

IMAGES

9

Issue No.

BUSINESS OF FASHION

September 2016

Volume XVII // No. 9 // ₹ 100



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**HOME FASHION IN INDIA
FESTIVE COLLECTIONS F/W 2016-17**

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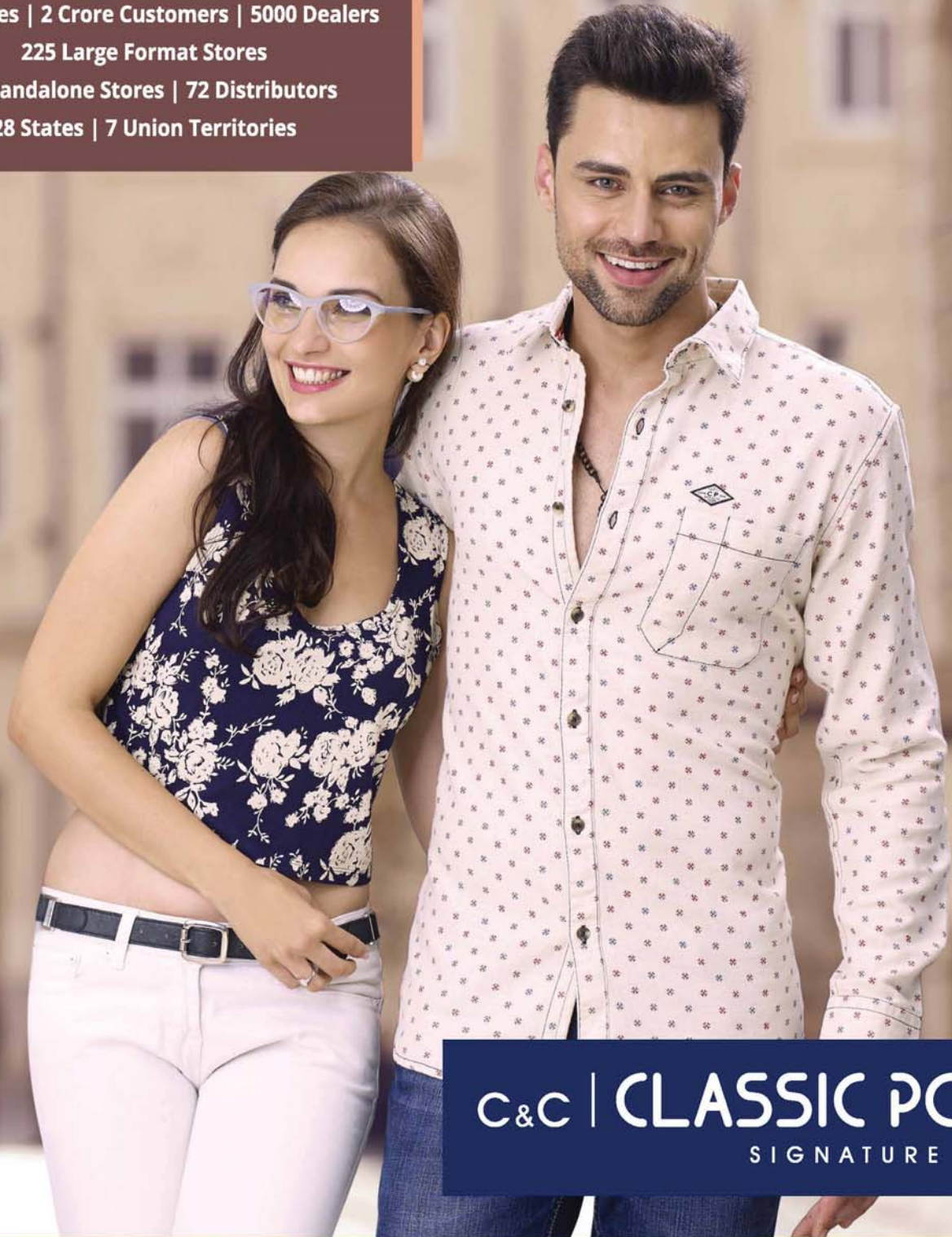
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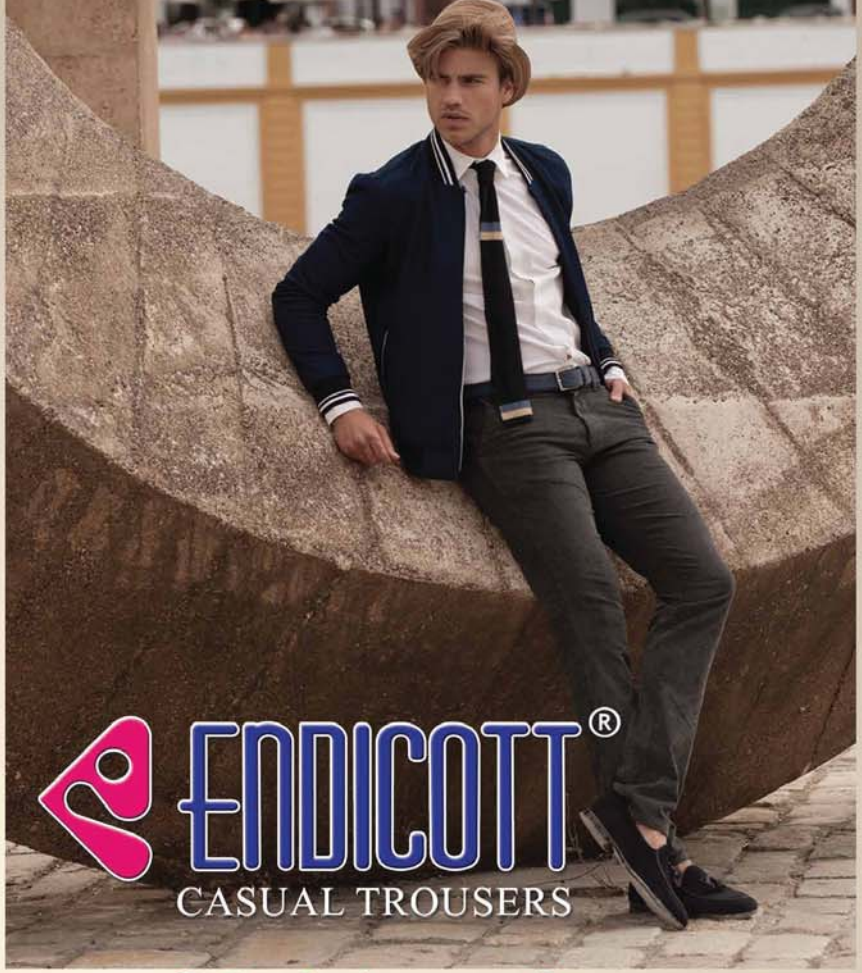
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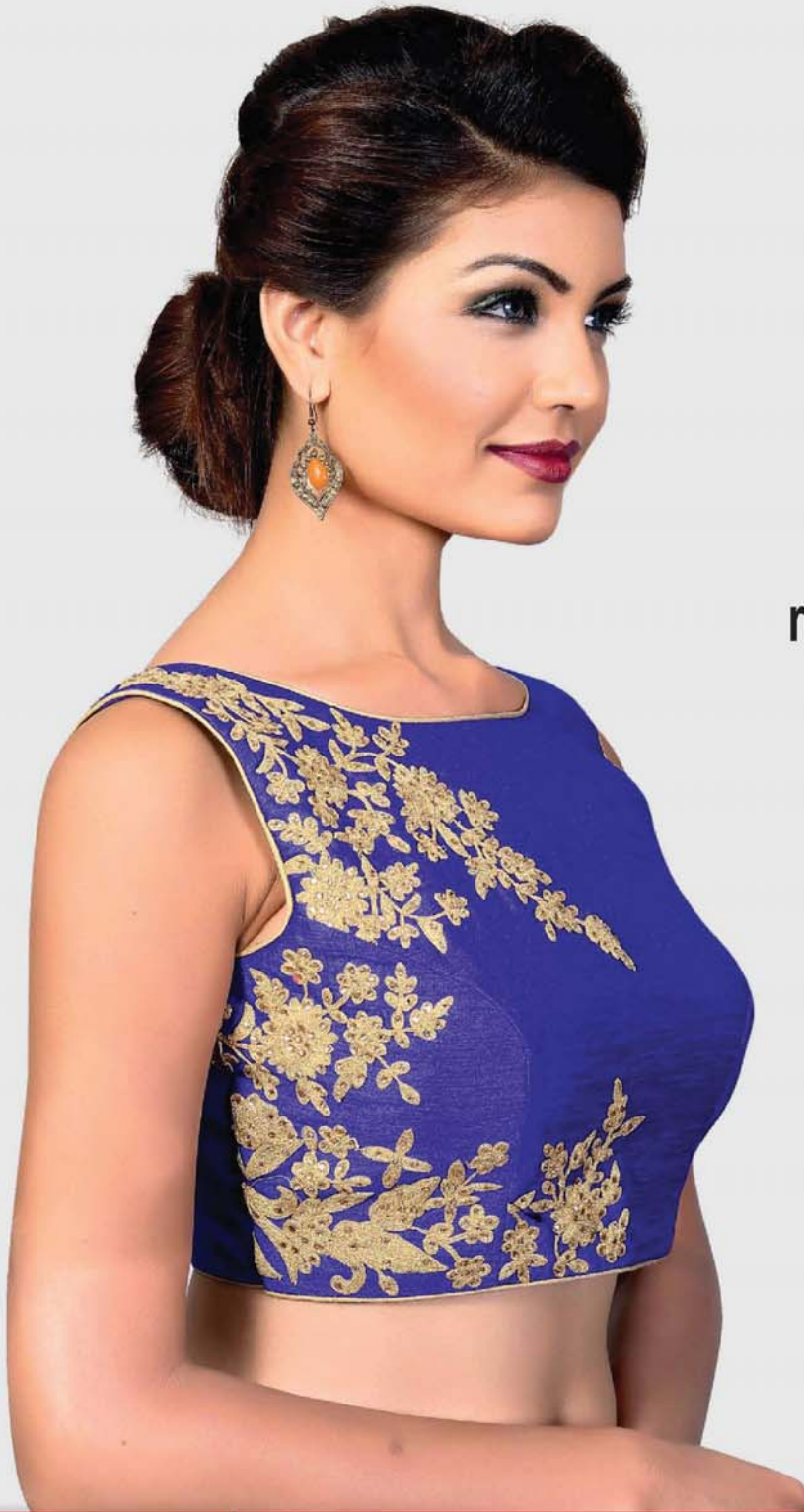




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Dear Readers,

Clubbed with factors like easy bank loans, the real estate industry has experienced growth in the last few decades. What's fascinating is that many families are now buying their first homes or getting their existing ones upgraded and when I say many, it is yet not a commendable number keeping in mind the potential of India. Also considering this with the growth of lifestyle aspirations in the middle class this is further giving a boost to the home fashion market. And now, with the growing options available for beautifying living spaces, home fashion has become a necessity even amongst the bourgeois. This remarkable development has compelled us to study the Home Fashion Industry in the September issue Business of Fashion.

As an issue lead, experts layout the core stats that outline the size and potential of the home fashion industry. This is followed by a detailed feature on trends and growth drivers of the game, which is a market roundup by the leading brands and retailers, both online and offline, in the segment. What's really positive about this is that the Indian players see the new international entrants like IKEA as a welcome phenomenon, as it will only increase the importance of the category. We also profile a few players in the segment who are ruling the roost in the Home Fashion market and are here to stay for long.

India is known to be a country of festivals and with the festive season just here, painting the

nation with colours, lights and joy, fashion brands and retailers have geared up with their best collections. We focus on the chief factors leading to sales growth of various fashion brands during the Festive Season. The issue narrows down the key trends that drive the festive season sales, and the strategies adopted by the retailers to promote the festive collection.

We also take a look at the Wear.Style Bangalore Fashion Week: Winter 2016, which encompassed myriad designers launching their essentials for the upcoming season. As also the Garment Show of India (GSI), and Galleria Intima's 2016 edition, the sourcing show for intimate apparel professionals.

Please don't miss a detailed chapter on the state of India spinning industry and how the Indian spinners are going through a difficult phase, despite the cotton prices being reasonably low; and NIFT pens a chapter on how companies maintain "green" in their different parameters of supply chain. In addition, the issue also looks into the evolution of Levi's with its next stage of innovation. We also talk to Paul Dillinger, VP of Global Innovations, LS&CO, about the developments in the brand. Overall, this is a complete must have issue of the magazine, perfectly in time with the festive season.

I hope you enjoy reading the issue.



Amitabh Taneja

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LETTERS TO THE EDITOR

The chapter TOP TRENDS IN INNERWEAR is brimful with all the relevant information . I would like to appreciate the magazine for its deep insights about the industry and the market.

-Rupak Kurmi, Guwahati.

I found this magazine very inspirational for young and dynamic entrepreneur who are new and want to learn industry and its tricks. BoF tries to explore experience and talent simultaneously so that readers can get full vision for their next major plans and decisions.

-Sachin Raheja, Bhopal.

I'm very excited about the the book that you have announced The evolution of Women's Lifestyle in India and. Sounds really exciting. Eagerly waiting for the book.

-Maheshweta Taneja, New Delhi

First of all I will give a great applause to the BoF's great team and their detailed work on inner wear which is a secret topic in India, people won't talk about this in such a open manner, but you people done a great job as an individual first time I had seen such an comprehensive articles, interviews and data.

-Tanya Mehta, New Delhi

Never knew the innerwear industry in India was this big. Will definitely consider expanding the segment in my retail store.

-Bhushan Pandya, Varanasi.

ADVERTISER'S INDEX

<u>cover on cover</u>	SOCH
<u>inside front cover</u>	CLASSIC POLO
<u>front gate fold</u>	ROCKSTAR JEANS
<u>back gate fold</u>	TWILLS
<u>back cover</u>	OKS BOYS
<u>inside back cover</u>	INDIAN RAYON
<u>special insert booklet</u>	CRIMSOUNE CLUB
<u>special ad. insert</u>	DE MOZA, MACHO, LIVA

119	ANTIGRAVITY	153	KK FASHION HANGERS
15	ARVIND SHIRTS	131	LECTRA
55	ASTRON	25	LORD WALKER
51	BEE VEE	53	LUX COZY
222	BODY MEN'S INNER WEAR	105	LUX ONN DENIM
219	BODYCARE WOMEN'S INNER WEAR	135	MAINETTI
24	BONJOUR	69	MARC SOCKS
61	CANDOUR	12	MASHUP
17	CHASE	36	MEXICO
107	CITY GIRL	14	MG SONS
16	CREAM CLASS CASUALS	103	MODA ELEMENTI
39	CRUSOE	32	ORION MALL
13	DEAL	23	OUTLOOK
34	DENIM FASHION FATORY	18	POISON
30	DERMAWEAR	171	RAM VIJAY CLOTHING
28,29	DESIBELLE	26,27	RIVER BLUE
21	ENDICOTT	169	SABEENA FABRICS
42,43	FOCUS	177	SAFEXPRESS
81	FORCE NXT	65	SCAN
57	GROVERSON SPARIS BEAUTY	115	SIMPLY
11	GROVERSONS BRIDAL WEAR	63	SUPERSOX
93	GROVERSONS PARIS BEAUTY SPARSH	75	SWEE
20	HATSOFF	40,41	TRANZ MANNEQUINS
220,221	IAF	77	TULIP INNER WEAR
165	JAINAM SILK MILLS	22	VAMAS
157	KAPIL RAYON	101	VAMI
		49	YKK
		19	ZOLA

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SHOWS

**BANGALORE FASHION WEEK
GARMENT SHOW OF INDIA
INTIMA GALLERIA**

OPENINGS



FASHION BUSINESS



Cover Picture Courtesy: zynna

Stores



Cott-Counter
Pg No. 40

Diva Rose
Pg No. 42

Kids Around
Pg No. 44

Monte Carlo:
Opens Its First Exclusive Brand Outlet In Mumbai
Monte Carlo, one of India's leading fashion brands, opened its first exclusive store in Mumbai's Satra Park on Shimpoli Road, Borivali (West).

Pg No. 46

Rangoli
Pg No. 48

KIDS

Revolutionizing Kids Retail In India

Sharad Venkta, CEO & MD, Toonz Retail Pvt. Ltd., talks to Images BoF, about the the kids' segment and the huge opportunity it holds for the retailers.

Pg No. 50

TRADE WINDS

Galleria Intima 2016: Where The Industry, The Media And The Government Converged

India's largest sourcing show for intimate apparel professionals, Galleria Intima's 2016 edition took place in New Delhi's Crowne Plaza, in the presence of 2,000 visitors and 500 exhibitors.

Pg No. 54



Garment Show Of India Debuts In India

New Delhi's Pragati Maidan hosted the three-day Garment Show of India (GSI) recently. Images BoF brings you the details of the event.

Pg No. 60

RAMP

WEAR.STYLE BANGALORE FASHION WEEK: WINTER FESTIVE ONLINE 2016

Held at Sheraton Grand with focus on Winter Festive collections, the Wear.Style Bangalore Fashion Week Winter Festive Online 2016 encompassed myriad designers launching their ensembles for the upcoming season.

Pg No. 56



AWARDS

Deal Jeans Wins Award For National Industrial Excellence & Quality

Deal Jeans recently bagged the "National Industrial Excellence Award" and "Quality Brand India Award 2016-2020" by National Chambers of Commerce and Industry (NCCI) of India.

Pg No.62

LAUNCH

Lyra To Expand Brand Portfolio

Lyra is to become a complete women's wear brand by foraying into the market with lingerie and lounge wear.

Pg No. 64

Breaking Traditional Fashion Sense Zegdo Enters India

Zegdo, a complete men's head to toe styling solution brand by Vishal Mawandia, opened its first studio in India, at Nariman Point, Mumbai in 2016.

Pg No. 66

Superdry Sports: Autumn/Winter '16

Hosted by veteran fitness expert Namrata Purohit, Superdry Sports introduced the season's must-have fitness looks from their A/W '16 collection.

Pg No. 68



Black Swan Life



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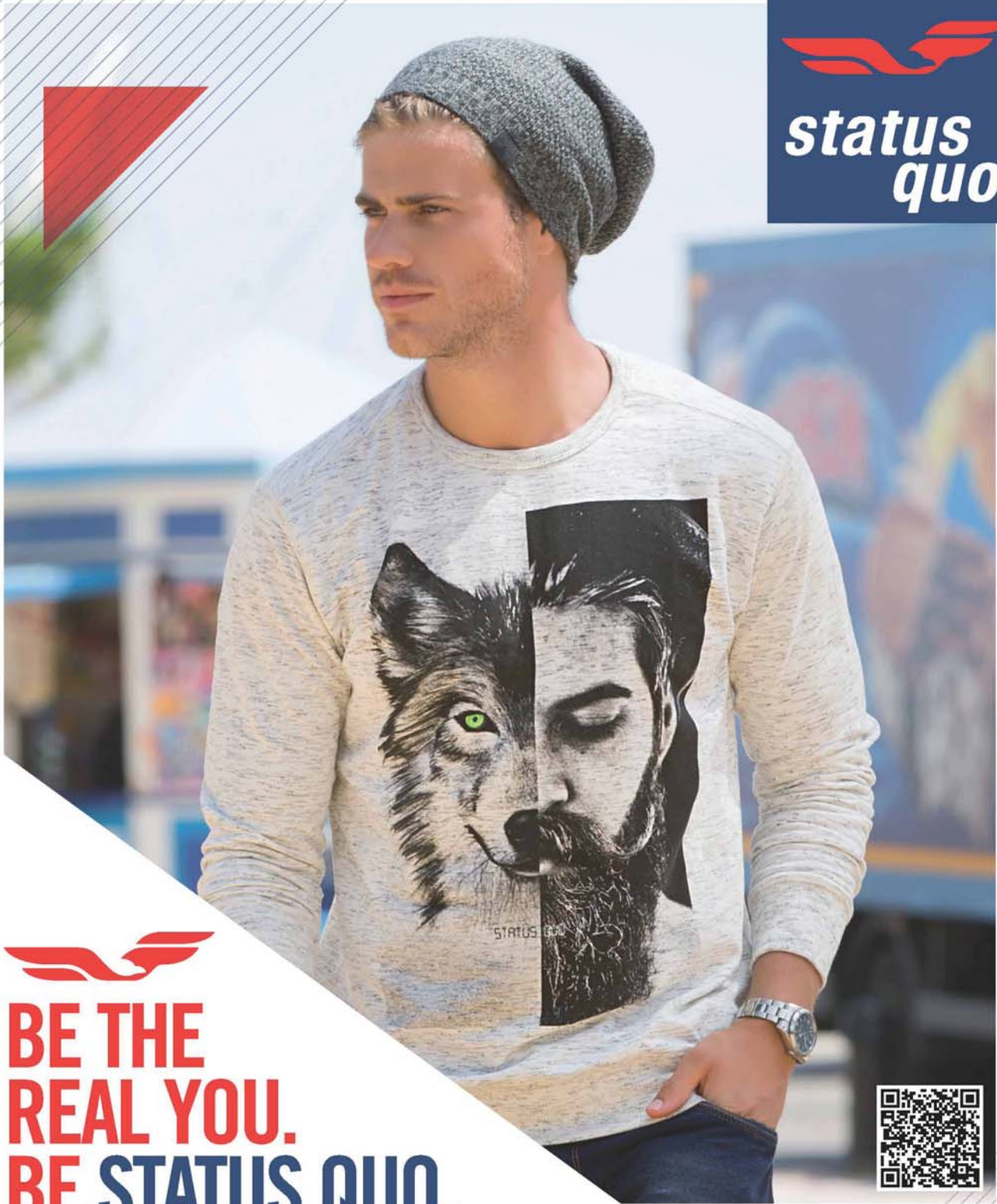


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BRAND: Cott Counter

PROMOTER: Cott Counter

LOCATION: Acropolis Mall, Kolkata

SIZE OF THE STORE: 380 sq.ft.

COTT COUNTER

Collection: The store offers kidswear for infants and upto 12 years of age. Made from 100 percent cotton, the store offers quality products at an affordable price range. The multi-brand outlet houses brands from the group companies like Zero, Teddy, Simply and Smarty.

Store Theme: The store has been designed with a minimalist approach. There is no particular theme, which is being followed in the planning and designing of the store. The first store of Cott Counter was opened in 1975. They have been into kidswear business for 41 years and the company has never offered any discounts at their store nor witnessed any dead stock.

Store Interior: The colour scheme of the walls is a combination of white and blue, which brings a sense of tranquility and serenity to the ambience. The store is well lit to highlight products on the shelves with white LED lights. The store has glass shelves, hangers and wooden racks for kidswear display. Since the store displays a lot of colourful garments for kids, white background adds sharpness to the colours of the products displayed in the store.

Store Designer: The store has been conceptualised by Pradeep Arora, its owner.





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BRAND: Diva Rose

PROMOTER: Simran Aggarwal

LOCATION: Lajpat Nagar, New Delhi

SIZE OF THE STORE: 1,200 sq.ft.

DIVA ROSE

Collection: The collection includes western couture, pret, bridal wear and accessories. With a wide variety of cuts from short and well-fitted to graceful and old-school, the clever use of fabrics like silk, cotton, brocade and neoprene bring out the strength and sensuality in the collection. The colours are vast and range from pale-day yellow to more classic night colours like red and black. The dresses themselves are far and varied.

Store Theme: Covering mid to high-level price ranges and providing a fashion sensibility, which ranges from understated to opulently chic, Diva Rose by Simran Aggarwal provides for all fashion lovers, while never digressing from the realm of impeccable style and taste. It is a one stop shop for all the ladies, starting from pret to bridal wear.

Store Interiors: Colours like white and gold have been beautifully played with. Gold lighting, Italian marbles, mirror work with gold metal sheet shelves complete the opulent store.

Store Designer: The store has been designed by its owner, Simran Aggarwal herself.





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KIDS AROUND



Collection: The store displays kid's apparels, shoes, caps, bags, hair bands, belts, etc., from brands like Hugo Boss, Billieblush, Billy Bandit, Little Marc Jacobs, DKNY, Carrement Beau and Karl Lagerfeld Kids.

Store Theme: Inspired by architecture with simple forms and contemporary lines, the concept uses simple, elegant, authentic materials like white walls, mineral soil and raw wood.

Store Interior: Mango yellow and golden colour have been extensively used in the colour scheme of the store. Girls' collection is placed towards the right side of the store and boys' collection is towards the left. The product range is segregated with different brands.

Store Designer: The designer from international Kids Around has designed the store.



BRAND: Kids Around India

PROMOTER: Sara International Inc.

LOCATION: Ambience Mall, New Delhi

SIZE OF THE STORE: 1,000 sq.ft.



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MONTE CARLO

Opens its First Exclusive Brand Outlet in Mumbai

Monte Carlo, one of India's leading fashion brands, opened its first exclusive store in Mumbai. The store is strategically located in the centre of the market in Satra Park on Shimpoli Road, Borivali (West), and will help expand the company's sales footprint in the commercial capital of India, especially among the elite and upwardly mobile sections.

"This is our first exclusive outlet in Mumbai and given its location at one of Mumbai's posh market, it gives us a planned presence and visibility. We have worked hard for the launch and have included the best and latest of Monte Carlo's range of fashion wear for men, women, and children," said Amit Maini, GM - Retail (North and Maharashtra Region), Monte Carlo. The brand has come up with a series of new collections including floral, fusion and sportswear, in the recent months.

Retail Presence

Currently, Monte Carlo is available through more than 225 exclusive brand outlets and over 1,500 multi-brand outlets in India and abroad. It has also marked its presence in Nepal and Bangladesh with its exclusive outlets. The company's products are also available online, retailing through its dedicated website www.montecarlo.in and are also available on other leading e-commerce portals such as Jabong, Myntra, Snapdeal, Amazon, etc. Monte Carlo is aiming to establish a larger foothold and brand value through more exclusive outlets in places like Mumbai.

Store Management

Its main objective is to stand up to the buyers' expectations and maintain the USP of the brand with respect to quality and designs. Monte Carlo works with an experienced workforce, the state-of-the-art machinery and quality raw material. The staff at the store has been trained to deliver a pleasant, informative and excellent shopping experience to the customers.

BRAND: Monte Carlo

PROMOTER: Monte Carlo Fashions Ltd.

LOCATION: Borivali (West), Mumbai

SIZE OF THE STORE: 1,000 sq.ft.



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RANGOLI

BRAND: Rangoli

PROMOTER: Rangoli Sarees Limited

LOCATION: Gariahat, Rashbehari Avenue, Kolkata (West Bengal)

SIZE OF THE STORE: 2,500 sq.ft. (approx.)

Collection: The store offers exclusive sarees and other apparel woven from different parts of the country. The brand caters to middle and upper-middle class Bengalis.

Store theme: The new Rangoli store at Gariahat opposite Triangular Park is a tribute to varied rich hues and vibrant styles. 'Mon Er Rong Er Udjapon' brings together a plethora of styles and trends, from sarees, suits, tunics, gowns, Indo-westerns to clothes for your little princess.

Store interiors: The new store displays traditional interior design with contemporary touch. The interior is coloured in off-white paint and golden hues, showcasing brown floral pattern. The store is well lit up with white LED lights. Open display racks complete the structure of the store.

Store designer: The store is conceptualised and designed by various individual vendors.





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REVOLUTIONIZING KIDS RETAIL IN INDIA

Toonz Retail aims to provide complete fashion solutions for kids of 0 to 12 years of age. With safety and quality being the top priority, the company provides the best in apparels and other kids' merchandise.

Every parent wants to provide the best to their kids. According to Sharad Venka, CEO & MD, Toonz Retail Pvt. Ltd., the kids' segment in India has not got its due attention yet, and there is a huge opportunity. In order to capture the gap and provide end-to-end solution, Toonz was launched in October 2010 as a one-stop destination for all needs of kids from 0-12 years.

Currently, Toonz has a pan India presence with 100 stores, including 19 selected hypercity stores. Internationally, Toonz Retail has entered the Gulf Cooperation Council (GCC) Region and launched its first store. Its brands WOWMOM and SUPERYOUNG are available in countries like Nepal, Mauritius, GCC, Fiji, and Papua New Guinea. The brand also has a strong online presence. Apart from its own e-commerce portal www.toonz.in, it is present in almost all the leading domestic e-commerce portals like Flipkart, Snapdeal, Jabong, Paytm, Amazon amongst other General Trade Outlets.

BoF: Toonz is now reckoned as the best in its class with a formidable impression not only in India but also in various overseas markets. So, how has the journey been for you? What are the challenges you encountered during the course and how did you overcome them?

In the initial phase, understanding the regional requirement was challenging, but over the years, with research and experience, we grew, and have now become one of the largest players in the kid's retail segment. As a new company, it





Sharad Venkta,
CEO & MD, Toonz Retail Pvt. Ltd.

was important that we had our own identity and it was a challenging task to train the new staff and inculcate our organization's values in our ever-growing team.

Give us insights into the kidswear market in India. How is it developing and what would be its size and growth estimations? What share does Toonz aspire to capture in this market?

The kid's apparel market is pegged at ₹90,000 crores by the end of 2016. The kidswear market is growing at the rate of 15 percent per annum, which makes it one of the fastest growing category in

the apparel market. Toonz Retail aspires to be the number one player in the organized kids retail segment.

Some distinct factors have contributed significantly to the growth of the kidswear market, like changes in the family system, increased spending on children, growing brand awareness among kids, and greater focus on the kidswear market by organized players.

Share insights into the target audience and market for Toonz Fashion.

The target audience for Toonz Fashion would be the fashion conscious kids who now want to dress up fashionably with international sense of style. Today's kids are the new fashionistas who love to be in trend. They have become conscious about what they wear and have become more mature in styling themselves. As a brand which understands the pulse of the kid's retail market, we realise the need of specialized outlets catering to fashion, which would be the most stylish store in town and a must visit for every kid.

What is your complete product range? What are your expansion plans?

The product categories available in Toonz Retail are fashion, baby care, nursery, toys and school supplies, amongst others. Under the fashion category, we have casual, party, as well as ethnic wear.

In the baby care section, we have a wide array of product range within sub-categories like infant bedding, baby accessories, infant safety and toiletries.

We have introduced three in-house brands WOWMOM, SUPERYOUNG and SUPERYOUNG CELEBRATION.

WOWMOM aims to provide fashion solutions for new born to 3 years. With premium and safe fabrics, WOWMOM garments are a second-skin for delicate infants. Recently, we have also launched booties for 0-12 months old babies under

WOWMOM, currently available in denim and cotton. SUPERYOUNG is for kids aged from 3 to 12 years while SUPERYOUNG CELEBRATION is for the kids in the age group of 1-6 years. This brand includes party wear, fancy dresses, ethnic outfits and casual range.

We are looking at category expansion of our existing brand WOWMOM by bringing in the nursery category. We will also be expanding WOWMOM from apparel category to few other related categories.

Tell us about your current retail numbers along with your market presence in India and overseas. What is the percentage share of business that you hold in North, West, South and East?

