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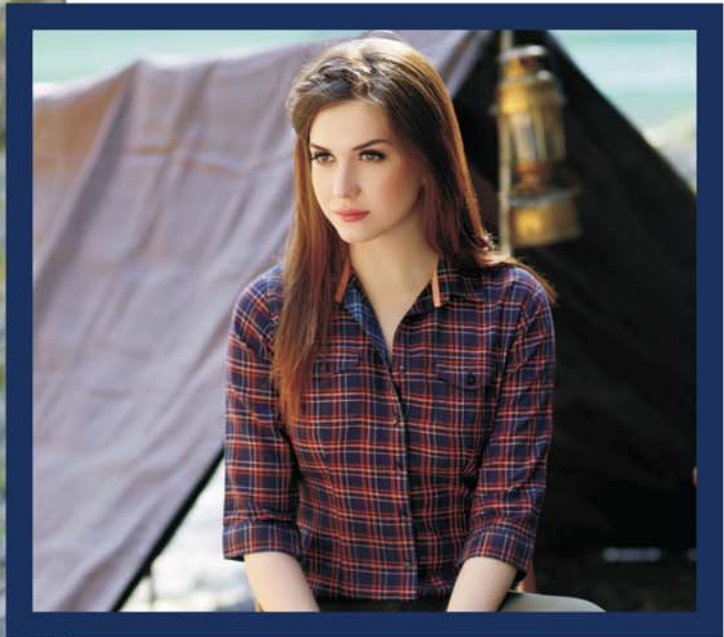
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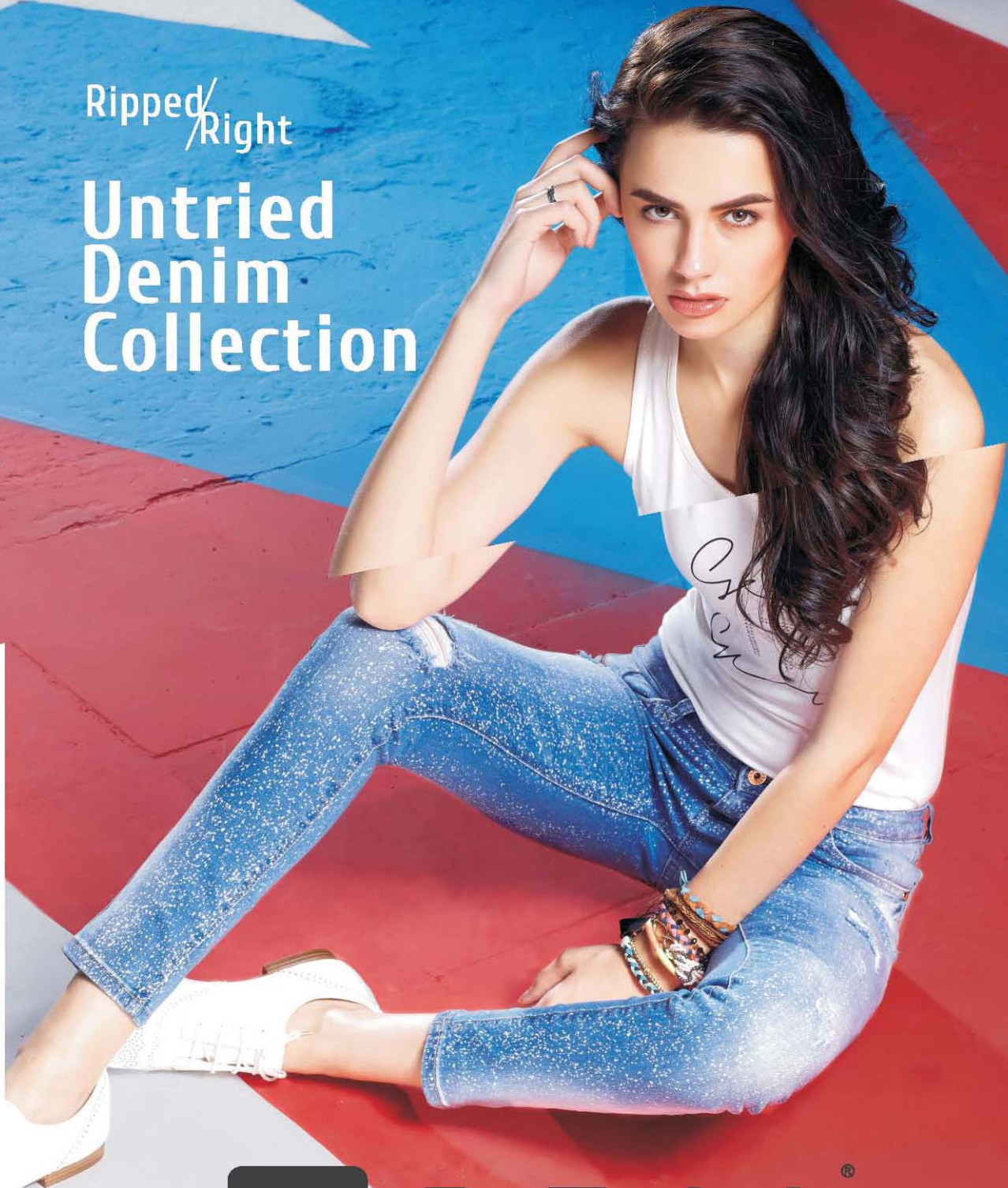
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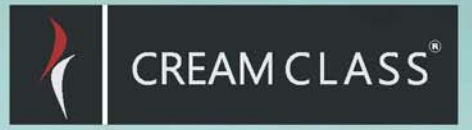
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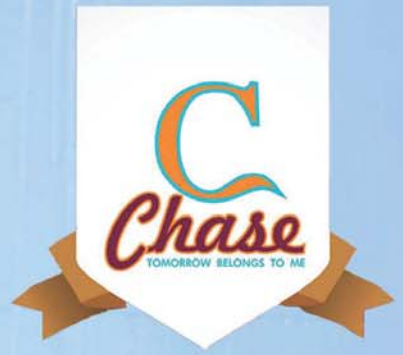


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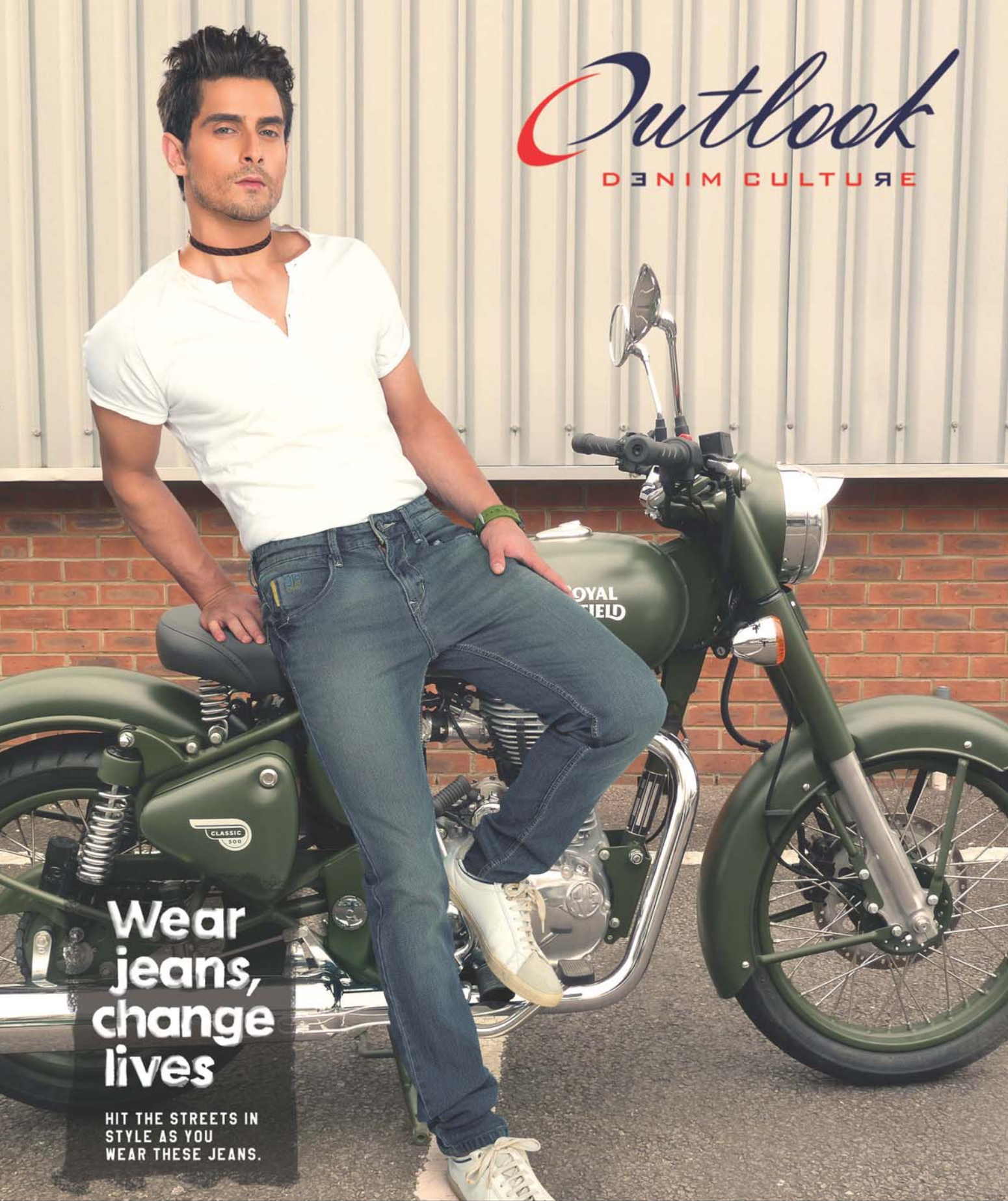
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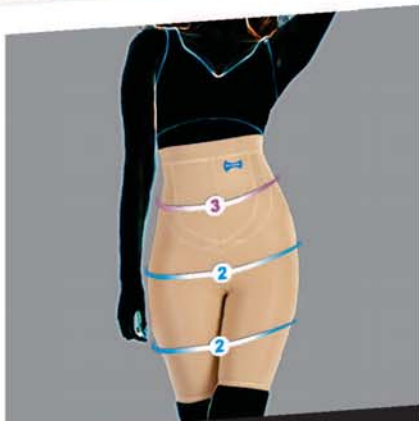


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Dear Readers,

Greetings and a warm welcome to the hottest issue of the year – The Denim Special. We are truly overwhelmed by the huge support and participation in this issue. First of all, I thank and congratulate all the contributors, participants and the entire team for bringing out this mammoth issue. I am extremely pleased to share the work of so many committed and thoughtful people.

