and effort. The first thing which must be asked regarding efficiency is: Is the effort worth it? How much benefit will result? What is the competitive situation like? What alternatives are there? What knowledge do I already have and what more do I still need? The right method results from asking these questions. A comprehensive neuroscience study with 30 to 40 participants now costs €40,000 to €50,000. A simple eye-tracking studio, with which it is also possible to discover interesting things, costs significantly less, perhaps €3,000. Thus, the most important basic question is: What equipment do I need to solve my problem?

The whole thing is still relatively expensive...

Yes, but the costs of a method are often a function of time: In the past, for example, for large-scale customer phone surveys, significant five-figure sums had to be spent; today online market research with comparable numbers of participants is substantially cheaper.

If you were a fashion retailer would you use neuroscientific methods?

I would use them if unconscious processes were controlling the purchasing behavior of my customers and I had no adequate theory to explain this behavior.

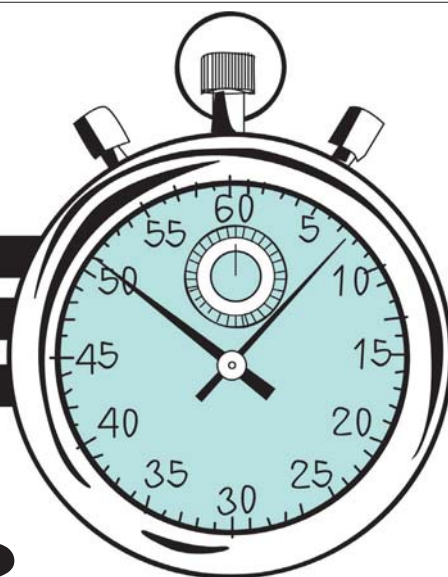
How long are neuroscientific findings valid? An hour? A day? A whole life?

According to what we know now, the interaction between reward and punishment reactions in the brain is relatively stable. According to the particular personal experiences customers have in their lives, these basic mechanisms take on differing forms, which are then reflected in customer preferences.

On the other hand, if something serious happens with a brand, which our brain becomes aware of, the corresponding neural processes also change. Such striking events can have a positive or a negative effect. Take the present situation of the VW brand, which is respected internationally, whose reputation has been significantly reduced within a short timespan because many customers feel the exhaust emissions problem is striking. In a nutshell: The basic mechanisms are stable, although specific reactions to individual brands can change relatively rapidly, especially on the basis of personal experience.

Where and how do you shop?

As a scientist you are your own subject, your own real-life laboratory. Before I buy I certainly think things over more, observe a lot, am curious and ask questions in order to see how sales staff reacts. All in all, however, I am probably a relatively uncomplicated customer. The lighting in a store is the most important thing for me. I do not like cold, glaring light, even though neon tubes reduce costs.



3. What do customers expect?

IT'S TIME TO THINK IN TERMS OF SERVICE

Text **Julia Mönnich**

“Our business is people. We haven't got a factory or any research and development,” said Olaf Koch, CEO of German retailer Metro Group, in an interview recently. In most cases this insight can be applied to the fashion industry, too. This makes how people, the customers, are treated that much more important. In the past customers were only looked at closely when they paid. Then they would be given a smile, a friendly word or two and maybe some bonus points. Now there is a new way of measuring time: Customers can buy a garment for €3,000 without exchanging so much as a word, in addition they can enter into a personal dialog with companies like never before. Getting customers to be loyal takes hard work. And that only works if you provide good service, because customers want nothing except a customized, uncomplicated shopping experience—from beginning to end: from research to availability, procurement, payment, shipping and returns, both online and offline. Here are the most important points to bear in mind:

Speed

“Shipping quickly, responding to e-mails rapidly, processing returns quickly and getting reimbursements done fast are not

unique selling points anymore. That's the standard,” says Jörn Stiller of Stylefile. “If customers approach us with a question, we do all we can to quickly and smoothly solve it so that they will not forget it very quickly,” explains Sven Schlager of Timezone.

Individualization.