Toonz has a pan India presence with 100 stores including 19 selected hypercity stores and spans across 50 cities in states like Delhi, Karnataka, Andhra Pradesh, Maharashtra, Telangana, Madhya Pradesh, Assam, Tamil Nadu, Kerala, Uttar Pradesh, Haryana, Rajasthan, Jharkhand and Punjab. We have recently entered the GCC region with our first store of Toonz Retail.

Internationally, Toonz Brands WOWMOM and SUPERYOUNG are available in countries like Nepal, Mauritius, GCC, Fiji, and Papua New Guinea.

In the Southern region, we hold about 40 percent share of business, followed by 25 percent in North, 20 percent in East and 15 percent in West.

Share details on your new launch of the retail business Toonz Fashion. What would be your USP for the new store and its expansion plans?

The Toonz Fashion stores will be an all-apparel and accessories store that would strengthen our positioning of being "India's Most Stylish Kid's Store". Toonz Fashion stores will be relatively

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The Toonz Fashion stores will be an all-apparel and accessories store that would strengthen the brand's positioning of being "India's Most Stylish Kid's Store".

smaller than the existing Toonz outlets and apparel as a category have a greater margin than categories like baby care and nursery, which will result in a higher gross margin return on footage (GMROF) than the existing Toonz outlets.

What has been the idea behind launching this new format store?

The idea behind launching Toonz Fashion was that the kids fashion industry has been on a rise and since we already have more than 50 percent of total sales of Toonz Retail through apparel, Toonz Fashion stores was the obvious choice. Also, we wanted to provide kids with the best in fashion.

What are the drivers for growth planning for Toonz Fashion? Tell us about your idea of diversification for growth.

Some distinct factors have contributed significantly to the growth of the kidswear market like changes in the family system, increased spending on children, growing brand awareness among kids, and greater focus on the kidswear market by organized players.

Urban India, today, is characterized by a nuclear family with double income parents, who are willing to spend

higher share of their wallets on their children. Consequently, the spending on children's apparel with better brand image and quality has received a boost. At the same time, Indian kids in both urban and semi-urban India are increasingly exposed to various media and are thus, aware about brands that cater to them. They have also started participating actively in purchase decisions relating to their apparel.

Tell us about your company's progress through online retail. What would be your take on offline vs. online model?

About 15 percent of the sales are generated by online platforms. We are eyeing to have a strong online presence through Toonz's e-commerce portal www.toonz.in and our WOWMOM and SUPERYOUNG are also available on other online portals namely Flipkart, Snapdeal, Jabong, Paytm, and Amazon. Despite the rapid increase and gaining demand for online shopping, there are consumers especially in tier - II and - III cities, who prefer to experience the touch and feel of the physical store for a pleasing shopping experience. Hence, offline retail stores still remain our core strength. These days, retailers are paying special attention to designing their store, to provide a memorable experience to the end-consumer and attracting them for repeat sale.

Tell us about the customer engagement with you brand.

We plan a lot of direct engagement with customers through promotional activities. We recently associated with Smile Foundation for 'Ramp for Champ' where we provided SUPERYOUNG

and WOWMOM apparels for the kids to be worn during ramp-walk. Similar activities were carried out in Gulbarga, Indore, Delhi and few other cities. Apart from fashion related activities, we actively support sports and creative activities like "Pune's Got Talent" in which participants across all ages participated to show their creative talent. During Holi, we promoted eco-friendly holi by distributing free herbal colours. We also regularly conduct contests on our company page on different social media websites.

Share specific details on marketing/promotions strategies. Talk about what are lined up for the future.

Our marketing campaigns are return on investment (ROI) focused. As our primary objective is profitable growth, we don't believe in customer acquisition through discounting. We believe customers are ready and willing to pay for a good product and shopping experience, which we provide. Detailed analysis is carried out for every single store after every campaign to understand the effectiveness and take necessary actions for future plans.

Kindly share details about the future strategies.

We are looking at expanding our retail presence from 100 stores to 200 stores in the next two years. We have recently entered the GCC region and are looking at expanding Toonz Retail in other countries too. We plan to continue to remain a privately funded company.



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GALLERIA INTIMA 2016:

WHERE THE INDUSTRY, THE MEDIA AND THE GOVERNMENT CONVERGED

Sharing knowledge and information forms a very crucial aspect of Galleria Intima and the 2016 edition was no different. Gurbir Gulati elaborates on the latest edition of the show that is often touted as being India's largest sourcing show for intimate apparel professionals.

Like last year, the fifth edition of Galleria Intima was held at the Crowne Plaza in New Delhi on 5th and 6th August, 2016. As it has depicted with each passing year, the Intimate Apparel Association of India (IAAI) exceeded the achievements, along with the pomp and display of last year. Close to 2,000 visitors thronged the stalls of almost a thousand brands from across India and the globe. More than 500 exhibitors networked and garnered an array of information, intel, sources, vendors and resources during the event. As ever, Galleria Intima 2016 encompassed diverse aspects of the intimate apparel industry. These ranged from fabric, laces, fibre, machinery, packaging methodology, design trends, creativity, innovation and accessories. Creativity and innovation were highlighted with the Trends Pavilion managed by professor Monica Gupta and her team from NIFT, which eventually turned out to be one of the star attractions of the entire event. Having commenced to address problems infesting the intimate clothing industry, the event has now emerged as one of the most substantial platforms for talent, skill, business and ideas in the industry to collaborate and contribute towards mutual growth.



Speaking about the event and how it has metamorphosed since its first edition, Dhiraj Makhija of Makhija Intimates, said, “The show has been growing from strength to strength year on year. Inclusions of newer companies from India and abroad, as well as an array of unique products under one roof are some of the USPs of this show. We get to meet with our fellow companies and also understand latest trends from the seminars and panel discussions. I think, going ahead, I would like to see more participation from Indian companies as well as from the distributors of companies based overseas to harness better business deals.”

Galleria Intima 2016 was inaugurated by Rashmi Verma, Secretary, Ministry of Textiles (MoT), Government of India. Lauding the efforts of the IAAI, she also explained the concept of the recent booster offered to the Textiles and Apparel Industry. Across a

period of over three hours, she spent time interacting and understanding the nuances of the industry. Rakesh Grover, the president of the IAAI apprised Verma about the problems and concerns ailing the intimate clothing industry. Understanding the concerns of the industry with the GST bill, Grover also submitted a memorandum asking for the intimate clothing industry to be included in the list of merit goods under the GST bill. With the industry’s interests uppermost in mind, Grover also wrote to the Consumer Affairs Ministry to exclude intimate clothing from the Packaged Commodity Act.

Gautam Makhija, Director, Sherry Apparels, said that the presence of government officials at the event was a welcome sign for the industry. He said, “I have been attending this show since its inception. It has been one of the best networking platforms for our industry. Inviting government officials has really boosted our morale as the ministry has been apprised of the grey areas and they have assured us all the possible help. I feel that global companies participating in the trade show should have a local distributor to facilitate easier business access. All in all, this is a great event for expanding business horizons.”

Most exhibitors were of the opinion that the show has truly evolved. Sanidhya Jhunjhunwala, Partner, ABSJ Fashions, who were participating as exhibitors for the first time summarised, “This was the first time we were participating as exhibitors. For us, this event was unique in terms of attracting not only Indian but also global players. The best part about the event was that we could find myriad companies, be it of accessories, fabric or machinery, all under one roof.”

Sharing knowledge and information forms a very crucial aspect of Galleria

Intima and the 2016 edition was no different. Wazir Advisors, the knowledge partners to Galleria Intima presented a white paper on the Indian men’s innerwear segment. Titled “Insights & Perspectives”, it was well received by all the attendees. Prashant Agarwal, Joint Managing Director for Wazir Advisors, threw more light on the category and explained the challenges as well as the way forward for brands. Explaining market dynamics, he said, “These days, what has long been regarded as the rural consumer, is moving towards a more suburban and urban middle class mindset. And in the future, the present middle class will shift to the status of upper middle class. This shift is made possible by economic growth, increasing disposable incomes, dual income households, etc. This has brought remarkable changes in the lifestyle of the people and they have become more brand conscious and are opting for better products and services. Men are opting for branded suits and jackets over the tailored ones and women are moving from ethnic Indian wear to western wear. These lifestyle changes have recently percolated down to both men’s and women’s innerwear segment as well and owing to this fact, the innerwear industry in India is expected to grow at a very healthy pace in the next decade or so.”

Galleria Intima also has its eyes firmly set on the future and so does its attendees. This was epitomised during the seminars and panel discussions on “Intimate Wear 2020” and the “Use of Technology in Manufacturing” which witnessed 100 percent attendance.

While it is established that each new edition of Galleria Intima enjoys more success than its predecessor, it also sets higher expectations for the next edition. That said, the IAAI takes it as a motivation. So here’s to the next edition which is definitely going to be better than ever.



Held at Sheraton Grand with focus on Winter Festive collections, the Wear.Style Bangalore Fashion Week Winter Festive Online 2016 encompassed myriad designers launching their ensembles for the upcoming season. The collections were theme-based, emphasizing mainly on femininity and 'Make in India'.

The 15th edition of Wear.Style Bangalore Fashion Week - Winter Festive Online took glamour and panache in style as the designers showcased their exclusive collections throughout the four day event. The 4 day extravaganza kick-started by students of the reputed training institute Dream Zone, that offers professional designing courses in Interior Design, Fashion Design, Animation, Graphic and Web Design. Among other highlights of the event were, tinsel town glitteratiies Elli Avram, Nora Fatehi, Ragini Dwivedi and Mrs. India Universe 2016 Lakshmi Seshadri walking the ramp for designer Ramesh Dembla, Shazia by 6 Degrees, Michelle Salins, and Alpa & Reena, respectively.

WEAR.STYLE *Bangalore Fashion Week* WINTER FESTIVE ONLINE 2016





Day 1

Devika Kalia's Indo-western collection based on the theme Hues of Trance. The collection mainly comprised of gowns and flowy skirts with embroidered blouses. The colours used were pastels in gold, corals, soft pinks and peaches. Net dupattas, soft pink satins, the fusion of traditional embroidery on English cut gowns and beautiful soft colours were the main highlights of the collection.

An ode to Elizabeth I who is also remembered for her contribution to fashion, Soumya Patel's Gloriana – The Virgin Queen exuded elements of women empowerment; violent and powerful; vintage and history. Extravagant gowns embedded with bows and jewels are still an inspiration for today's designers.

Purvi Doshi's theme 'Rhythm of Desert' purely focussed on the use of hand-woven India-made "Khadi" fabric. Inspired by gypsy culture, geometric patterns embellished with floral highlights in vibrant colours formed the core structure of this collection.

Shazia's chic line from the theme 'Reflections' was a melange of abstract prints and soothing colours. The collection used sheer fabrics such as organza, satin in the shades of white and blue, which depicts the calm and soothing shades of the sky connecting to the mind of an individual.

Other highlights of the day included themes like Katha by Stuti Shah, Shaping with Elegance by Perna Sarkar, and Abha Choudhary's Aura that encompassed an inspirational Indo-western collection.

Day 2

The day two of the Wear.Style Bangalore Fashion Week continued the zest of the previous day and was abuzz with designers displaying the best of sartorial art. The highlights of the day were as follows: Divya and Snigdha's theme 'Ro-Mania'. The elaborate and aesthetically appealing collection was inspired by the 'ro-man' architecture that is 'ro-ya!'. The look was very larger than life with emphasis on colours like burgundy, black, peach and gold throughout the collection.

Madhusmita Panda's Solidarity Dandelion showcased a collection that reflected strong intensity with drama and romance, mirroring the powerful and resilient women of the 21st century. The theme displayed opulent rich colours such as deep red, elegant blue, decorative velvet and textured fabric, which gave a dramatic effect to the garments. The enriching part of the collection was the encrusted embellishments that maintained a ritualistic and ornamental quality throughout.

Kavya and Pooja's 'Language of Flowers' took inspiration from the 19th century when the flowers were used to exchange coded messages. Depicting various moods and fragility of the language, the collection comprised 3 different floral prints in the shades of blue, orange and green.

Alpa & Reena's 'Malakia' exemplified the decadence of period royalty in its most contemporary form. As a confluence of Arabian grandeur and extravagant Indian tradition, the assemblage accentuated intricate weaves, ample ruffles and tulle appliqués to elaborate draping and bold volumes.

Other inspiring themes and collections included Hina's work on the theme 'Nature', and Michelle Salins' 'Retro' that exhibited silhouettes in trapeze style, fit and flair dresses in the shades of pastel colours like red, blue and green.

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Day 3

Lisha and Aakanksha's theme 'The Falling Dusk' depicted the darker shades of dusk and encompassed myriad appealing colour shades from darker shades of yellow, orange to shades of pink, purple and finally to grey and blue.

Apart from this, Kamal Raj Manickath's 'Alice in Desi-Land', Puja Mapxencar's 'Escape O Nature' and Ashok R Maanay's 'xxxx' were some of the most favoured themes of the day.

Khitija Rana's 'Elements of Life' was inspired by the elements of life - Fire, Water, Earth, Wind and Ether. Each garment reflected the beauty, colour, and grandness of these elements. The colours used were bright and rich, embellished with intricate handwork in gold.

Abhishek Dutta showcased a collection that drew from contemporary chaos in terms of prints, textures and surfaces, stain and collection. Cotton twills, linens, jacquards and leather formed the key fabrics. Fragmented heart, tessellated skulls were the key motifs which enhanced and implemented the fabric. The collection epitomized modernity with quintessential of grunge and rustic fused in tinges to accentuate its aestheticism.

The Finale of Wear.Style Bangalore Fashion Week Winter Festival Online 2016

Abhilasha and Abhishek's theme 'Playful Persia' played with colours and revolved around the unique architecture of the Persian culture. The bright shades used in Persian crafts were extensively used in the collection to showcase beautiful blend of east and west. The motifs used were inspired from traditional Persian art and were highlighted with bright colours which gave it a unique and modern look.

Govind Kumar Singh's theme 'Panigrahna' was inspired from the rich mythical history of India. Chosen from Sita's swayamwar abstract of Ramayana, the concept focused on the rich cultural heritage of India. The collection is inspired from the garments and jewellery of the Ramayana; chiefly from the beauty personified through Sita. The main agenda of the concept was to bring about a worldwide understanding of the rich Indian culture.

Vimal Pareek showcased an exclusive men's wear collection enriched with peacock and flower motifs, delicate sequined designs with luxurious attributes made with an extraordinary amount of soulfulness, taking you to a seamless sojourn of regal palaces with its full grandeur. Called 'The Royal Odyssey', the theme exhibited colour palate drawn from dusty beiges, browns and grey to cheerfully rich red, navy blue, deep wine and maroon, boosted

with gold and metallic embellishments. The collection encompassed a wide range of Achkans, Bandhgals, Nehru Jackets, Breaches and Jackets, with emphasis on Indian craftsmanship beautifully depicted through vintage embroidery.

Sameena Parveen's theme 'Sufi' drew from the the erstwhile era of Mughal royalty. The show transported the audience to the times of charming courtesans, beautiful princesses and exotic queens.

Archana Kochhar's new digital collection, 'Garden of Eve' was inspired by the beautiful imagery of the glorious gardens. It mesmerized the audience through a visual spectacle propelled by luscious flora and a dream like vision. The prints had highlights of angelic portraits and floral motifs offset with black and white stripes that brought out the modern zest in the collection. Intricately digitally printed garments with silhouettes ranging from Indian fusion to contemporary bridal included lehengas with crop tops, keyhole anarkalis, structured saris, pencil skirts with flared tops and floor length anarkalis.





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Garment Show of India debuts in Delhi

North India, particularly Delhi and adjoining areas has been looking for a platform to showcase their potential range of garments and reach every nook and corner of the country. In order to meet this demand, Saina Events organised, The Garment Show of India (GSI) at Pragati Maidan in New Delhi. The three-day garment fair took place on 8, 9 and 10 August 2016.



The event was inaugurated by Meenakshi Lekhi, Member of Parliament, Lok Sabha from New Delhi constituency and the national spokesperson of Bharatiya Janata Party. She expressed, “This is a good initiative taken and will definitely help the industry in going forward. GST is also going to be an important step for the garment industry and although it seems as a burden, but will prove to be beneficial in the long run.”

GSI served as a platform for garment manufacturers, retailers, brands, wholesalers, distributors, traders and retail chains to enhance business by coming under one roof and networking, so as to meet potential buyers and suppliers. The show caters especially to small and large scale domestic garment manufacturers, retailers and brands. Around 80 participants from Delhi, Noida, Gurgaon, Bengaluru, Mumbai, Kolkata, Ahmedabad, Surat, Ludhiana, Tirupur, Tronica City, Chennai, Jaipur and several other parts of India came to the show and displayed their latest range in women’s, kids and men’s denim, active, sports and ethnic wear.

The show also became a budding ground for many garment exporters who are exploring the idea of the retail apparel segment of India. Companies like Virender Textiles, Ruby International, Saraj, Lotus Knits, Singh Overseas and several others expressed their satisfaction over GSI as it opened new doors of opportunities and helped them in meeting potential clients from the retail segment. Well established brands like 109F, Mystere Paris, Identiti, Shiv Naresh, Cocoberry and many others participated at the show and reported a positive feedback.

Attendees of the garment show also included sourcing teams from Pantaloons, Reliance Retail, Chennai Silk, Ajio.com, Abof.com, Bindal Group, V-Mart, V2, Landmark Group, Bharti Walmart, Westside, Ritu Wears, City Life Retail, Wills Lifestyle, Amazon, Snapdeal, Jabong, Myntra and many more. Also, retailers, wholesalers, distributors from small towns and cities like Meerut, Aligarh, Haridwar, Saharanpur, Guwahati, Agra, Kurukshetra, Ambala, Ludhiana, Jalandhar and Chandigarh visited the show.

Gagan Marwah, organiser of the garment fair, shared, “We are now eyeing the second edition of Garment Show of India in a bigger way, with a lot of additional features like fashions shows, conferences and seminars and we

are hopeful that the next edition will be double in size than this year both in terms of visitors and participants.”





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DEAL JEANS

wins award for National Industrial Excellence & Quality

Deal Jeans' Founder and Chairman, Sameer Patel has been conferred with the prestigious "National Industrial Excellence Award" by National Chambers of Commerce and Industry (NCCI) of India for being an entrepreneur, having the qualities of conceptual thinking and international competency.

Also, the brand Deal Jeans has been entitled with "Quality Brand India Award 2016-2020" in industrial field survey by NCCI in India. Deal Jeans takes pride in being the only brand to win this prestigious award from the garment industry.

Deal Jeans is transforming the trends in the field of fashion while emerging as one of the top most brands in the fashion industry. As Patel quotes, "Holding such prestigious awards in consecutive years has enriched our brand value and recognition. We thank our Deal Jeans family members, especially the channel partners, consultants, associates, vendors and employees who have contributed directly and indirectly, and brought this company to where it is today."



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LYRA

TO EXPAND BRAND PORTFOLIO

Lyra is to become a complete women's wear brand by foraying into the market with lingerie and lounge wear.



In an attempt to establish itself as a complete women's wear brand, Lyra has announced their plans to expand the portfolio and venture into women lingerie and lounge wear segment. Launched in 2012 by Ebell Fashion Pvt. Ltd. (a Lux Group company), the legging brand has successfully established its foothold in the mid-to-premium segment with market share of 38 percent in a short span.

Elaborating on the expansion plans, Udit Todi, Senior Vice President, Lux Industries Ltd., said, "Lyra has been successful in establishing itself as the largest legging brand in the women's wear segment. Today, it is the market leader in the leggings category with highest brand recall in the organised retail and online space."

"Our legging business is growing by 50 percent year-on-year and currently, we command a market share of 38 percent in the mid-to-premium segment," he added.

He shared, "We plan to extend our brand portfolio to intimate wear like lingerie and lounge wear for women. With more than 5,000 strong retailers and distributors across India, we plan to reach out to our discerning customers. In the online space, in addition to our own website, we will have tie-ups with leading e-commerce sites to sell our new products. We will competitively price the products, keeping in mind the price sensitivity of the Indian consumers."

The market

With the influx of branded apparels, the women's wear market has been growing at 15 to 20 percent. By 2018, women's branded apparel will capture 41 percent of the USD 68 billion domestic textile market.

Lyra lingerie and lounge wear will be positioned in the market as an affordable fashion collection. The brand will target independent women who like to be in style and are fashion conscious, and prefer to own a good product at a decent and affordable price.

The ingredient

Lyra lingerie and lounge wear is made of comfortable cotton-lycra fabric for the right comfort and support. The product development and innovators within the company are also experimenting with modal fibre to enhance the comfort quotient.

The customers

According to the company, psychographic segmentation of tier -II and -III cities has shown the changing and evolving nature of lifestyle, which is bringing in a sea change in the Indian legging and innerwear industry. As a result, the market place is witnessing a gradual shift towards branded products.



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Breaking traditional fashion sense, Zegdo enters India

Zegdo, a brand by Vishal Mawandia, opened its first studio in India, at Nariman Point, Mumbai in 2016. Spanning over an area of 700 sq.ft., the Indian male now appears to be more 'open' to the concept of fashion. Zegdo curates the best in men's fashion from around the world, offering a head to toe styling solution. Zegdo proffers the right merchandise mix: Italian and English suits, Egyptian and Italian shirts, trousers and chinos/shorts, jeans, ethnic Indian wear, lapel pins, collar stays, ties, bow ties, scarves and gadgets. Along with its own in-house label, the brand has collaborated with international designers and artists.

Zegdo studio can be visited only on appointment and not otherwise. Within the next 6 months, the brand is planning to collaborate with international designers and brands for a trend setting collection.

The brand plans to open 3 stores in India in the next 5 years- with another store in Mumbai followed by in Delhi. Zegdo claims to bring a variety of options for its customers in fabrics, designs, etc., where the consumers can design their own ties, shoes or sunglasses. Swimwear, riders' gears, sports socks and formal socks, bespoke cigars and shoe care are all in the pipeline.

Delimiting Fashion for the Indian Male

The brand's philosophy is to challenge oneself and ask, "why not?". According to Zegdo, there is always more to explore in fashion as change is permanent. The company offers customization for

each product type. The brand maintains that luxury is no longer suited only for the rich, but the aspiring youth with comfortable incomes should also have access to fashionable products. A decade or two ago, luxury meant owning only a luxurious brand that could be afforded by only a few. Over the years, this perception has changed and today, owning something exclusive is the new definition of luxury.

Vishal brings forth his years of experience in the fashion industry and designs and styles every product himself. His sharp sense of dressing and style is contemporary and in sync with current global fashion trends. He noticed the dearth in good styling and wishes to break norms relating to men's fashion: standard colours of black, blue and grey are no longer the only options men have. He, along with his efficient tailoring team, is able to proffer this exquisite personalized shopping experience.

Zegdo's bespoke process educates men on the nuances of a good, yet comfortable fit. Vishal believes it is most important to first understand the client's individual style and profile followed by personal choices and desires, based on which, he presents many options most suited to the profile. Designing evolves while interacting with clients. Zegdo uses American devices for measurements as they help eradicate all assumptions taken by a master and ensure that there is never any extra fabric left hanging on you and that there is enough room for movement.

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SUPERDRY SPORTS:

AUTUMN/WINTER'16 INDISPENSABLES

Hosted by veteran fitness expert Namrata Purohit, Superdry Sports introduced the season's must-have fitness looks from their A/W '16 collection. As a popular brand in the celebrity world, launch party witnessed attendance of numerous fashionable fitness lovers in the city such as, Pooja Hegde, Manasi Scott, Aparna Badlani, Kanishtha Dhankar, Jhataleka Malhotra, Malini Agarwal, etc.

Superdry hosted an exclusive 'Be Fit Party' with Fitness Expert, Namrata Purohit to unveil its A/W'16 Sport Collection at 'The Apartment' during Lakme Fashion Week. In keeping with the brand's design aesthetic, Superdry showcased a modern workout wardrobe with flattering and breathable hi-tech fabrics in the hottest colour trends.

The Superdry collection depicts impeccable attention to details, reflective stitch, gloss print graphics, super soft touch fabrics and secure branded zip pockets giving a sleek sport-tech feel to the stylish yet high performance driven range. The collection focuses on moisture wicking fabrics that have been used to ensure fitness fans stay cool while working out and brushed fleece lining to provide warmth and safety during outdoor activities.

The extensive sport collection included running shorts, tracks, funnel neck tops, lightweight basic t-shirts, running hoodies and gym bombers for men in 'fluro orange', black and 'grey grit'. The women's capsule collection featured alphabet graphics and python skin patterned sports bras, trainers and kit bags. Specialised embossed prints on capris and leggings added a unique statement to gym bag essentials.



FASHION

RETAIL



INDIA'S HOME FASHION MARKET

FOCUS:
FASHION IN FESTIVE SEASON '16-17



FASHION RETAIL

LEAD STORY

**FESTIVE SEASON 2016-17:
BOOM TIME FOR FASHION IN INDIA**

The festive season in India morphs the country in its brightest and most jubilant avatar of the year. It's the time the entire nation musters together to feast, pray, share love and above all—SHOP, with unsurpassed fervour.

Pg No. 74



FESTIVE COLLECTION

- Aura: A/W 2016 Collection By Amante
- Festive Charm By Cornelianii
- A/W 2016 Collection By Deal Jeans
- Pretty Wonderland By De Moza
- Tie- Dye Your Festive By Desi Belle
- Vibrant & Festive Men's Collection By Manish Creations
- Fusion Beats By Mash Up
- Festive Affair By Meena Bazaar
- Yana By Soch
- A/W 2016 Collection By Success

Pg No. 82 -91

COVER STORY

HOME IS WHERE THE HEART IS

With easy bank loan availability, the real estate industry has experienced growth in the last few decades in residential as well as commercial sector. Booming real estate industry is further driving the growth of the home décor market. BoF takes a quick look at the current trends in home furnishings, especially with the festive season just round the corner.

Pg No. 102

PLAYERS ! HOME FASHION

SPRUCE UP YOUR SPACE!!

Aspirations for better lifestyles, well decorated houses, that once was prerogative of only the elite class, have now become a necessity amongst the bourgeois. Images BoF handpicks a few of the hottest brands from the sector.

Pg No. 140

PROFILES ! HOME FASHION

- 112 CHUMBAK:**
Magnifying Home Decor
- 114 GODREJ INTERIO:**
From Storewell To Live Well
- 116 HAPPILY UNMARRIED:**
For The Uber Cool Home
- 118 PEACHTREE:**
Decorating Homes With Trendy Furnitures
- 120 PRESTIGE:**
Making Cooking Easy With Complete Kitchen Solutions
- 122 SKIPPER FURNISHINGS:**
Decorating Homes With Sentiments
- 124 STORY@HOME:**
Helping Homes Create Beautiful Stories
- 126 URBAN LADDER:**
Beautifying Homes At Ease
- 128 BIANCA:**
Adding Life to Lifestyle
- 130 BSL:**
Offering Best Home Furnishing Fabrics
- 132 DURIAN:**
Bringing Your Home Alive
- 134 RAYMOND HOME:**
Embellishing Homes in Unique Style
- 136 RUMORS FINE FURNISHINGS:**
Adding Charm & Elegance to Homes
- 138 ZYNNA:**
Beautifying Homes With Sophistication



Fashion Retail



COVER RESEARCH

INDIA'S HOME FASHION MARKET

The total retail market for home and interiors is worth ₹1,15,000 crores. It is growing at 12 percent and is expected to be worth ₹1,81,000 crores by 2020. Modern retail is estimated to be 20 percent of this total market and is expected to grow at a rate of 25 percent. JORRS goes into detail.

Pg No. 92

BRAND WATCH

DESIGNED WITH PASSION

Founded in 1952, BoConcept is globally-renowned premium furniture and accessories brand, offering customised, coordinated and affordable products styled for modern day living. With its flagship store opened in New Delhi recently, the brand seeks to add a touch of class and its "Urban Danish Design" heritage to homes of NCR denizens.

Pg No. 146

BLISSFUL ELEGANCE

Boutique Living, an aspirational home textile brand, was launched by Indo Count Retail Ventures (ICRVL). Drawing upon the avant-garde production capabilities and global export experience of parent Indo Count Industries, ICRVL aims to capture around 25 percent share of Indian bed linen market in the next five years.

Pg No. 150

CONCEPT

LIVING LIKE THE STARS

Started in 2012, The Label Life is a famed e-commerce lifestyle brand which celebrates an Indian woman's desire for classy, glamorous lifestyle. Images BoF caught up with the brand founder, Preeta Sukhtankar, who talks about the nitty-gritties of her business.

Pg No. 154

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Festive Season 2016-17

BOOM TIME FOR FASHION IN INDIA

The festive season in India is such a huge phenomenon. The season, that begins in earnest in autumn and lasts till mid-winters, morphs the country to its brightest and most jubilant avatar of the year. It's the time the entire nation musters together to feast, pray, share love and above all—SHOP, with unsurpassed fervour. Auto sales jump up, gold buying picks up, bumper discounts pervade, new products are launched—all in all, sales velocity reaches its pinnacle triggered by the increased demand during the festive season.

-By Bharti Sood & Rosy Sharma



“Customers first start purchasing for their kids during the season. It is followed by women who mostly shop for ethnic wear or for gifting purposes. Whereas, men and youth shop the least.”

-Vasanth Kumar
Executive Director, Max Fashion.



“For a retailer, Navratri and Diwali are the most important days. They are considered auspicious according to Hindu rituals and customers often tend to buy more.”

-Arpit Bindal
Director, Bindal Apparels Pvt. Ltd.

Apparels Pvt. Ltd., the Delhi based retail chain. However, India is a diverse country even in its festivities. So, from a pan Indian perspective does the festive season start earlier in some parts and later in some, we wanted to know.

According to Srinivasa Rao, Vice President, Marketing, Lifestyle, who are more spread pan-India, the festive period this year, started early in September with Ganesh Chaturthi, followed by Onam in select southern markets. He opines, “The festive shopping will continue through the festivals of Durga Puja in different parts of the country and will peak up at a pan India level between mid and end October. Festive shopping will again be at its high during Christmas.” So as a whole, as Lalit Agarwal, CMD, V-Mart Retail Ltd., puts it, the impact of the festive period becomes apparent throughout around 30-45 days prior to Diwali, except for Bengal, Odisha and East Bihar, where the season is very strong in the first 15-20 days due to Durga Puja.

The Span

It is clothes and colours galore from Navratri to Diwali. But what after that? Does the season end after Diwali or does it continue? As per Arpit Bindal, for a retailer’s point of view, the season lasts till February, especially so in North India. “After the festivities of Diwali, comes the wedding season which begins in November and December. Thereafter comes the winter season which continues till February. These are the three important seasons when the sales can really pick up, and the retailers have to come in the right time and the right way,” he said.

But if Lalit Agarwal is to be believed, the jest somehow starts to wane after Diwali. “The shopping for an average middle-class Indian household continues >

The festive season in India is indeed a phenomenon, that is acknowledged by local as well as global players, with even tech behemoth Apple choosing to launch the new iPhone 7 series on the 7th of October to get the most out of this extended span of exuberance.