From a utility dress during the Great Gold Rush to evolving into a symbol of youth rebellion, denims are easily one of the most ubiquitous pieces of clothing, and have ruled the world of fashion for more than a century. After all, could there be anything more comfortable than slipping into your pair of comfy used jeans, molded perfectly to your body shape?

Standing at ₹17,661 crores in 2015, the denim industry in India is already substantial. But the game has just begun. It is, from now on, expected to grow at a CAGR of 15.4 percent and reach ₹36,110 crores by 2020. And although, it is the men's segment that dominates the sector, growing fashion consciousness, influence of media and western culture, and growing free choice have bolstered the growth curve of the women's segment too. Industry sentinels expect it to exhibit a CAGR of 18.5 percent.

As our research associates and industry experts have mapped the market and trends, it is evident that jeans, as a category, have undergone a massive evolution from their straight fit indigo hued avatar. Today, the industry is stockpiled with options to spoil a customer with unfathomable choices from a plethora of fits, cuts, styles, fabrics, colours, washes, effects, value-adds, and of course, brand names. The evolution has been so massive that brands are now compelled to shift their focus from the traditional blue template to concentrate on more contemporary manifestations. We try to map some of these. We also take a look at the positive contributions of brands like H&M and Archroma towards a more environmentally responsible future along with studying the opportunities in emerging categories like kids' denim.

In addition, we take a look at what's the latest at top denim brands. In our Fashion Creation section, we study prospects of denim fabrics in India and feature the leading denim fabric companies, while WGSN shares its thoughts on sustainability. And in the Sportswear International section, this time we present the top men's wear trends, key items, and colours and materials for Fall/Winter 2016-17.

I hope you like the issue. Happy reading!!



Amitabh Taneja

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CORRIGENDUM

Volume XVII // No.6 // June 2016: "Made to Measure Shirts - Creating Individualistic Style Statements". Page 136: The caption of the second photo should read Zahir Shahpurwala, Kachins Clothing and not Akshay Narvekar, The Bombay Shirt Company. Also, Bombay Shirt Company has been incorrectly published as Bombay Shirting Company at several places in the article.
 Volume XVII // No. 5 // May 2016: "The Growth Drivers in the Indian Knitwear Industry" by Nischal Puri. Page 123: The first sentence of the second paragraph mentions Max as a 'discount' fashion chain, whereas it should read as a 'value' fashion chain.
 We regret the mistakes. Readers are requested to note the aforementioned corrections.




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**FASHION RETAIL
IN INDIA**

STORES:
**BROOKS BROTHERS
C9
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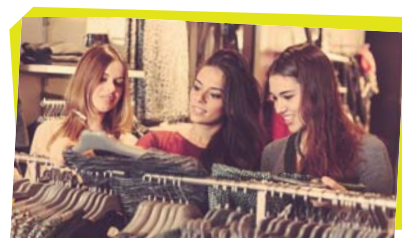
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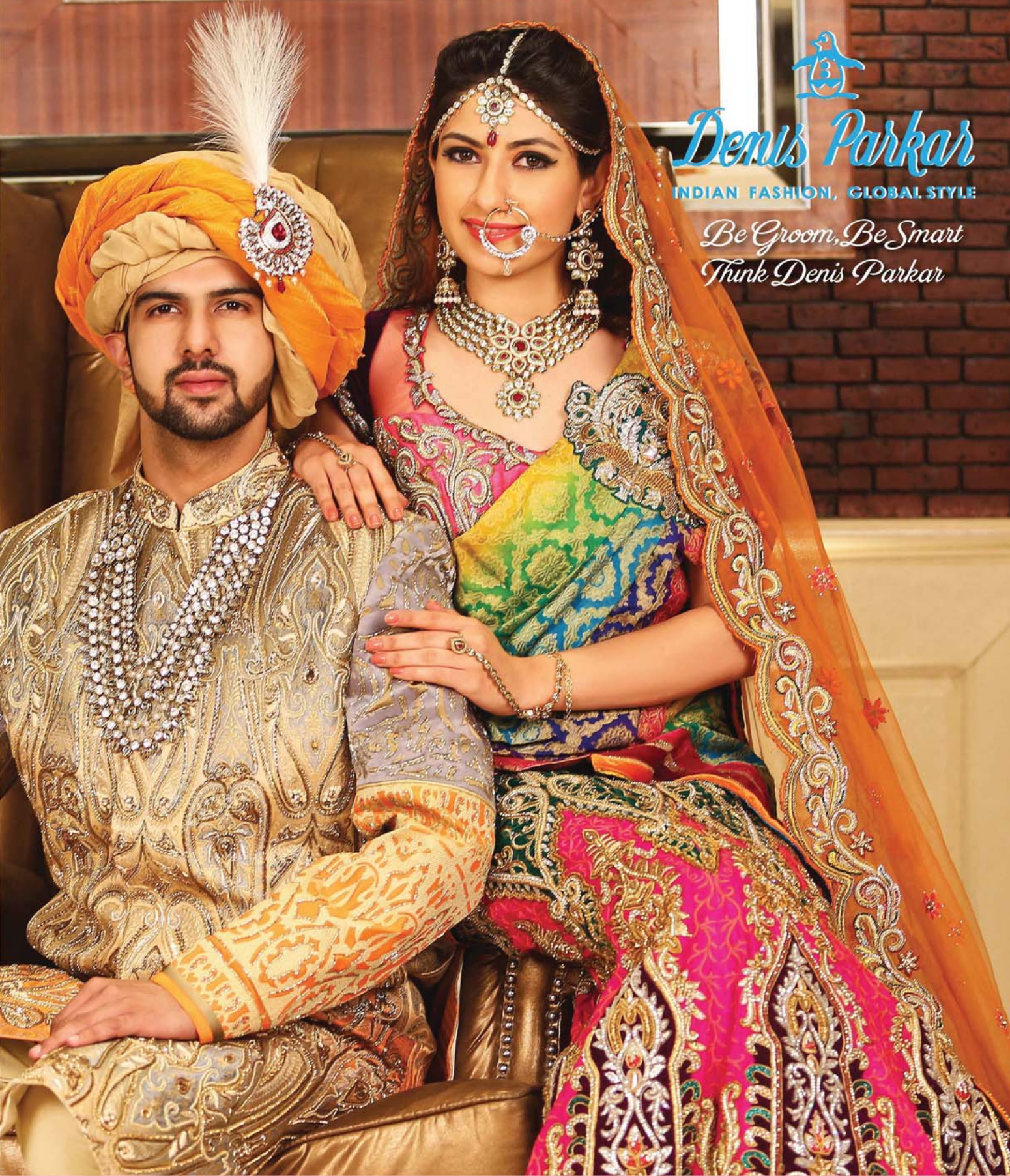