Customizing is the most individual form of shopping—but it doesn't have to be a tailored suit in each case. Cologne-based Apropos, for example, offered customized bag stickers by Anya Hindmarch—it was a huge success. Sam Bloor of Edwin Europe individualizes things differently: “We use our online platforms to build communities around our retail stores and help consumers feel part of the family.”

Simplicity

Automatic payment as you leave a store saves time, but means a big technological effort. Making things easy can also be done another way: “When customers live nearby, we can let them take an article home and try it out and decide whether to keep it or not. Similarly, we can help them find parking in the city center, or help them with carrying their bags,” adds Tommaso Pecchioli of Gerard Loft, Florence.

Focus.

To focus in on one area and offer a clear profile creates added value for the customer. “A good online e-shop should have a good selection of items,” says Enzo Fusco of FGF Industries.

Know-how

“Today's customers are very well prepared and they expect the same or better competence from the store clerk,” says Fusco. Even online retailer Zalando does not dispense with human know-how: The Berlin-based e-tailer introduced its styling service, Zalon, which provides customers with free, personal advice on styles.

New formats

Taking showrooms to where the customers are. French sports discounter Decathlon, which used to share the outskirts with supermarkets Real and Carrefour, is one example of a company doing that: Now Decathlon, in 200 sq. meters (2,153 sq. feet) of space in downtown Munich, is offering customers a few items, most of which—from a canoe to an eight-person tent—can be looked at and ordered on a huge screen. Trunk shows do without a local store entirely and show a select group of customers at hotels, galleries and other venues how the knitwear label Gembalies is made.



4. The gender difference

THE SPORTSWEAR AND ATHLETIC SECTOR IS THE ONE SEGMENT THAT BEST EXEMPLIFIES THE DIFFERENCE BETWEEN THE MEN'S VS. WOMEN'S CONSUMER EXPERIENCE. EXPERT CONSULTANT COMPANY VALUE LAB

EXPLAINS WHY. Text **Maria Cristina Pavarini**

An increasingly important consumer behavior trend is visible in the athleisure and sportswear markets according to Value Lab, an expert Italian company that works with numerous sportswear, jeanswear and fashion brands in the areas of management consulting, information technology, marketing, sales and omnichannel customer experience. Value Lab believes that an experiential approach is key for the athleisure market, even if men and women consumers perceive them differently. "In the last 15 years the whole consumer goods industry has been steadily shifting from a product-centric approach to a customer-centric one," say Marco Di Dio Roccazzella, equity partner, managing director head of fashion & luxury practice, and Gianmarco Gallone, senior consultant, Value Lab.

"If yesterday owning a product was essentially a way to communicate one's own social status, today it is also and foremost a way to access exceptional experiences and, ultimately, a lifestyle. Sportswear pure players are leveraging on a

distinctive advantage since their products are intrinsically connected to exciting customer experiences while enjoying athletic activities such as challenging workout sessions, a jog in the park, a yoga class on the beach and similar ones," they explain.

Men: Welcome to my world

"Men, while wearing brands such as Nike, Adidas and Reebok can test their energies, abilities and personal records when playing sports thanks to those brands' related apps," continues Gallone, referring to apps such as Nike+, which is used while golfing, running or skateboarding, or Adidas' Micoach. "Choosing a specific apparel brand is a means through which they can learn how strong and high-performing they can be. Actually, they like to play these activities alone being moved by a highly competitive spirit," he adds, pointing out how male consumers' attitude is driven by pursuing personal goals.

Women: Join my community

Taking an opposite direction are women,

who generally gravitate toward lifestyle and community-based marketing strategies. "This approach was developed by sportswear brands focusing on market niches originated by the rise of new fitness trends such as yoga and pilates. Their followers aren't just looking for products to practice these disciplines, but are instead fascinated by the overall lifestyle related to them," say Roccazzella and Gallone. Canadian brand Lululemon was the first one to implement community-based marketing strategy by offering free in-store yoga classes and promoting local initiatives. Its English counterpart Sweaty Betty has emerged as a fierce competitor: It is built around a fitness community and offers free classes, workout videos on its website and fitness tips and trends to let customers fully embrace their own new lifestyle. Similar blogs have been launched by other yogawear and fitness apparel brands aiming for holistic community approach. These include Soybu, Mika Yoga Wear, The Upside and Calia by Carrie Underwood.