For the fashion retail industry, it’s rush hour! Everyone, right from hawkers on the streets to luxury brands on the high streets pin their hopes on the festive season to hit the right note with the consumers. The manifestations of this enthusiasm becomes apparent with elaborate in-store decorations, vibrant lighting, visual merchandising campaigns, promotional offers and discounts. Simply put, this is precisely the time that the entire industry gears up for, throughout the year.

Now that the festive season is round the corner, the sleuths at Images BoF decided to delve deeper and perceive the trends of this season as foretold by some retail giants. This comes straight from the horse’s mouth, so you know you can bet on it.

The Festive Period

So, when exactly does this period start? Conventional wisdom would say that the festive season starts from September, with the onset of Navratri and stay strong upto Diwali. “For a retailer, Navratri and Diwali are the most important days. They are considered auspicious according to Hindu rituals and customers often tend to buy more,” concurs Arpit Bindal, Director, Bindal



“We have seen good double digit like-to-like growth over the last five years. Our festive contribution to overall sales is stable.”

-Srinivasa Rao,
Vice President, Marketing, Lifestyle,

till December and even up to January in some instances, due to the wedding season. But, the demand cycle starts to weaken after Diwali as the buying capacity of the consumers begins to diminish,” he revealed.

Quintessential Categories

So what exactly does a retailer need to stock pile for the season? “The festive and wedding season include more of ethnic and party-wear range,” affirms Arpit Bindal. Without a doubt, ethnic wear, for one, is a staple of this season. The festive season has traditionally been the time when India glitters in ethnic opulence. Also, as the festive season is always followed by the winter season, sales of woolen garments get a boost during this season, as per Bindal.

“During the wedding season, customers buy ethnic attires such as lehengacholis, sherwanis and Indo-western apparels, while in the winter season,

sweatshirts, pullovers, cardigans, coats, woolen tops, etc., are in great demand,” adds Sagar Suri, COO, Chunmun Stores Pvt. Ltd.

While asked about the specific categories that has long enjoyed popularity during this season, Srinivasa Rao stated “All our categories, including apparel for men, women and kids, makeup, shoes and bags, do quite well during the festive period. Gifting, during festive occasions, is also in full swing and we often have people choosing gifts from all our categories including watches, fragrances and accessories.”

As per Lalit Agarwal, the contribution varies across categories for men, women and kids. “For men, the top choices are jeans, full sleeved casual shirts, full sleeved t-shirts, sweatshirts and cotton trousers. For women, the best-selling categories are full sleeved tops, sweatshirts, cardigans, jeans and salwar suits. For boys, the top sellers during the festive season are full-sleeved t-shirts, jeans, winter t-shirts and jackets. For girls, the top sales come from full-sleeved tops, winter-tops, jeans, jackets and casual sets,” he added.

Vasanth Kumar, Executive Director, Max Fashion, pointed out a very peculiar consumption trend witnessed mostly among the middle class consumers. “We have often seen at our stores that customers first start purchasing for their kids during the season. It is followed by women who mostly shop for ethnic wear or for gifting purposes. Whereas, men and youth shop the least. Maybe because they buy throughout the year, unlike women and kids.”

The responses made it fairly clear that while ethnic wear and party wear are the top selling products of the season, women’s wear and kidswear emerge as the top selling categories. Also, another



quintessential category of the season is home furnishing as everyone tends to give their home a makeover for the festive season.

Contribution to Annual Sales

The festive season is probably the most important span for every retail door across the country as it contributes significantly to yearly sales. Arpit Bindal revealed that more than fifty percent of the annual sale happens during the festive season in Bindal's Apparel Pvt. Ltd. While Sagar Suri and Vasanth Kumar confirmed that there is an approximate jump of about 30-40 percent in sales during the festive season, Lalit Agarwal shared that the festive season contributes 22-24 percent of their overall apparel sales for the year.

In reference to whether the contribution of festive period sales to overall sales is declining or increasing over the years, Bindal observes, "Contribution of festive period sales is definitely increasing over the years. More so, when the three main contributors of the season (festivals, weddings, and winter) align at the right time. In the last five years, we have been witnessing around 15-20 percent increase in our share."

Sagar Suri also agrees that the sale during the festive season has definitely been increasing over the years. "However, the customers do hold their purchases till the last day as they like to avail the benefit of end of season sales," he added.

Informs Rao, "We have seen good double digit like-to-like growth over the last five years. Our festive contribution to overall sales is stable."

But, according to Vasanth Kumar, while the purchase during this period has been steady and on the rising, it differs from market to market. "Some markets have extended sales, while in some markets, the season ends in 10 days of the festive period," he said.

Trend Prediction for this Season

Traditional yet contemporary look is what's trending these days. Designers like to blend modern with traditional styles, utilizing a riot of Indian colours, stunning embellishments and styles for their festive collections.

Apprising on their festive wear collection this year, Bindal of Bindal Apparels Pvt. Ltd., informs, "Our latest festive collection will offer more vibrant and bright colours in our entire product range."

At Max Fashion India, says Vasanth Kumar, the collection includes kurtas and bandi jackets for men; skirts, traditional anarkalis, jewelled toned crop tops, vibrant coloured tiered kurtas and maxi dresses for women in beautiful chanderis, silks and rich brocades. Also, fabric innovation is there with the designers using non-cottons like viscose, crepes, spandex, modal, polyamide, etc. "Basically, all kinds of embellished garment do well during festive season," he added.

Lalit Agarwal revealed that V-Mart is betting heavily on quality yet trendy products with keen sensitivity towards pocket friendliness. "Most individuals in the middle class households in tier-II, tier-III and tier-IV cities in India purchase just 2-3 pair of clothes in an entire year. And more often, this buying happens only during the festive season. Keeping the above scenario in mind, we aim to offer quality yet trendy products to our target group at value-pricing. Some of the key features of the

>



“We aim to offer quality yet trendy products to our target group at value-pricing. Key products of the festive collection this year would be sweatshirts, pullovers, denim spandex shirts, stretch denim, reversible shirts, and cotton printed shirts.”

-Lalit Agarwal,
CMD, V-Mart Retail Ltd.

festive collection this year would be sweatshirts, pullovers, denim spandex shirts, stretch denim, reversible shirts, and cotton printed shirts,” he said.

Suri of Chunmun also stores bed sheets, blankets, gifts and novelty items, figurines, crockery, etc., besides party wear collections during the season. Talking about the brands which are expected to do exceptionally well, Suri feels that Tommy Hilfiger, US Polo, United Colors of Benetton, Park Avenue, Color Plus, Portico, VIP, etc., will be the hot favourites.

New Initiatives in Private Labels

Private labels are the rising start of Indian retail. In a sharp contrast to earlier periods, consumers have now started considering purchase of

PLBs as smart shopping. And there seems to be valid reasons too. Private labels provide the retailer the ability to offer a significant price advantage to consumers as compared to manufacturer brands. Vasanth Kumar explained that earlier, ethnic wear were bought mainly from designers or specialised boutiques. As a result, the per unit price of the garment was also high. While today, ethnic wear is available through value fashion brands offered at good price points. “We have our in-house label, ‘Tavish and Tavisha’, an ethnic solution for men and women. It is priced at ₹1,600- ₹2,000, which is above the normal Max price range. However, it is still affordable to the normal buyers. The range is available at less than half the price of any boutique range. These things will improve sales and encourage the ethnic wear segment,” he added.

The festive season is the apt time to shell out private label initiatives as well as innovations in the existing ones and most modern retailers have religiously been practising it. Shedding light on the new initiatives in private labels for the season, Srinivasa Rao of Lifestyle, says, “We have introduced ‘Fame Forever’ a kids’ range in apparel. The range has fashionable offering for boys and girls at very competitive prices. For women, we have offerings across ethnic and fusion wear in ‘Melange’ and ‘Color Me’ – which are both new introductions. The ethnic range has a substantial offering for the festive occasions. We have also recently launched handbags under our leading western wear brand ‘Code’. The collection is chic and priced well. Code for men includes velvet jackets, occasion specific suits, etc., that are designed keeping in mind the festive season.”

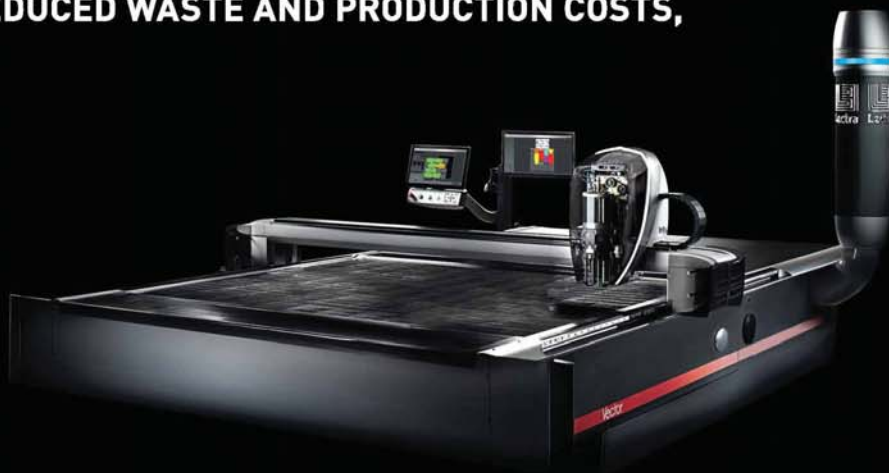
Adds Lalit, “We have always had private labels as part of our kitty. ‘Flick’ and ‘Elwood’ are the two brands that we are looking at actively promoting via internal branding and external communication.”



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Colours in Vogue

Flamboyant colours and ornate embellishments are two indispensable aspects of Indian ethnic wear. Hence, they form the core of every festive collection launched. “Bright colours, which are neither light nor dark in various shades, is ruling this festive season,” points out Arpit Bindal.

On asked about the specific colours that might be in vogue this season, Srinivasa Rao quoted that demand for metallic hues and vibrant colours remains consistently high, year after year and the trend is expected to continue.



“During the wedding season, customers buy ethnic attires such as lehenga-cholis, sherwanis and Indo-western apparels, while in the winter season, sweatshirts, pullovers, cardigans, coats, woolen tops, etc., are in great demand.”

-Sagar Suri,
COO, Chunmun Stores Pvt. Ltd.

“Traditionally the festive season is highlighted with shades of red, blue and white,” explained Lalit Agarwal, “Some of the key colours we usually focus during this season are: navy, red (maroon), blue, white and beige/khaki.”

Apart from the usual palette that has been trending on and off since long, Lalit Agarwal mentions a very fresh colour that have the potential to trend this year — sherbet colour. “This year along with the colours mentioned above, we are also betting on sherbet colour to be a big hit. A little less freshly squeezed than a classic orange colour, sherbet is another citrus trend which provides a breeze of freshness to the collection, especially for women’s wear,” he explained.

Market Promotions

Needless to say that the holidays just wouldn’t be the same without

them – decorations are a big deal for both homes and businesses alike. An effective, seasonal window display is paramount to tap into the holiday spirits (read spending habits) of your consumers as it piques a shopper’s curiosity to discover what is new.

Retailers, today, indulge in a melange of marketing efforts right from visual merchandising, promotional activities, to discounts, gift coupons and special offers to outshine and promote their visibility. Lifestyle exercises rigorous ATL and BTL marketing campaigns planned starting early September till the end of October. They even take up advertising space across leading dailies and magazines, and do promotions through hoardings, radio, etc. “As festive is a key season for us, we put in substantial marketing efforts to promote our collections across various media platforms. Even the stores will be done up to highlight the festive collection and capture the celebratory spirit of the season. We also have strong digital presence across social platforms and will leverage it for creating a further buzz about our festive offerings,” said Srinivasa Rao.

In an effort to reinforce brand loyalty, retailers like Max Fashion and V-Mart even reward consumers during the festive season. While Max Fashion shell out designer gifts to customers, V-Mart holds lucky draw campaigns.

Simply put, the festive season is a grand opportunity for fashion retailers. This is the prime time when retailers can sell at the optimum level and make up for the rest of the year. With proper knowledge, preparations, and strategies, retailers can easily capitalize on this cash rich market and make it a win-win situation, both for themselves and their consumers.





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AURA: A/W 2016 COLLECTION BY AMANTÉ

AURA, THE AUTUMN WINTER 2016 COLLECTION IS ALL ABOUT BEING EXQUISITE AND SOPHISTICATED. THIS COLLECTION SIGNIFIES THE AURA A WOMAN CAN EXUDE WITH INNER CONFIDENCE. DESIGNED FOR THE STYLISH WOMEN OF TODAY, THIS FASHION-FORWARD COLLECTION IS A PERFECT MIX OF ELEMENTS LIKE METALLIC HIGHLIGHTS, GEOMETRIC PATTERNS AND EXOTIC FLORAL PRINTS.

"Aura is a collection based on the latest international trends, and we are a leading brand in lingerie to get a curated collection to our consumers. This will help us strengthen our fashion leadership in the category. With this range and imagery, Amanté urges all women to choose their innerwear more carefully than outer wear, as it can make or break your look and state of mind."



– Smita Murarka,
Head - Marketing, Amanté

The Brand:

Amanté is an international intimate wear brand, offering comfort, fashion and sensuality to the modern Asian woman. Amanté aims to provide a complete world of intimate wear with premium lingerie, sleep wear, sportswear and swimwear to its customers through its own stores and website.

Key Stats:

No. of EBOs: 4 | No. of MBOs: 1,000+
No. of SISs: 10+ (as on August 2016)

Target Customer:

The brand's target audience comprises women in the age group of 22- 45 years, who are now more mindful of international fashion trends and make decisions based not solely on fiscal values, but rather on their requirements and preferences.

Launch and Availability:

The collection launches in September 2016 and will be widely available across all exclusive stores and leading outlets across the country. The collection will also be available on www.amantelingerie.com.

FESTIVE CHARM BY CORNELIANI

PROFFERING A VIBRANT COLOUR PALATE, THE ASSORTMENT RANGES FROM A MULTITUDE OF STYLES AND PATTERNS. A PLUSH COLLECTION OF JACKETS, SILK SCARVES, TIES AND CUFFLINKS THAT EVOKE A LUXE APPEAL, CONCEIVED TO ENHANCE AND COMPLEMENT THE GENTLEMAN'S CLOSET WITH A DASH OF STATEMENT. CORNELIANI CREATES REASSURING DESIGNS WHICH ALWAYS HAVE JUST THE RIGHT DOSE OF CREATIVITY. THE DESIGN TEAM BELIEVE THAT MODERATION SHOULD ALWAYS REIGN SUPREME, ALTHOUGH SOME DEGREE OF VANITY IS PERMITTED.

"The latest collection is dynamic, has contemporary form of elegance which increasingly features materials and details. This is in sync to the fashion that a stylish contemporary man likes to follow."

— Sales Grover,
Business Head, OSL Luxury Collections Pvt. Ltd.



The Brand

Tradition, quality and modernity... Corneliani stands out for its values of tradition and quality that – together with its modern brand – makes it a world landmark in men's elegance. Designed for the demanding, fashion-conscious man, it combines the most refined fabrics with tailoring details into a lithe, graceful look. The brand has a long history of bringing innovations and new styles into men's wear segment.

Key Stats:

No. of EBOs: 2 (Delhi & Bengaluru)
Area Covered: 7,200 sq.ft.

Target Customer:

The brand's focus customers are global travelers and those who are well aware of the latest styles and fits, which results in increase in demand of such products in luxury segment.

Launch and Availability:

The huge range of tuxedos, ceremonial/sartorial collection, carrying shawl collar, notch collar, and three piece tuxedos from the latest collection will be available at the exclusive stores. Corneliani focuses on customer service by marketing the brand as per international brand standards and ensures to give a high quality customer service.



A/W 2016 COLLECTION BY DEAL JEANS

THE RECENTLY LAUNCHED A/W'16 COLLECTION IS A BLEND OF FRESH PASTEL HUES AND TRENDY PATTERNS CRAFTED IN 14 CATEGORIES, RANGING FROM LEATHER JACKETS TO CARDIGANS IN TOP WEAR, STUDED DENIMS TO COMFY CULOTTES IN BOTTOM WEAR AND STRIKING DRESSES IN PARTY WEAR.

The team plays a crucial role in every style crafted in product portfolio as they keep travelling and exploring international trends and then conceptualises the collection. – Design Team

“Our values of positivity, freshness and authenticity have been put into practice by crafting vibrant and quirky collections for the world of fashion.”



– Sameer Patel,
Chairman and Managing Director, Deal Global Fashions Pvt. Ltd.

The Brand:

Deal Jeans is a fashion empowerment that women use to bring out the most defining aspect of their personality. The brand aims to help express the innate desire of every girl to be in-trend and making her fashion sense speak her mind out.

Key Stats:

No. of EBOs: **3** | No. of MBOs: **1,200+**
No. of SISs: **35** SISs in MBOs and **52** in LFS
No. of LFS : **123** | Annual Turnover (FY 15-16): **₹102 crores**

Target Customer:

The brand's core target is women, in the age group of 18- 35 years and girls in age bracket of 6- 16 years, who are mainly fashion seekers with a lot of style, attitude and flair.

Launch and Availability:

The Autumn/Winter 2016 collection is made available to our customer base through various distribution channels in 1,200+ retail stores and leading online portals.



Designer, Hussain Basha

PRETTY WONDERLAND BY DE MOZA

PRETTY WONDERLAND IS COLLAGE OF FLORAL MIRAGE, ANIMAL MAGIC, LOVELY LACES WITH GEOMETRIC AND INDIGO PLAY IN SEASON COLOURS AND SILHOUETTES, LIKE WIDE LEG BOTTOMS, CROPPED LENGTH TROUSERS, JOGGER PANTS AND LEGGINGS.



"Pretty Wonderland takes us to a different land of fashion basics with trendy silhouettes and modern colours and prints. The response from our customers are very positive and we are looking for a great season."

— Agnes Raja George, Managing Director, De Moza

The Brand:

De Moza offers everyday fashion basics for modern women and kids. The range covers trendy silhouettes to modern fabric blends with vibrant colours and prints.

Key Stats:

No. of EBOs: **14** | No. of MBOs: **20** | No. of SISs: **12**

No. of LFS: **30*** (as of August 2016)

Annual Turnover (FY 15-16): **₹5 crores**

Target Customer:

De Moza offers everyday fashion basics for the upper class modern women in the age group of 20-30 years, who are aware of prevailing trends and how to present themselves at every occasion.

Launch and Availability:

Apart from De Moza stores in Chennai, Bengaluru, Hyderabad, Mumbai, Pune and Jaipur, the collection is being launched across India in Central stores, leading MBOs and online market places like Jabong, Myntra, Amazon and Flipkart.



Tie Dye your Festive

Although tie dye has been around for ages, it is one crafting trend that will never get old. Creating the colorful designs and unique patterns is a perfect activity that can be enjoyed by all. The designs are very simple and elegant to be worn on any festive and celebration With the touch of Colorful Tie dye patterns!!!!



TIE-DYE YOUR FESTIVE BY DESI BELLE

THE IDEA BEHIND THE FESTIVE COLLECTION IS COLOURFUL CRACKERS – HOW THEY CHANGE COLOURS WHEN THEY LIGHT UP IN THE SKY AND MAKES ONE FEEL HAPPY. TO ADD RICHNESS AND FESTIVE LOOK TO THE COLLECTION, A DETAILED GOLDEN. THREAD EMBROIDERY IS DONE. THE DESIGNING OF THE BRAND'S COLLECTION IS SPECIALLY HANDLED BY THE CMD, SHARMILA NADKARNI ALONG WITH THE DESIGN TEAM.

“Though tie-dye has been around for ages, it is a craft technique that will never go out of fashion. Creating colourful designs and unique patterns is a perfect activity that can be enjoyed by all. The designs are very simple and elegant to be worn on any festive and celebration with the touch of colourful tie-dye pattern.”

– Sharmila Nadkarni,
CMD, Re-Source World Exim Pvt. Ltd.

The Brand:

Design thinking at “Desi Belle” is the search for a magical balance between style and season. Clothes that fit, no matter what the occasion, that are smart and casual for office wear and elaborate enough to be worn at festivals. The mantra is to create affordable fashion for the ageless and self-confident women.

Target Customer:

Desi Belle’s festive collection comprises crop tops, kurtas, palazzo, pants, leggings, etc., which cater to ladies from 25 to 40 years of age.

VIBRANT & FESTIVE MEN'S COLLECTION

BY MANISH CREATIONS

KEEPING TO THE FESTIVE SEASON, THE CORE THEME OF THE COLLECTION IS A BLEND OF TRADITIONAL DESIGNS WITH A CONTEMPORARY FEEL TO IT. THE BRAND FOCUSES ON VIBRANT COLOURS, INTRICATE AS WELL AS QUIRKY DESIGNS AND AN OVERALL GRACEFUL SILHOUETTE.



"The idea behind this collection was to make it a celebration of the vibrancy and love for ethnic fashion in these festive months. We've kept the core Indian styles intact, while embellishing it with new-era vibes!"

— **Chaitali Rajpuria**
Head- Design, Manish Creations.

"We wanted to offer our consumers a fine blend of vibrant and upbeat colours before the start of the festive period. This upcoming season is very pivotal to us and we wanted to reach out to a lot more people with our new collections of sherwanis, kurtas, Indo-westerns and suits."

— **Sanjay Das**,
Retail Head, Manish Creations

The Brand:

The core of Manish Creations is to give Indian men a line of ethnic wear which are handcrafted to match their personalities and fashion sentiments.

Key Stats:

No. of EBOs: **40** | No. of MBOs: **400+**
Area Covered: **35,000 sq.ft.**

Target Customer:

Manish Creations is an exclusively male ethnic couture line, with the targeted customer base being the contemporary Indian men who believe in fashion that is youthful, vibrant and unique to their personalities.

Launch and Availability:

The collection will be available across all the stores in India from October onwards (which is a prime celebration month and includes the pan India wedding season).



FUSION BEATS BY MASHUP

FUSION BEATS, THE COLLECTION AIMS TO BLEND INTERNATIONAL TRENDS WITH INDIAN SENSIBILITIES, TO GIVE STYLE AND CONFIDENCE TO BOYS THIS FESTIVE SEASON. ENHANCED WITH SUBTLE DETAILING, THE COLLECTION IS IDEAL FOR FESTIVITIES, PARTIES AS WELL AS WEDDINGS.



"For Fusion Beats, we have taken inspiration from trendy European styles that young boys love, and sparingly combined them with ethnic elements like embroidery, prints and embellishments to match the tastes of both, parents and kids."

– Aman Motwani,
Product Development Head, Half Ticket Apparels

"Since the past few years, sales growth during the festive season has not been as per expectations due to various reasons. But the tremendous response we received at the pre bookings proved that even retailers are expecting a turnaround. There was a good pickup in retail sales and footfalls during Rakshabandhan, and it being the start of the festivities, the uptrend is here to stay. We are expecting a stellar performance this festive season due to improved consumer sentiment."



– Akash Motwani,
Director-Marketing & Sales, Half Ticket Apparels

The Brand:

MashUp is a new-age boys' wear brand that speaks of passion and leadership. With an aim to transform the fashion sense of Indian boys, the brand offers exclusive designer shirts for tween and teen boys.

Key Stats:

No. of MBOs: **870** (as on August 2016).

Target Customer:

Our customers are fashion-forward parents of grown up boys from 6-16 years, who like to keep up with trends and are constantly looking for stylish and unique options for dressing.

Launch and Availability:

The entire collection 'Fusion Beats by MashUp' was showcased and pre-booked at CMAI's 63rd National Garment Fair held in July, at Mumbai. The designs are now available at over 870 leading kids' fashion stores across India.



FESTIVE AFFAIR BY MEENA BAZAAR

THE COLLECTION FOCUSES ON OCCASION WEAR AND PARTY ETHNICS WITH A LIGHT RANGE OF LAYERED GARMENTS WITH STYLIZED CUTS AND SURFACE EMBELLISHMENTS.

"The collection is curated keeping in mind the festive season ahead. Perfect for the weddings, celebrations and festivities."

— Sameer and Akshay Manglani
Head Design & Procurement, Meena Bazaar.



"The collection has the right mix of garments from kurtis, lehengas and anarkalis for the aspirational women of today. Price is also a benefitting factor for this as well."

— Sameer Manglani
— COO & Marketing Head, Meena Bazaar

The Brand:

Meena Bazaar offers the finely crafted and designed Indian ethnic wear range at the best price.

Key Stats:

No. of EBOs: **24**

Annual Turnover (FY 2015-16): **₹100 crores**

Target Customer:

The brand caters to brides to bridesmaids, friends and families attending the wedding functions.

Launch and Availability:

As the festive season is approaching, the procurement is already underway and will be available at Meena Bazaar stores pan India. The collection is also available online at www.meenabazaar.com on made to order, with worldwide shipping service.



YANA-BY SOCH

YANA ENCOMPASSES A SPECTACULAR RANGE OF STYLISH ANARKALIS AND CHURIDAR SUITS. THE COLLECTION EXHIBITS BOLD YET ELEGANT PIECES WITH FLORAL EMBROIDERY, BROCADE, STONE, THREAD AND EXQUISITE ZARI WORK. FEATURING ALLURING COLOURS AND DESIGNS IN COMFORTABLE FABRICS SUCH AS GEORGETTE, CHANDERI, GLOSSY SATIN AND COTTON-SILK, THE EXHAUSTIVE COLLECTION EPITOMIZES MODERN READY TO WEAR OVERALLS WITH CHIC FEMININE DETAILING LIKE PEARL AND STONE EMBROIDERED LACES AND ZARI EMBROIDERY WITH DUAL COLOUR STONE WORK.

The Brand:

Soch is one of the most loved ethnic brands in the country, designed for the modern Indian woman. The brand has redefined traditional Indian outfit for women of all ages, who effortlessly balance work and home, while still looking their best. The brand offers a wide range of stylish and elegant designer ethnic wear like sarees, salwar kameez, kurtis, kurti suits, readymade blouses and bottoms.

Key Stats:

No. of EBOs: **67** | No. of MBOs: **2**

Annual Turnover (FY 2015-16): **Over ₹250 crores**

Total Area Covered: **1.5 lakhs sq.ft.**

Target Customer:

The brand's target audience falls under the age bracket of 16 to 60 years.

Launch and Availability:

The collection is available at all Soch outlets and on www.sochstudio.com. The company has 70 stores across India at convenient locations in Bengaluru, Mysore, Mangalore, Hubli, Chennai, Coimbatore, Cochin, Hyderabad, Vijayawada, Belgaum, Visakhapatnam, Gulbarga, Mumbai, Thane, Pune, Kolhapur, Lucknow, Indore, Bhopal, Patna, Cuttack, Delhi and Nellore.



"This year, we had a quintessential European men's wear collection fused with details of some oriental sensibilities. For a brand which has suits, blazers and trousers as their core offering, we noticed a major upward movement in demand for European men's fashion, fused with our own Indian taste of details."

— Mazhar Khan

Design Head, Success (Agwani Fashion Pvt. Ltd.)

A/W 2016 COLLECTION BY SUCCESS

THE ENTIRE COLLECTION HAS BEEN MODELLED ON A 'MR. SUCCESS', AN AGENT OF FORTUNE; HE IS SOMEONE WHO IS PERFECT IN WHATEVER HE DOES, AND HIS APPROACH TOWARDS BUSINESS OR LEISURE IS BALANCED. A WELL-TRAVELLED AND SUCCESSFUL MAN OF DEEP ROOTED INDIAN DESCENT, HE POSSESSES A COMPOSED SOUL WHO DOES THINGS IN STYLE TO ATTAIN PERFECTION. ALWAYS KEEPING HIS CALM, HIS DRESSING STYLE COMES OUT OF HIS SELF-APPRECIATION AS HE SMILES QUITE OFTEN, KNOWING THAT HE WINS EVERYDAY WITH POISE.

"I think the world's attitude towards masculinity have really progressed. The idea of the 'proper man' has gotten less defined, less restricted. Men have become so fashion-conscious that they are now outspending women. Our sole purpose is to educate them about self-appreciation in terms of fashion and using the right media of communication at the right time, at the right places."

—Rajnish Sethia,

Director, Agwani Fashion Pvt. Ltd.

The Brand

Success, having started out in 1996 as a trouser manufacturing company, has come of age, assembling a man's complete wardrobe, consisting primarily of suits, blazers, jackets, waist coats, shirts, trousers, denims and accessories broadly classified into formal, casual and party-wear segments. As a brand that promptly adapts to fashion, it has stood its ground firmly and has also evolved with each passing milestone.

Key Stats:

No. of EBOs : 25+

No. of MBOs: 375+

No. of LFS : 43 including Brand Factory and Central Mall

Target Customer:

The brand targets men from age of 20 years and up; who have a sophisticated taste in garments. The customers with 'mature' taste continue to stick to basics with western formal wear or basic casuals while the youngsters are making their presence felt with newer details, colours and cuts. Understanding and serving customers is a continuous learning process.

Launch and Availability:

We have already launched the new collection at our exclusive outlets which continues to be distributed on an 'exclusive collection' basis.



INDIA'S HOME FASHION MARKET

The total retail market for home and interiors is worth ₹1,15,000 crores. It is growing at 12 percent and is expected to be worth ₹1,81,000 crores by 2020. Modern retail is estimated to be 20 percent of this total market and is expected to grow at a rate of 25 percent.

- JORRS Research



India is a country with close to 400 million urban dwellers. The demand of home and interiors items for such a large number of urban houses alone, is huge. Add to this, the rural population's basic requirements of bedding and home textiles and the Indian home market appears unfathomable. The country with 1.3 billion population is not only a big demand market but also a strong supplier of these items as well. Globally, India is known for its wide variety and exquisite designs in home textiles and furnishing fabrics. The country is home to some of the world's biggest producers in the segment, like Welspun (third largest towel producer), Trident (largest terry towel producer) and Dicitex (Fifth largest furnishing fabrics producer).

Many Indian brands like Indian Drape, RR Décor, F&F, Maspar, Goldtex, ABN, Portico New York, Birla Century, Spread, Swayam, MYCK, Zyne and Super Net, etc., are recognised nationally and are growing at a healthy pace. A large number of international brands like Zimmer+Rhodes, Designers' Guild, Esprit Home, Harlequin and United Colors of Benetton have also experienced healthy growth in the Indian market. Not only that, but centres like Mumbai, Thane, Delhi NCR, Ahmedabad, Jaipur, Panipat, Karur, Bhadohi, Kunnur, Coimbatore, Bengaluru, Raipur and Kolkata together provide a wide range of products in home textiles like, bedsheets, bed sets, top-of-the-bed lines, towels, upholstery fabrics, drapery, table and kitchen line and other household textiles. These centres are home to many key manufacturers, retailers and importers.