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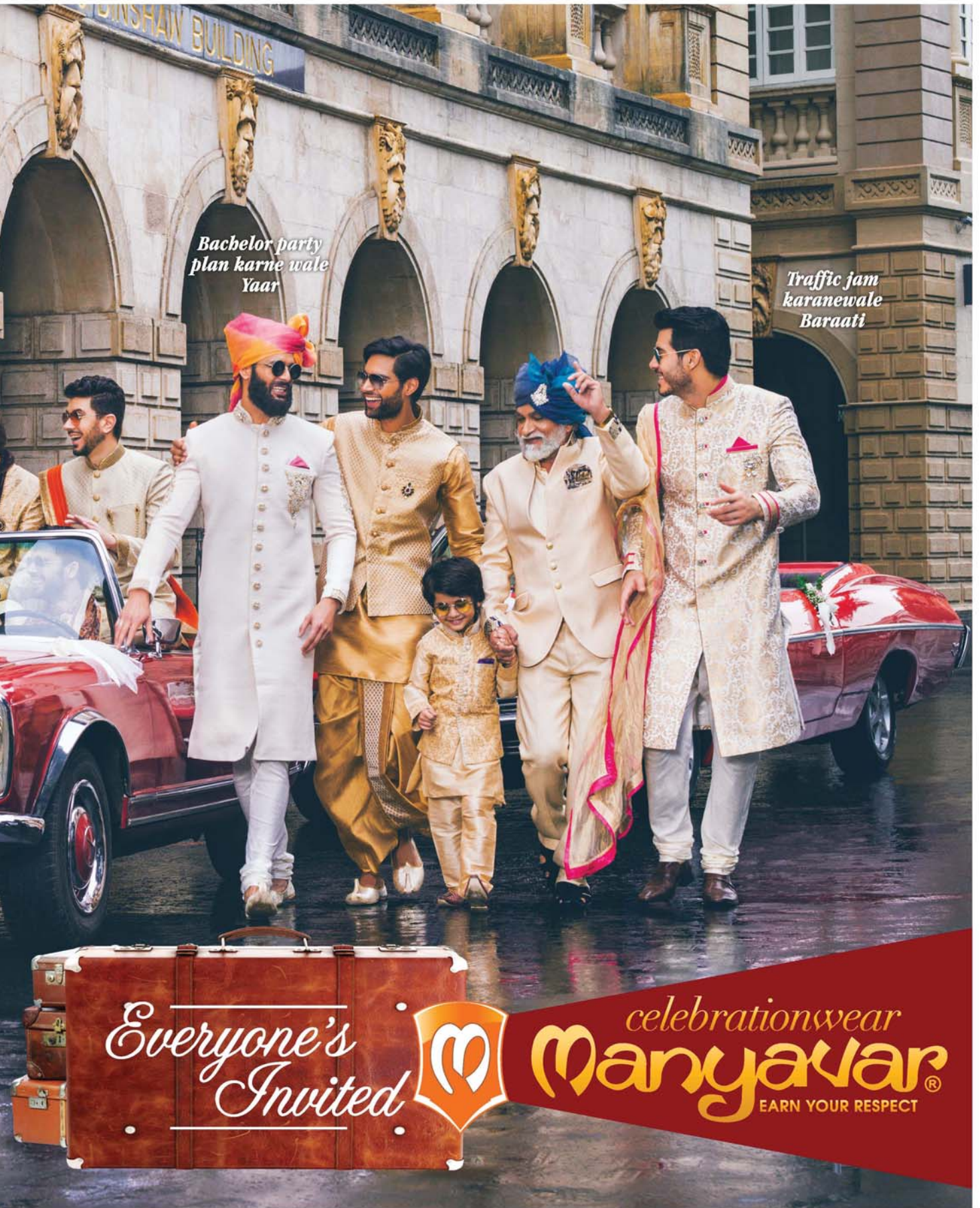
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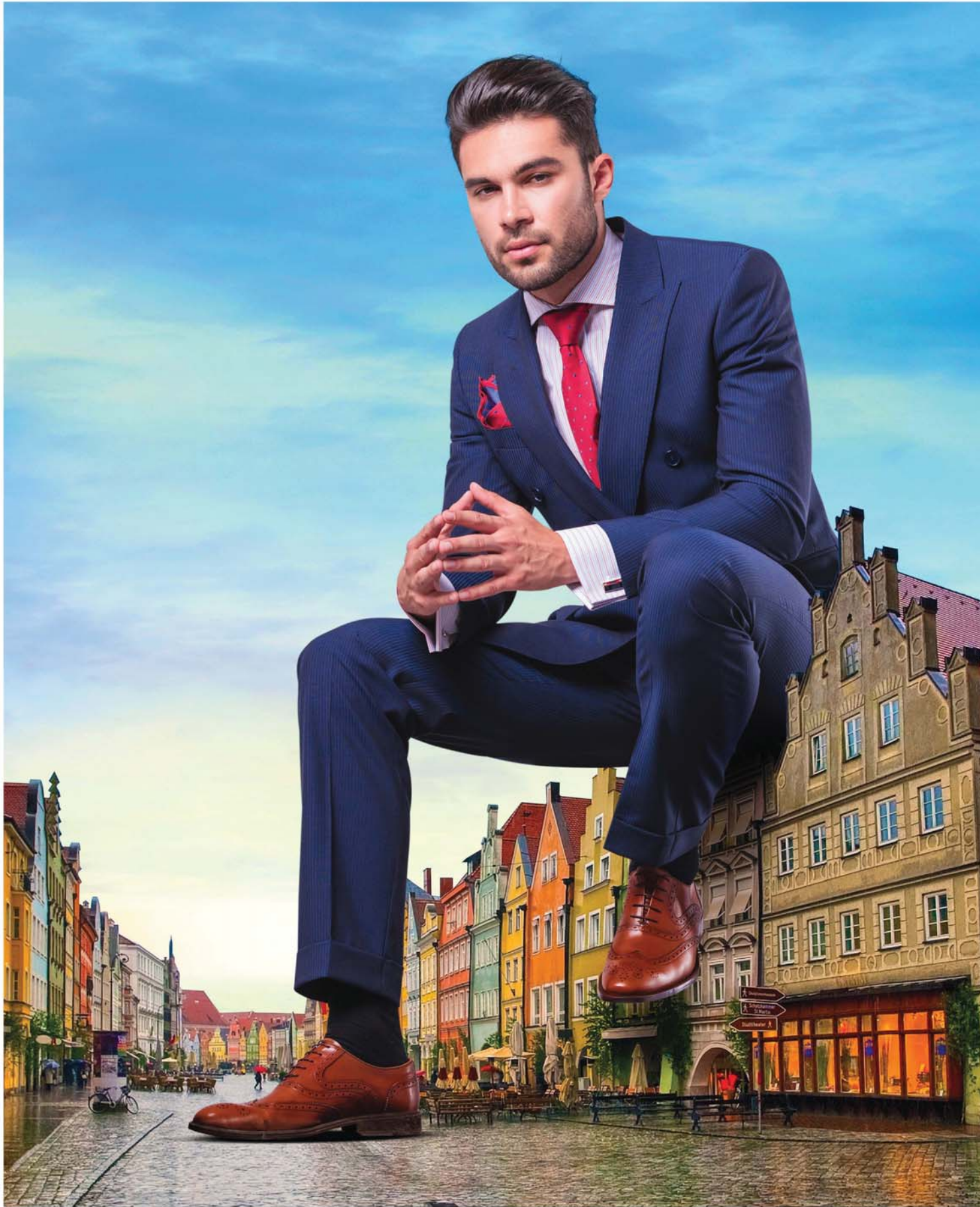
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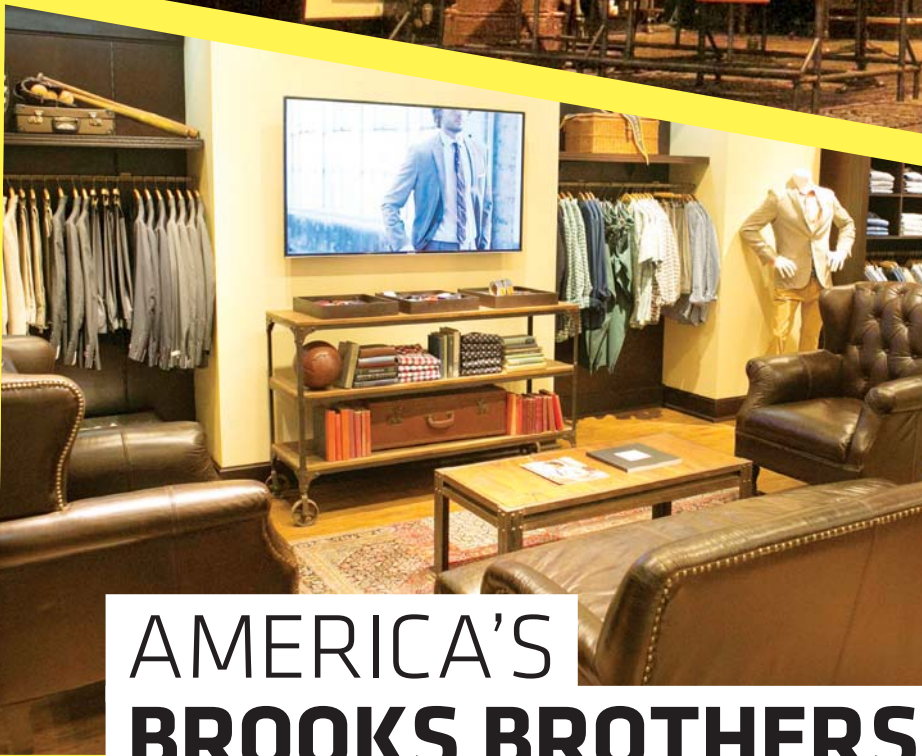
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AMERICA'S BROOKS BROTHERS NOW CLOTHES NCR

BRAND: Brooks Brothers

PROMOTER: Reliance Brands

LOCATION: DLF Mall of India, Noida

The classic American clothing brand, Brooks Brothers opened its first 'Red Fleece by Brooks Brothers' store in Noida recently. The store, in India's largest mall, DLF Mall of India, covers an area of 2,000 sq.ft. in the ground floor of the shopping mall.

Red Fleece by Brooks Brothers, a youthful take on the classic Brooks Brothers style, is rooted in tradition. Styled to bridge the gap between classic silhouettes and tapered fits, Red Fleece prides itself as the smarter casual that amalgams both. Imprinted in its DNA, Red Fleece perfects an assortment of men's wear, with the same attention to detail like its parent label, Brooks Brothers.

Anand Nair, Business Head, Brooks Brothers India, said, "As America's oldest retailer, Brooks Brothers has long been a fashion innovator. We are very excited to bring 'Red Fleece by Brooks Brothers' to Noida.

Red Fleece is about an attitude that promotes personal expression. Fit for any age, Red Fleece believes in keeping it fun and fresh. The brand plays on the Brooks Brothers favourites to bring forth revived classics for the fashion conscious men. Nair added, "The Indian customer loves colour and should find an immediate connect with Red Fleece's playful spirit



inherent in its bright hues. With more work places endorsing smart casuals as the dress code, the launch of this store is well timed.”

The American fashion major has a total of 10 stores in India. Nair reiterated, “With the opening of the new store, we have expanded our retail footprint to 10 stores in the country, with 7 mainline Brooks Brothers stores and 3 Red Fleece by Brooks Brothers stores.” Brooks Brothers had entered India in a joint venture with Reliance Brands and was one of the first companies to get FDI approval in October 2012.

Established in New York City in 1818, Brooks Brothers was the first to offer ready-to-wear clothing and has continued throughout history with iconic product introductions. Over the years, Brooks Brothers has dressed 39 out of 44 US Presidents, from Abraham Lincoln and John F. Kennedy to Bill Clinton and Barack Obama.

COLLECTION: Red Fleece by Brooks Brothers offers both classic and contemporary men’s wear wardrobe solutions that cater to all lifestyle needs. The newly opened store showcases the brand’s Spring/Summer ‘16 collection, offering both formal and casual wear, including suiting separates, sport coats, trousers, shirts, denims, ties, polos, shorts, knits, shoes and accessories.



STORE THEME: Wooden flooring, comfortable couches and soft colour palettes of the newly opened Red Fleece by Brooks Brothers store exhibit a calm, easy going and comfortable experience. The placement of trophies, a classic brown leather soccer ball and other sports equipment, give a classy look and adds an edge to the store. The store promises to offer a shopping experience like never before with a revamped environment and a stylish range of clothing and accessories set against the backdrop of a carefully thought and creative store layout.

STORE LAYOUT: The interior is simple, bright and fuss-free with careful light fixtures to draw shoppers’ attention to the merchandise on display. Wall finishing and fixtures are in brown. The store is well-lit making the environment inviting, drawing in potential customers and aiding their movement in the store. The placing of the shelves are simple and effective, and the merchandise is placed carefully on classic wooden shelves according to different categories.





BRAND: C9

PROMOTER: Sangam India Ltd

LOCATION: Lokhandwala Market, Mumbai

SIZE OF THE STORE: 600 sq.ft.

C9

Collection: The store is comfortably accessible and reachable and offers products which include leisure wear (tops, leggings, capris and t-shirts), active wear (t-shirts, tops, tank tops, capris, leggings, cycling shorts) and intimate wear (basic bras, sports bras, tube bras, panties, boy leg panties, camisoles, and shape-wear). The present range has been focused on fashion, style, fitness, art, and colours, inspired by Spring/Summer 2016 theme of “The Urban City”.

Store theme: The C9 store would be a unique place to experience the warmth of buying, with highlights including the ambience and the personalised services of the team. Apart from the classy ambience, the tastefully designed store is well laid out to accentuate the product mix and give customers a seamless experience with their purchases.

Store design: The flagship store has been given a bright hue with off-white and orange stripes. The store is well lit up with white LED lights. In an attempt to give a natural feel to the ambience, the floor is laid with pepperica wooden flooring and the shelves, also wooden, are coloured in Morning Glory.