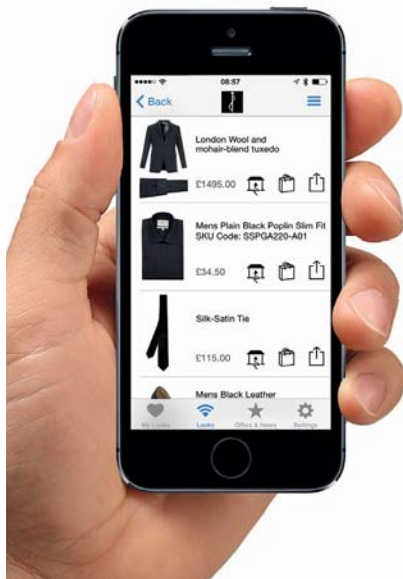
5. Tech innovations

TECHNOLOGIES DESIGNED TO ENHANCE THE IN-STORE EXPERIENCE ARE COMING TO THE FORE, WHILE CONSUMERS INCREASINGLY RELY ON SHOPPING APPS TO SOURCE PIECES FROM ACROSS THE WORLD.

Text **Emma Holmqvist Deacon**

More and more shopping trips unfold in the palm of consumers' hands, putting pressure on retailers to digitalize their concepts. It might not be necessary to go as far as Burberry, who pioneered smart shopping on a major scale with the unveiling of its digital London flagship in 2012, or Rebecca Minkoff, who opened her first "connected" concept in collaboration with eBay in 2014—but it might be worth incorporating a feature or two to help bridge the gap between e-commerce and traditional retail. One of the most buzzed-about recent launches is MemoryMirror. Invented in 2015 by Salvador Nissi Vilcovsky, the California-based CEO and founder of tech company MemoMi, it lets consumers virtually try on garments and change outfits with the swipe of a hand, and even see themselves wearing different outfits side by side from any imaginable angle. The first version to hit the market last year was customized according to the specifications of US department store Neiman Marcus. Over in the UK, digital retail specialist Iconeme is pushing ahead with its army of smart mannequins, the first of which surfaced in 2014. Equipped with a so-called VMBeacon, the interactive mannequins communicate with passers-by, imparting shareable style sheets and product information as well as offers. "The VM Beacon allows the window display to become a portal for interactive selling 24 hours a day," observes Iconeme founder Jonathan Berlin. Ted Baker, Lyle & Scott, House of Fraser and Hawes & Curtis are among the retailers that currently use the innovation. Aside from rolling out in-store solutions, most retailers and their digital

equivalents have developed unique apps to make shopping-on-the-go as effortless as possible. Inventions that help consumers navigate the entire online shopping jungle are also on the rise. Entrepreneur Daniela Cecilio, who previously served as Farfetch's international projects manager and stylist, is the brains behind ASAP54. Dubbed the Shazam of Fashion, the app's visual search technology allows users to upload images of a garment they've spotted online, or on a fashion maven on the street. It then suggests a feed of similar pieces available to buy online. The visual recognition system doesn't just pick up actual garments. For example, if you'd like a wearable version of a fancy ice cream sundae, ASAP54 will unearth its cloth equivalent. Since the launch in 2013, the app has amassed over one million users (60% female and 40% male, the top market being the US). A make-up search function was recently introduced to broaden its appeal.



Snap ColourPop, meanwhile, is an iPhone app developed for consumers with a taste for "matchy matchy" looks—it analyzes the color shade of any uploaded item and finds pieces in the exact shade across the offering of a wide range of UK retailers including Miss Selfridge and Net-a-Porter. Consumers have also taken to the charm of "Tinder for fashion" apps such as Grabble and Mallzee. Both rely on the same "reject or like" swiping system as the famous dating app, presenting a never-ending stream of pieces from far-reaching online retailers and brands, inviting consumers to deem them worthy of the virtual basket or the bin.