FASHION DRIVING HOME PRODUCTS MARKET

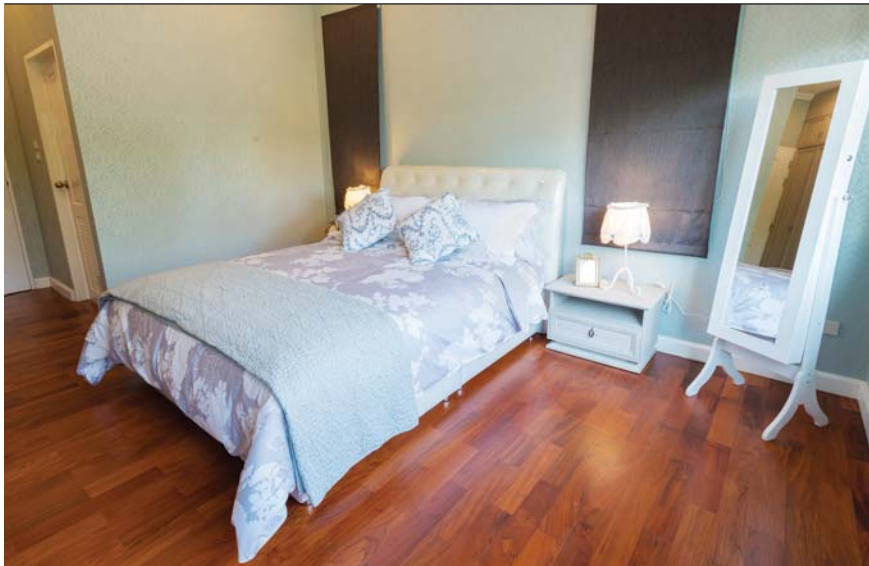
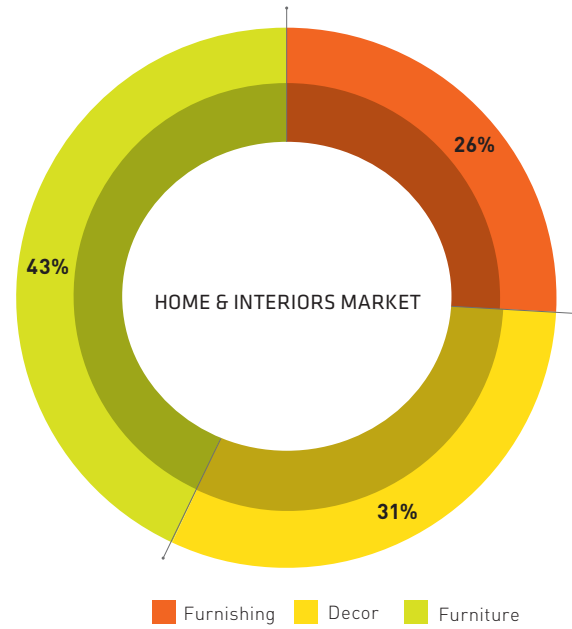
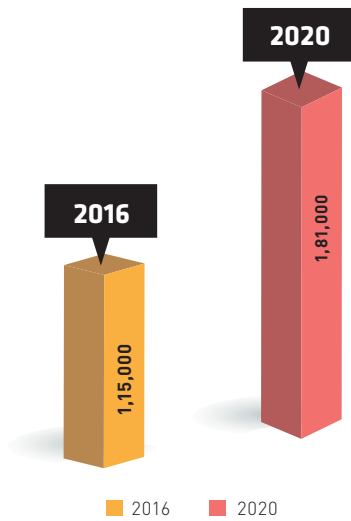
The fashion aspect in home and interiors segment is blooming. Growing home fashion has boosted the sale of furnishing, decor and other home products including furniture, home

paints, lightings, flooring, tiles and sanitaryware. Thus, fashion element is not confined to soft home products anymore but has penetrated into hard home products as well. Soft and hard home and decor products together make a compelling fashion statement for an average Indian home these days. Consumer perception is also changing. It is being realized that products like curtains are not just a fabric to cover doors and windows but rather, a style statement that goes a long way in embellishing homes. This has inspired players in the segment to think differently and today, one can easily find value addition in home textiles and fabrics, which provide special effect and that much needed X factor to home interiors. This different thinking has further incorporated colour and design aspects to enhance value addition. Owing to this evolution, home fashion consumption in India is growing at a good pace and now has the potential to gather higher momentum. One of the restricting factors, however, is lack of modern retail infrastructure to support this growth, as is being observed by the experts.

BRANDED PRODUCTS IN DEMAND

Although brand preference in home products is not that big a market yet, but the growth of modern retail has helped in pushing demand for branded products in the segment for sure. Although consumer is still not as brand loyal in home segment as he is in apparel or footwear, yet the branded market within the segment is expected to gather much faster growth compared to unorganized home segment. This will become possible with increased availability of branded products at competitive prices. This is the reason why consumers have started patronizing speciality stores for home

HOME MARKET (₹ Crores.)



and sanitaryware and lighting where presence of brands is very strong. The consumer is aware of involved brands in these product categories and has certain trust in them as brands ensure high durability and design aspect. Among branded products, the market is still ruled by domestic brands, which enjoy higher market share against international brands, which bank heavily on premium products. Despite smaller market share, international brands seem to grow relatively stronger purely relying on 'premium' factor in their offering.

Direct access and deeper penetration have been further fuelled by online retailing. The online channel has significant contribution coming from home textiles and furniture, which provide these products at lower prices.

fashion which, in turn, have geared up to showcase a wider variety of products to choose from. The retail outlets selling home fashion merchandise exist across the country and enjoy deeper penetration and direct access to various consumer segments. Direct access and deeper penetration have been further fuelled by online retailing. The online channel has significant contribution coming from home textiles and furniture, which provide these products at lower prices.

The branded home fashion market seems to have taken a cue from branded players in home paints, bathroom

Euromonitor reported that the share of internet retailing in India's home fashion and related products were almost negligible in 2015 whereas, home retailers in brick and mortar mode accounted for a dominant 75 percent value share in 2015. Internet retailing lost the competition due to low sale of home improvement products like tiles and sanitaryware which require additional work of installation at a consumer's home. The brick and mortar players benefitted on this aspect and stayed ahead in the competition. The report also revealed that organized players in furniture market possess less

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ANTI GRAVITY

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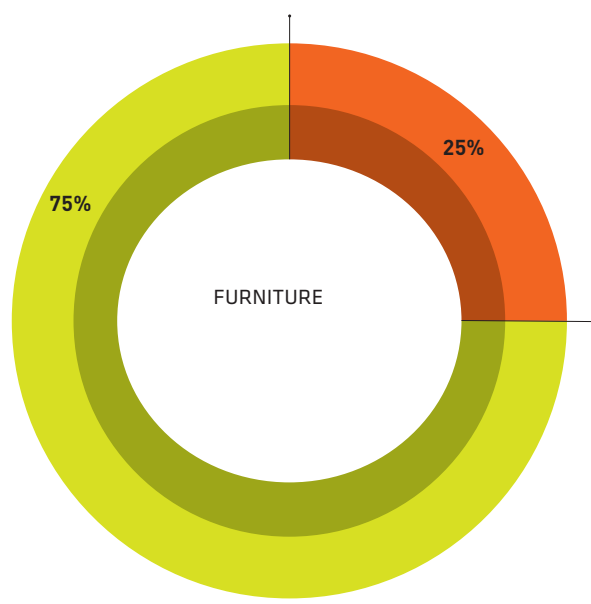
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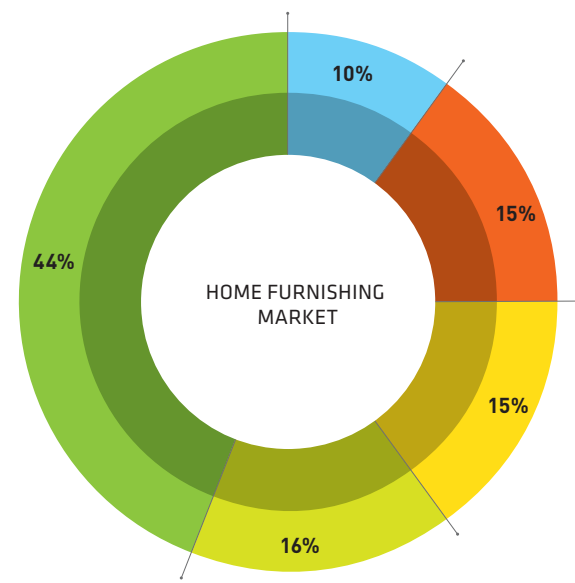
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fashion. Entry of branded products and international retailing brands like IKEA has expanded consumers' awareness level which has resulted in consumer now spending more time on browsing and selecting products. This has allowed the importance of quality and design in home fashion to grow in the mind of consumers, unlike earlier days when consumer was content with functionality and price aspect of the products he used to buy. Going by this trend, the market will see healthy growth in premium home fashion products which epitomize quality and design.

Entry of branded products and international retailing brands like IKEA has expanded consumers' awareness level which has resulted in consumer now spending more time on browsing and selecting products. Going by this trend, the market will see healthy growth in premium home fashion products which epitomize quality and design.

than 10 percent share and that too in tier I and -II cities only. Probably this was the reason that many furniture brands listed their products with online retail stores recently to expand their reach.

CHANGING CONSUMER

Consumers are driven by increased disposable incomes and growing urbanization which has given much required impetus to the demand for premium products and brands. The Indian consumer is now more inclined towards home improvement and has moved up from essentiality to lifestyle aspect in his quest for home

The perception with regards to pricing is also changing. Consumers, are today, willing to spend 10 times more than what they used to spend 5 years back, whether it is home soft products or hard products. Indian consumers, today, are better aware of the various sub-segments within each furnishing and home textile product segment; therefore, brands will have to keep innovating to attract and retain customers' loyalty. Consumers are willing to spend more money on home interiors and home decor, if they are convinced. However, from the point of view of marketing strategy, there are





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The affluent class of consumers is going for more refined and international taste in home products which has high quality, better designs and colourful varieties.

At the same time, mid and economy class of consumers are driving volume sales of products which are competitively priced to suit their budget.

some key consumer segments which home players need to focus upon. The affluent class of consumers is going for more refined and international taste in home products which has high quality, better designs and colourful varieties. Such class of consumers do not find high price as a deterrent. At the same time, mid and economy class of consumers are driving volume sales of products which are competitively priced to suit their budget.

Home segment is also getting proactive on environmental issues and is gearing up to come out in support of this global concern. With growing awareness towards environment, safety, hygiene and functionality, the demand for better quality home textiles with features like stain-resistance, flame retardant, fragrance, etc., is increasing. Consumers are seeking unique and environment friendly products, which is an emerging market.

FURNITURE – KING OF THE SEGMENT

The highest contributing category in home segment continues to be furniture. However, notable point of the category is that small furniture items continue to sell more than big furniture items; the share of their contribution being three-fourth in the overall furniture market. The trend is gaining momentum with increase in online shopping. Consumers prefer shopping small furniture online because one, it costs lesser than in speciality stores; second, prices can be compared instantly without hopping from shop to shop and third, such items are free from installation and fitting or fixing drills. No wonder, with an increase in online retail sales, top furniture brands find it wise to list their products on shopping websites and marketplaces. From consumer perspective as well, buying big and heavy furniture makes sense if it is localized. The localization helps in product customization and after sale service tremendously. A later date servicing or consultation becomes convenient. Moreover, spending on high ticket big furniture items is one-time opportunity and thus demands ready and quick solutions to all concerns which the online medium is unable to provide as of now.

FURNISHINGS – PRESSING MARGINS

The category of furnishings is growing and not much of a change in the trend has been observed except in profit margins. The profit margins are under stress more due to increased competition from online sales than cost related issues. The major competition has come from online sales which thrive on discounts and deals, spoiling consumer discipline in relation to MRP. With heavy discounts,

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MACHO

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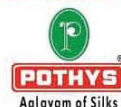
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Almost half of home furnishing sale comes from bed linen and according to industry reports, the product category has great potential. The market share of branded bed linen is very low. Since Indian consumers are increasingly aspiring for high quality branded products across all categories, bed linen will be no exception.

consumer expects better deals, which eventually affect profit margins of the category. The items involved are also not that highly priced to yield sustainable margin value in return. If the store selling furnishings with low profit margin happens to be a large sized store with higher operating expenses, then the business faces huge challenge. The industry is still hopeful of regaining the lost margins through smart mix of imports.

BED LINEN: AN IMPORTANT CATEGORY

Almost half of home furnishing sale comes from bed linen and according to industry reports, the product category has great potential. The market share of branded bed linen is very low. Since Indian consumers are increasingly aspiring for high quality branded products across all categories, bed linen will be no exception. The category will see good quality brands in near future. The industry also reports that a small but upcoming trend is also visible towards fitted sheets. Demand for comforters and quilts is also growing. Earlier, bed sheets were preferred in prints, a trend which is changing now, though gradually. Consumers now seek more variety, more functions, luxurious feel, better health, eco-friendly products and innovative features. The market has witnessed consistent price rise in the

bed linen segment over the years which is expected to stabilise but category growth would still be around 25 percent. Today, bed linen has become a fashionable product.

WAIT AND WATCH

Growth of home segment is directly related to real estate, which witnessed a steep fall in 2015. The sector saw slow growth last year, reasons for which were observed on both fronts: On demand side, there was an expectation of reduced interest rates on home loans as well as lowering of market prices which did not happen as expected, resulting in decline in home demand resulting in unsold inventories of houses. The situation was further compounded by suppliers and builders on supply side, by not lowering the home prices under the anticipation of revival of market sooner or later. The anticipation was primarily based on India's economic upswing given the country's improving position in the international market.

Therefore, the Government of India is expected to take appropriate measures to contain volatility in the market, decrease real estate prices and improve the real estate situation in the coming days. In addition, the GDP growth of India is expected to outperform BRICS countries going forward, which is expected to bring positive sentiment to the country. Improvement in the real estate situation coupled with strong economic growth is expected to drive the home and furnishing industry in India.





HOME IS WHERE THE HEART IS

The residential real estate industry has experienced growth in the last few decades. The home real estate industry is further driving the growth of the home décor market. Many families are now buying their first homes or getting their existing ones upgraded. There is an increased consciousness of good home design among the owners, spurring a growing interest amongst them to make their homes look beautiful. IMAGES BOF takes a quick look at the current trends in home furnishings, especially with the festive season just round the corner.

By Zainab S Kazi & Tanya Krishna

Sanjay Gupta, Chief Marketing Officer, Urban Ladder shares, “One of the factors that has contributed to this growth is that people have started taking their home as the reflection of themselves and so, a lot of people are now spending more on both furniture and fixtures and also on home decor. The second big change seen is that working women are spending a lot on home fashion. A lot of our customers are working women.”

Sandeep Ganguli, Vice President -Commercial, Durian, adds, “Factors like rise in disposable income, better education and also the growing trend of individuals opting for professional services to do their interiors have together led to a rise in this category.”

Reteish Sharma, Director, Zynna, is of the view, “Indians are well travelled now and have an exposure to the lifestyle in other countries which they want to have for themselves.”

It is not just Bombay Dyeing and Wellspun but more funky players like Chumbak and niche players like Masper, Tangerine, etc., are expanding their reach across the country, which speaks volumes about the growing

need in the market for the organized players. The online home furnishing segment too has grown rapidly over the years and is expected to gain more prominence in the coming years. Every online portal has a devoted section for home furnishings and during each festive season, we see healthy discounts and promotions around this category.

On what makes this category so dynamic, Vivek Prabhakar, Chief Executive Officer and Co-Founder, Chumbak, shares, "More than a couple of

factors seem to have come in play to see this growth. The biggest is the growing middle class getting exposed to global home trends with many international brands becoming accessible online. Also people are using a category like home for self-expression which was previously done through fashion. The rise of so many home brands and marketplaces, is a clear indication of this trend."

Bedraj Tripathy, Associate Vice President, Integrated Marketing Communications, Godrej Interio, adds that apart from the reason related to the rise in disposable incomes, the change in demography too is leading to the growth being witnessed by this category. Explaining this further, he shares, "In the demography pyramid according to family incomes, there is a high growth in middle class families than the lower and upper class. We find the middle class to be around ₹48,000 crores as compared to upper, which is at ₹7,000 crores and the lower ₹10,000 crores. Also, the average age of a buyer has changed from 45 years to 37 years over the span of last 5 years."

Sharing a forecast on the size at which this industry is slated to grow, Sanjay Gupta revealed, "The home market is worth about USD 20 billion; in that, furniture contributes to 75 percent and decor and the rest is 25 percent."

Vishal Jain, Business Development Head, Skipper Furnishings, says that by 2018, the home furnishing market in India is expected to grow at a CAGR of 8 percent to reach USD 5.29 billion. According to him, "China, India and USA, in that order, are the largest markets for home furnishings globally. With advent of real estate, the growth in this industry is unbeatable."

Buying Patterns

Unlike clothing which has now picked up off the shelves without any specific need in mind, major chunk of home furnishing shopping happens either during setting up a new home or during the festive season.





During rest of the year impulse purchases become a key trigger but during the festive season people have specific buying plans. Thus we ensure to announce various season driven offerings."

-Vivek Prabhakar,
CEO & Co-Founder, Chumbak.

Ganguli shares, "Festive period is extremely important in India. Most of the purchases are done during this time as it is considered auspicious. Generally during festive time like Diwali, Navratri, people look forward to re-decorating their houses and buying new furniture, especially so in North India. So, the market gets a boost during this time."

Prabhakar opines, "During the festive season, home furnishing takes on a whole new dimension as it is a category that is perfect for gifting. It is also an investment customers want to make for their own homes, as this is the time when they wish to brighten up their homes with something new. During rest of the year impulse purchases become a key trigger but during the festive season people have specific buying plans. Thus we ensure to announce various season driven offerings."

The Indian consumer is not only price sensitive, but quality sensitive as well — especially when it comes to the home design segment. Adds Tripathy, "Customers are purchasing throughout the year and not only during specific seasons. The design savvy audience is also emerging who are more concerned

about the overall product/service offerings than the price discounts being offered."

Getting Across the Message

Promotions and discounts offered plays a major role in the way India shops. Ganguli of Durian shares, "We promote our products during the festive time through various ATL (print) and outdoor activities."

Sharma shares, "Even though a minimal amount of marketing is carried out during the festival season, we believe in promoting a lifestyle change — showing more luxury, abundance in every house." On the factors that differentiate Urban Ladder from the others, Gupta explains, "Urban Ladder is slightly different from the others. We launch new ranges during the festive season than offering discounts, and we tend to do it across our core categories."

Tripathy believes in tapping the sentiments of the season and providing offers they cannot refuse. He elaborates, "We try to attract more customers through various programmes (themed) and exciting offers. We provide better opportunities to our existing customers



for repeat purchases. Not only so, we also prop-up our retail stores according to the festival for better visual ambience and appeal.”

Something similar is also done at Skipper Furnishings. Vishal Jain shares, “The main emphasis while making our marketing plan is on giving customers maximum benefit. We run our discount campaign called – ‘Furnishing ka Mahamela’ during the festival season and offer discounts up to 50 percent. Advertising, be it print, outdoor, or door to door, gives further boost to our activities. Furnishing ka Mahamela is Skipper Furnishing’s own festival which receives good response from the customers.”

Category Calling

Where soft furnishing is witnessing a considerable interest, the market for home furniture still rules the game. According to Sharma, roughly 50 percent of the home industry would be of the home furniture as people still look at investing in furniture that would last them for twenty years. He shares, “The soft furnishings would also capture 35 percent of the market which is a substantial increase and the home décor would be the remaining 15 per cent.”

“In Urban Ladder, furniture contributes to about 95 per cent and the remaining is made up by home furnishings and decor,” says Gupta.

According to Shastri, “In India, most of the people are willing to spend on furniture and furnishings than any other home decor products. Around 60 percent of the Home Industry in India would be of furniture, 30 percent would be of furnishings and remaining 10 percent would be of other home decor products.”

Of Themes and More

For those who are into shopping via groups on Facebook, it isn’t difficult to spot the trend on the themes in vogue. While there are customers who go for digital printed bedsheets and covers, there are equal number of customers wanting hand-embroidered soft furnishings. There is a healthy offering for kids as well with cartoon printed bedsheets, covers and blankets. Ganguli shares the trends saying, “Modern, contemporary and minimalistic designs are preferred more now.”

Jain explained that betting on trends that would do well is difficult as the dynamics are very uncertain. Though, he feels that in the Indian market, floral and damask always work. He shares, “We have a dedicated team of designers who do a thorough research before coming up with a theme and get inspired from around the world. Lately, we have come up with English, tribal, ethnic, Mughal and pop themes and they are doing pretty good.”

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-Reteish Sharma,
Director, Zynna.





“People are shifting their focus from just products to different use of materials and finishing. In line with this, overall we keep designing products around different themes to cater to different users’ tastes.”

-Bedraj Tripathy
Associate Vice President, Integrated
Marketing Communications,
Godrej Interio.



“Chic furnishings are in trend these days. Our designers are working with warm but calm colors that are complimented by natural textures and soft shapes. Adding to the richness of design will be the beautiful florals, cheerful chintz and delicate damask.”

-Ramachandra Shastry
Director, Rumors Fine Furnishings.

Sharing his take on how Indian themes are giving way to more of Western designs, Sharma shares, “The typical Indian themes are a little passé these days. Now we are moving towards European look- either a classical or a very minimalistic chic look. It can also be the Italian chic look or the French Louis XVI look, which is very theatrical. Shabby chic theme is also very popular which promotes mixing many themes like having an opulent chair on one side and a rugged look on the opposite wall.”

Talking about furniture, Gupta shares the trend saying, “Two themes are coming up which are being promoted a lot. One is minimalist furniture; more and more people are going for what they call open furniture. The second is color. Initially, furniture used to be all brown but now whites and creams are taking over, which typically used to be more western.”

Talking about furniture trends, Tripathy feels it is more about variety than any specific theme. E.g., South and East region are more towards heavy wood furniture with traditional designs. He adds, “On the other hand, we have customers who are more inclined towards contemporary and international themes with minimalist design and straight lines. People are shifting their focus from just products to different use of materials and finishing. In line with this, overall



we keep designing products around different themes to cater to different users’ tastes.”

To this, Shastry adds, “Chic furnishings are in trend these days. Our designers are working with warm but calm colors that are complimented by natural textures and soft shapes. Horticulture inspired furnishing, traditional layouts and prints are some of the latest trends this season. Adding to the richness of design will be the beautiful florals, cheerful chintz and delicate damask. On the whole, glorious colors and uncontrived elegant patterns are emerging popular in demand. “





Prabhakar who is more into home decor solution adds, “Chumbak is mostly known for the themes we portray through designs and illustrations. Food, travel, animals, floral and type related designs have been the most popular and work best for us. We continue to refresh illustrations amongst these popular themes whilst constantly adding newer themes that are in trend. For us, this year, art deco, animal themes and dip-dye was really big and this can be seen across our home and décor collection.” He informs, “Before each season, the design and sourcing team

home.” Tripathy adds, “Space utilization also plays a strong role in deciding the themes. We have themed offerings in our portfolio and this also varies with different spaces in the house. Overall we have observed, people often like contrasting themes in different living spaces in the same house.”

At Skipper, the brand is running a brand campaign called “Yeh Mera Room Hai” which basically delivers a message. Jain shares, “We have a wide range of products specially designed to match your personality.”

Involving Local Artisans

With modern and organized retail spreading itself across the country, the fear of traditional retail and small mom and pop stores being wiped out was far and large. Though, the trend we witness today is that both of them coexist and compliment each other. The same applies to this category as well. Where we have some industry experts debating on the fact that with more and more brands coming in, the local artisans involved in painting/embroidery/carpentry, etc., will be wiped out, there are other who think that the growing demand for soft furnishing shall instead help them grow better.

Tripathy says, “This situation is like a double edged sword. As an organized player we try to organize the unorganized market, which includes skill development in the present artisans’ base in the country. Godrej as a company believes in inclusive growth. Godrej Interio’s U&Us Design Studio provides customers with custom and tailor made interior and furniture solutions. For this we have developed teams of carpenters who are trained by us, provided with better tools and equipment and workshops have been set up. This is one of the examples of inclusive growth which we believe in.”



sit together, research global trends and plan the look for the next season. Based on what we believe will be the trending themes, the designers then work on their interpretations of these themes.”

Gupta brings forth an interesting change being observed in the furnishing of each room within the house. He shares, “Kids are becoming more demanding with growing awareness. There is also a great demand for the home office themes as a lot of people are working from

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“Many brands are obligated to give minimum wages and good working environment to its employees. So, whenever an industry gets organized, it is for the good as then you cannot exploit people.”

-Sanjay Gupta
Chief Marketing Officer, Urban Ladder.



“Organized retail format particularly of this industry would never have any harrowing effect on the traditional artisans because in the back end they are the ones who work and would always work.”

-Vishal Jain
Business Development Head,
Skipper Furnishings.



Going Organic

Organic clothing has got its niche set of customers and the trend is being witnessed in home furnishing as well. Sharma elaborates, “There is a lot of trend towards natural fibres like linen. We are working on a lot of projects with linen as it gives a very chic, sensual and interesting look for the house.”

Gupta talks about the use of organic/home grown merchandize/fabrics at Urban Ladder. He shares, “We are very conscious about home grown products; and so, our largest product line comes from Jodhpur, Jaipur, which is where the business started. In the fabrics that we put on our sofas, we tend to use organic cotton.” Jain talks about how they have put to use various techniques on their fabric like tie and die, kantha, block print, hand embroidery which are home grown. He shares, “Customers love these prints and always demand which shows that they are well promoted.”

Jain shares, “Organized retail format particularly of this industry would never have any harrowing effect on the traditional artisans because in the back end they are the ones who work and would always work. If I talk about hand embroidery, no machine can

replace that and it is always going to be in demand. So, with the growth of this industry, people involved directly or indirectly would also grow.”

Sharma makes a valid point on the sustainability of the artisans, “It depends on how these artisans are used. If we use them solely for developing the traditional art, it may not work out. However if we use these artisans for mixing these traditional ideas on new blended fabrics it may work out. If we do a traditional screen printing on a polyester sheer, it may really bring a new feel to it and at the same time use their art.” Prabhakar adds to this, “It depends on the approach a brands want to take. At Chumbak we too have worked with local artisans on some of our categories and the results have always been very encouraging. And we believe that our in-house design team themselves have so much to learn from local techniques and are able to bring a lot of this into the kind of designs we create.”

Gupta sees a pattern of give and take. He shares, “Many brands are obligated to give minimum wages and good working environment to its employees. So, whenever an industry gets organized, it is for the good as then you cannot exploit people. On one



“We look at the entry of IKEA as positive and healthy competition, which will only lead us and other Indian players in this segment to perform their best.”

-Sandeep Ganguli,
Vice President -Commercial, Durian.

side, there are shopkeepers who used to hire 2-3 carpenters and make them work for 24 hours, on the other hand, there is a branded factory, like for instance Urban Ladder, who have a label and they follow labour laws, etc. So, in general, an organized industry is always better. If an industry is organized, it is better for the skilled workers because then the skill is fully valued.”

Retail Space

Customers prefer shopping under one roof and the pattern isn't any different for the home sector. Tripathy talks about his experience based on Godrej Inferio, “Malls attract higher footfalls as compared to home fashion stores. However, the rate of conversion is very low which is the case for any mall outlet. Even at lower conversion, the sales are equitable to par or above par compared to other standalone stores.” Jain is of the opinion that home fashion stores perform pretty well in the malls. He reasons it out stating, “As the foot fall in malls are very high in comparison to individual outlets so the probability of walk-ins in the stores automatically rise.”

Shastri shares, “Home furnishings sector would always want to work independently rather than being occupied in a mall or so. Whereas,

home decor products work well at malls as the customer does not demand for customization of products and purchases whatever is displayed and is liked by them.”

International Invasion

IKEA, the global leader in home retail, with a presence in 27 countries and a whopping €28.7 billion sales turnover (in 2014), has entered India and is all set to start operations next year, with its first store in the country in Hyderabad. Will this have an effect on Indian players in the segment? Ganguli takes this as a blessing in disguise. He shares, “We look at the entry of IKEA as positive and healthy competition, which will only lead us and other Indian players in this segment to perform their best.”

To this, Gupta adds, “IKEA makes very aspirational furniture. Once IKEA comes in, home fashion and furniture will gain more popularity. It would be similar to the entry of Zara in the Indian market, which made fashion more popular. Apart from that, IKEA has a good catalogue in small things like cup holders, plates, etc. And even globally, 50 percent of their business comes from these items and only 50 percent from the furniture like sofas, dining tables, etc. I think the overall industry will grow and the good players will become better and the players who are not conscious about what can change, might find it difficult to survive.”

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Tripathy too welcomes IKEA's launch but makes an interesting point when he shares, "The market is 85 per cent unorganized, hence there is enough space for everyone to stretch by organizing the unorganized part. Also with IKEA in the picture, the overall competitiveness of the market will increase which will lead to better offerings by every organized player to stay relevant. With this the users will be truly benefit. Given the size of the market and the format in which different players are working, IKEA entering India will have different effect on different players."

Sharma feels that IKEA will affect the mid segment like in other parts of the world. Customers who are willing to spend more to get customised things would look for specific stores. However the middle segment will go to IKEA as they are assured of the quality and the ease of buying these items. He feels, "It will be successful in India as there is huge market for the middle segment."

According to Jain, the launch of Ikea shall not have an immediate effect in India but few years down the line, brands shall have to gear up. He explains, "IKEA is no doubt a huge brand of furniture and when it comes

to India it would try hard to dominate the market but here it's not that easy. Indian customers are very varied. They are usually very hard to predict. Indian players would not be affected for few years because understanding Indian market is a very difficult task. But Indian companies would have to come with extraordinary policies and strategies to compete with IKEA in next 5-10 years. Well, it is always good to have next level competitors to ensure our growth."

Moving Ahead

The home furnishing segment in India as we have noticed is growing and there is space for more brands to be accommodated. Players like IKEA shall change the game bringing in more of freshness and affordability thus pulling in more and more Indians towards opting for shopping in an organized retail format and opting for brands for their home furnishing needs. The market as of now is divided between players from the unorganized market who meet with the needs of SEC B and C and branded players who sell at a premium thus restricting their target audience to SEC A-, SEC A and SECB+.





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Chumbak: MAGNIFYING HOME DECOR

Chumbak was founded in 2010 by the husband-wife duo, Vivek Prabhakar and Shubhra Chadda, as an idea for creating a range of fun souvenirs for India and Indians. Chumbak is one of India's most promising lifestyle brands, that brings together an eclectic mix of fashion clothing, accessories and home decor with global design appeal, targeted at consumers worldwide. The brand was conceived at the time when there was an increasing demand for well-designed and crafted products that could be used as accessories but were not easily found in the market. What started with souvenirs stocked in multi brand outlets, soon transformed itself into a business spanning stores across the country in both large format, full experience stores and pop up stores across popular malls and high streets. A huge part of what Chumbak symbolises, is also driven by its philosophy to 'Make Happy'.

Market Presence

Chumbak retails in cities like Bengaluru, Delhi/ NCR, Chennai, Hyderabad, Kochi, Jaipur and Chandigarh. Apart



– Vivek Prabhakar,
CEO & Co-Founder, Chumbak

No. Of Employees:
80 APPROX.