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L to R: Daniella Nicole Faralli, Brand Director, Cadini, Ugo Ciarlatani, Consul General, and Ramesh Poddar, CMD, Siyaram Silk Mills Ltd.

ITALIAN FASHION MAJOR **CADINI** DEBUTES IN INDIA

BRAND: Cadini

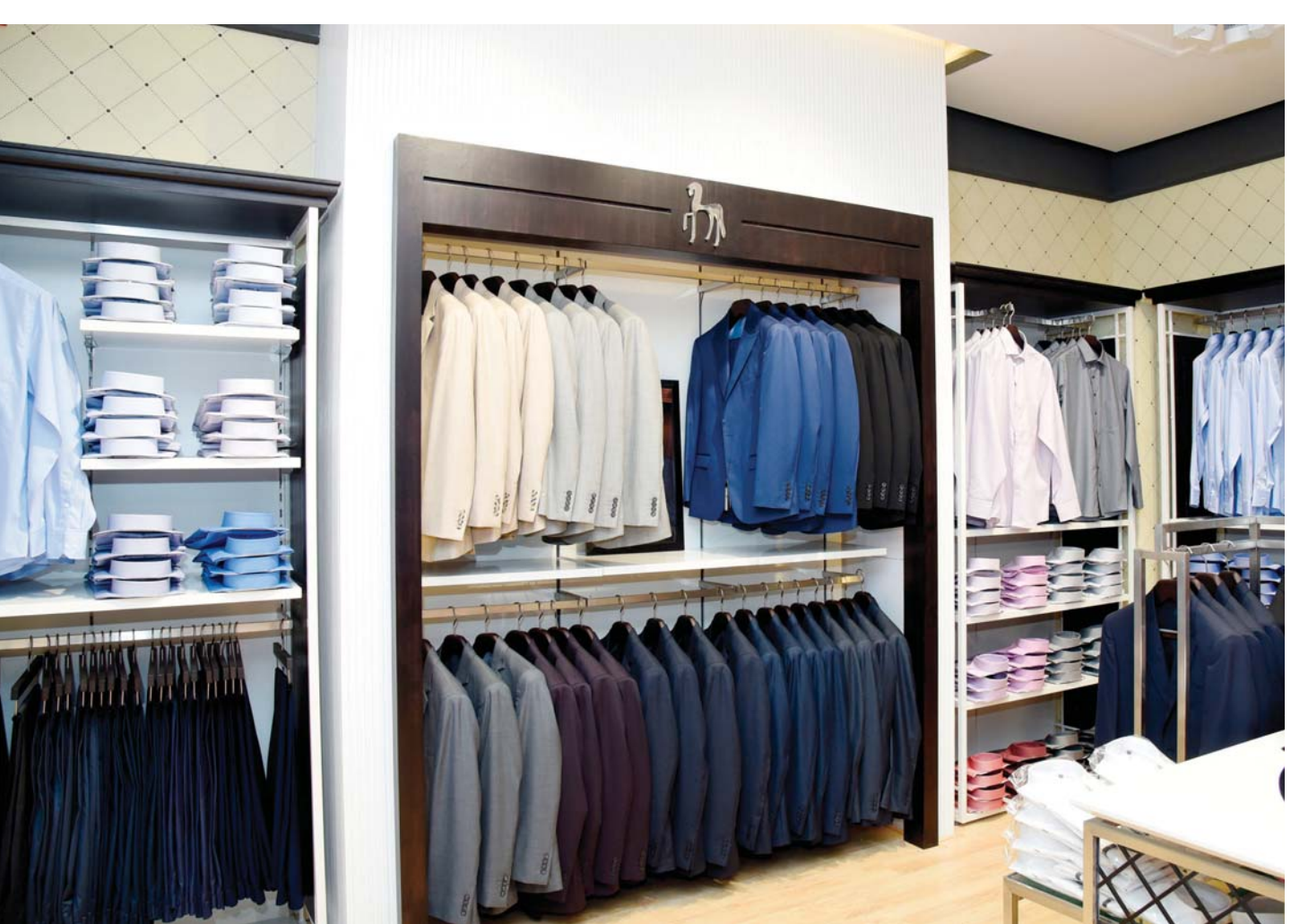
PROMOTER: Siyaram Silk Mills Ltd.

LOCATION: Mumbai (Maharashtra)

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

Cadini, a fashion brand synonymous with premium Italian dressing for men has launched its first flagship store in India at Colaba, Mumbai. Cadini has embarked upon an investment of ₹15 crores for its retail foray and is poised to open 10-15 stores during this year in the high streets and destination shopping malls of all the major metro cities including, Mumbai, Delhi, Pune, Bengaluru, Chennai and Kolkata.

Founded in 1970 and celebrated for its high quality and timeless “Made in Italy” style, the brand has shown, since the beginning, great promise as a renowned



“Cadini is targeting SEC A+ audience across the leading metro cities with an estimated revenue potential of ₹125 crores with the retail foray with each store having on an average an area of 1,000-1,200 sq.ft. Initially, Cadini stores will be company owned and operated. Subsequently, it will offer outlets on the franchise model as well.”

-Shridhar Iyer,
Assistant Vice President, Cadini

manufacturer in the menswear sector. It impeccably crafts the “total look” for the man and is an internationally sought-after menswear fashion brand with presence across 40 countries. In pursuit of expanding its global footprint, it is establishing its presence in India as part of the global venture of India’s largest and most preferred men’s wear brand – Siyaram’s.

Sharing his pleasure at the launch of the first flagship store in Mumbai, Ramesh Poddar, Chairman and Managing Director, Siyaram Silk Mills Ltd., said, “India’s menswear segment registered a retail value growth of 15 percent in 2015 with sales touching ₹1.3 trillion. Today, Indian male consumers are concerned about their looks and appearance and are willing to spend more on apparel and accessories. To tap this market opportunity, Cadini is bringing the best of Italian men’s wear dressing accessible across 15,000 sq.ft. of retail footprint across metros in India within the course of this year.”

Daniella Nicolle Faralli, Brand Director, Cadini, shared, “With the launch of this first flagship store in India, Cadini is strengthening its global presence by establishing its footprint in India. The store reflects the characteristics of Cadini in its interiors and merchandise as part of bringing the globally admired Cadini

experience to the Indian consumers with a range of premium Italian men’s wear product offerings.”

Inaugurating the store, honourable Consul General of Italy, Ugo Ciarlatani said, “Cadini offers the perfect harmony of trends and tradition and today’s store launch, amongst many to come, is a positive step towards bringing the best of Italian dressing that is recognised world-over to Indian consumers.”

Shridhar Iyer, Assistant Vice President, Cadini - Garments, added, “Cadini is targeting SEC A+ audience across the leading metro cities with an estimated revenue potential of ₹125 crore with the retail foray with each store having on an average an area of 1,000-1,200 sq.ft. Initially, Cadini stores will be company owned and operated. Subsequently, it will offer outlets on the franchise model as well.”

×



COLE HAAN PENETRATES INTO INDIA'S PREMIUM FOOTWEAR MARKET

BRAND: Cole Haan

PROMOTER: Arvind Sports Lifestyle Ltd.

LOCATION: VR Mall, Bengaluru

SIZE: 1,200 sq. ft.

Cashing in on India's growing premium footwear market, iconic American footwear and accessories brand Cole Haan recently entered Bengaluru. The premium brick and mortar store in Bengaluru, covers an area of 1,200 sq.ft. in the city's spectacular VR Mall.

Launched by Arvind Sports Lifestyle Limited, a subsidiary of Arvind Limited, India's lifestyle brands and apparel Major, Cole Haan's first store in the country opened its doors in Noida's DLF Mall. Known for its exceptional craftsmanship and timeless style, the brand focuses on elegant innovation to differentiate itself.





Textile firm Arvind had entered the footwear segment a year ago with existing partners like Arrow, Tommy Hilfiger and Calvin Klein. Earlier, American brand Cole Haan was owned by Nike but now it is controlled by Apaz partners. It specialises in casual and dress leather shoes.

In a statement, the company revealed that, as part of its business strategy, Cole Haan will open more stores in the times to come in all the major Indian metros. It further added that the brand will only be present offline for now, and that the company will soon reveal its e-commerce plans.

The price range of Cole Haan's collection in India will be between ₹7,000 and ₹24,000.

Cole Haan was launched in 1928 by Trafton Cole and Eddie Haan in the US. The brand invests significant resources in design, development and innovation each year, a factor that sets Cole Haan apart from the other major fashion and lifestyle brands. The year 2015 marked a turning point for the fashion major with the opening of its Global Innovation Center in Greenland, New Hampshire.

COLLECTION: The American fashion major offers a myriad range of footwear and accessories to its discerning, fashion conscious customers. For men, the brand offers products like the lightweight Zerogrand and the Pinch Campus Penny Loafers which have a stamp of Cole Haan's elegant innovation coupled with timeless style. The women's wear collection is versatile with products like comfortable

stilettos, wedges, bellies, penny loafers and thong sandals which are chic and stylish yet highly functional.

STORE THEME: The theme of the newly opened store is modern and contemporary. The store offers a great environment to its customers for an even greater shopping experience. Wooden flooring adds an extra star to the visual appeal.

STORE LAYOUT: The interior is elegant and simple with soft natural light fixtures to give a comfortable yet classy experience to the shoppers. The colour scheme of the walls is divided into a mix of blue, black and white. The merchandise is placed on elegant fixtures and shelves. The outlet is designed by Cole Haan, New York.





DKNY

Collection: The DKNY store at the Mall of India will showcase wallets, handbags and footwear from the spring 2016 collection. Inspired by the minimalistic pallet of the spring 2016 ready-to-wear collection, the accessories collection is elevated without sacrificing function or practicality. Design is carefully considered and satisfies an infinite need to create the foundation for the modern woman's wardrobe.

Store theme: The store design reflects clean lines and modern aesthetics, that invite an intimate sense of discovery into DKNY's retail experience.

Store interior: The updated store design is a neutral but sophisticated palette of black, white and grey with warm accents of wood. A combination of black glass walls with white lit lacquer niches are seen throughout. The white painted brick walls are interrupted with steel L-beams and floors are done in light gray limestone. The visual display is a clean palette with the shoes and handbags highlighted by the mirrored finish on the walls and furniture. The storefront is accented with a glowing light loop. Signage is a white lit version of the new logo.

Store designer: The store has been designed by Bonetti/ Kozerski Architecture and Design DPC.