SMART MANNEQUIN CONCEPT
BY ICONEME



6. Best Case: Coffee

IF THE FASHION WORLD NEEDS A ROLE MODEL FOR EXCITING RETAIL EXPERIENCE, THERE IS ONE: WITH ITS NEW EXTRAORDINARY SEATTLE AND LONDON SPOTS, COFFEE ROASTER STARBUCKS STAYS A STEP AHEAD OF CONSUMERS, STRIVING FOR WORLD LATTE DOMINATION.

Text **Rebecca Cringean**

There was a time in America when coffee was just coffee. Drip or instant, it was nothing special. That, however, was before Starbucks. The brand's version of a café society took the US by storm, ushering in legions of half caf vanilla-flavored fiends and zillions of copycat coffeehouses. Even among the competition, no one cornered the market quite like the Seattle-based giant and soon the phenom spread internationally. But how to keep up the pace? There are only so many versions of a Frappuccino, after all, and Starbucks had to stay ahead of the game. To that end, it branched out, got creative, intellectualized coffee and created conceptual spaces for its most avid, coveted fan bases. Enter the Seattle Reserve Roastery and Tasting Room plus a London digital concept store, two locales opened with the last year.

"The Roastery is the fulfillment of a decade-long dream, an homage to our relentless pursuit of coffee innovation that will create, for our customers, the most immersive, sensory demonstration of how we source, roast and craft the





finest coffee from around the world,” says Howard Schultz, chairman, president and CEO of Starbucks. Schultz speaks of the 15,000-sq.-foot (1,394-sq.-meter) Roastery in the Capitol Hill neighborhood of Seattle, opened a little over a year ago, a mere nine-block walk from the original Starbucks at Pike Place Market. Taking coffee to the level of a fine wine or gourmet experience, the Roastery actually “pairs” special brews with selections from chef Tom Douglas, including coffee-infused creations such as the coffee roasted turkey sandwich and the espresso shortbread. There are two roasters in operation. Their freshly roasted beans are delivered to a whole bean scooping table for baristas to brew handcrafted coffee from a variety of techniques such as pour over, French press or clover brew. Customers watch a clacker board that updates regularly with what’s brewing and who’s roasting it while a digital smart glass display, called the Coffee Passion Projection Wall, shows images of Starbucks’ own Costa Rican farm.

Customers bring the in-store experience home in the form of pottery mugs, home brewing equipment, linens, note cards and reusable hot or cold cups. Within the next five years, the Roasteries will spread to Chicago, Los Angeles, New York, San Francisco and Washington D.C. Across the Atlantic, the sun might just have set on the British Empire’s love for tea drinking, making it conquerable territory for coffeehouses. With Costa Coffee leading the UK pack and Starbucks not taking defeat lightly, meet a new Starbucks strategy, the digital coffee concept store situated at the heart of the Covent Garden District. “The store is a platform of connection,” says Ad de Hond, vice president of design for Starbucks. “Everything is visible; the way we make our coffees, the way we prepare and present our food and the way we interact with our customers.” De Hond isn’t kidding. There’s not even a queue or a main till. Instead, there’s a host to greet visitors and roaming staff with digital devices for customers to

place orders when and how they please. With the Seattle Roastery serving as an influence, the new London digital coffeehouse hopes to completely immerse people in a world of coffee, including that now familiar wine-to-coffee comparison where actual coffee “flights” are offered for tasting. An open kitchen serves breakfast, lunch and dinner while floor-to-ceiling glass walls visually connect the interior to the bustling city outside. “The coffee bar is a theatre for Starbucks Reserve Coffee,” says de Hond. “It can be seen from the outside, like a billboard inviting customers to come in. It’s about juxtaposition. Rough meets smooth, raw meets refined.” The future of Starbucks will no longer just be a queue for coffee since, in this consumer driven market, good coffee is simply no longer enough. The future of Starbucks will be, as Liz Muller, vice president of concept design for Starbucks says, designed experiences that: “Will heighten all the senses, a real life Willy Wonka experience with coffee as the heart and soul.”

CUSTOMER BASES

IF YOU THINK THAT BRICK-AND-MORTAR SHOPPING DOESN'T THRILL CONSUMERS ANYMORE, A LOOK AT THESE NEW STORES WILL PROBABLY CHANGE YOUR MIND.