No. of Doors Present In:
16

No. of States Present In:
8 STATES

No. of Cities Present In:
8 CITIES

Total Retail Space:
20,000 SQ.FT.



from this, the brand's online portal caters to most of the pin codes in the country.

Product Basket

The brand retails through two major categories – Fashion and Home. Under the fashion category, products include apparel, bags, footwear, wallets, watches, jewellery, etc. and as part of the home category, products on offer are wall art, clocks, vases, decor items, bed linen, dining accessories, furniture, etc. Furthermore, Chumbak also introduces new styles, designs and new products every month.

Business Dynamics

Chumbak recently won 3 awards at the VMRD (Visual Merchandising and Retail Design) Awards. Recognizing its potential and the immense growth since its inception, the brand was honoured with the Home Improvement – Speciality Store Award in the 9th edition of in-store award presented by Roland in 2015. It also became the first start-up to win the VMRD Award for Design in 2015 and 2016. The brand has also repositioned itself in the last year as a design led lifestyle brand that offers its customers, products under the fashion and home categories.

E-Commerce/ Omni Channel Initiatives

Chumbak has a successful brand website, www.chumbak.com. The brand has recently invested in technology to create a complete omni-channel experience which is expected to get operational in the coming months.

Customer Engagement

The home and lifestyle brand owns a loyalty program for customer engagement. Chumbak understands that customer experience is the key to business growth and thus, the brand is working to improve the same through various touch points at its stores, website and also through marketing initiatives.

Marketing & Promotion Strategies

For marketing and promoting the brand, Chumbak focuses mainly on in-store and digital advertising and also through promotions on social media along with other strategic partnerships.

Future Plans

Chumbak has plans to open more exclusive stores in the next financial year. Also, the brand is working on introducing new products, which happens every 2 weeks.





Godrej Interio: FROM STOREWELL TO LIVE WELL

One of India's largest furniture brand, Godrej Interio has travelled a long journey from manufacturing the humble storewell cupboard 80 years ago, to being a vibrant, innovative brand with a diverse portfolio. Godrej has sustained itself for years, on the pillars of trust, durability and quality. Be it collaborating with the best design minds internationally, co-creating with the haute couture artists or sourcing the latest in technology from across the world, the brand's team derives inspiration from a simple leaf to the most advanced technology in all its product categories. Godrej Interio works with emphasis on comfort and aesthetics while delivering well designed, fun and functional furniture solutions for its customers.

Market Presence

Godrej Interio has a wide reach pan India and also boasts of the largest customer base. The brand claims to be the market leaders in the category for the last 10 years. Godrej Interio have 11 formats for retail addressing every consumer segment spread across 490 EBOs and 2,000 MBOs. The experience across each of the 11 formats of retail is standard.

Product Basket

Godrej Interio's product basket has expanded over the years from just storewell cupboards to over 1,600 SKUs. The brand's each product is developed with user insight collected by a strong and dedicated team of designers. Godrej Interio is the only company in India to have BIFMA certification for both manufacturing process as well as products. The product categories include, home furniture and interior solutions, bedroom solutions, living room solutions, dining room solutions, storage solutions, kids furniture solutions, study furniture solutions, kitchen solutions, accessories, mattresses, customized hardwood furniture and interior solutions, and institutional furniture and interior solutions, desking solutions, seating solutions,

No. of Employees:
4,000

Total No. of Doors Present In:
EBOs: 490 | MBOs: 2,000

No. of States Present In:
29 STATES

No. of Cities Present In:
640 CITIES

Annual Turnover:
₹1,800 CRORES

Total Retail Space:
75,700 SQ.FT.

Average Bill/ Ticket Size:
₹52,000

Same Store Sales Growth Percentage:
15% YoY



— **Bedraj Tripathy**,
AVP- Integrated Marketing Communication,
Godrej Interio

storage solutions, modular office solutions, healthcare furniture solutions, laboratory furniture solutions, marine furniture solutions and 360 degree turnkey solutions.

Business Dynamics

Godrej Interio, has in its kitty, a number of awards and accreditations, which the brand has earned over the years. Recently, the brand was honoured as Asia's Most Promising Brand 2016, World's Greatest Brands 2015 Asia, Home and Lifestyle Retailer of the Year, to name a few. The brand is also working on a number of dynamics for a better business. Godrej Interio is working on a sustainability drive for its manufacturing units, in association with a large private sector interiors company, on e-commerce platforms for a better experience for the customers, etc.

Core Operations

Design— Godrej Interio claims to be the only brand in furniture which has a dedicated design and engineering team who study user aspirations and develop solutions for them pro-actively.

Manufacturing – The brand has distributed manufacturing bases at 5 locations across India, operating with 9 manufacturing facilities.

Marketing – The brand has a combination of direct (B2B) and retail (B2C) sales, touching lives of over 230 million people in India and is growing by 20 percent YoY.

Leveraging Technology

Technology is the backbone of the brand. However, it believes that technology can only enable the strategies that is developed in consonance with user needs. Godrej Interio has strong technology integration right from product design to development, to automation (including robotics) in manufacturing, to CRM platforms that collate user and buyer data to help develop predictive models and help in DSS. The brand is also working on implementing omni-channel experience for the customers and users.

Customer Engagement

The brand takes special care to involve with its consumers and work in different ways for customer engagement:

At Store Engagement Events: Godrej Interio organizes many at store events to have healthy user engagement. It also decorate stores during festivals and the whole staff celebrates with the walk-ins. The brand also conducts competitions and hobby classes such as cookery, stitching, etc., for an enriching user engagement.

Upload & Transform: The brand is on its fifth season of consumer campaign, “Upload & Transform”, where the consumers upload their living spaces, share their experiences, aspirations, concepts and some lucky consumers get the chance to actually see their homes transformed by Interio.

Social Media Engagement: The brand has a twitter handle named #HomeCanvas where all the design and interior lovers/enthusiasts can share thoughts, ideas, moodboards and concepts. Godrej Interio also keeps seeding articles, creatives and concepts on #HomeCanvas.

Marketing & Promotion Strategies

Godrej Interio have a 360-degree communication approach. It uses the 5E (Entice, Enter, Engage, Exit & Extend) to identify the type of communication which should be going out. It generally runs brand campaigns, tactical campaigns, engagement campaigns and industry level communications. The brand advertises through both print and digital medium. It also has its main campaign resonating through other mediums like on-ground activations, PR and collateral development.

Future Plans

The brand has plans to cover 350 cities in India virtually for better reach across the country. Godrej Interio is also planning on improving online sales experience through omni-channel means.





Happily Unmarried:

FOR THE UBER COOL HOME

Happily Unmarried started operations in the year 2003 with the underlying idea that everyday regular use products have no reason to be boring and mundane. The brand is all about well designed products but not necessarily designer products. Happily Unmarried has travelled a long distance from a business idea that started in a rented flat with a small team of 3-4 people to retailing through 10 company owned stores and being available at number of doors in the country. The brand works in a flat operating structure and avoids hierarchy and protocol to the maximum. For Happily Unmarried, every single employee of the company has an equally important role.

Market Presence

Happily Unmarried is present in all major cities in India through either EBOs or MBOs. The brand has a total of 10 exclusive stores and is also present in about 35 MBOs. Furthermore, Happily Unmarried caters to consumers from Tier II and Tier III cities as well through its online portal.



– Deepa Singh,
Manager, Happily Unmarried



<u>No. of Employees:</u>	114
<u>No. of Doors Present In:</u>	EBOs:10 MBOs:35
<u>No. of States Present In:</u>	11 STATES
<u>No. of Cities Present In:</u>	16 CITIES
<u>Total Retail Space:</u>	2,000 SQ.FT.
<u>Average Bill/ Ticket Size:</u>	₹1,000
<u>Same Store Sales Growth Percent:</u>	8%

Product Basket

The brand majorly deals in 5 categories, that is, bar and kitchen accessories, home furnishings, apparel/ bags and men's grooming. The idea behind every product is to turn the items of everyday use into something quirky and fun. Happily Unmarried recently launched its Roamani and RnR range of bags which have been receiving good response.

Business Dynamics

Happily Unmarried has been funded by Info Edge (India) Ltd. and now have launched a men's grooming brand called "Ustraa", which is receiving a marvellous response in the country. The underlying idea behind its products is to provide men with good quality stuff which is SLS, SLES, Parabene and all other harmful chemical free and also cruelty free. Happily Unmarried prides in offering products which are 100 percent vegetarian and claims to use no ingredient which is an animal derivative, even remotely.

E-Commerce/ Omni Channel Initiatives

The brand has tied up with various e-commerce portals like Amazon, Amazon Global, Flipkart, among others and is also retailing through its own website. Happily Unmarried website gets over a million hits a month and ships around 3,000 parcels a day.

Customer Engagement

Happily Unmarried is present on Instagram, Twitter and Facebook and have a dedicated social media team, constantly engaging with its consumers and receiving genuine feedback of the products on sale. From collecting feedback to introducing new products and addressing client issues to even featuring on-request customer selfies with its products, the brand claims to have one of the most effective social media team in client engagement. The uber cool brand also publishes contents and listicles on its blog page.

Marketing & Promotion Strategies

The brand is not very much into marketing and promotions and feels that it will get the support of its discerning customers if and only if it is deserving. Happily Unmarried has brand ambassadors in all the people who buy its products.

Future Plans

Happily Unmarried is presently concentrating on "Ustraa" and keeping with the response received, is planning to focus on building a new team for "Ustraa". Also, the brand will be working on introducing few products every month.





Peachtree:

DECORATING HOMES WITH TRENDY FURNITURE

Peachtree is a world class brand of furniture and accessories, born from a confluence of strong design, product innovation, craftsmanship and international furniture expertise. With focus on creating furniture and accessories that are modern and contemporary, Peachtree develops products with smart features that enhance usability and energise living spaces. Established in the year 2005 as a manufacturer and exporter of iron and wood furniture, handicraft and accessories, the brand entered into the domestic market only early this year. The brand envisions to be India's preferred furniture brand and also to fill the vacuum in the India's Home Fashion industry in terms of quality furniture and decorative items.



– Sharad Jain,
Managing Director, Peachtree

Market Presence

Peachtree entered the Indian market with 3 stores in Delhi/NCR and is running a good business from them.

Product Basket

The brand offers a wide range of products in categories like home decor, furniture, home furnishings and wall/floor coverings.

Business Dynamics

Peachtree is too young in the market, but has received commendable response from its customers. However, in export business, the brand has been honoured with many awards and trophies. For better business, the brand keeps itself well versed with global trends and practices and invests in products and designs which are globally preferred.

Customer Engagement

The brand has involved itself in a lot of customer engagement programs at the store level and has also engaged with the consumers through its social media platforms.

Marketing & Promotion Strategies

For marketing and promotions, Peachtree gives advertisements in all mediums of publicity - print, electronic and digital.

Theme of Latest Collection

Peachtree introduces new designs across categories every month based on the season and trends in fashion. Years of experience and knowledge of the material, processes and trends have helped Peachtree develop expertise to match the best in the world. The brand's designs carry the essence of Indian ancient art and craftsmanship in a modern and contemporary manner.

Future Plans

The brand, presently, has three stores and is planning to expand in all the major cities in the form of EBOs, MBOs and franchise stores. Peachtree is also considering going online soon.

Number of Employees:
100+

Total No. of stores Present In:
3 STORES

No. of States Present In:
2 STATES, 1 UNION TERRITORY

Total Retail Space:
40,000 SQ.FT.





Prestige:

MAKING COOKING EASY WITH COMPLETE KITCHEN SOLUTIONS



– K G George,
Senior Vice President, Prestige

Prestige, from the house of TTK, has been working for the last over 50 years with a dream of making a company that provides total kitchen solutions to the modern Indian consumer. Prestige believes that kitchen is a place in the house where love is nourished and so, the brand is continuously working to offer a total kitchen solution for a smarter cooking. Prestige has been loved and accepted by one and all for its innovative kitchen equipments and tools, which complete a modern kitchen. Prestige products claim to have essential qualities like safety, durability, reliability, innovation and value. With the tagline, 'Jo Biwi Se Kare Pyaar, Woh Prestige Se Kaise Kare Inkaar', the brand goes an extra mile to offer its customers a cooking guide, "Prestige SmartChef". Prestige SmartChef is a unique initiative to bring together a community of people who love food and love sharing recipes, cooking tips and more.

Market Presence

Prestige has a pan India presence with over 10,000 multi brand outlets. The brand also retails through its 530 exclusive stores spread across 290 towns.



Number of Employees:
2,500

Total No. of Doors Present In:
EBOs: 530 | SISs: 100 | MBOs: 10,000

Total No. of States Present In:
30 STATES

Total No. of Cities Present In:
290 CITIES

Annual Turnover:
₹1,560 CRORES

Total Retail Space:
2,65,000 SQ.FT.

Average Sales per sq.ft. per day:
₹30/SQ.FT. PER DAY

Average Bill/ Ticket Size:
₹2,000

Same Store Sales Growth Percent:
10%

Product Basket

The brand offers pressure cookers, cookware, gas stoves, mixer grinders, induction cooktops, which have a huge customer base throughout the country. Prestige's product basket also includes rice cookers, irons, wet grinder, barbeque, OTG, sandwich makers, toasters, kettles, juicers, hand blenders and air fryers.

Business Dynamics

Prestige has excelled in the kitchen equipments and tools category since years. The brand had crossed a whopping ₹1,500 crores turnover in the financial year 2015-16. Prestige also recently set up a greenfield manufacturing unit in Karjan, Gujarat with an investment of over ₹300 crores in an area spanning over 60 acres. Through its wholly owned subsidiary TTK British Holdings, Prestige had also acquired Horwood Homewares, a table and cookware supplier in the UK, to gain a foothold in the European markets.

E-Commerce/ Omni Channel Initiatives

The brand has its own e-commerce portal with four fulfilment centres across four zones in Hosur (Tamil Nadu), Pune (Maharashtra), Gurgaon (Haryana) and Kolkata (West Bengal), and processes over 750 orders per day. Prestige is also present on online portals like Flipkart, Snapdeal, Amazon, Shopclues, etc. The

brand is also working on omni-channel initiatives to leverage its 530 EBOs.

Customer Engagement

Prestige claims to be the first company in kitchenware to have a call centre, handling customers' complaints and grievances. The brand has 250 service centres across the country, providing consumers a seamless experience. Service technicians are provided with a mobile app to get complaints instantaneously and act on them. Besides, over 1 million customers are enrolled in the brand's loyalty program at its EBOs.

Marketing & Promotion Strategies

Prestige has a promotion budget of over ₹100 crores with over ₹50 crores spent on mass media, ₹15 crores on BTL, ₹15 crores on EBOs, and ₹5 crores on digital advertisements.

Future Plans

The brand introduces over 100 new products every year. Recently, it has launched a new category —Home Cleaning Solutions. Furthermore, the kitchenware major has plans to open 50 new EBOs in the year 2016-17.





Skipper Furnishings: DECORATING HOMES WITH SENTIMENTS

Skipper Furnishings has been a household name when it comes to beautifying homes and interiors. Established in 1986 by Kamlesh Agarwal in Kolkata, Skipper Furnishings is distinguished as one of India's most valued furnishing brands. It is a family owned business, committed to converting spaces into signatures - signature of style, signature of poise and above all, signature of your dreams. With its wide array of exclusive furnishing merchandise, the brand ensures that the customers get the best buy, however personalized their choice may be. Skipper Furnishings believes that a home is not just a place



– Vishal Jain,

Business Development Head, Skipper Furnishings

Number of Employees:

174

Total Number of Doors Present In:

29

Number of States Present In:

12 STATES

Number of Cities Present In:

22 CITIES

Annual Turnover:

OVER ₹100 CRORES

Total Retail Space:

72,500 SQ.FT.

Average Sales Per sq.ft. Per Day:

₹34 PER SQ.FT.

Average Bill/ Ticket Size:

₹42,000

Same Store Sales Growth Percent:

25%



that houses, but also defines a family, and the brand ensures to make every design, every product a reflection of its customers' emotions. A space complete with beautiful sentiments is Skipper Furnishing's commitment.

Market Presence

Skipper Furnishings is spread across more than 22 cities and 29 stores in India and has emerged as the country's largest home furnishing retail brand.

Product Basket

The brand offers a wide range of products which includes wall coverings, carpets, curtains, blinds, mattresses, drapery rods, upholstery, wooden floorings, bed linen, etc. Skipper Furnishings also deals with major luxury brands like Armani, Versace, etc. The brand points out that all the categories are performing well; however blinds and wallpapers have shown extraordinary response from the customers.

Business Dynamics

Skipper Furnishings was recently awarded the 'Images Most Admired Retailer of East India' award.

E-Commerce/ Omni Channel Initiatives

The brand is present in almost all the major e-commerce platforms including, Flipkart, Snapdeal, Pepperfry, Jabong, etc. Skipper Furnishings also has its own online portal www.skipperhomefashions.com.

Customer Engagement

Skipper Furnishings have a loyalty program in place for customer engagement. Apart from that, the brand also engages with customers on social media.

Marketing & Promotion Strategies

For marketing and promotions, Skipper Furnishings engages in ATL, BTL, social media, sponsorships, mock ups, etc. The brand also runs promotional campaigns and puts up in-store stuffs like danglers, stickers, etc.

Future Plans

Skipper Furnishings is planning to launch its mattress brand very soon. It also has plans to expand its store count and reach 35 stores by March 2017.





Story@Home:

HELPING
HOMES CREATE
BEAUTIFUL
STORIES

Founded by Sohan Rungta in 2011, Story@Home has now evolved as a leading brand in the home furnishing category. A part of Elite Decor Private Limited, it is much more than just a source for beautiful home furnishings and decor items. It works on transforming its customers' decorating ideas into reality, with inspiration and excitement. Over the years, the brand has worked and brought in a lot of modernization and technology to keep abreast of changing trends. The brand claims to be a symbol of style, comfort and luxury and assures to give a style statement to future homes as well as stylish

make over to the existent ones. Story@Home also boasts of a team of designers who constantly travel around in search of new trends in fashion, colour and style and translate these into exclusive products.



– Sohan Rungta,
Managing Director, Story@Home

Annual Retail Sales Turnover:
₹50 CRORES

No. of Pin Codes Served:
+18,000

No. of Brands Offered:
5 (Story@Home, Bedspun, Happy Life, Queen Cotton, Ahem Homes)

No. of Products Offered:
+3,000

Percentage Wise Category Break Up:
BED SHEET: 50%
CURTAINS: 15%
TOWELS: 5%
OTHERS: 30%



Market Presence:

The brand retails only through e-commerce portals. Story@Home prides on its presence pan India, through its online retail channel. The home furnishing major also has a strong and healthy partnership with portals like Amazon, Flipkart, Snapdeal, Paytm, etc. Working on the 'Make in India' initiative, the brand is also planning to expand to overseas virtual market.

Product Basket:

Story@Home offers products like bed sheets- single, double and king size; comforters—single and double; curtains—for both doors and windows; towels—hand, bath and face; bean bags and poufs; mattresses —single, double and foldable; mattress protector; door mats; carpets; pillows and cushion fillers; cushion covers; diwan sets; blankets; and mosquito nets.

Best Performers:

Story@Home stands for value for money product range in home furnishing segment. The brand's best selling products vary within the price range of ₹499 to ₹699. Besides, other best selling product range includes: a) Queen sized bedsheets collection named Candy; b) Magic collection made of 100 percent cotton; and c) Forever XL self satin striped king size bedsheets, which sells for around ₹999.

Latest Introductions

The home furnishing brand has recently introduced carpets, sofa-cum-beds, canvas bean bags and poufs in its product category. The brand has successfully succeeded in making the sofa-cum-beds, canvas bean bags and poufs, a hit among its customers. However, the carpets are yet to bag its place in customers' hearts.

Business Dynamics

Story@Home has recently invested in the field of infrastructure and are setting up a 25,000 sq.ft. additional office and warehouse space. It also claims to efficiently handle up to 2,500 order dispatch per day.

Leveraging Technology

The brand is working with the latest technologies and have developed an internal ERP system to maintain the order flow. Equipped with the latest fabric manufacturing and printing processes, Story@Home also boasts of an enthusiastic and highly qualified backend team, which takes care of all the quality checks and listing parameters. Also, its creative and photography team and a dedicated R&D team ensures that the brand is always one step ahead of its competitors. All these has helped Story@Home to garner customer loyalty and has also lowered down the overall returns percentage.

Customer Engagement

For customer engagement, Story@Home updates its Facebook page with the latest trends and ongoing deals on its products. A customer engagement team also connects with its customers on social media and caters to its online consumers. The brand also writes blogs about the brand products and about latest trends in home furnishing and decor.

Marketing & Promotion Strategies

For promotions and campaigns, the brand involves in a lot of ad campaigns on social media, print media and digital media.

Future Plans

Story@Home is planning to expand its product range in home furnishings, and also on entering into home decor and furniture.





Urban Ladder: BEAUTIFYING HOMES AT EASE



— Sanjay Gupta,
Chief Marketing Officer, Urban Ladder

Urban Ladder started in the year 2012 when the founding members, Ashish Goel and Rajiv Srivatsa, felt the need for an online home furniture brand, while looking for good quality furniture for their homes in Bengaluru. Urban Ladder came into existence with an aim to offer high quality products both in terms of design and functionality, and also to give Indians a hassle free experience in home shopping. After some intense planning, trials and discussions with the best manufacturers across India and the world, and hundreds of consumer interviews, the founders narrowed down on a solution that could get distinctive products, manufactured at prices that consumers would find practical. The brand works with a vision to set global benchmarks for distinctive products, consumer experiences and honest best practices.

Market Presence

Urban Ladder retails in 19 cities and operates via online channel only.

Product Basket

The brand offers furnitures for living rooms, bedrooms, dining rooms, study rooms, kitchens, etc. The categories include furnitures like sofas, dining tables, beds, storage units, etc. Urban Ladder also deals in smaller items including coffee tables, book



in terms of responsiveness and ease of e-commerce. The online brand also claims to have one of the best applications in terms of rating and 35 percent of its business comes from the same.

Customer Engagement

The brand works continuously to provide a seamless online experience to its consumers. Urban Ladder prides in having a great customer service team, who encourage the customers to call or chat (10:00- 20:00) with them, in case of any query or grievances. The brand also boasts of an in-house customer service and delivery team, who not only delivers the products but installs them for the consumers at the same time.

Marketing & Promotion Strategies

Urban Ladder basically targets working professionals who do not get time to shop for home furnitures and decor items. The brand started its initial marketing through Facebook, where it basically identified potential consumers and connected with them. It considers 'word of mouth' to be one of the biggest reasons of its growth. Urban Ladder also boasts of a Net Promoters Score (NPS) of 0.8, which is one of the highest in the world, and the brand gives the credit for the same to the ease it gives to its customers, who come back remembering the past experience. Urban Ladder does not involve in television advertisements.



shelves, mattresses, and other interiors and decor items. Among all the product categories, the brand's range of sofas are receiving good response.

Business Dynamics

Urban Ladder was recently awarded with the best online furniture consumer brand award. Also, the brand has bagged a host of other awards because of the quality and service it provides to its customers.

Leveraging Technology

Urban Ladder, being an online business, conforms to best technology for a pleasant customer experience. The brand claims to have ranked as one of the best websites

Future Plans

The brand has recently launched a new range in sofas, named 'The Apolla Infinity'. These are customised sofas, which will be made as per demands and designs suggested by the consumers. Furthermore, Urban Ladder is also considering to go offline in some point of time but for now, will remain an online retailer.

No. of Cities Present In:
19 CITIES

No. of Products Offered:
4,000 SKUs



Bianca:

ADDING LIFE TO LIFESTYLE



— Hiten Dalal & Devang Dalal,
Directors, Bianca

Retail Presence:

MBOs: +2,000; SISs: +100

Number of Cities Present In:
40 CITIES

Average Bill/ Ticket Size (FY 2015-16):
₹1,200



Bianca, the flagship brand of Mangal Exports, was launched in the year 2008 and since then, has emerged as a prominent player in the Indian home decor space. Mangal Exports stands as one of India's most formidable export houses and a premier manufacturer of home textiles and accessories, since the year 1980. Bianca prides in being a contemporary, one-stop shop for all the home decor needs. It works on a distinct design philosophy that represents a perfect blend between western trends and eastern artistry. The brand has successfully explored its existence within the horizon of tradition and modernity, thus inventing and determining the term 'TRENDITION'.

Market Presence

Bianca is present pan India, offering everything from home decor to table and bath accessories, under one roof. Bianca is also available in leading home decor stores in Mumbai, Pune, Bengaluru, Delhi, and many other cities. The brand also retails through e-commerce channels.

Product Basket

The brand offers bedsheets, bath towels, floor rugs, curtains, table linen and a variety of other bath and kitchen accessories.

Marketing & Promotion Strategies

For marketing and promotions, Bianca puts in-store stands and brandings, creating awareness about the offers and discounts and new products on sale. The brand also has a loyalty program in place, to encourage customer engagement.

Theme of Latest Collection

The theme of Bianca's latest collection is Tropical, with different textures and bright bold designs.

Future Plans

Bianca has plans to launch new and refreshing collection of carpets, curtains and other furnishings. The brand also has plans to focus more on developing exclusive online range in home decor and furnishings.





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BSL:

OFFERING BEST HOME FURNISHING FABRICS



– Nivedan Churiwal,
Joint Managing Director, BSL

No. of Employees:
450

Annual Turnover:
₹400 CRORES

BSL Ltd. was formed 45 years ago in Bhilwara, Rajasthan and has moved from strength to strength to reach a point of excellence in the field of manufacturing and exporting men's suittings. The company diversified into the field of furnishing fabrics about 10-12 years ago. In this segment, the company produces and mainly exports a wide range of furnishing fabrics for the purpose of upholstery and drapery. It produces over 18 million meters of fabric every year, from all fibres such as polyester, linen, cotton, silk, etc.

Market Presence

BSL Ltd. has significant global presence in the furnishing business and the company is also exporting its products to almost 25- 30 countries all over the world. BSL Ltd. also supplies its furnishing fabrics to some of the biggest retail chains in the world. Apart from this, it also supplies its products to some of the largest retail chain stores in India as well.

Product Basket

The company offers furnishing products which include, fabrics for curtains, fabrics for upholstery and made-ups in the form of ready curtains and cushions.

Business Dynamics

BSL Ltd. has made major investments recently in the furnishing business and is constantly ramping up its production facilities to cater to the demands. Apart from increasing the production, the company has also been investing regularly to maintain the environmental and pollution norms and to attain zero discharge.

Marketing & Promotion Strategies

The Company takes part in 2-3 global home textiles exhibition all over the world, such as Heimtextil Frankfurt in Germany, Intertext in Shanghai, etc. for promoting itself.

Theme of Latest Collection

BSL Ltd. offers a new collection every 4 months. Each collection is an exhaustive range of new presentations in dobby and jacquard, having a wide array of designs and colours. Each collection of BSL Ltd. has about 2,000- 3,000 SKUs.

Future Plans

The company is constantly in expansion mode with some expansions being planned every year.



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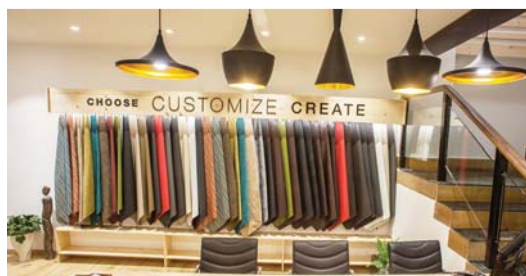
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Durian: BRINGING YOUR HOME ALIVE

Started in 1985 under the Durian Industries Ltd., the brand Durian has, over the years, excelled in the home fashion category with relentless pursuit of its vision. Durian initially started with importing furniture, but later, came up with its own factory manufactured products. The brand prides in taking the 'Make in India' initiative forward and also in promoting the same among the fellow countrymen. Durian believes in constantly upgrading itself and works to bring new ideas that inspire business innovations. The brand has covered a long journey from being the pioneer in veneer business to being the leading infrastructure company and a lifestyle brand.

Market Presence

Durian has a total of 31 stores in India. Also, the brand retails through its own e-commerce portal www.durian.in and is available at some of the leading online websites like Pepperfry, Flipkart, Amazon, etc.

Product Basket

Durian's product basket comprises of home furniture including living room furniture, dining room furniture, bedroom furniture and bedroom sets, storage utilities and also a wide range of office furniture. Other offerings include laminates, veneers, doors and plywoods.

Customer Engagement

For customer engagement, Durian has a dedicated team to look into the grievances of its consumers. Besides, a research and innovation team constantly work to bring to its customers research based designs that fulfill contemporary needs. A quality control team works on different testing technologies in order to ensure that every product meets the expectations of the consumers. The different types of tests through which a Durian product passes, include Furniture test, Component test and Package test, to give 100 percent satisfaction to its consumers.

Marketing & Promotion Strategies

For promotions and campaigns, Durian gives out Above the Line (ATL) advertisements in print, and also uses outdoor campaigns and social media platforms like Facebook, Twitter, Instagram, in order to spread awareness about the brand.



— Sandeep Ganguli,
Vice President - Commercial, Durian

Total No. of EBOs:
31

No. of States Present In:
13 STATES

No. of Cities Present In:
24 CITIES





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Raymond Home: EMBELLISHING HOMES IN UNIQUE STYLE



— Pankaj Saxena,
Business Head, Raymond Home

Raymond Limited, India's leading textile and apparel company, entered the home textile segment in 2013 as "Raymond Home", to exploit the opportunities in the rapidly growing segment. In less than 3 years since its launch, Raymond Home has created its space in the home textile market and is growing rapidly. Raymond Home promises to deliver its customers the same impeccable design, as well as quality that the company is known well for over 88 years. With over 500 designs ranging from the contemporary to the classic, Raymond's relentless product innovations and stringent quality standards has been its hallmark.

Market Presence

Raymond Home retails, currently, through 2,000 multi brand outlets and also through 600 The Raymond shops, spread across the country. Plans are also underway to open a few exclusive stores for Raymond Home this year. Apart from these, Raymond Home products are also available at major large format stores like, Home Stop, Pantaloons, Hypercity, Evok, Big Bazaar and Walmart.

Product Basket

The brand's product basket includes a complete range of bed sheets, pillow covers, comforters, blankets, bath robes and towels in a wide selection of colours and designs. Raymond Home A/W'16 collection features unique prints and soothing hues enhancing home decor this season. The collection also consists of innovative fibers such as Tencel and Modal. Also, the special feature of S/S'16 collection is the launch of designer bedsheets collection - Grandeur.

E-Commerce / Omni Channel Initiatives

Raymond Home's myriad options in home fashion are available at all the major e-commerce portals.



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Distribution Redefined

Rumors Fine Furnishings: ADDING CHARM & ELEGANCE TO HOMES



— Ramachandra Shastry,
Director, Rumors Fine Furnishings



Rumors Fine Furnishings is a Bengaluru-based one stop furnishing brand with top-notch quality furnishing products at the finest furnishing stores across the country. The brand has put together a collection of timeless creations that the discerning customers could invite into their living spaces. Through its unrivaled expertise in furnishing business, Rumors Fine Furnishings amalgamated its inherent creativity and zeal for providing exquisitely designed fabrics. The brand works with a promise to offer creations which never go out of style, are fresh and exclusive.