BRAND: DKNY

PROMOTER: DLF Brands Ltd.

LOCATION: DLF Mall of India, Noida (Delhi NCR)

SIZE OF THE STORE: 975 sq.ft.





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Manjula Tiwari,
Chief Executive Officer, Future Style Lab

“The market today is either dominated by overpriced international brands with minor or no tailoring to suit Indian tastes and body shapes; or local brands which are producing majorly ethnic or fusion wear. Our consumer is left with hardly any choices for a gorgeous dress that flatters her body, or a blouse with the right cuts and detailing. And this is where Cover Story enters. Every girl wishes to be cover of her story and we will help her do so.”

COVER STORY: INDIA’S NEW WOMEN’S FAST FASHION BRAND

Future Retail has announced the launch of their new brand Cover Story, an exclusive fast fashion brand dedicated to women. In an exclusive interview, Manjula Tiwari, Chief Executive Officer, Future Style Lab, shares Cover Story’s expansion plans.

By Gurbir Singh Gulati

The fast fashion concept in India which is led by big international brands, is relatively new, but is catching up at its own pace. They are aiming to create a trend for more frequent shopping amongst Indians, who are culturally not accustomed to changing their wardrobes often. Also, since most fast fashion derives its inspiration from local and international trends, Indians will become more global and experimental in their approach to fashion clothing. Cover Story wants to be a clear differentiator between the existing brands and would like to stand out in this market as a first fast fashion women’s western wear brand which is truly global. Its range will be highly competitive in terms of prices as compared to the top-notch brands. It will bring feminine international designs, prints and styles, with just the right amount of tweaking for the Indian context.

IN AN EXCLUSIVE INTERVIEW, MANJULA TIWARI, CHIEF EXECUTIVE OFFICER, FUTURE STYLE LAB, SHARES HOW COVER STORY WILL MOVE AS A FAST FASHION BRAND WITH ITS PRODUCTS QUICKLY MOVING FROM THE CATWALKS TO ITS STORES, IN ORDER TO TAP THE LATEST TRENDS FOR ITS DISCERNING CONSUMERS.

Tell us about Cover Story and its concept of fast fashion. How would this work?

Manjula Tiwari (MT): There is a huge opportunity out there today in the women’s western wear segment. Women in India are incorporating global trends and sensibilities in their dressing but there isn’t any Indian fast fashion brand which can truly keep pace with their expectations. That is how the idea of Cover Story came along. While we are backed by an Indian retail

conglomerate, our designs and styles originate in London.

What would be its positioning and target audience?

MT: Our customer is like any other 23-40 year old financially independent woman who splurges on frequent shopping. Someone who thrives on social media and seeks new experiences, she often needs to refresh her wardrobe. She is modern yet rooted, and can effortlessly switch between western and ethnic wear.



Cover Story is all about giving today's women that luxurious experience whilst being affordably priced. Our clothes are polished and trendy which give women that sense of easy glamour. We are subtle and thoughtful in our designs and that manifests into the detailing in our clothing. And sure enough, it is everything that would give her the confidence of being globally fashionable!

Please tell us about the complete product portfolio of Cover Story and its expansion plans.

MT: In apparel, we have dresses, tops, tees, shirts, shorts, skirts, jumpsuits, jackets and jeans. We currently have bags and shoes as part of our accessories range. However, eventually we see Cover Story becoming the complete wardrobe solution for women, complete with all accessories and jewellery pieces.

How many trends/collections will you be showcasing in a year and how often will you top it up?

MT: Fast fashion relies very heavily on freshness and hence we bring in a new collection for our consumers every two weeks. Along with a monochrome collection which is for the desk-to-dinner transition, and an updated basic collection, this makes it four collections per month. Moreover, for our exclusive and standalone store, the number goes upto six collections per month.

To launch a fast fashion collection requires a lot of design sensibilities.

Tell us about the Future Style Lab setup in UK?

MT: Most domestic brands do not offer fresh, global trends in a fast fashion format or focus too much on fusion wear. The international ones are too expensive for our consumer and often lack the Indian context in their design sensibilities. Cover Story is all about delivering the latest from the fashion capitals of the world while it is still the 'latest'. What we are doing, in nutshell, is making global fashion wearable for the Indian women. We are bringing in the latest trends and designs with the help of our prolific London team which

is always on the look-out for the newest fashion. With the Indian team, we filter out and tailor the trends in line with the Indian context, by keeping the consumer always at the center of our product. We understand the cultural context of our target group - how would a girl in Hyderabad or Kolkata wear this style - and that's the thought behind every product.

Tell us about the retail planning for Cover Story? How many exclusive stores have you planned and of what size?

MT: We've incorporated the brand's identity into the detailing for every little aspect in the store. Our stores are designed to recreate the intimate boutique, and provide a comfortable shopping experience. The cash counters mimic a woman's vanity bag while the display panels provide the feel of a magazine editorial. Most importantly, we are giving consumers the 'physical' experience, blending technology

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are lined up for the future.

MT: We have planned a subtle advertising campaign for this season. Spring/Summer'16 was a soft launch for us to test the product across markets. Having said that, we have been meticulously focusing on our branding. We have shot a beautiful campaign in Barcelona with Spain's top fashion photographer who has previously worked for Zara, Mango and Free People. We've taken strategically important visual spaces around our stores and emphasized on spreading word of mouth through our social media handles for now.

through tablets with a personal shopping assistant for every customer. For this year, we are currently projecting 5 exclusive outlets across the country and these will be around 1,200 to 1,500 square feet in size.

What about online presence?

MT: We are preparing to go live with our own Cover Story e-commerce website very soon. We have taken a lot of care to ensure a very engaging and visually pleasing consumer journey on the platform.

We are also collaborating with Myntra and will be starting on the platform soon. This will give our product a pan-India reach and we are very excited to reach out to more geographies.

Share specific details on marketing/promotion strategies. Talk about what

Our Autumn/Winter'16 campaign will be launched with a bigger event in Mumbai with socialites and celebrities donning the key-pieces from our collection in a gala fashion event. This will be followed up by an aggressive media campaign across national dailies and high end fashion magazines, as well as increased visibility across digital media. We also want to run unique contests on social media channels in collaboration with some of India's most fashionable bloggers and socialites.

What are the turnovers that you are estimating in the first year? What are your growth aspirations in the next 2-3 years?

MT: We have aggressive plans to roll out stores across India in a span of 3-4 years. We are looking at opening 50 standalone stores.

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THE EVOLUTION OF FASHION RETAIL IN INDIA

Fashion category occupies 45-60 percent of mall spaces in India. Fashion retailers have not only expanded in metros, but have also moved into tier - II and - III cities. Pankaj Renjhen, Managing Director - Retail Services, JLL India, analyses the growth of fashion retail in the country.

Organised retailing in India has undergone remarkable growth in the last decade owing to favourable demographics, growing consumer aspirations and brand consciousness. Correspondingly, the fashion category has also undergone profound transformation over the years in terms of type and positioning of brands, formats, products and emergence of new players. The depth and variety of fashion brands have taken a quantum leap in shopping malls across all the sub-categories including apparel, footwear, bags and accessories. Fashion retailers have not only expanded in metros but have also moved into tier - II and tier - III cities as organised retail spaces started mushrooming up in smaller towns.

Owing to changing market dynamics and growing popularity of online retailing, fashion retailers have become more adept and flexible in their business models. More and more retailers are adopting multi-channel retailing, so as to provide a seamless shopping experience.

The liberalisation of India's retail FDI policy has further provided impetus for the entry of some popular international fashion brands and fast fashion retailers. In the year 2015, global fashion brands such as GAP and H&M

entered India in order to capitalise on the growing consumption and market potential here.

Fashion - Moving with the times

Indian fashion brands are constantly reinventing themselves to evolve with the increasingly competitive retail landscape. There is now an increasing emphasis on productivity when it comes to the revenue generated per square foot in physical stores. Therefore, fashion brands are reviewing their store networks and conducting structured research when it comes to location, rentals and sales generation.

In the last decade, there has been a manifold increase in the number of malls, but the quality retail real estate space is still quite limited. Therefore, fashion retailers are currently not only competing for consumer wallet share but also for prime real estate space due to the shortage of quality retail real estate developments in India. Demand for right quality retail spaces in the right locations has increased significantly in recent times.

Across Indian shopping malls, there has been a significant rise in the number of retailers in the premium and high-end fashion segments over the last decade. However, it has become more important than ever before for the retailers to understand the need for customisation of product offerings and formats across different micro-markets.

No scope for cookie-cutter approach

We have seen that what works in a shopping mall in one region may not work in another. Within the fashion segment, there are also variations in

type and positioning of brands across various malls depending upon the location and catchment. In other words, the real estate strategies of fashion retailers are customised according to micro-markets, taking into account the shopping preferences of the potential shoppers.

In order to cater to aspirational and discerning consumers, newer formats that integrate technology and improved shopper experience have been conceptualised. Retailers have become

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- Emergence of fast fashion retailers as anchors in malls.
- Introduction of newer formats and the adoption of technology by fashion retailers.
- Growing prominence of western wear and fusion wear.
- Customisation of retailers' real estate strategies for different micro markets.
- Increasing competition necessitating regular evaluation of brands' performances by shopping malls.
- Regular churn in prime shopping malls to accommodate newer global and high performing brands.

The Future

- Fashion retailers will continue to command a prominent presence in Indian shopping malls. It is expected that more fashion brands will open 'experience stores' and newer formats, and strengthen their footprints across the country.
- Established fashion retailers will look for opportunities in secondary and tertiary cities in order to grow further.
- National fashion retailers are expected to innovate and come up with newer formats to sustain in the highly competitive market environment. Interactive and enhanced consumer experience will be the key to success for fashion retailers.

- The Indian fashion retail market is open for greater brand assortment, but requires customised approach as each market is unique with different requirements and preferences.
- Going forward, there will be more investments by international retailers to expand their networks to in order to maximize profitability.



Retailers have become more relationship and experience-focused, as opposed to being purely business-oriented. More efficiency, adoption of technology and increased in-store engagement has become the mantra for success.



more relationship and experience-focused, as opposed to being purely business-oriented. More efficiency, adoption of technology and increased in-store engagement has become the mantra for success.