WER HAUS/BARCELONA

Carrer d'Aragó, 287, 08009 Barcelona, Spain

Opened: November 2015 / **Size:** 400 sqm

Segment: Men's and women's contemporary brands, cafe/restaurant, art gallery/bookstore

Assortment (fashion): Lemaire, Cmmn Sweden, Converse, Études Studio, Gosha Rubchinskiy, PB0110, Nike

Store concept/Shopfitting: Laboqueria Architecture & Design; Marta Peinado Alós





ARCHIVE18 20/PARIS

18/20 Rue des Archives, 75004 Paris, France

Opened: October 2015 / **Size:** 400 sqm

Founder: Séverine Lahyani

Segment: Men's and women's contemporary brands

Assortment: Ly Adams, Antonio Marras, Marni, Études Studio, Maison Kitsuné, Garçons Infidèles, Cohérence, Tomorrowland, Alexander Wang, Art Comes First, James Perse, Hevo, QBISM, APC, N2, Shinola, Kart, Want Les Essentiels, Harpo, Linda Farrow, Adidas, Asics, Reebok, Filling Pieces, Church's

Store concept/Shopfitting: Séverine Lahyani, Daniel Gallo (furniture)

Photos: Elodie Chapuis

MAISON KITSUNÉ/TOKYO

20-14 Sarugakucho, Shibuya-ku, Tokyo, Japan

Opened: February 2016 / **Size:** 140 sqm

Segment: Men's and women's ready-to-wear

Assortment: Maison Kitsuné

Store concept/Shopfitting: Maison Kitsuné

Photos: Maison Kitsuné





AFURA STORE/AMSTERDAM

Jan Pieter Heijestraat 164, 1054 ML, Amsterdam, The Netherlands

Openend: April 2016 / **Size:** 52 sqm

Segment: Men's contemporary brands

Assortment: Harmony, Soulland, Han Kjøbenhavn, Stutterheim, Schnayderman's, Mfpen, Aspesi, etc.

Store concept/Shopfitting/Furniture/Lighting: Afura Store

Realization: Afura Store, Roebuust / Stan Koolen



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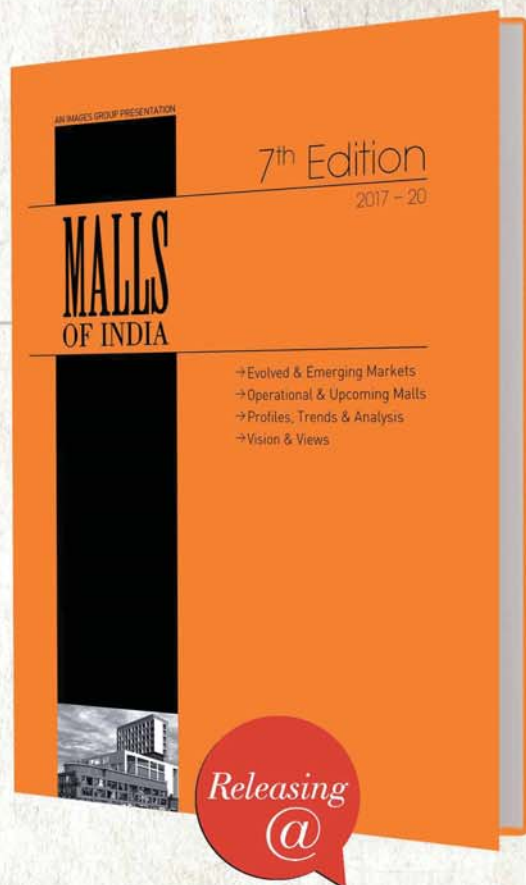
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1	Feature/s, editorial coverage in Images/ IFF magazine/s, IFF e-briefs/ portal (inputs from members)	1 Page	1 Page	2 Pages	4 Pages	6 Pages	2 Pages	1 Page	2 Pages	1 Page
2	FOC ads/ promo banners in IFF e-briefs/ portal or in classifieds section of Images Business of Fashion magazine (applicable as per category)	FOC up to Rs.5,000	FOC up to Rs.25,000	FOC up to Rs.50,000	FOC up to Rs.1,00,000	FOC up to Rs.1,50,000	FOC up to Rs.50,000	FOC up to Rs.15,000	FOC up to Rs.50,000	FOC up to Rs.30,000
3	Entry Pass for IFF/ InFashion Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Shows	1 Pass	2 Passes	2 Passes	4 Passes	6 Passes	2 Passes	1 Pass	2 Passes	2 Passes
4	Special Invite for IFF Power Breakfasts, Networking Lunches, Awards & Gala Dinners	NA	2 Invites	2 Invites	4 Invites	6 Invites	2 Invites	1 Invite	2 Invites	2 Invites
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6	Presence at India Fashion Forum Website	URL link	URL link	URL link	URL link	URL link	URL link	URL link	URL link	URL link