Market Presence

Rumors Fine Furnishings has a pan India presence with presence in all the leading furnishing stores across the country. The brand also works in partnership with international brands like, Fabricut, Silk Wave, Texture, Prestigious Textile, Artiq, Antex, and Daylight.

Product Basket

The brand is known for sophisticated yet elegant upholstery, curtains, cushions, etc. Rumors Fine Furnishings offers products in three broad collections:

- Premium Collection which is a collection of 15 catalogues ranging from classics to contemporary to florals and plains;
- Sapphire Collection which offers a collection filled with delicate damasks, modern geometrics and bold florals; and
- Quartz Collection which is a sharp collection with a special emphasis on textured upholstery weights and breezy drapes, on cost effective jacquard for home and the hospitality sector.

Customer Engagement

Rumors Fine Furnishings have loyalty programs and have a good customer base at its disposal.

Theme of Latest Collection

The brand's latest collection sports burnished jacquards, textured weaves, geometric abstracts and dotted patterns.



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It's not every day that a cobbler is given a free eye check-up and a new set of spectacles, as a gift by a total stranger. But that's exactly what Mr. Satish Raut, a sales associate at Titan Eye Plus, Varanasi, did. That's the kind of initiative that wins a TRRAIN Retail Award.

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BEAUTIFYING HOMES WITH SOPHISTICATION



— Reteish Sharma,
Director, Zynna

No. of Employees:
45+

Total Retail Space:
20,000 SQ.FT.

Zynna has been creating beautiful home decor solutions under the erstwhile Deepak Furnishings since 1970, however, it was registered as a brand only in 2015. Zynna has, today, established itself as one of the largest luxury curtain makers in India. The brand aims to become the finest curtain making stores not just in India but internationally and this has led Zynna to bag exclusive partnerships with a number of iconic European and American brands. The brand has also created its own exclusive designs which are supplied across the world. Zynna works to educate people and spread the joy of fine window treatment.

Market Presence

Zynna retails majorly in NCR region and is also increasing its presence in all major cities through a number of dealers.

Product Basket

Zynna offers elegant window treatment with exclusive and luxurious window draperies, sheers, blinds, fabrics, stitching solutions, wallpapers, furnishing coordinates and specially ordered European design products. Other product offerings include cushions, bed runners, etc.

Business Dynamics

Zynna has been recently awarded the 'Good Homes Award' for the best in drapery section.

Customer Engagement

Zynna has a very loyal customer base including some of the leading architects and some high net worth individuals (HNIs).

Marketing & Promotion Strategies

The brand does not involve majorly in marketing strategies. However, Zynna feels that its good presence on Google has tremendously increased its visibility.

Future Plans

In the times to come, Zynna is planning to introduce some exclusive European brands in its portfolio and also on increasing its dealer network.

×





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SPRUCE UP YOUR SPACE !!!!!

Along with the substantial growth of the middle class population, aspirations for better lifestyle also witnessed a tremendous boost in India. Well decorated houses, that once was prerogative of only the elite class, have now become a necessity amongst the bourgeois. The Indian home furnishing sector, touted to be one of the fastest growing markets for home furnishing products in Asia-Pacific, is now teeming with brands offering infinite choices to customers. We handpick a few of the hottest brands from this sector.

-Vaneeta Punchvedi





@home.

@home is a retail division of Nilkamal Limited, the world's largest manufacturer of moulded furniture and India's leading manufacturer of Material Handling Systems. @home is spread across the country with 19 large format retail stores with an average size of 16,000 sq.ft. per store. Positioned as a home styling expert, it is a perfect one-stop solution store for home planning with finest quality furniture, soft furnishings and home accessories to enhance your indoor and outdoor spaces. The designs at @home are contemporary yet practical, mirroring Indian tastes and requirements.



Furnishina your world

Dicitex Furnishings.

Incorporated in 1999, Dicitex Furnishings is amongst the top furnishing companies in the world, manufacturing luxury furnishing fabrics, upholstery, etc. The company's extensive product line includes velvets, jacquards, chenille, digital prints, embroidered fabrics, suede, linen and linen/cotton blended fabrics that are skilfully processed and finished. Constantly exploring new avenues to connect more to their customers, the company, recently added wallpapers to their product portfolio. With their extensive vertical scope in terms of pricing and market requirements for homes, hotels, hospitality and outdoors, as well as their all-encompassing horizontal reach in thematic designs, colours and textures; Dicitex Furnishings aim to serve all kinds of furnishing set ups, be it contemporary, classic, abstract, opulent, simplistic or otherwise. With a turnover of ₹300 crores, the company has more than 1,000 customers and over 800 retailers.



D'Decor.

D'Decor Home Fabrics Pvt. Ltd. (formerly Dicitex Decor Pvt. Ltd.), is the world's largest producers of curtain and upholstery fabrics. Their products are designed by top-class in-house Italian designers, and are also being used by top designers and furniture-makers in both Europe and USA. D'Decor has copyrights and ownership to more than 10,000 designs. The brand is a staple of the biggest international trade fairs including, Moods, Heimtex, Intertex Shanghai Show, Proposte and Evtteks. The company's turnover has increased from USD 8 million in 1999 to USD 250 million in 2014. D'Decor exports home fabrics to about 65 countries. The customers include some of the largest and leading global brands such as Kravet Inc., Jab, Romo, Designers Guild and Casamance.



F&F Furnishings.

This brand is a premier textile editor with five retail showrooms around India and a growing national and global distribution network, offering a chic collection of fabric. F&F Furnishings is globally known for its range of upholstery, drapes, wall coverings, bed & bath, and flooring products that satisfy even the most demanding of tastes. Founded by Subhash Khandelwal in 1984, the brand, buttressing on its innovative product range and the high quality standards, now has 16 EBOs and 58 MBOs across the country.



FabFurnish.

FabFurnish.com is an online marketplace for retail of furniture, decor and home appliances. The company is headquartered in Gurgaon, NCR. FabFurnish.com was launched in March, 2012 by Vikram Chopra, Mehul Agrawal and Vaibhav Aggarwal. In July 2015, the brand declared strategic restructuring of its top management by introducing Ashish Garg and Ankita Dabas Kohli as the new co-founders. In April 2016, FabFurnish became a Future Group company and a part of the Group's long term growth plan. Indian Home Congress & Awards declared FabFurnish.com as the 'E-Retailer in India' in home category in the year 2012. In 2014, FabFurnish.com was awarded 'Home & Lifestyle e-Retailer of the Year, 2014' at the Indian e-Retail Awards. FabFurnish.com was acknowledged as one of the Red Herring Top 100 Asian companies in the year 2014.



Good Earth.

Established in 1996 by Anita Lal and Asha Madaan with its first boutique at Kemps Warner, Mumbai, Good Earth set standards in stylish luxury retail across India. As an everyday luxury brand, it offers a wide variety of dining and entertaining, and decor and spa products defined by intense connection to nature, history, heritage and original design through an Indian prism. Good Earth, as of now, has 9 EBOs across India, each spanning an area of 50,000 sq.ft. With a growing market presence, Good Earth's total turnover for FY 2015-16 is a whopping ₹1,500 million.



HomeStop.

Shoppers Stop's home furnishing venture, HomeStop, is a complete home solution chain offering all home needs, right from home decor, furniture and recliners, bath accessories, bedroom furnishings, mattresses, draperies, carpets, kitchen gadgets accessories and appliances to modular kitchens. With doors in Ahmedabad, Bengaluru(4), Chennai, Coimbatore, Hyderabad, Delhi, Chandigarh, Mumbai (2), Navi Mumbai, Pune(1), Vijayawada and Lucknow, HomeStop is a premium home concept destination that lets you transform your dream house into a reality.



HomeTown.

HomeTown is India's first home improvement store format, offering end to end solutions for new homes. Launched by the Future Group in 2007 with the first ever store in The Great India Place, Noida with an area of 12,500 sq.ft., it now has spread to 35 EBOs in 17 cities across India. The brand's major product categories are living room furniture, dining, bedroom furniture and furniture essentials, mattresses, modular kitchens, home furnishing, decor, household and bath luxury. HomeTown offers customers a unique, personalised shopping experience, and has grown to be India's biggest store in homemaking, renovation and decor.



Housethis.

Housethis is a leading home furnishing brand which mainly deals in home furnishing products. With a retail presence of 17 EBOs, each covering almost 15,000 sq.ft of space, and 5 MBOs, the brand has emerged as one of the most popular brands in India and registered a turnover of ₹25 crores.



Hulsta Furniture.

A time honoured German furniture manufacturer and exporter established in 1940, Hulsta Furniture was launched in India in 2010. As an upmarket residence solutions service provider, the brand offers myriad exquisite furniture options for both home and office. As of now, Hulsta has four EBOs in Delhi, Mumbai, Hyderabad and Bengaluru with average size in between of 12,000 sq.ft to 45,000 sq.ft. What sets the brand apart from its peers is the fact that all the products are custom made in Germany, with a lead period of 3-4 months from order.



Maspar.

Maspar was founded by Rajesh Mahajan in 2002 with a wide range of home furnishing products. Now, the brand has 8 EBOs, 45 SISs and 100 MBOs across the country. Maspar deals in 9 major categories including, bed & bath and table linen, curtains, rugs, decor and more. In 2011, Maspar was launched in France and is currently available in 'Maspar Shops' in several furniture and speciality home stores. In 2013, the brand entered the Canadian market. It currently retails through several large format lifestyle stores in the country. Maspar marked an annual turnover of ₹30 crores for FY 2014.



Mebelkart.

Mebelkart, a part of Getit Furniture Private Limited, is an e-commerce portal specializing in exquisitely designed interiors and furniture. Established in 2012 with just five sellers in two categories, the brand, today, boasts of 10,000 registered sellers offering 8,00,000 products that could be delivered to 400 cities. As India's largest online furniture store, Mabelkart deals in furniture, home decor products, household appliances, kitchen and dining utilities, housekeeping products, modular kitchens, etc.



MoBEL Furniture.

Launched in 2005, MoBEL Furniture's vibrant contribution to the world of home decor, now stretches across over 19 locations in India. They have a catalogue of more than 3,000 designs with an assurance of finding top quality merchandise for both homes and offices at the most economic range. The range of products includes bedroom furniture, sofa sets, dining tables, living room furniture, and kids' bedroom furniture. The MoBEL Furniture stores in Kolkata and Bengaluru also have, on display, a wide bouquet of office furniture. Their manufacturing units are well equipped with high-end German and Italian machines to create outstanding quality materials with alluring designs.



Pepperfry.

Pepperfry.com is a furniture and home products e-commerce marketplace, headquartered in Mumbai, India. A managed marketplace, it has a product range of over 10,000 items across categories like furniture, decor, lamps, bed & bath, furnishing, kitchen, dining, bar, hardware & electricals, etc. Pepperfry was established on January 3, 2012 by Ambareesh Murty (former eBay Country Manager) and Ashish Shah (former head of eBay Motors-India and Philippines). Pepperfry initially offered a selection of products across multiple lifestyle categories. Since 2013, the company pivoted to sell only furniture and home decor products, sourced from SMEs, artisans and large brands in multiple cities across India. It proved to be a strategic business move made by the company. Soon after, it achieved the milestone of shipping 1 lakh units of furniture in November 2014. In December 2014, the company launched its first concept store “Studio Pepperfry” in Mumbai. This was followed by similar studio openings in Bengaluru, Gurgaon and Kolkata. Pepperfry marked its annual turnover at ₹25.3 crores in FY 2015.



Portico New York.

Launched in 2004, Portico New York, a wholly owned subsidiary of Creative Portico Pvt. Ltd., is a home styling solutions brand. In less than a decade of its existence, Portico New York has carved a niche for itself with trend setting bed, bath and top of bed solutions. It has captured a leadership position in the market with an impressive +30 percent growth year-over-year for four consecutive years. Portico New York retails through an ever-expanding network of shop-in-shops at leading lifestyle and exclusive home furnishing stores across India. The brand deals in wide range of soft furnishings and Utopia range of bed and bath linen for the youth. It also deals in licensed kids’ merchandise of Mattel, Nickelodeon and Warner Brothers.



Seasons Furnishing.

Launched in 1975, Seasons Furnishings is a leading home furnishing and decor brand of India, which mainly deals in soft furnishings like upholstery fabrics, cushions, curtains, sheers and made ups. The company has a global presence in all the leading fashion capitals of the world including London, Paris, Milan, New York, Hong Kong, Singapore and Dusseldorf. The domestic network includes exclusive Club Class outlets in Delhi, Gurgaon, Mumbai, Hyderabad, Bengaluru and Chandigarh and a National Dealer Network with a pan India coverage. They have 80 shop-in-shops and 5 club showrooms. The total retail space Seasons Furnishings showrooms acquire across India is 25,000 sq.ft. The company registered a turnover of ₹20 crores in FY 2015-16.



Spaces.

Established in 1985, the Welspun Group is one of the most reputed conglomerate in the international markets, and is recognized worldwide for its innovation and the emphasis on the quality. While the company grew by leaps and bounds, there was always the want to cater to the local market as well. It was this burning desire that led to the founding of Spaces - Home & Beyond in 2004, an Indian brand with a global mindset.



Swayam.

Swayam is synonymous with offbeat, designer and colourful home linen that guarantees to brighten one's interior. Based in Gurgaon, the company offers a wide range of home furnishing products - bed linen, table linen, comforters, cushion covers, curtains, kitchen linen, laundry bags and host of home accessories. Swayam's retail presence is in surplus of 400 counters in over 70+ cities across India. Some leading retail chains where Swayam products are showcased are HomeStop by Shoppers Stop, Pantaloons, @Home, HomeTown, EVOK, Spencer's, TOTAL, Hypercity, etc.



The Pure Concept.

Established in 2012 by Chanya Kaur and Dalbir Singh, The Pure Concept designs innovative and contemporary furnishing and upholstery fabrics for interiors. GM Syntex, the brand's partner manufacturing company is a major exporter of fabrics from India. Starting with a small manufacturing unit in Tarapur, the factory now has over 300 machines, including jacquard, dobby, dip dye and embroidery machines, giving a diverse range of options in fine fabrics.

veaura®

Veaura.

Veaura, a division of Valia Retail Pvt. Ltd., has been in the heart of interior trends ever since its inception, given its lineage of over five decades in the import, wholesale and retail of furnishing fabrics and decorative products in India. Led by the dynamic young entrepreneur Varun Valia, Veaura presents an inspiring range of upholstery fabrics, curtain fabrics, wallpapers, rugs and carpets and home decor products, such as cushions and bedding. Its flagship stores are located in Mumbai, India. Veaura showcases an eclectic and glamorous mix of products from an exclusive line of international brands that cater to the hi-end market, and also top Indian fabrics that are sophisticated yet affordable. There are more than 10 brands which also works under the banner of Veaura.

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DESIGNED WITH PASSION

Founded in 1952, BoConcept is globally-renowned premium furniture and accessories brand, offering customised, coordinated and affordable products styled for modern day living. With its flagship store opened in New Delhi recently, the brand seeks to add a touch of class and its “Urban Danish Design” heritage to homes of NCR denizens.

By Namita Bhagat

Denmark-based BoConcept, a premium furniture and accessories brand, has entered the Indian market via the franchise route. With its flagship store opened in New Delhi recently, the brand is looking to mesmerize the denizens of National Capital Region (NCR) with its exquisite, modern design furniture that adds a touch of class and its “Urban Danish Design” heritage to one’s abode! BoConcept has appointed Zoe Concepts Pvt. Ltd. as its exclusive franchise partner for Delhi NCR and other markets. The firm has been conceptualized by Navin Khanna, who is a modern contemporary design enthusiast. An established entrepreneur, he also owns “Nouvel”, a leading integrated service provider company, offering solutions for: facility management, turnkey interiors, ambient scenting, handyman services and plant rentals.

The origin of the brand dates back to 1952, tells Navin. “BoConcept is a premium furniture and accessories brand based in Herning, Denmark. Its foundations were laid by two Danish craftsmen, Jens Ærthøj and Tage Mølholm.



Part of the brand's name is "Bo", a Danish name for "living" and other part is "concept", and thus, BoConcept stands for creating your own living concept. The brand, today, enjoys a worldwide presence, with approximately 250 flagship stores in 60 countries," he expounds.

Market potential

The taste and fashion of the people in Delhi is evolving each day, notes Navin and says that we are extremely excited about the launch of the BoConcept flagship store in the national capital. I believe that the well-travelled discerning buyer of New Delhi would be able to identify with our product offerings. There is a void in the interior space for high quality finished products designed by world-class designers. We believe that BoConcept will successfully fill that void

in the market. What makes us even more unique is our ability to customize each piece to suit the individual style of our buyers. It's more than a great design, it's a concept!

Inside the store

The BoConcept store presents an ultimate destination for modern and contemporary furniture. It offers a wide assortment of home furniture and accessories ranging from small accessories to complete furniture solution for the entire home. "Our store is situated at MG Road, Delhi and is spread across 4,500 sq.ft. of area. It has 14 in-house studios displaying different design schemes and has skilled design consultants to assist customers decorate the home of their dreams. The store offers a wide range of furnitures like

dining tables, beds, sofas, chairs, etc. and accessories like cushions, rugs, lamps, etc. to choose from," Navin informs.

Product bouquet

In furniture, the brand's product range comprises: living (sofas, sofa accessories, sofa sleepers, daybeds, armchairs, coffee tables, etc.); dining (tables, chairs, bar stools, sideboards); sleeping (beds, sofa sleepers, mattresses, bedspreads, etc.); storing (wall systems, media units, book cases, shelves, chest of drawers); hallway (hallway furniture, mirror & accessories); working (desks & chairs, office accessories); and outdoor (furniture & accessories). Product range in accessories includes: decorations (vases, candlesticks, bowls & dishes, sculptors, clocks & mirrors, wall decorations &



“The USP of the product is that it’s manufactured in Europe and we don’t want to take that speciality away from it by local manufacturing.”

– Navin Khanna,
BoConcept Franchise Partner
(for Delhi and other markets)

frames); textiles (cushions, bedspreads, poufs, throws and more); rugs (rugs & runners); lamps (floor, table, pendants, wall); functional accessories (living collection, storage, stools, racks & hooks, office accessories).

Pricing strategy

The brand will primarily cater to the upper middle class with its range of modern design products. Regarding the pricing strategy in India, Navin apprised, “We call it as affordable luxury for the reason that we are not on the top end of the market but we are somewhere slightly above what we get at this point of time in India.” He also lets in that the minimum price for a piece of furniture such as a 3-seater sofa or bed starts from ₹1.5 lakhs and can go upto ₹10 lakhs and above. The minimum price of accessory item like candle holder is ₹600 whilst the most expensive piece of accessory can cost ₹20,000 and above.

Made for success

Importantly, BoConcept’s whole range will be produced at Denmark and would be imported to India. But why not manufacture locally? Navin avers, “The USP of the product is that it’s manufactured in Europe and we don’t want to take that speciality away from it.”

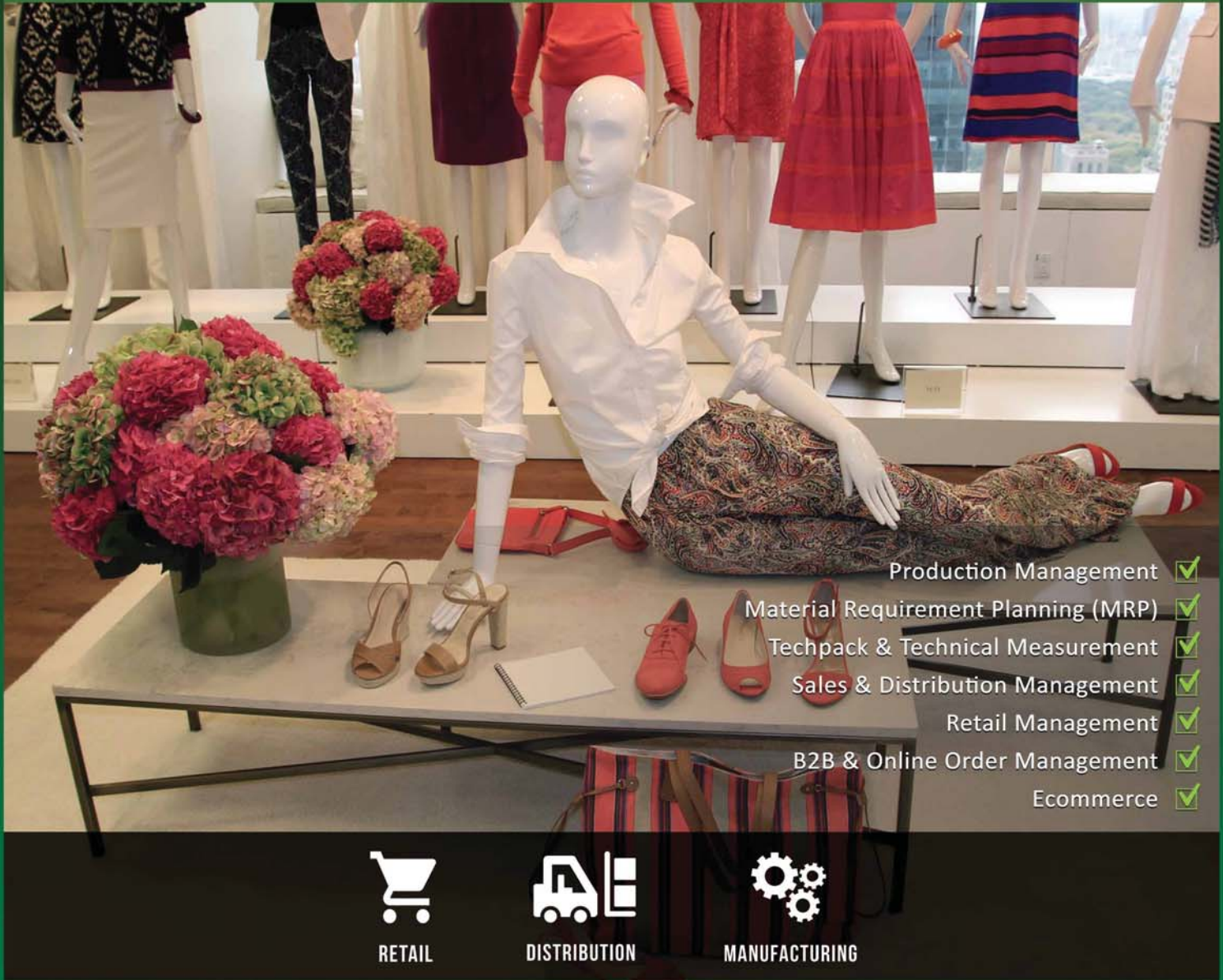
The brand has a passionate team of talented in-house designers at its headquarters, who design exclusively for it. They strive to design the perfect furniture and accessories in their quest to help their patrons realize their dream home. They are devoted to urban life and functionality yet hold their background, ideas and approaches whilst creating the beautiful products with international audience in mind. Simplicity and functionality are BoConcept’s core values. The designers focus on optimizing the manufacturing process and making it cost-efficient without compromising on the look. Besides, the designs are a clever and innovative piece of work. The brand takes delight in accomplishing the best results for its customers. BoConcept’s design and product knowledge can help them make the best choices for their living spaces.

...What’s next?

Encouraged by the positive customer reception in Delhi, Zoe Concepts is planning to expand BoConcept into other markets also, for which it has franchise rights. It is looking to have two stores in Mumbai and Bengaluru by 2017. Shares Navin, “We plan to open another one in Mumbai by February 2017, followed by Bengaluru and Chennai. In the next three years, we expect to have at least four stores, and eight stores in all in the next five years.” In reference to the sales expectations, he feels that each store could generate at least ₹12 crores a year. Zoe Concepts will be investing roughly half a million euros (~ ₹4 crores) for opening each new store. The firm has already started scouting for locations in Mumbai, where the store is expected to open its doors by March next year.



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The Mumbai-based Indo Count Industries Limited (ICIL) is a leading export-oriented textile manufacturer and a preferred partner for some of the most renowned global retail, hospitality and fashion brands. The company has a formidable worldwide presence as a specialized end-to-end bedding provider that is solely focused on creating all-encompassing sleep experiences! Indo Count is now all set to see its success spread in the domestic market also, as its subsidiary, Indo Count Retail Ventures P. Ltd (ICRVL) has forayed into ₹13,000 crores Indian Bed Linen Market with launch of 'Boutique Living' range of bed linen products. The Boutique Living range will be available across the country very soon. Noticeably, ICIL will make an investment of ₹25 crores for strengthening its domestic sales, marketing networks and logistics.

BLISSFUL ELEGANCE

Boutique Living, an aspirational home textile brand launched by Indo Count Retail Ventures (ICRVL), offers refined quality bed linen which lets you slumber away in blissful, cozy elegance! Drawing upon the avant-garde production capabilities and global export experience of parent Indo Count Industries, ICRVL aims to capture around 25 percent share of Indian bed linen market in the next five years.

By Namita Bhagat

States ICIL Managing Director Mohit Jain, "With growing exports, we thought it is right time to introduce our high quality affordable products for Indian consumers. Our vertically integrated manufacturing facilities make our products for domestic market affordable and we are well-equipped to meet the growing domestic demand as well. We are also supporting the Make in India campaign."

About the brand, ICRVL Managing Director Asim Dalal apprised, "Boutique Living, as the name suggests, is an aspirational brand launched by Indo Count Retail Ventures to showcase its refined quality bed linen offerings.



“Due to the parent company’s global exposure, Boutique Living product offerings are evolved and of a certain standard. In short, we intend to pioneer setting standards of quality through our offering in retail.”

– Asim Dalal,
Managing Director,
Indo Count Retail Ventures Ltd.



With robust R&D, technical know-how and in-house production, the brand offers the Indian consumer superior quality products ranging from 300 TC – 1000 TC (Thread Count)."

Demand Landscape

According to Dalal, there is an enormous potential for bed linen business in India. In view of the growth in the housing sector and the rising youth population, there is going to be a constant demand. He refers to a Technopak study that estimates the country’s home textile market to be ₹40,800 crores by 2021, of which bed linen is pegged to be ₹19,000 crores. He also points out that the Indians are becoming increasingly health-conscious and they understand and acknowledge the benefits of good sleep.

However, Dalal also notes that there is a huge gap for good quality bed sheets with health benefits as well as soft comfortable feel to them. “The present market scenario offers massive growth prospects for the Boutique Living brand,” he feels.

The Brand Strength

The brand’s core strength remains its vertically integrated set up. Its parent, Indo Count Industries, is known for innovation, technology and high quality

standards across all its product ranges. “Due to the parent company’s global exposure, Boutique Living product offerings are evolved and of a certain standard. In short, we intend to pioneer setting standards of quality through our offering in retail,” avers Dalal.

He as well explicates that the offerings have been devised to suit the design acceptance/sensibilities of the Indian consumer, especially the discerning, well-travelled homemaker/woman, who remains the decision maker in this territory. “Our focus remains good living with great health, and our product offerings reflect that notion clearly. These are totally new for the Indian consumer,” he asserts.

Product Assortment

“In line with the prevailing consumer preferences, one can expect a lot of printed bed linen and the quality of Boutique Living designs is way beyond what other brands are offering at the moment. The brand will also offer its specialized finishes with functional features, which are one of a kind,” Dalal informs.

The Launch Collection of ‘Boutique Living’ showcases a range of luxury, colours and patterns inspired from

across the world. The collection comprises of four ranges with various sub-ranges that are crafted with innovation and technology. The wide range includes: The Highlife, a range of luxury bed linen, with six sub ranges of Vignette (400 TC), Elegante (400 TC), Marrakesh (300 TC), Serenity (600 TC), Infinity (1000 TC) and Dobby (400 TC). The other three ranges YAH (Young @ Heart), Trendsetter and Refresh also come in sub ranges.

On the pricing strategy, Dalal said, “The product range starts from ₹2,000 per bed sheet set and goes up to ₹8,000 for premium category. Overall, Indo Count is offering 139 product designs and themes to cater to every customer’s individual needs and tastes.”

Market Build-up

Shedding light on how ICRVL plans to build up the Boutique Living’s presence in India, Dalal elaborates, “Our launch strategy is to sell through multi-brand outlets (MBOs) and large format stores (LFS) to start with. Once we have a large portfolio of products, we will look at standalone stores. We will sell through

BRAND'S LAUNCH COLLECTION

The Launch Collection of 'Boutique Living' includes four ranges with various sub-ranges.

The Highlife: This is a range of luxury bed linen which embodies the urge to live tastefully, in an elegant and stylish manner. The prints are varied, subtle and pleasing to the eye and are available in dobby and damask patterns to choose from. The range has six sub-ranges and each sub-range offers a king-sized bed sheet with 2 or 4 pillow covers:

Vignette (400 TC) | Elegante (400 TC)
Marrakesh (300 TC) | Serenity (600 TC)
Infinity (1000 TC) | Dobby (400 TC).

YAH (Young @ Heart): The range is inspired from the idea that 'everyone is a student of life; we learn and unlearn from our experiences, with the challenge to not lose the youth within ourselves'. It reflects the thought process with some vivid and energetic prints to discover the active 'you'. The range comes with three sub-ranges: Adventure (325 TC) | Camouflage (325 TC) | Colorstories (325 TC).

Trendsetter: This collection is perfect to fit one's stylish and trendy sense of fashion and caters to those who like to keep up with changing fashion trends. Collection offers the latest designs and themes from across the globe, with a wide variety of options. It is available in the following sub-ranges:

Herbal Garden (300 TC)
Gypsy Spirit (300 TC)
Intersection (300 TC)
Cosmopolitan (300 TC) | Hues (200 TC).

Refresh: This is a therapeutic and protective bedding. With a multiple range of finishes in this collection, there is something that fulfills every individual's need for evolved wellness and holistic well-being.

Personal Touch (300 TC) | Mother's Touch (300 TC) | Rejuve (300 TC)
Fahrenheit (360 TC).



our own website as well. We still do not have a clear strategy to sell through marketplaces."

He, however, maintains that the brand is not aiming to compete with the unorganized market in terms of the price points but expects a huge conversion towards organized market in the years to come as customers become more brand aware.

Gaining Foothold

The company is mindful that the general lack of awareness on quality amongst the Indian consumers can be challenging. For this reason, ICRVL's main focus is to address this issue of 'lack of awareness' and also evaluate parameters such as 'acceptance' and 'product experience', says Dalal. He is quick to add however that "these need to be experienced more than talked about!" Nonetheless, he also says that the potential for growth is immense, because the scope for educating the consumers is high and so is the possibility of introducing new ideas and products. Improved aesthetic sense through the products/designs being offered by us will make us stand out and get noticed.

In its pursuit to gain place in the consumer mind space, Boutique Living is ready to take on other brands in fray. According to Dalal, there are a handful of established Indian brands in

the market. And there is a significant number of Indian consumers who like to pick up bed sheets, comforters etc during their foreign sojourns.