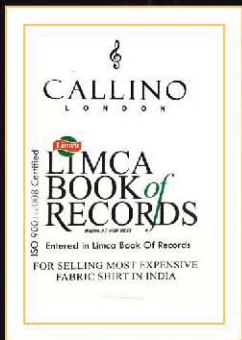
PANKAJ RENJHEN,
MANAGING DIRECTOR, RETAIL
SERVICES, JLL INDIA

Currently, the fashion category occupies 45-60 percent of mall spaces in India. The past few years have seen the emergence of national-level women ethnic and fusion wear brands which are expanding aggressively across the country. Western wear brands, including fast fashion and casual wear, are also expanding rapidly due to increasing demand by consumers.

To summarise

The key trends witnessed in the fashion category over the years include:

- Increasing number of brands in the premium fashion category.
- Entry of newer global brands and fast fashion retailers in India and subsequently, growing demand for quality Grade A retail real estate space.



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DLF MALL

OF INDIA:

AN INDELIBLE FASHION DESTINATION

India's mall space hits a new dimension with the launch of the long awaited DLF Mall of India. Sprawling over two million square feet, it is the largest shopping mall in India and harbours over 330 brands along with about 100 kiosks.

With the launch of DLF Mall of India in Noida (Delhi NCR), India got its first destination mall. Spread over two million square feet which can broadly be defined as current malls into four times, DLF Mall of India houses over 330 brands, close to 100 kiosks selling interesting curios, tid bits and some quick bite counters.

DLF Mall of India has been designed as per international standards. It introduces the unique concept of zoning for an upgraded shopping experience such as - all Indian, ethnic, wedding and occasion wear on one floor, kids and casual dining on an individual floor, while indoor entertainment sitting on the top two floors of the mall. The mall also has some interesting differentiators like the top floor of the mall has


ZONE & SPACE SEGMENTATION

Zones	Area in sq.ft.	Percentage Share
Market Place (lower ground level)	3.5 lakh	15%
International Boulevard (ground and first level)	6 lakh	40%
High Street Fashion (second level)	2.8 lakh	13%
Family World (third level)	2.7 lakh	12%
Leisure Land (fourth and fifth level)	4.2 lakh	20%

an indoor snow park, gaming facility for kids, DT Cinemas and a massive food court. “DLF Mall of India has a very well thought out marketing calendar, which is linked to tenant sales and has very targeted ROI’s attached with every event and promotion. Every event and activity planned is targeted towards improving the sales and has a full strategy engine working behind it,” shared Pushpa Bector, Executive Vice President and Head, DLF Mall of India.

THINGS TO LOOK OUT FOR IN DLF MALL OF INDIA:

Shopper’s paradise: DLF Mall of India houses 330 brands with over 100 fashion brands, 75 food and beverage

brands and an iconic entertainment zone which offers the same experience as Dubai Mall and some of the malls in Singapore.

Convenience and ease of shopping:

Introducing the unique concept of ‘zoning’ for the first time in India, the mall is divided into five impeccably crafted zones, making the shopping experience of visitors all the more seamless and convenient. The mall is categorised into five zones namely -- ‘market place’ on the lower ground level; ‘international boulevard’ on the ground and first level; ‘high street’ on the second level; ‘family world’ on the third level and ‘leisure land’ on the fourth and fifth floor.

A full floor for Indian-ethnic shopping:

High street zone at DLF Mall of India is one of its kind in the mall segment. The organised format of the zone provides convenient access to some of the best Indian ethnics as well as designer brands in the country. Some of these brands include Anita Dongre, Ritu Kumar, Bombay Selection, Meena Bazaar, Simran, Anokhi, Biba, Zardozi, Lakshita, Ethnicity, Suvasa, Perfection House, Greenways, Charming and many more. It’s a paradise for wedding, occasion and daily ethnic wear shopping.

Feast on the delicious F&B platter:

With a total of 75 F&B options to choose





from, there is something to please every food enthusiast. What's more? Its food court is massive with a lot of good options to choose from.

The largest array of indoor entertainment:

Redefining the concept of indoor entertainment are the mall's unique and large-scale gaming concepts. The top floor of the mall features '15 degrees and below' in Ski India, an indoor snow park modelled after

Ski Dubai, Smaash and also an all new format of Funcity for kids below 10 years on the fourth floor. The floor also houses 7-star DT Cinemas with a seating capacity of 2,000 people.

A special treat for kids:

The cinema has a special treat for kids in the form of a unique auditorium for children with a dedicated kids candy bar.

Digitally smart:

The visitors will be pleased to see smart advertising on LED walls along with some

useful digital directories that'll remind you of any good international mall.

Eco-friendly mall:

DLF Mall of India is the first LEED Gold certified mall in North India. It has energy efficient air conditioning system with 20 percent less energy consumption, solar power plant of 40KW for using solar energy, solar water heater with a capacity of 4,000 litre to save electricity, ventilation fans coupled with CO sensors in car parking, pumps and fans coupled with variable speed drives to save energy, sequencing batch reactor for waste water treatment with largest technology and organic waste converter for wet garbage.

Minimal & green:

The mall is refreshingly different from other malls in the city – other DLF malls included. For instance, the interiors have been kept minimal, fresh with white showing quite abundantly. You'll like the plush greens when you drive in the complex.



Aditi Rao Hydari & Pushpa Bector at the launch of High Street

DLF MALL OF INDIA LAUNCHES 'THE HIGH STREET ZONE' WITH A FASHION SHOW

DLF Mall of India, India's first destination mall organised a high street fashion show on its premises on May 14, 2016. The theme 'Celebrating what India wears' focused on Indian ethnic, occasion and bridal wear designed by some of the distinguished names in the retail world such as, Ritu Kumar, Bombay Selection, Meena Bazaar, Kalpana, Perfection House, Zardozi, Greenways, Mohanlal & Sons, Simran and Kala Niketan, to name a few.

The High Street zone at DLF Mall of India is one of the biggest differentiators for the mall. Bustling with cherry-picked and home-grown brands, High Street zone offers wide variety of choices for wedding, occasion and daily wear Indian-ethnic shopping. The zone houses some cult names in the business which Delhi has been fond of over generations. High Street

has over 70 brands of apparel, footwear and accessories to choose from.

Pushpa Bector, Executive Vice President and Head at DLF Mall of India, said, "The high street retail has primarily been an unorganised category. However, DLF has identified the significance of high street shopping among the Indian audience and given it the importance it deserves by clustering some of the best names in the industry in an organised retail format by conceptualizing the High Street zone at DLF Mall of India. It is indeed one of the unique propositions that sets us apart from the other malls. Our endeavour is to turn the spotlight on the many sartorial choices and fashion picks that this zone will offer to those customers who love their roots and celebrate their individuality through ethnic drapes."



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RECORDS OUTSTANDING GROWTH TURNOVER

Actor Akshay Kumar played a significant role in making Dollar a household name.

Dollar Industries Ltd., a leading knitwear company registered a turnover of ₹829.94 crores for FY 2015-16 as against ₹736.56 crores during the corresponding period of FY 2014-15, as per the audited financial result. Profit After Tax (PAT) grew by 35.48 percent to ₹26.35 crores. Earnings Before Interest, Taxes, Depreciation and Amortisation (EBIDTA) also witnessed a growth of 18.62 percent. The export revenue of the company stood at ₹69.35 crores, thus witnessing a 13 percent growth.

According to the company, Dollar Industries' buoyant growth in the last six years has been attributed to its mega star brand ambassador, Akshay Kumar, who contributed in making Dollar a household name across the country.

Over the years, the hosiery brand, Dollar has evolved as an umbrella brand by launching an array of successful sub-brands like Dollar Bigboss Premium Innerwear, Dollar Club, Myme, Hutch, Midas, Comfort, Interlock, Missy, Kidscare, Force Go Wear, Ultra Thermals, Wintercare, Force NXT and many more. Today, it has presence across countries like Nepal, Middle East and the Gulf.

"It has been an overwhelming and satisfying journey for Dollar Industries with the brand making inroads in the hosiery segment, also consolidating its position in India and abroad. Our values of openness, collaboration, mutual dependency, professional delivery, sustainable profitable growth and innovation are the standards by which we have been judged and will be judged in the days to come. Ever since we have signed Akshay Kumar in 2010 as the brand ambassador of Dollar Bigboss, the growth has been exemplary. We have more than doubled our turnover in these six years. He is our brand's lucky mascot," expressed Vinod Kumar Gupta, Managing Director, Dollar Industries Ltd.





“I feel great content at the thought that I could be a support to the Dollar team in making the brand larger than life. We all prefer comfort wear on our day-to-day schedule. Dollar Bigboss is the perfect comfort wear that we need. I have thoroughly enjoyed my tenure with this company during shoots and beyond,” shared Akshay Kumar, Brand Ambassador, Dollar Bigboss.

Technology Innovation & Sustainability

Dollar Industries has invested heavily in its manufacturing facilities by creating a purpose-built, state-of-the-art headquarter and factories in Kolkata, Tirupur, Delhi and Ludhiana, which have daily production capacity of 5 lakh pieces. The facilities can manufacture products for men, women and children in all segments of knitwear – innerwear, lounge wear and thermals.

Dollar has its own spinning mill to make fabric yarn from raw cotton with a world class zero discharge dyeing facility. The mill generates its own electricity helping in earning carbon credits. By using the latest combing and drafting of sliver with the help of ‘reiter technology’,

Dollar ensures an improvement not only in staple length, but also the fineness of the raw material. It has introduced the latest blow room or carding facilities of German global leaders Trutzschelar. It manufactures 350 tones of quality yarn a month, consisting of 100 percent cotton.

The dyeing facility of Dollar in Perundurai sets the example of an eco-friendly manufacturing facility for industries to follow. The water generated from the factory is treated chemically and biologically at its effluent treatment plant which has a capacity of 1,000 KL Zero Liquid Discharge. The bulk of the treated water is re-used in the factory while the remainder goes to watering plants and landscaping the area. Any sludge is disposed off at a government appointed disposal site. The company’s windmills are based in Parameshwarapuram, Sundankuruchi, Amuthapuram and Angalakurichi in Tamil Nadu which help in saving approximately ₹2 crores of power bill annually.

Supporting “Make in India” Campaign

As a part of “Make in India” initiative of the Government of India, Dollar Industries is providing employment

opportunities to hundreds of people at its factories and offices. “With consistent growth, there comes the increased responsibility of sustaining the growth. This holds not just for the company but for the growth of the country too. So Dollar goes to great lengths to provide its people with the requisite training they need to realise their fullest potential, thus taking an initiative towards “Skill India” movement,” said Gupta.