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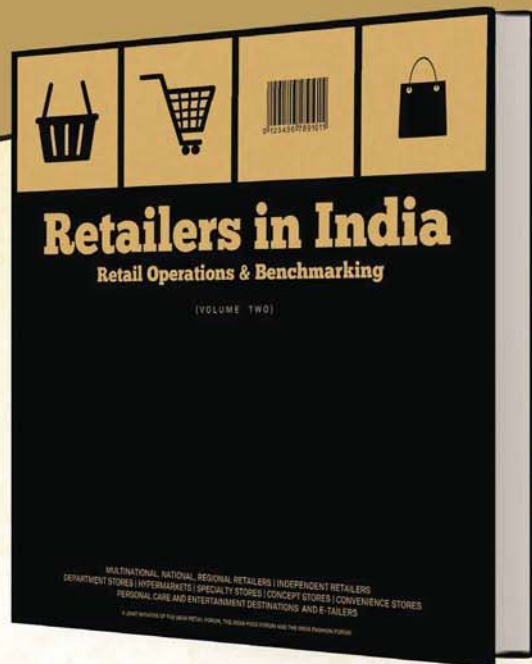
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- The book is now in the making...

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- An initiative of the IRF, IFF and India Food Forum Privilege Member Clubs, the book upholds the IMAGES Group philosophy of **Learn>Share>Evolve** wherein the immense learnings, insights, best practices and benchmarks studied in the book will help catalyse the growth of retail in India.
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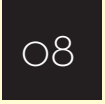
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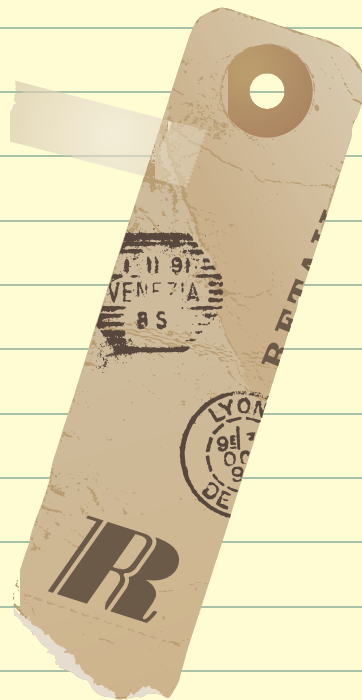
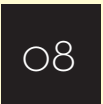
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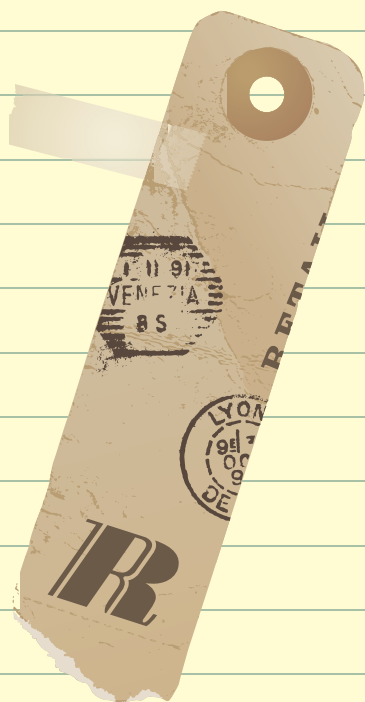


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