The products they purchase, in all probability, are 'Made in India'. Till recently, there was a huge import of Chinese bed linen products into the Indian market. We are now observing the trend whereby customers prefer locally manufactured cotton bed sheets. We would look at building our brand on good quality and interesting designs.

Besides, Dalal also finds a colossal opportunity in the unorganized sector. "The challenge and the opportunity would be to convert them to the organised market. There are few Home-focused stores in India. We need something like a Bed, Bath and Beyond in our country. This will create more shelf space for our products," he opines.

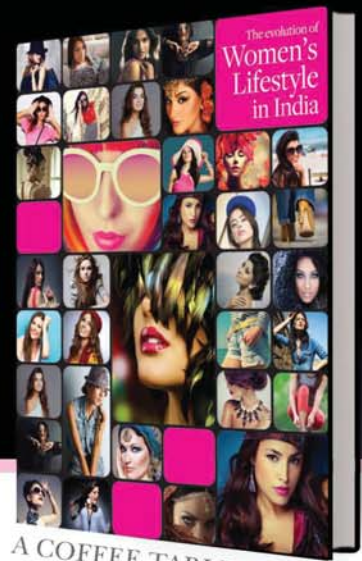
Looking ahead

The company is optimistic that Boutique Living has tremendous scope of performance, especially because of its market positioning, the target clientele and the price points offered by it. On market expectations, Dalal said, "We are targeting to capture about 25 percent share of the country's bed linen market in the next five years. We are fairly confident of delivering our brand promise to our end consumer."





The evolution of Women's Lifestyle in India



A COFFEE TABLE BOOK

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 unmaped changes to women's lifestyle in India.

the Heart... & the Hustle...

The Indian woman who was always all heart, is today making her mark in every sphere. She now takes a majority of decisions both at home and at work. Her decisiveness is today visible in her unique lifestyle preferences and choices. Now, the heart also commands tremendous hustle!

Launching Soon

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**.

Further, **WOMEN'S LIFESTYLE IN INDIA** will take an in depth look at certain key consumption categories and trace their evolution and trends. These will include • **Apparel • Jewellery • Footwear • Bags • Timewear and Eyewear • Beauty, Wellness and Fitness • Entertainment and Recreation • Food • and • Home**

WOMEN'S LIFESTYLE IN INDIA will also showcase some selective and most significant **retail concepts** which have been conceptualised specifically for women consumers. It will also talk to young women and **forecast trends** that will be brought about by the next wave of the evolution of women's fashion lifestyle in India.

As the first and the only book of its kind in India, it is " **ADVERTISING OPPORTUNITY NO. 1** ". To advertise contact:

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Celebrity Style Editors: Malaika Arora Khan, Sussanne Khan & Bipasha Basu

LIVING LIKE THE STARS



Mumbai-based “The Label Life” is a popular e-commerce lifestyle brand that celebrates an Indian woman’s desire for classy and glamorous lifestyle. The concept’s USP lies in offering celebrity-curated collections and free content in an exciting user interface to provide a superlative, personalised shopping experience. The BoF caught up with the brand founder, Preeta Sukhtankar, who talks about the nitty-gritties of her business and her future plans.

By Namita Bhagat

Preeta’s tryst with fashion and style began long before she founded her own e-commerce lifestyle brand – The Label Life. Her work as a television producer at MTV, and later as a publisher at Seventeen Magazine & L’Officiel helped her develop a profound understanding and appreciation of the beauty and luxury tastes. During this time, she also dabbled in event production and celebrity management, and styling ads. These experiences further enriched her learnings and endowed her with diverse set of skills that came in handy when she donned the mantle of an entrepreneur. Importantly, she also developed a good sense of consumer wants and needs, especially the Indian woman consumer, which became a precursor to her decision to launch a woman-centric fashion & lifestyle e-commerce venture.

Tell us a little bit about yourself! How and when did you enter the realm of entrepreneurship?

Preeta Sukhtankar (PS): I have always been interested in fashion and entrepreneurship and hence decided to start my own fashion e-commerce venture in 2012. Originally known as The Label Corp, the company was later rebranded into “The Label Life”. When I started, I had zero experience in e-commerce; and it was hard for me to even name 10 e-commerce sites in India. And that made me work twice as harder. Good thing was that I already had expertise in managing large teams and brand building from my earlier work experiences. I believe in hard work and in not over-thinking things. If something has to be done, you should just go ahead and do it!

Brief us on the idea behind TheLabelLife.com (TLL). What makes your concept unique and different from other players in India’s e-commerce fashion & lifestyle space?

PS: TheLabelLife.com is a destination for independent Indian women who desire a curated mix of clothing, accessories, home décor and much more! The portal hosts three celebrity Style Editors or “tastemakers” for each category. They are Sussanne Khan, Style Editor – House and Home; Malaika Arora Khan, Style Editor – Clothing; and Bipasha Basu, Style



Editor - Accessories. Our tastemakers curate signature everyday essentials for the home and closet. They provide the potential shopper with a personal touch.

We also have a guest editor for the month - the top-notch fashion designer who creates exclusive merchandise for our customers. Likes of Malini Ramani, Rocky S, Narendra Kumar, Nikhil Thampi, and others have associated with us as the guest editors so far.

We want to inspire the urban Indian women in making all the right shopping decisions. Our concept stands out among the rest, as our aim is to provide consumers with an editorial experience whilst shopping for trend-focused pieces. I think, each product has a story and a reason to exist, and therefore, we won't upload just a product image, instead, we show our customers how to style and use that product giving it a reason to become a part of their everyday life.

We do not want celebrities to endorse our brand. Instead, we want experts in the field to style and curate products. We are in essence a tastemaker-led e-commerce store and I hope we break conventional ways of doing e-commerce.

What all product categories do you have? Tell us about your core target group and the pricing strategy.

PS: In Fashion, we have Clothing and Accessories categories. Whilst the clothing range comprises items such as dresses, tops, skirts, and bottoms, swimwear, nightwear, etc, the accessories range includes an assortment of shoes, bags and jewellery. Moving on to House and Home, the collections are as diverse as home décor (lighting & candles, wall art, mirrors & accessories); dining & entertainment (drinkware and barware, serveware, tableware); Linens (cushions, bed linen, curtains, etc);

and also organisation & storage. We primarily cater to the style-savvy women in the age group of 25 years and more, especially the working women. We offer quality products at competitive prices.

Each of your product categories is styled by your celeb partner. Tell us how they contribute and what about their design and style inspirations?

PS: Our tastemakers are involved right from ideation to curation to final product. All collections are inspired by cool hunting, trend forecasting and heavy brainstorming with their teams for fashion and home. Their teams are always researching on latest trends and are extremely avid with what goes on in the fashion industry. The tastemakers are constantly giving inputs according to their experience, travel and constant involvement in the core industries.

Besides your own online store, is your brand available on other online shopping platforms also? Would you consider expanding presence to offline channels in future?

PS: Apart from our official e-commerce portal, we also retail through other leading online fashion shopping portals such as Myntra, Woopl, Voonik and Villara. We might look into the offline channels in the future, but it's too early to say.



Nikhil Thampi for TLL





Suhani Pittie for TLL

How do you keep up with the ever evolving fashion trends and consumer tastes? Let us know about your latest collection(s).

PS: We work on content, trends and constant research: they are the core elements of our business. Moreover, we also maintain constant touch with our customers to take their feedback and work backwards on evolving as brand to serve our audience/customer better. Our latest collection is the festive collection where we have an entire look book for the festive season in a story. Our look book, www.thelabellife.com/lookbook, is an e-magazine format with clickable links, and it provides a very interactive and immersive experience to the shoppers.

How are you leveraging the technology for your business?

PS: Since we are an e-commerce brand, the technology plays a key role in every aspect of our business – from sourcing to order fulfillment on one side of the business and from discovery to conversion on the other side. Technology is an enabler and key to offering a superlative customer experience for us.

What is your strategy to grow your customer base and how do you engage with them?

PS: Our success mantra is: “excellence in everything”, that means, fabulous content, fabulous products and fabulous customer service. To increase our customer base, we work on two broad strategies: acquiring new customers through various channels, and focus on retention and repeat of existing customers.

Your company has raised growth capital on different occasions. Can you please share your funding history?

PS: We had raised \$1.09 million from venture capital firm Kalaari Capital in 2013. Subsequently, the company has raised around \$500,000 more from other investors whom I don't wish to disclose.

How do you plan to grow The Label Life further, in terms of reach, market share or new product categories, etc?

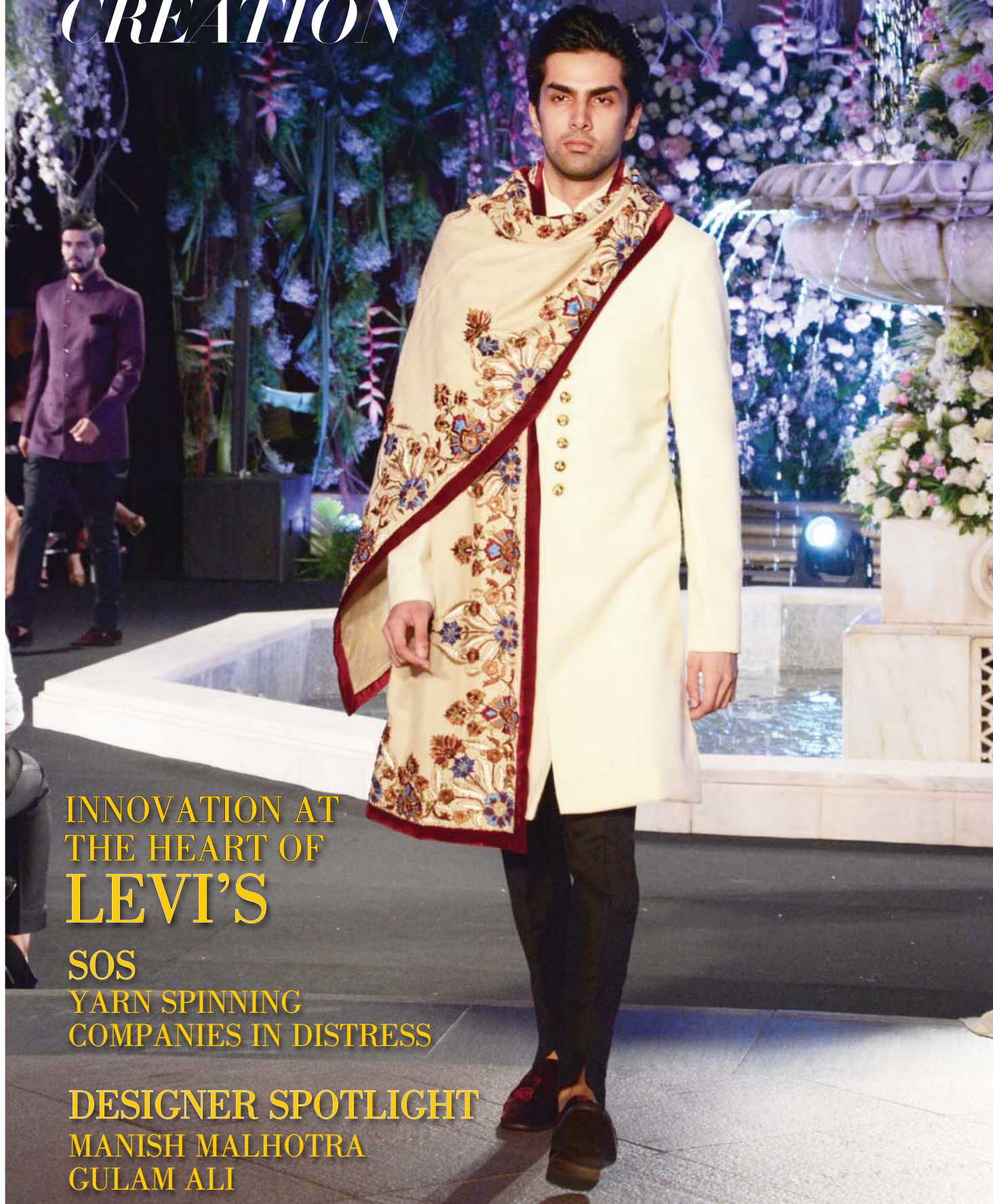
PS: My idea was to marry content with commerce and give users a personalised shopping experience. The e-commerce industry was and will continue to grow with leaps and bounds, but I was of the opinion that personalisation was something that was missing. I wanted to fill that gap and provide users with India's first editorial e-commerce brand.

As per experts, India's fashion e-retail market is expected to touch \$35bn by 2020. Currently, only about 1-2% of total addressable market is online which a colossal opportunity is for us. We might expand our categories and venture into newer ones like furniture and beauty.



Nitya Arora for TLL

FASHION *CREATION*



INNOVATION AT
THE HEART OF
LEVI'S

SOS
YARN SPINNING
COMPANIES IN DISTRESS

DESIGNER SPOTLIGHT
MANISH MALHOTRA
GULAM ALI

experience fluid fashion

"Festive season is here and my Liva infused clothes are ideal for every occasion. Having Liva in my wardrobe during this season is perfect, because it's a nature-based fabric that effortlessly drapes around me. It's fashion so fluid, that when I move - it moves with me!"

KANGANA RANAUT

LivaTM
natural fluid fashion

Contents



160-180

FASHION CREATION

Innovation

INNOVATION AT ITS HEART

Hailed as one of the world's most influential fashion brands today, "evolution" and "innovation" have been consistent themes at Levi's ever since its inception in 1873.

Pg No. 160



Study

GREENING THE FASHION SUPPLY CHAIN

The worldwide environmental awareness has forced modern enterprises to view supply chain strategies from an environmental perspective. A research from NIFT brings together several examples on how companies maintain "green" in their different parameters of supply chain.

Pg No. 164



Focus

SOS YARN SPINNING COMPANIES IN DISTRESS

The Indian spinning industry is the most developed segment of the textile and clothing industry. But Indian spinners have been going through a very difficult time over the last two years, despite cotton prices being reasonably low. **Sanjay K. Jain, President, NITMA**, analyses the state of the spinning industry.

Pg No. 174

Fashion Creation



Designer watch

MANISH MALHOTRA UNVEILS FESTIVE GLAMOUR

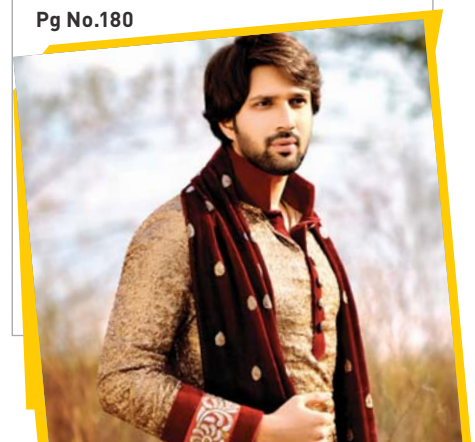
The Manish Malhotra Winter Festive 2016 collection spotlights Indian craftsmanship, combined with modern silhouettes for a stylish, young bridal entourage.

Pg No. 178

STILE BY GHULAM ALI MAKES GRAND ENTRY IN DUBAI

With men's fashion making huge strides on Indian and international fashion ramps, it was only a matter of time for the designer duo from Pune, Gulam Ghaus Khan and Mohammed Ali Khan, to stamp their brand's worth with fortitude.

Pg No.180





INNOVATION AT ITS HEART

To be able to capture the consumer mind space for over 160 years is no mean feat. But Levi's, an American denim brand, has done it, quite remarkably. Hailed as one of the world's most influential fashion brands today, "evolution and innovation" has been a consistent theme at Levi's ever since its inception in 1873.

By Namita Bhagat



INDIA MARKET PRESENCE

With a large population base, and a growing middle class, India is a very important market for Levi Strauss & Co. Overall, the company operates from about 1,500 doors pan India. Along with their classic blue jeans, the brand also focuses on bringing in new washes and colours to cater to the consumer demand and tastes. Last Fall, it had launched a new line of Indigo tops in a wide range for men and women. The collection is a fusion of the heritage of the Levi's brand with the romance of Indigo. The specialty of Indigo is that through regular wearing and washing, the colour fades away artfully, making each garment unique. This line was brought alive in a young, modern and distinctly Levi's aesthetic. For Spring/Summer 2016, the brand introduced its unique Shibori Collection, which is inspired by the traditional Japanese method of dyeing fabric. This traditional method renders itself to interesting prints and patterns and this unique optic was used in a range of styled knits, shirts and tops. The brand's other key washes to look out for are Khaki and Olive tints, that lend a very unique surplus utilitarian look.

and it prefers to not chase trends. Here's a snapshot of what Levi's has been upto lately:

The Commuter Collection (2011)

The Levi's Commuter Collection, launched in 2011, caters to the needs of modern urban cyclists. Full of purpose, style and function, it has been designed to enable a longer and more comfortable ride. Its Spring 2016 collection introduces multiple new fabric innovations for both men and women – right from reflectivity woven directly into the fibres of button down shirt fabrics, to evolutions in moisture wicking and odour repellency through more sustainable technologies. The new Levi's Commuter Endurance Fabric is its most advanced fabric developed and stronger and more durable, with more stretch for mobility and increased water repellency. This advanced fabrication has helped remove the need to reinforce areas of wear, like the seat region of the Commuter bottoms.

Transformational Women's Jeans (2015)

For the Fall 2015 season, the Levi's brand harnessed over 80 years of women's global denim expertise, paired that knowledge with the innovation and relevancy of today, and obsessed over the details - from the fit and fabric to finish and style - to create a transformational women's jeans collection. The brand's global design team identified the key fits and styles that women want, zealously working to optimise the latest fabric innovations and slimming technologies, creating the perfect fitting jean for each body type. Such innovations include the most advanced stretch and recovery, signature authentic Levi's details and world-class finishing.

One may wonder when Levi Strauss invented the world's first blue "denim" jeans in 1873, did he ever imagine that his creation would become one of the most popular attires of all times? Or that even a century and a half later, its craze will only continue to grow, as his namesake brand will go on to become a global jeans wear leader and one of the most influential fashion brands in the world. On all counts, the journey of this US-based denim brand is nothing but iconic! In fact, it won't be wrong to say that the advent of the Levi's gave birth to the global denim industry.

With passage of time, denim has undergone many changes – whether it be fabric and textures, production technology or design and style trends. Especially in the last few years, the denim industry has made significant strides in this direction. Levi's parent company, Levi Strauss & Co. (LS&CO), too has taken its innovation efforts to a whole new level. Clearly, for a brand to be able to capture the consumer mind space for more than 160 years and preserve its worldwide market leadership in this fashion-crazy world, "evolution and innovation in continuum" is imperative. And that's exactly what Levi's has been doing all along.

With innovation at its heart, the brand, however, has kept true to its Classic, American, distinctly San Francisco look, and cool aesthetic. That's really its mojo





Reconstructed Vintage Levi's Jeans (2015)

Having revolutionised fashion forever by inventing the blue jean, Levi's has continued to draw on that denim heritage and combine it with the latest happenings to make great even better. In Fall 2015, Levi's entered into a partnership with RE/DONE, a company that reconstructs vintage Levi's jeans into modern fits. The result is a perfect blend of old and new — a celebration of Levi's heritage, combined with a modern sensibility. Each pair carries the history of its past life; its journey recorded in the frayed pockets, whiskered colouring, torn knees and faded fabric. As two companies that were both founded in California, RE/DONE and LS&Co. understand the importance of sustainable business practices and are committed to conservation. RE/DONE | Levi's

jeans are manufactured in Downtown Los Angeles using water-conserving methods and no harsh chemicals.

The Wellthread Collection (2015)

The Levi's Wellthread Collection considers every aspect of production— from where the brand gets the materials that it uses for the production of the garments. Not only is it well-intentioned, it's well-planned. The conscious-minded collection encompasses production elements such as material integrity, water-conscious dyeing and durability to create a garment that the wearer will not only look good in, but also feels good about wearing. Garments of the Wellthread Collection are allocated to vendors that invest in workers' well-being, highlighting social value and community development.



Q/A WITH PAUL DILLINGER, VP OF GLOBAL INNOVATIONS, LS&CO.



Paul Dillinger,
VP, Global Innovations, LS & Co.

Please tell us about Levi's product development efforts. How has the brand benefitted from innovation? Walk us through your Eureka Innovation Lab.

Paul Dillinger (PD): At Levi Strauss & Co., innovation is in our DNA and is a key part of our product development efforts. From sustainability to wearable tech, we are working on a variety of projects. Innovation has benefitted the company because it helps to position us as a leader in the apparel space and be ahead of customer trends. Our Eureka

Innovation Lab is a big part of that. We opened it in 2013 and it is where all our product innovation takes place. It is located here in San Francisco near to our company headquarters, which allows us to seamlessly work with the team.

The Eureka Innovation Lab is a place for creativity and collaboration, where the product design and development teams can step away from a conventional office environment and step into an immersive "maker's" space. We believe that innovative design solutions come from a hands-on approach to product creation, when designers, merchants and product developers are all actively engaged in the development of new ideas.

Other obvious benefits are speed and agility. We can see daily iterations of new fits or finishes. We're able to test for core product integrity metrics on site, confirming the production viability of a new concept prior to its presentation and adoption into the Levi's assortment.



Stoneless Stonewash Finish (2015)

The Levi Strauss & Co has collaborated with Tonello, a global specialist in garment finishing technologies, to develop a new finishing technique called “NoStone”. Together with Tonello, the company has worked to create a stonewash system that eliminates the use of pumice stone, while reducing water usage, production costs and carbon footprint. The technique has also received the 2015 ITMA Sustainable Innovation Award for Industry Excellence from the European Committee of Textile Machinery Manufacturers (CEMATEx).

Jeans Made from Post-Consumer Cotton Waste (2016)

Textile technology startup Evrnu, SPC and Levi Strauss & Co. have joined

hands to create the world’s first jean made from regenerated post-consumer cotton waste. The first prototype, in the form of a pair of iconic Levi’s 511 jeans, represents a future where textile waste is reduced considerably and cotton garments are continually regenerated to create a more sustainable world.

Commuter Jacket With Wearable Tech (2016)

Levi’s and Google ATAP Group have recently unveiled the newest in wearable technology – Levi’s Commuter x Jacquard by Google Trucker Jacket. Coming in the spring of 2017, it is the first ever smart garment with Jacquard by Google technology woven in. The jacket allows users to stay connected with easy access to directions, information on nearby places, change their music, and answer calls just by touching the sleeve of their jacket. It is the latest innovation in Levi’s Commuter line, performance-driven products for the urban cyclist and designed to confront the challenges of today’s hyper-digital world.



There is a lot of emphasis on sustainability in denim manufacturing these days. How is your brand addressing this issue?

PD: Our goal is to become the world’s most sustainable apparel company by transforming the way we do business. We look at environmental and social sustainability and address it through all areas of our product life cycle – from cotton growing to consumer care. A few examples of how we are addressing sustainability are as follows:

- At the production level, through our Water<Less finishing techniques, which we recently open sourced with the industry. Many of these techniques were developed in the Eureka Innovation Lab and would have been much harder to achieve without the close proximity of our innovation center. We are currently extending our water saving initiatives to include Water<Less fabrics, changing the way we process and dye fabrics at the mill level.

- At a product level, through our Wellthread collection. This uses a holistic, systems-based design methodology to link our social and environmental sustainability initiatives. The result is a total re-design of our product icons, without sacrificing the look and feel consumers already love.
- And at a factory level, through our Worker Well-being initiative.

Today the market is rife with numerous denim brands. How does Levi’s plan to keep ahead of the curve? What can you predict about the future of denim/jeans in the next five years?

PD: With more choices available, the consumer can expect more from the brands they choose. We must stay current, offering a relevant point of view on style, fit and finish. We have to make lasting, durable, useful jeans; that’s the promise we make when we put the Two Horse Pull® Patch on our jeans. Beyond style and quality, the consumer will continue to expect their denim to do more, like the technical performance attributes that you

would expect from athletic brands which will need to be integrated into jeans wear without compromising the look or feel of the denim.

An extension of this performance expectation can be seen in our collaboration with Google through Project Jacquard. We’ve made digitally connected garments with woven tactile interface for our Commuter collection, allowing an urban cyclist, for example, to access essential digital features without taking their smartphone out of their pocket.

We also believe that consumers will want to express their personal values through conscious consumption. Growing along a similar trend trajectory as the local and organic food movement, there is a growing appetite for supply chain transparency and sustainable manufacturing practices. We’ve been working towards these goals and leading the industry for many years without consideration for their market appeal, and we welcome a future where these considerations drive consumer choice.



GREENING THE FASHION SUPPLY CHAIN

The worldwide environmental awareness has forced modern enterprises to view supply chain strategies from an environmental perspective. An efficient green supply chain management system not only ensures a sustainable environmental but also results in lower costs, manufacturing lead-time, and quality. This research paper contains several examples on how companies maintain "green" in their different parameters of supply chain.

-By Isha Singh, Student, Masters of Fashion Technology
Nimish Rastogi, Student, Masters of Fashion Technology
Dr. Archana Gandhi, Associate Professor, Department of Fashion Technology
National Institute of Fashion Technology, New Delhi

From product design, manufacturing to logistics management and product recovery, your supply chain has a major environmental impact. To be accepted and successful, it has to be seen to drive value creation throughout your company.

The key to success of any sustained Green Supply Chain initiative depends solely on how your company changes the way it works with its upstream and downstream trading partners. Note that, if you take a complete lifecycle approach, i.e., from initial raw material extraction to eventual product disposal, then this will require a much greater degree of collaboration, transparency and integration of supply chain processes and systems between the trading partners.

A green supply chain involves five parts in the whole process – from designing to retailing, including green designing, green procurement, green manufacturing, green logistics, and green retailing. (Figure 1)

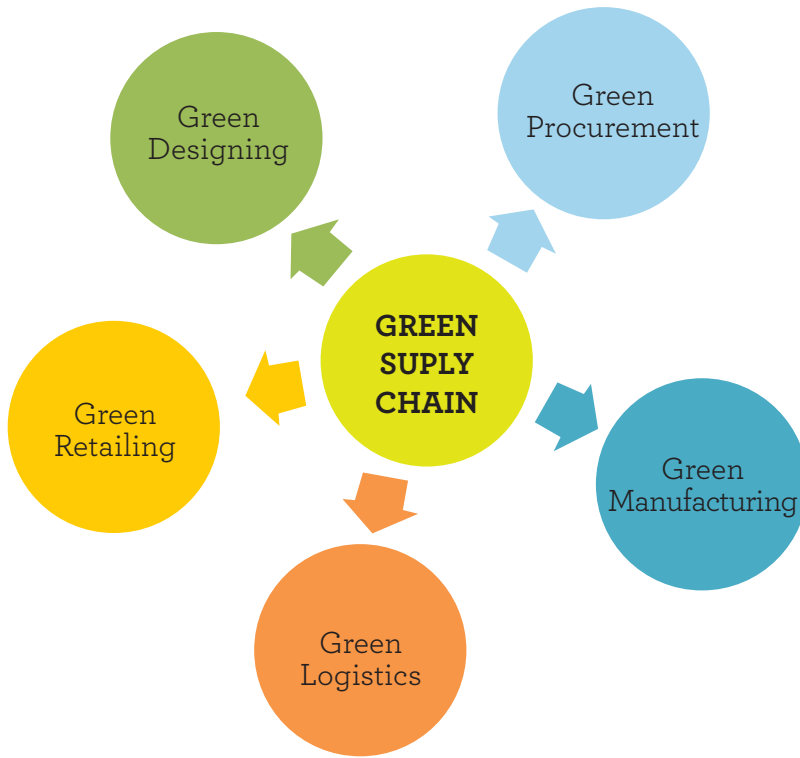


Figure 1

GREEN DESIGNING

Designing is the process of transforming the ideas, needs or wants of consumers into products or the process. In the fashion industry, the term designing is not only confined to the aesthetic appeal of the product but also encompasses designing the process of procuring, manufacturing and distribution network. Needless to say, designing is a gargantuan field in itself in any organization and plays an important role, especially when an organization is trying to implement sustainability in its supply chain. The efficient management of green supply chain starts right from designing the product or the process: and every step involved has to be fine tuned to optimize the environmental efficiency as a whole and achieve sustainable development.

Life cycle assessment (LCA) helps to know the product's complete life cycle starting from the raw material to the disposal of the product. It is a tool which helps to analyse the environmental

aspects and the impact of a product or a process [1]. With the help of similar tools, designers or retailers can compare different products based on energy use, CO₂ emissions, ozone depletion, reusability, recyclability, etc.

One such example is the renowned footwear company Crocs Inc. According to its sustainability report 2014, Crocs Inc., in the process of providing quality product to the consumer, are also focusing on improving the environment by responsible use of natural resources. With the help of their social and environmental initiatives, the company has succeeded in reducing the amount of volatile organic compounds (VOCs) used per pair by more than 17 percent. The organization also reuses the rubber scrap and the croslite (proprietary material used for manufacturing the shoes) scrap at a rate of 7 percent. The initiatives taken by the company are not restricted to manufacturing, sourcing or logistics only; the Crocs Inc. is trying to implement sustainability in their product designs as well.

The company believes that “simple designs can be beautiful, fun and functional by using fewer materials and generating less waste”. In 2014, the company came up with the re-used tooling technique, in which the mould used to produce the bottom of the clogs, i.e., Croc's original shoes, can be used interchangeably across the various shoe lines produced by them. Another strategy for simplifying the process includes the reduction of types of materials in their shoes. The company has identified the materials that could be used in children's, men's and women's footwear.

The sustainability in design does not end here for Crocs Inc. The company had introduced the ColorLite line which looks and functions like leather but does not have some of the negative environmental impacts that are associated with the leather.

Another initiative which gives way to implementing green in designing is the ECOCHIC DESIGN AWARD, with the motto of “Cutting Waste Out Of Fashion”. It is a sustainable fashion design competition which challenges emerging designers to create high appeal clothing but with the minimum amount of waste. It focuses on zero waste design technique, i.e., eliminating the textile waste at the design stage itself.

GREEN PROCUREMENT

Following green designing comes the next step in the supply chain, i.e., green procurement, also known as sustainable procurement. Sustainable procurement involves “organizations meeting their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organization, but also to society and the economy, whilst minimizing damage to the environment.”

>



Figure 2

M&S has defined sustainable procurement as: “How M&S sources goods and services in a way that achieves best value over the total life cycle generating benefit for our business and our customers, while minimizing damage to the environment and ensuring ethical standards are achieved.”

Marks & Spencer implemented sustainable procurement with the help of BS 8903, which provides expert guidance as to how sustainable procurement can be done in practice. There were 5 key drivers that were identified to be good fit for the organization.

Under the financial heading, M&S identified that sustainable procurement could drive a more holistic approach that challenges demand at source, assesses total life cycle costing and reduces disposal costs. Under the heading of risk, sustainable procurement could help manage price volatility and security of supply. Under organizational values, sustainable procurement could make targets and commitments more focused. Under marketing, sustainable procurement could drive sales of ethical and fair trade goods, help build a positive image, and attract talent to M&S. Under stakeholders, sustainable procurement could build awareness among internal and external stakeholders, address their concerns

and improve communication with them. M&S’s non-merchandise procurement team adopted these 5 key drivers of sustainable procurement.