Moving Ahead

The company is targeting a turnover of ₹1,000 crores in the current fiscal and have an aggressive sales and marketing plan to achieve it. It also aims to increase its presence across India with special emphasis on South India. The new diversifications in terms of products will see a nationwide rollout. Moreover, it has received encouraging responses over internet both in visibility and e-commerce. “We shall push the e-commerce sales up to the maximum percentage in our total turnover,” concluded Gupta.





WILL THE INDIAN KIDSWEAR MARKET GROW OUT OF ITS INFANCY STAGE?

Industry experts feel that the domestic market for kidswear is still in its nascent stage although there is huge scope for growth. A peek into the current statistics and the challenges involved.

By Kishore Amati

The last few months of 2016 have witnessed a bunch of Indian and foreign brands foray into the kidswear market in India to vie for their piece of the \$10 billion pie, that industry experts suggest, is growing at an annual rate of 10 percent. The recent conference organised by Kidzania - a marketing company that markets kidswear products across India from Mumbai, Delhi and Kolkata, brought owners of over 15 different kidswear brands and distributors from across the country on a common platform to discuss multiple industry-related topics and devise new business strategies, keeping with the latest design and buying trends. The five-star property in Candolim, Goa served as an exhibition venue for brand owners where their best products were on display and new deals with distributors were signed.

Rajeev Harmilapi, Proprietor, Kidzania, feels that the kidswear market in India is still in its nascent stage. When asked to comment further, Harmilapi said, "Infant garments have not been marketed well in India. Until a few years ago, local brands were a bit sceptical to move out of Kolkata but global exposure and better understanding of the domestic market has nudged them to spread out. The potential is huge." He also suggests that the kidswear industry in India is in an unorganised form and the infrastructure and work culture needs to improve to get the industry organised. Harmilapi said, "All major kidswear garment brands are from Bengal. From a total of over 2 lakh brands, most have outsourced their production with the exception of about 15-20 companies who continue to rely on their in-house production capabilities because of complicated labour laws along with a few other factors."

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“Infant garments have not been marketed well in India. Until a few years ago, local brands were a bit sceptical to move out of Kolkata but global exposure and better understanding of the domestic market has nudged them to spread out.”

Rajeev Harmilapi
Proprietor, Kidzania



“People are travelling more than ever before. This, coupled with the global exposure imparted through the media, lead to most people now wanting to wear something that matches the design quality of Benetton and Hilfiger.”

Samir Mehra
Proprietor, Kids R Us



“In today’s time, a particular design trend lasts a maximum of one season. Once a design trend gains popularity, manufacturers tend to go overboard churning out the same designs and this leads to monotony, which in turn marks the end of the trend life cycle.”

Sunit Bajaj
MD, Ambe Tex Fab (I) Pvt. Ltd.

Talking about the factors influencing the garment industry in Kolkata, Harmilapi said, “Things have changed for the better in the state but not as per expected standards. People have made payments and bought place in the garment park project initiated by the previous government that has been pending for the last 20 years, but the infrastructure is not ready yet. The government is trying to make another garment park whilst the old one is lying unused.”

E-commerce is one of the key factors responsible for getting things a little organised. Most manufacturers feel that a majority of kidswear brands who initially shied away from the idea of listing their products online, are slowly waking up to the immense advantage that digital platforms have, thanks to the wide reach that they offer. ‘Diapers’, a product that continues to be one of the key items in kidswear, finds a strong presence online. A majority of

parents have shunned the old school method of buying diapers in physical shops and instead prefer buying them online. Furthermore, the diapers are being sold online at a discounted rate to influence the buyer to purchase it in the online space. This also makes for an excellent opportunity to grab their attention towards kidswear garments and this exercise has proven to be quite successful. As a result, most brands have listed their products on e-commerce portals such as Hopscotch.in and Firstcry.com. A few others have tried a few more portals in the form of Flipkart and Amazon.

Samir Mehra, Proprietor, Kids R Us, feels that the market is made up of a majority of people belonging to the middle class, followed by a minority section of people from the elite class. **“We haven’t been able to woo the buyers from areas like Banaras, Kanpur, Nagpur, etc. Our products are sober in design as opposed to the ‘jhatka-matka’ (read: loud/flashy) design preferences of people from the aforementioned areas.”** He adds that the taste of people

is changing rapidly and nowadays exposure to design trends from the West and Europe is greater than ever. Sharing his thoughts on this topic, Mehra said, “People are travelling more than ever before. This, coupled with the global exposure imparted through the media, lead to most people now wanting to wear something that matches the design quality of Benetton and Hilfiger. I am foreseeing tremendous revolution in the Indian manufacturing sector in the next 5 years.” After earning his post graduate degree from NIFT, Kolkata, and working in garment manufacturing for about 18 to 20 years, Mehra incepted his brand, ‘Kids R Us’ about 5 years ago. The brand which primarily targets the buyers from the middle class segment, is growing at the rate of 20-25 percent every year. In a relatively short span of time, the positive response to the business has inspired him to launch yet another brand – ‘Toys R Us’ for the forthcoming season, aimed at attracting buyers from the premium segment.

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KIDZANIA APP:

The conference was attended by over 15 kidswear brands and several distributors from across the country. Brands that registered their attendance at the event included Olio Kids, Fun, Angel, Kids R Us, Camey, Rituals, Babylove, Just Chillin', Baby's Day Out, Kid Angel, i-baby, Twinkle Twinkle Little Star, Johnny Johnny Yes Papa, Toys R Us, Little Darlings & Point, etc. The conference also saw the launch of a mobile application - 'Kidzania' where products of all the brands under the Kidzania group will be listed. The app that will facilitate B2B operations will help the distributors go through the entire range of products and will ease the overall process.

Elaborating more on the design trends, Sunit Bajaj, MD, Ambe Tex Fab (I) Pvt. Ltd., the parent company of brand, Olio Kids, said, "Movie characters like Minions, superheroes and cartoon characters influence the design trends a lot. But because exploiting these involves licensing and other protocol, legally it is not possible and hence we avoid taking that route. Bollywood is also a big factor. In today's time, a particular design trend lasts a maximum of one season. Once a design trend gains popularity, manufacturers tend to go overboard churning out the same designs and this leads to monotony, which in turn marks the end of the trend life cycle." Founded in 2003, Olio Kids has been doing good business in Tier I and Tier II cities. Banking on his experience, Bajaj points out yet another interesting buying trend. He says, "In kidswear garments, the actual buyer is the mother of the child. And

the mother is always concerned about things like the quality of the fabric, the comfort that it provides, value for money, etc. After assessing different brands on these parameters, the mother then zeroes in on one brand and tends to stick to it."

While the brand manufacturers are dealing with a dicey market, the distribution network appointed by them is coping with their own share of challenges. Dilip Rangwani, a distributor functioning in Telangana and Andhra Pradesh, said, "Firstly, the online market place is posing as a challenge to the distribution network. Secondly, many brand manufacturers are appointing multiple distributors leading to cut-throat competition." Dilip Rangwani deals with brands such as Zero, Point, etc., to name a few.

Additionally, there are some area-specific internal issues too that are affecting the dynamics of the distribution market. Deepak Gangwani, proprietor of Super Enterprises who deals with multiple kidswear brands in Delhi, said, "On one hand, new young players entering the distribution market who are energetic and have a vision, find it tough to tie up with brands, manufacturers and factories. On the other, seasoned players do not feel the need to change their traditional business practices and strategies, and are happy with their small share of the market pie. This has made the market stagnant."

A majority of distributors feel that the future for kidswear market in India is bright and forward is the only way to move. Especially, with the value of Indian Rupee appreciating better than the Chinese currency, coupled with better manufacturing setup in India, the next couple of years are going to be crucial for the Indian market.





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Amyra Dastur in Sangeeta Sharma creation



Sooraj Pancholi in Anuj Madaan creation



Tanisha Mukherjee in Mayyur Girotra creation



Zarine Khan in Sanjukta Dutta creation

India Beach Fashion Week 2016

Running successfully into its third year now, the India Beach Fashion Week 2016 witnessed an euphoric participation and overwhelming turnout.

The third season of India Beach Fashion Week, Asia's largest resort wear fashion fiesta, started off in style. The three-day event was organised at the Museum of Goa from May 20-22, 2016. This year, IBFW powered by Audi, saw a lot of excitement and panache with some of the most popular designers presenting their flamboyant resort wear collections including stalwarts like Neeta Lulla, Asmita Marwa, Mayyur Girotra and Darshi Shah-Bhavin Trivedi, Falguni & Shane Peacock.