BS 8903 asked the organization to put in place a clear organizational policy and a supporting strategy so as to give everyone clear guidance on the organization’s overarching principles and aims with regard to sustainable procurement. M&S has defined sustainable procurement as: “How M&S sources goods and services in a way that achieves best value over the total life cycle generating benefit for our business and our customers, while minimizing damage to the environment and ensuring ethical standards are achieved.” The M&S sustainable procurement vision states: “We will actively promote best practices in sustainable procurement and be the champions for this by embedding sustainability in our process.” The company has developed and delivered two training modules for all members of the non-merchandise procurement team, keeping in view that all its procurement personnel should understand the reasons for sustainable procurement, as well as how to play their part in the implementation. M&S structured a process named Sustainable Procurement Impact Assessment (SPIA) which comprises of a formal process that evaluates every significant sourcing project against the seven ‘pillars’, involving customer in the procurement process.

The SPIA is a live document, which is reviewed on monthly basis. M&S also worked with their suppliers to bring about sustainable improvement in the supply chain. In this process, suppliers are expected to answer questions that specifically relate to sustainability issues and are invited to join the Supplier Exchange, a website to share best practice and knowledge across a wide variety of topics. In addition, key suppliers are invited to attend the

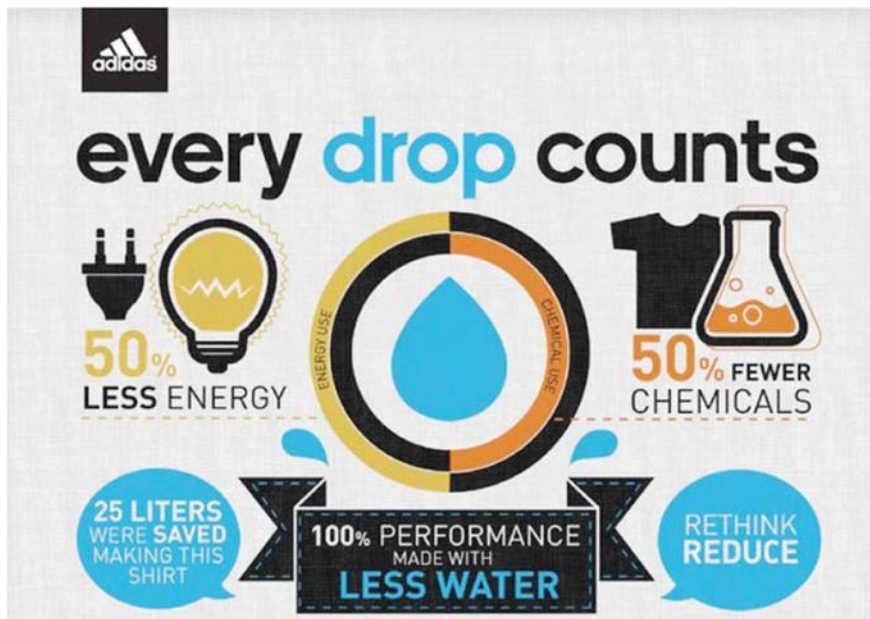


Figure 3

process” suppliers and report the data on their discharge of hazardous chemicals. It also has set a new goal of disclosing upto 80 percent of the global “wet process” supply chain data by 2017.

Eco Innovation - The B-Wool: The Benetton Group along with the Benind S.p.A Research & Development team is working to produce a new generation of wool garments that can be washed in any domestic washing machine, do not have face-felting problems and significantly decrease water consumption. The group is aiming to achieve knitting wool garments and cotton fabrics with innovative properties obtained by atmospheric plasma processes with low environmental impact.”

In Adidas, DryDye technology of dyeing is used, because of which dyeing of a t-shirt, that usually takes 25 litres of water, is reduced to zero water consumption. This process use 50 percent fewer chemicals and 50 percent less energy with compressed carbon dioxide as shown in Figure 3. This game-changing technology will be introduced to footwear in the 2016 Adidas collection.

The Adidas “NoDye” program is used for the material that uses no colour and skips the dyeing process. By skipping dyeing process in manufacturing of fabric, less water, less energy and fewer chemicals are consumed.

In the “Low-Waste” initiative of Adidas, the product is made with fewer number of parts, like running shoes, which is otherwise made on an average with 30 parts is made out of 12 parts. This is used in footwear, sports apparel, t-shirts, tanks, tights, skirts and shorts with fewer parts, recycled materials and maximum pattern efficiency, aiming to reduce material waste.

>

company’s annual conference, which is attended by over 1,200 suppliers.

Likewise, H&M runs a “Conscious Action” program in order to be more sustainable in the business. It uses organic cotton, in line with it. The company is also involved in a project called Better Cotton initiative (BCI), which provides better cotton farming techniques to the farmers. The firm not only focuses on direct procurement but also tries to eliminate wastes from the organization through recycling. It also uses recycled polyester, recycled polyamide, recycled plastic, and recycled wool in its product lines. This has helped the company to save energy, water, and reductions in green house gas emissions.

GREEN MANUFACTURING

The third and one of the most important steps in supply chain is manufacturing, which has the maximum control over sustainability of the entire supply chain. With roots dating back to the 1980s in Germany, the term consists of manufacturing methods that reduce

wastage and pollution with focus on reduction of excess usage, rationalizing materials, recycling and reusing components as much as possible so as to prove beneficial for the future demands and needs. Based on the “Manufacturing for Reuse” and “Design for disassembly” concepts, green manufacturing involves much more than the simple act of analyzing and modifying the manufacturing system. It include eco-friendly packing, distribution and usage after the lifetime of the product.

In few of the many examples that are considered, the Benetton Group has a strong history of committing to environmentally responsible business practices, which they maintain by implementing green procurement and manufacturing in their supply chain. Following are the ways in which they thrive to achieve green manufacturing in the process:

Detox Commitment: In association with Greenpeace, the group delivers this commitment by disclosing approximately 50 percent of its China-based “wet



Figure 4

The hot runners used in Adidas FORMOTION™ reduce waste by eliminating sprue units which in turn reduced material waste to 50 percent [10]. The amount of glue used has been reduced by using laser welding or a mechanical locking design, thereby reducing emissions.

Yet another example in green manufacturing is Nike’s “ColorDry”, which in association with DyeCoo, the world’s first supplier of industrial CO₂ dyeing equipment and a leading innovator in CO₂ dyeing technology and processes, came up with an innovative technology to dye fabric

without water, while also saving energy and eliminating the need for added chemicals. Further, another initiative by Nike, i.e. “FlyKnit”, has enabled designers to precisely micro-engineer every stitch to create a featherweight, firm fitting and virtually seamless upper while reducing manufacturing waste and the amount of materials used, by nearly 2 million pounds.

Nike also introduced the “Nike Grind”, in which the recycled material is scraped out of athletic shoes collected through Nike’s Reuse-A-Shoe program. In this initiative, “slice-and-grind” technique is used, i.e., where each shoe is cut into three slices—rubber outsole, foam midsole and fiber upper. These slices are then fed through grinders and refined for use. Since 1990, Nike has transformed more than 29 million pairs of shoes and 36,000 tons of scrap material into Nike Grind.

In the Burberry Group Plc., a “Product Restricted Substances List (PRSL)” is followed. Undertaking this programme, Burberry is able to phase out 11 hazardous chemical groups as listed in PRSL so far. The Burberry Group Plc, in collaborating with ZDHC (Zero Discharge of Hazardous Chemicals), also undertakes the efforts in leading the apparel and footwear industry towards zero discharge of hazardous chemicals for all products across all pathways by 2020. For running this initiative, a “Manufacturing Restricted Substance List (MRSL) is followed. The list of the brands can be seen in Figure 4.



environmental issues and directives laid forth by the Environmental Protection Agency and Restriction of Hazardous Substances Directive.

Award-winning designer Michael Kors, for his eponymous brand, utilizes an innovative ocean freight service through Ocean Guaranteed, a joint service provided by APL Logistics and Con-Way Freight. Since the size of the volume of handbags was very small than the capacity of the container, Michael Kors needed a service that could match the volume of the handbags with the full container. So to solve this issue, Michael Kors partner shipped with APL logistics and Con-Way Freight. Also the designer shifted means of transportation from air freight to ocean freight. The result, along with reduced carbon emission, was reduction of transit time by 30 percent as compared to standard LCL shipment and cost by \$20 per bag.

GREEN RETAILING

Pioneer of modern retailing in India, Shoppers Stop tries to implement sustainability in the business through the principle of 3Rs (Reduce, Reuse, Recycle). A few initiatives taken by the company towards green retailing are mentioned below.

In Solar Power Initiative, Shoppers Stop has installed solar panels at its Andheri store in Mumbai. The solar panels installed on the roof of the store are capable of generating 30kW of power, which is utilized to power the second floor of the store. The store is also equipped with solar pipe system, which reflects and intensifies the sunlight or the normal day light, down through a pure silver base mirror finish aluminium tube. This technology helped Shoppers Stop to reduce its store lighting by 50 percent.

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Also, FabIndia supports CSE (Centre for Science and Environment) by taking up activities involved in environment conservation. It has been actively campaigning about the sustainability issues and has been raising funds to CSE and supports its cause to educate and spread awareness in the society.

In spring 2012, Levi's came up with the "Less is More" initiative. Since then, Levi's together with water.org (who is a pioneer in delivering sustainable water solutions around the globe), is working to make a big difference to fulfill the vision of clean water to all. Presently, Levi's is using it in more than 13 million products and have been able to reduce the water consumption up to 96 percent. The total water saved is over 172 million litres.

GREEN LOGISTICS

Logistics act as an external factor for any organizations' green supply chain management and therefore plays an important role when making the supply chain more efficient and green. So, in order to develop the strategies for green logistics, one should focus on upstream factor, i.e., the inbound logistics (material management) and the downstream factor which include the outbound logistics (physical distribution). Some of the key reasons for greener logistics include — increasing energy costs and green house gases emissions, climate change, increasing awareness among the consumers regarding the

FabIndia follows three types of logos to differentiate between the varied levels of sustainability measures. The logos are as follows:



Products with a green logo are "Fully Certified Organic", i.e., all processes involved right from growing to packing are done by following National and International standards.



Products with a blue logo are "In Conversion", i.e., the farmers are using purely organic techniques right from the start.



Products with a yellow logo are "Natural", i.e., the farmers are using purely organic techniques, which includes product that do not contain any preservatives, colours, flavours and additives.

HomeStop, one of the specialty stores by Shoppers Stop, offers the eco-friendly brand 'Back to Earth'. The merchandises offered by the brand are inspired by nature and are made up of rubber wood, dead wood, recycled wood, bamboo and jute.

Continuing the trend, Reebok with its parent group, i.e., the Adidas Group, started two projects in 2012 — one for consolidating hangtag shapes, and one introducing single-wall transportation cartons for apparel garments. This resulted into minimising the use of paper and reducing costs, while maintaining quality. Reebok is enhancing its transport cartons and shoe boxes in a sustainable way by using 100 percent recycled material, clay coating and no use of glue.

Mango follows the PEP (Packaging Waste Prevention) Business Plan, which consists of policies for reduced, and optimal use of product packaging. Mango uses 100 percent recycled material in its boxes and paper sealing tape with no metal components to pack. Also, all the transfers of products between stores, as well as returns to central warehouses, are made using re-used cardboard boxes only. Mango uses Halide lights in their stores, which saves energy up to 45 percent and also reduces residual heating, which in turn regulates the store's climatisation system. Since 2014, Mango is using bags made up of recycled paper or paper issued by Programme for the Endorsement of Forest Certification (PEFC).



Inditex, one of the world's largest fashion retail group, with more than 7,000 stores across the globe, abides by a sustainability strategy that encompasses three major initiatives, i.e., water management, energy and green house gas emission management and bio-diversity protection. The firm tries to implement these strategies in their business model through their eco-efficient stores, manufacturing and logistics. In order to ensure sustainability in all of their products, Inditex has developed right to wear standards as a quality guarantee.

In 2007, Inditex introduced the eco-efficient stores manual and since then they have opened 2,419 eco-efficient stores. These measures helped the organization to save 20 percent in electricity along with the reductions in green house gas emissions. These measures also resulted in 50 percent savings in water consumption with respect to a conventional store.

CONCLUSION

The purpose of this paper is to discuss an overview of the development of "Green" in different processes of the supply chain in apparel industry by taking examples from varied brands. It is important for organizations to consider moving towards "Green" more and more in their sector right from designing, procurement, manufacturing, logistics and retailing. It is becoming a necessity now rather than a fad. Also, implementing "Green" has various benefits like financial, environmental and social.

Hence keeping in mind the future needs and requirements, the organization awareness level on environmental problems should be updated. More understanding towards the adoption and implementation of "Green" should be encouraged in the organization and within its different departments.



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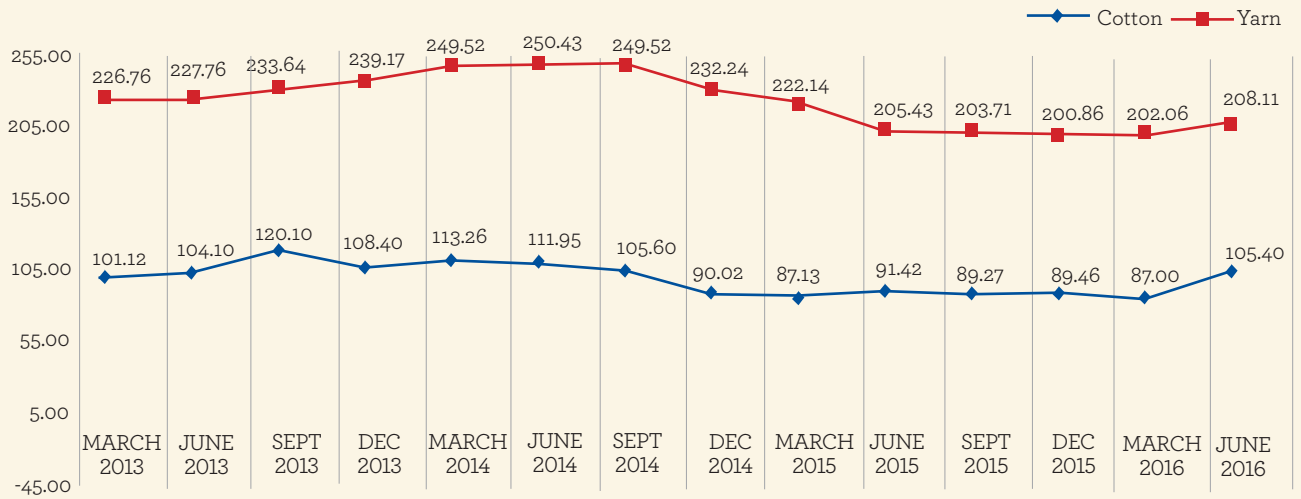
The Indian spinning industry is the most developed segment of the textile and clothing industry. But Indian spinners have been going through a very difficult time over the last two years, despite cotton prices being reasonably low. Sanjay K. Jain, President, NITMA, analyses the state of the spinning industry.

In my business life, I have not seen a worse situation than this, where such a big disparity arose between spot cotton prices and yarn prices. This disparity for such an extended period of time shows that there is a deep rooted problem and it's not a temporary feature. The current isolated spurt in Indian cotton prices has aggravated the situation to an extent that many can hear the death knell. The more disturbing fact is that no domestic yarn buyer is hassled or is rushing to buy yarn – they know cotton prices have moved 50 percent and yarn just 20 percent – still no anxiety! International buyers have diverted their orders as cotton prices in India has increased much more in comparison to international cotton prices.

Indian spinners have been going through a very difficult time over the last 2 years, despite cotton prices being reasonably low due to a demand- supply imbalance created out of new spinning mills coming up in some states (viable due to incentives rather than fundamentals) and slow demand locally due to two successive poor monsoons and overall subdued sentiments in the globe. Exports have failed to cheer us up due to the disadvantage created by FTAs of our competitors with the big buying nations and we, as usual, are not able to break any ice anywhere.

Cotton yarn has suffered further as the Government felt that yarn needs no incentives. It's true that yarn no more needs any investment incentives, but it surely needs incentives to export. Requests went unheeded by the Government from various

COMPARISON OF COTTON AND COTTON YARN PRICES IN INDIAN MARKET (₹ PER KG)



Source: Office of Textile Commissioner data base, July 2016 and Ministry of Textiles, July 2016



Indian spinning industry is the most developed segment of the textile and clothing industry. It is a market leader in the global markets and we have 30 percent exportable surplus, which is being exported all across the world. Hence, it seems to be an industry needing no assistance, as the Government (central and state) has given it a lot of incentives over the years leading to the industry coming of age with the best technology. However surprisingly, the excessive and long term continuation of incentives has been the bane of the industry. It has grown no doubt, but more on incentives rather than fundamentals. The Central Government realised this and as a first step, curbed incentives to the industry and finally stopped all incentives. However, State Governments (Gujarat Maharashtra, Andhra Pradesh, Rajasthan, Madhya Pradesh, etc.) came in with even higher incentives leading to the industry continuing its expansion.

associations because they didn't go into the details of demand- supply minutely or tried to understand the plight of spinning industry (though it is classified as a stress industry by the Banking sector). The recent RBI Financial Stability report stated that textiles had the highest slippages from Standard Account to NPAs, i.e., 8.8 percent in 2015 and the way the industry is working, 2016 is going to be worse.

The state of the spinning industry can be further understood by the above chart which shows how the margin over cotton for the yarn industry has shrunk despite power, labour and other overhead costs going up. Margins, instead of going up, have come down and is today at a cash loss level.



As visible, cotton to yarn had a value addition of ₹125/kg in March 2013 and went up to ₹144/kg in Sept 2014. Since last 1 year, its been down to ₹115/kg and now its has come down to ₹100/kg. Hence in last 3 years, contribution from yarn manufacturing has reduced by 25 percent, while manufacturing costs have gone up by about 10 percent.

We live with hope that things will improve; however, instead of seeing green shoots suddenly, the industry faces a dark black tunnel through which many may not get through to see the light of the day.

It's a serious crisis, hence kindly read me out (even if you disagree or find it boring).

Why are we here today ?

- Unplanned and illogical incentives being given for building spinning capacities - so much that it's practically irresistible, for one, to not invest (Central Government has finally understood, but State Governments still haven't).

- Lack of any authentic crop and stock data in India despite being the largest producer and second largest consumer.
- No clear cotton fibre policy, hence no system of planning exports, stock to use ratio and other cotton developmental issues - working in an ad hoc fashion and leading to lobbying by different interested factions.
- Wrong and misleading cotton estimates from leading agencies/ associations - gave a false notion that the country had enough cotton - agreed its difficult to estimate, but if so, then better not to give estimates.
- Crop size in 2015-16 season is turning out to be substantially lower than estimated, catching spinners on the wrong foot. Quality cotton was exported at low prices and now cotton is being imported at high prices (industry losing its main competitive advantage to competing nations).
- The Cotton Corporation of India (CCI) acting like a trader when it comes to sell cotton - it surely helps farmers by picking up cotton but disposes work simply as a trader without any vision of price stabilisation, industry service, etc. This year, small open bids were made by traders for CCI cotton, raising the price level everyday which acted as a market indicator for price levels.
- MCX/NCDEX is for hedging and price discovery, however it is 99 percent run by traders and speculators (many who have nothing to do with cotton) and hence, disrupts the physical market equilibrium. No action taken to rein steep rises in short times, allowing a free run to bulls. Curbing volatility of any nature is one of the prime roles of a regulator.
- The Government turning a blind eye to the spinning industry without understanding the facts.
- TUF payments delayed and companies penalised for system errors by banks in filing TUF claims.

- Retrospective amendments made to deny benefits under Incremental Export Incentives – industry had to go to court for justice.
- Export incentives given to all segments of the industry excepting yarn under MEIS and subvention – does the end user industry in India have the capacity to consume Indian yarn? India leads in exports not because we are the best, but because spinners have no choice but to undercut and sell yarn in exports to offload the excess spinning capacity.
- The rupee has weakened much less than most other currencies, even yuan has depreciated more over the last one year.



- Domestic consumption has remained muted due to 2 consecutive poor monsoons, fabric imports, and overall low sentiment in the economy.

Today, the way the spinning industry is placed, there seems no hope for the industry – we have excess capacity, which has to be dumped to China at below cost prices to keep the mills running. High fixed costs make production cuts difficult. As a result, NPAs are increasing, mills are partially or fully closing down on one hand, while new investments are coming on the other hand. Old and new mills have a cost differential of 10 percent in

an industry, which doesn't even have a consistent net profit margin of 5 percent. Government is sitting peacefully and hoping that as the value added industry grows, the balance will set in (don't know how they expect the industry to get through these prolonged times before the value added industry catches up).

It's amazing that despite this unprecedented and isolated increase of Indian cotton prices in 3 months, the Government has not come out in any visible fashion to understand the issues and problems. Weak and small mills have been left to the mercy of God to wither away with the strong bull winds as the world looks on. There hasn't been even a statement from the Government. Of course, some mills that stocked cotton are making big gains out of this sudden boom in cotton, but the health of majority has got critical.

Anyway, we live in hope and with a new cabinet rank minister, we expect that the Government shall pay heed to the spinning industry's problems and work with it to find solutions to atleast breakeven. We have everything that spinning industry needs, still we are suffering – a real pity. Indian textile industry is at a very important threshold and it's now or never. China's cost escalation has given India a golden opportunity to capture a bigger pie of the large global market and up its share from 4- 5 percent to 10 percent over the next decade.

What we feel the Government can do (in order of priority):

- Allow immediately from April 1, 2016, Merchandise Exports from India Scheme (MEIS) and interest subvention for yarn industry.
- Cotton fibre policy to ensure the country's main competitive advantage, i.e., cotton is leveraged fully and a healthy stock to use ratio of cotton is maintained. Our cotton to stock ratio (except 2015) has been always one of the lowest in the world

ranging from 8 to 12 percent as against the world average of about 30 to 40 percent.

- Design a comprehensive, scientific and unbiased system for crop forecast and arrivals.
- Create a balanced all India policy in consultation with states to ensure that valuable Government money goes into developing the textile industry in a balanced manner (states giving incentives without seeing the national picture is detrimental to the industry as a whole).
- Release data by DGFT of cotton and yarn exports/imports on real time basis.

Conclusion:

Sincerely hope the step motherly treatment to the existing spinning capacity with high leverage and created out of incentives won't be allowed to wither away. Spinning is a capital intensive industry and is very important for the value added industry to develop and thrive.

We should not forget that such isolated rises in domestic prices of raw material will make the whole value chain uncompetitive and the logic that we shall take the space occupied by China, will go adrift. The ₹6,000 crores package given to garment industry is already more than nullified by this sudden spurt in domestic cotton prices and the future price index reflects that its not a temporary phenomenon.

Last but not the least, we should not forget that our biggest competitive advantage is our availability of cotton fibre. India cannot afford to fritter away its biggest competitive advantage – we have built our yarn economics on the same and need to take it forward to fabric and garments. Lets hope a comprehensive and well thought out long term policy/strategy is put in place before its too late.





MANISH MALHOTRA

UNVEILS FESTIVE GLAMOUR



The Manish Malhotra Winter Festive 2016 collection spotlights Indian craftsmanship, combined with modern silhouettes for a stylish, young bridal entourage. The fashion house showcased its signature resham threadwork, clustered sequins and intricate hand embroidery on dramatic trails and off-shoulder capes, alongside floral motifs. Replete with avant-garde twists, there were jacket-saris, lehengas paired with sheer crop blouses and draped dupattas on contemporary anarkalis. Elaborately detailed long tunics worn over cigarette pants and majestic, flowing, backless gowns effortlessly brought the classic and contemporary together.

Statement accessories, including bejewelled belts and pill-box clutches added a glamorous edge. Crafted in silks, sheer net and lace and in hues of pure white, baby pink, lime green, lilac, champagne/nude, metallic grey and honey mustard, the ensembles were worn with elegant fine jewellery by Anmol Jewellers. For the modern gentleman, the collection presented textured velvet bandhgallas, structured jackets and vests paired with Jodhpur pants. The elegant outfits were styled with pocket-squares, jewelled buttons and embroidered silk scarves.

“Lakmé Fashion Week is very special to me,” Manish Malhotra said. “Both my label and my association with LFW turns eleven this year. Label Manish Malhotra is also the first Indian brand to present a Virtual Reality experience with Etihad Airways. Every season, the muse for my collection has been the young Indian woman, who carries her traditions and modern values with ease. I am excited to present a collection that suits her style, as well as her bridal entourage,” he added.

Speaking on the opening day of the Lakme Fashion Week, Neerja Bhatia, Vice President, Indian subcontinent, Etihad Airways, said, “Lakme Fashion Week is very exciting for us in India, as it has marked another step in our efforts to enhance its positioning as the global airline for the fashion industry and further elevate Mumbai on the international fashion calendar. Working with Manish Malhotra has also been a fantastic experience showcasing the best of his latest collection, proudly presented by Etihad Airways.”

Etihad’s association with Manish Malhotra is the latest initiative by the Abu Dhabi-based airline, following its recently-announced global agreement with WME | IMG to become the fashion industry’s preferred airline. Manish Malhotra is the second designer that the airline has partnered with globally, after Oscar de la Renta at the Mercedes-Benz Fashion Week in Australia, earlier this year.



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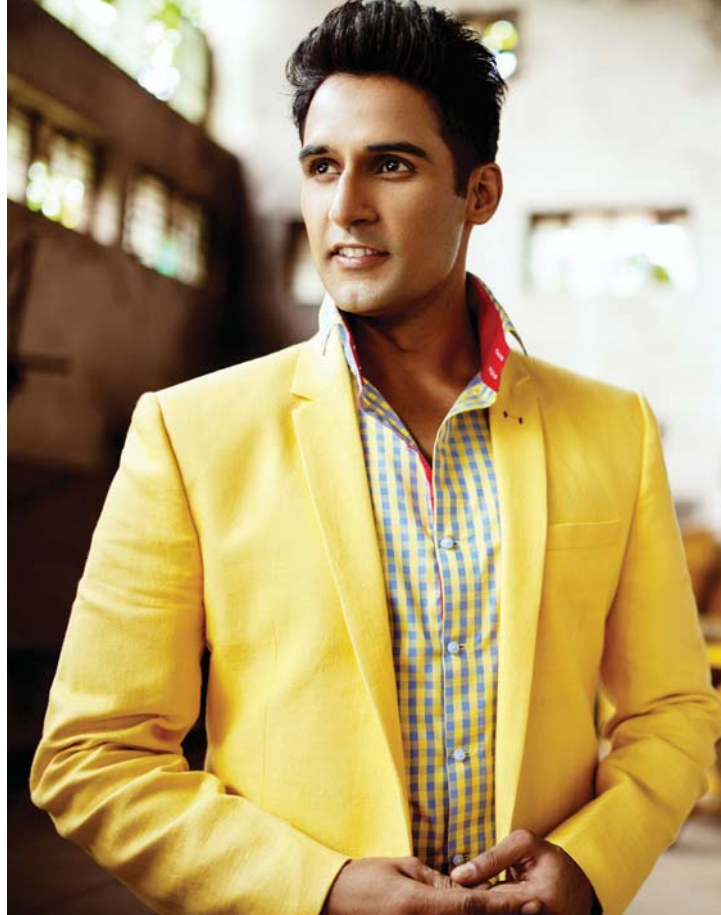
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With an expertise of more than a decade in designing men's wear, 'Stile by Gulam Ali' has evolved from making regular pathanis for friends, to a flagship designer store in Pune first and now in Dubai, exhibiting an exclusive range of men and women couture and bridal wear collection to an international audience.

ABOUT THE COLLECTION

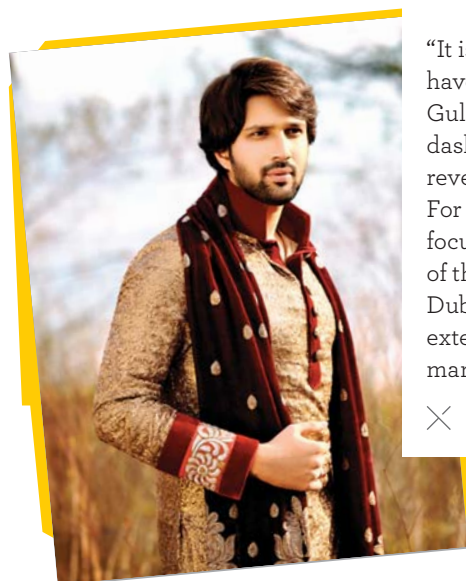
Drawing from heritage and Indian workmanship, the collection is a flamboyant and eclectic line of traditional sherwanis, kurtas, exclusive limited edition pathanis to contemporary western designer suits, formal wear, structured jackets and men's bridal and cocktail evening wear. 'Stile by Gulam Ali' has steadfastly grown into one of the most sought after labels in recent times. A limited edition and an exclusive women's bridal wear also makes the presence during bridal seasons and on special occasions.

RETAIL EXPANSION

With their recent foray into international markets, 'Stile by Gulam Ali' decided it was time to venture beyond India and into the UAE, Dubai markets with another flagship store at Meena Bazaar, Bur Dubai. The intention has been a hit, bringing together Bollywood and fashion with Actor-Director-Producer Sohail Khan launching the flagship store on August 31st.

The brand envisions global expansion with a strategic vision to create brand presence across the Mid East and Europe in the coming years. Designers Gulam and Ali couldn't have been more happier with the success their work continues to enjoy.

"It is all about hard work and the grace of God. We have been meticulously working towards this," shares Gulam. Ali, who also loves to model and makes a dashing visual for his brand collection campaigns, reveals Stile will venture soon into luxury couture. For now, the designer duo have thrown their might focusing on capturing the imagination and sentiment of their clients and growing audiences in India and Dubai, for the next couple of years. They will, then, extend their brand to newer, emerging and established markets across the world.





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THE WEDDING & DESIGNER SPECIAL

The Big Fat Indian Wedding!! A grand showcase of fashion, glamour and exuberance a rare occasion within Indian's expand extravagantly. And today a wedding is meaningless without its array of some great designer work. In fact, wedding work is perhaps the main business proposition for a majority of independent fashion designers in India. In this issue of Images BoF, we study this great phenomenon and also India's most wanted fashion designers.

- We size and map the opportunity in wedding wear.
- Top trends and best recent innovations.
- India's most wanted fashion designers.



FASHION ACCESSORIES

In this issue, we also bring the first of our two-part study on the fashion accessories market in India. We study shoes, bags, belts, ties, bows, cravats, mufflers, wraps, drapes, shawls, hats and caps in this issue.* We will define and size the market, pinpoint main trends and map pioneering moves.



INDIA'S TOP FESTIVE COLLECTIONS

We will also present the top collections launched in India, during this festive season.

* In the next issue, we will study time wear, jewellery and body accessories.

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