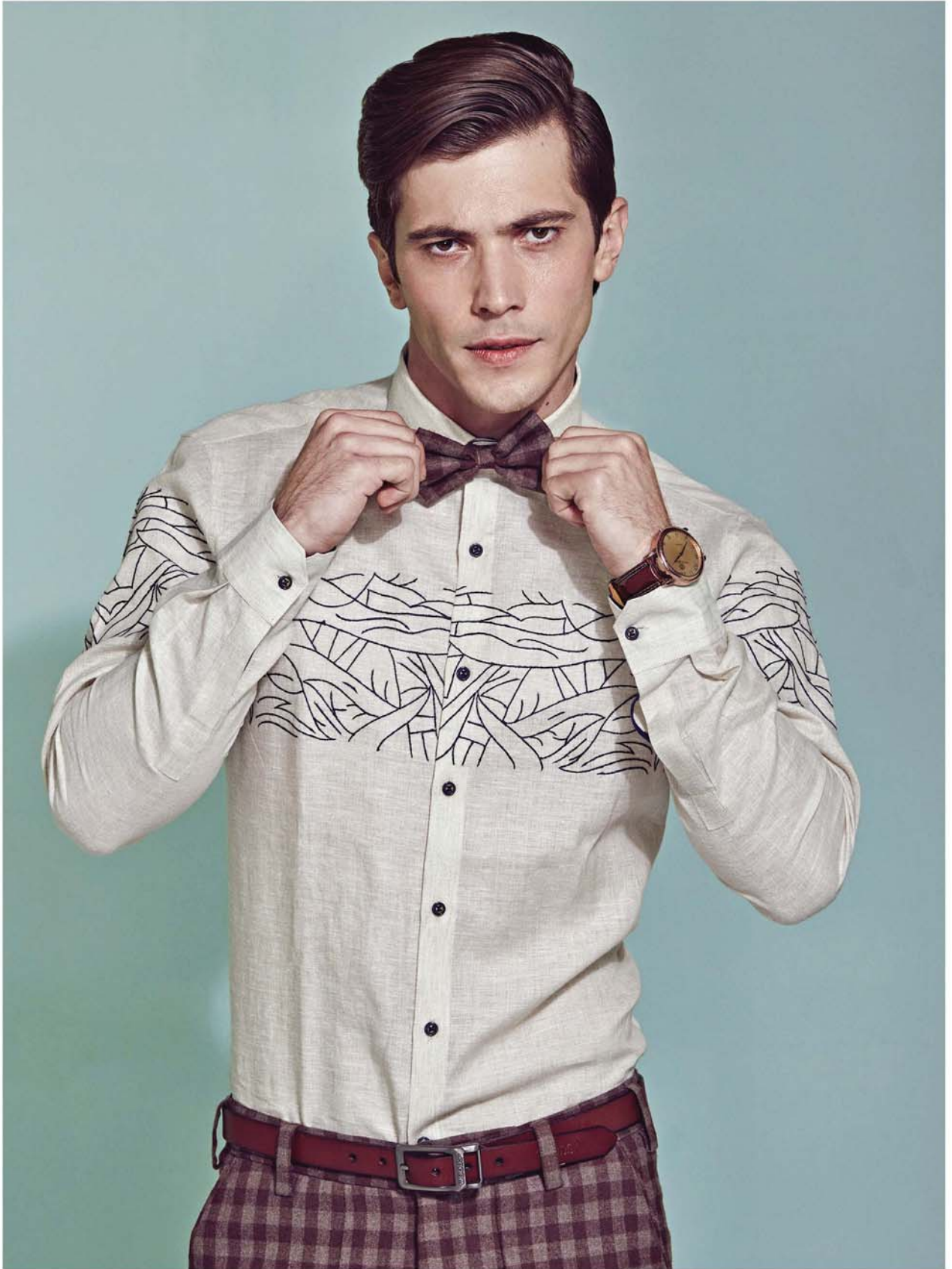
The Fashion Week started on a high octave with Neeta Lulla opening the season, with a charismatic line alongside dignitaries like Francis D'Souza, Deputy Chief Minister of Goa and Dilip Parulekar, Minister of Tourism of Goa. This was followed by endless display of talent for the country's fashion enthusiasts through a series of other ace designers like Mayyur Girotra, Bani Pasricha, Niyati Monga and Riddhi and Siddhi, who presented their latest designs for destination wedding and resort wear. Other interesting creations included Kanchan Kulkarni, Gabbana, Neha Godara, Harshita Chatterjee Deshpande, to name a few. Another highlight was, 'Sangria by the Sea' which was a collaborative effort to bring together the stalwart fashion designers and the fraternity to network and discuss about the changing dynamics of the industry. This light and suave session also showcased creative work by the students of Rachna Sansad School of Fashion and Textile Design.

The attractions of the fashion week were showstoppers Divya Khosla Kumar, Amyra Dastur and Sooraj Pancholi who graced the ramp with creations of Sukriti & Aakriti, Sangeeta Sharma and Anuj Madaan. Shibani Dandekar walked the ramp for Deme by Gabriella which was presented by Audi. Tanisha Mukherjee and Zarine Khan also walked the ramp for Mayyur Girotra and Sanjukta Dutta respectively.



(L-R) Amyra Dastur, Neeta Lulla, Wendell Rodricks and Pallav Ojha





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The Garment Show of India 2016

In order to bring the garment manufacturers, brands, retailers, distributors, agents, e-commerce players under one roof, the Garment Show of India (GSI) is organising an exhibition in New Delhi at Pragati Maidan, Hall Number 7 on August 8, 9 and 10, 2016.

India has become a garment hub in the past few years for international as well as national fashion. While the upsurge in demand for the latest fashion amongst Indian consumers continues, there is a missing link between the buyers and the manufacturers who are trying to create a name and position in the retail market of India. Hence, the GSI will be an unmatched opportunity for sourcing teams linked to brands, retailers, distributors, traders and agents who are in search of manufacturers with potential to perform. “The aim of this event is to connect with new businesses and explore new opportunities in apparel retail,” said Gagan Marwah, Co-Founder, Garment Show of India. According to the organiser, it is anticipated that more than 20,000 garment buyers would attend the upcoming garment event.

The exhibitors include manufacturers and traders of women’s wear, men’s wear, infant and kids’ wear, as well as sportswear, lingerie and accessories brands from all over India. Buyers from all across the country such as Delhi, Noida, Gurgaon, Chandigarh, Kolkata, Maharashtra, Gujarat, Punjab, Bengaluru, Himachal Pradesh, Madhya Pradesh, Rajasthan, Andhra Pradesh, Bihar, Kerala, Tamil Nadu, including tier -II and -III cities, are expected to be a part of the event.

The three-day event will be full of activities like fashion shows, conferences, an awards night and a networking summit. Meanwhile, business to business meetings will be arranged for in-depth interaction with the biggest domestic garment manufacturers and retailers in the country. Moreover, Shoppers Stop, Westside, Lifestyle, Pantaloons, Chunmun Stores, V2, Kapsons, Pratapsons, Vishal Retail, Jabong.com, Myntra.com, Snapdeal.com, Madura Garments, Pothy’s and Chennai Silk are expected to visit the event to source the collections for the upcoming season.

The event is supported by myriad garment clusters from all over the country such as Noida Apparel Export Cluster, Okhla Garment and Textile Cluster, Eastern India Garment Manufacturers & Exporters Federation, Garment Exporters Association of Rajasthan, Garment Manufacturers & Wholesalers Association Hyderabad, Tirupur Thozhil Pathukapu Kulu, South India Garment Association and many more.

The event is being organised by Saina Events, an organization that specializes in publishing of B-2-B trade magazines like Apparel & Fashion and Perfect Sourcing.



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(Left to Right): Bimal Rangrej, Marketing Manager, Shalendra Vasudeva, Chief Marketing Officer and Nilesh Sevak, General Manager, INVIYA, along with Pawan Poddar, Jt. Managing Director, Siyaram Silk Milks Ltd., Avinash Poddar, Director & Business Head, J. Hampstead, and Seerat Soni, Brand Manager, INVIYA.

INVIYA

With India at the cusp of a digital revolution, INVIYA, from India's premium elastomeric fibre company Indorama Industries Limited, launched its mobile application for Android platform at the Fibres and Yarns Expo held in Mumbai.

By Gurbir Singh Gulati

With India at the cusp of a digital revolution, INVIYA, one of India's premium elastomeric fibre, launched their mobile application for Android platform at the Fibres and Yarns Expo held in Mumbai recently. The company plans to launch the iOS version shortly.

The main objective of the mobile app is to further enhance the growing list of customer services that the brand offer.

INVIYA has gone beyond traditional market studies and worked with leading biometric market research companies to gain deeper customer insights. As a result, the app is equipped with an abundance of essential features.

After a long period of research and testing, Indorama Industries Limited (IIL) developed a product fully loaded with features, enabling its end users, like fabric experts, spinning and knitting professionals, sourcing professionals, fashion designers and marketing experts across the value chain gain maximum benefits. It was tested across the value chain and textile colleges in the month of March, wherein 90 percent of those who surveyed found it engaging and user-friendly and more than 75 percent said they would recommend it to friends and colleagues.

Shalendra Vasudeva, Chief Marketing Officer, IIL, while launching the new app said, "In times to come, the INVIYA app will revolutionize the textile manufacturing industry. The smart and easy to use interface comes with various features pertaining to the textile value chain, turning your calling device into a spandex handbook. Thanks to our advanced algorithms, the next version of the app will be equipped with features like order tracking, 3D body scanning software for finding the perfect fit and much more, making this the most efficient app in the textile b2b space."

×

Some key features of the INVIYA app:

- Guidelines for using INVIYA spandex
- Global textile event calendar
- INVIYA spandex applications and end usage
- Textile calculator
- Currency convertor
- Handy fashion tips



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GRANITE

TROUSERS INSPIRED BY SIMPLICITY AND ELEGANCE

Established in 2011, Granite trousers have emerged as a key player in the formal wear market in India. With specialities like the Super Crease and the Stain Free range, the company is geared up to explore newer territories, says S K Jain, Managing Director, Granite.

Tell us how your company started and how has the journey been so far.

We have a retail showroom since the last 16 years, but gradually I became more interested in manufacturing. I wanted to start a brand that is reasonable and qualitative; I feel we have very few such brands in India. So in 2011, finally, I ventured into manufacturing trousers. It wasn't easy at first and at the time, I was single-handedly supervising both the manufacturing unit and the retail unit. About a year later, after I got a hang of the manufacturing process, I handed over the responsibility of the showroom and devoted all my focus on the manufacturing venture.

It has been a favourable journey so far; we started just with Delhi/NCR and now, we have successfully added Himachal Pradesh, Punjab and Maharashtra to our roster. I feel this has been possible only due to our unflinching attitude towards quality.

Tell us about your core target audience.

We target corporate men in the age group of 20-50 years.

Tell us about your present product portfolio and the MRPs.

We make all kinds of trousers; and our product range starts from ₹750 and goes upto ₹2,000. But, of all the products that we manufacture, I want to highlight the Super Creased trousers that we specialize in. The



"I wanted to introduce a brand that offers unparalleled quality with keen sensitivity towards cost as there is a dearth of such brands in India. Granite guarantees the finest of quality and the most competitive prices."

-S K Jain
Managing Director, Granite

Super Crease is one of a kind that uses an imported chemical to maintain a permanent crease. Procured from a UK based firm called Clantex, the crease can easily sustain upto 100 washes, so you don't have to worry about maintaining the creases anymore. The price range is from ₹1,100 to ₹1,500. Our lycra range are made using INVISTA's lycra and is available in the price bracket of ₹1,100 to ₹1,300. Our linen trousers, tailored using genuine European linen procured from the Aditya Birla Group, are priced between ₹1,800- ₹2,000.

We also have a Stain Free collection priced between ₹1,100- ₹1,300, that has a DuPont Teflon coating that keeps stains at bay. It is an excellent party wear option as you don't have to worry about spills and stains.

What new collections are in store for your customers in the upcoming season?

We have a new collection that features very subtle and subdued checks. Very sober, I tell you, and I am highly optimistic about the response it is going to receive.

Are there any new colours that customers can expect?

We played with staple colours only—black, grey, coffee, and beige along with vibrant tones of blues and khakis.

Are there any plans for category expansion?

None as of now. I want to concentrate only on trousers and emerge as one of the most coveted players of this domain.

Please elaborate your retail presence.

As of now, we are present in about 180 counters across Delhi/NCR, Haryana, Himachal Pradesh and Maharashtra. We also have a strong online presence across all major e-commerce sites like Snapdeal, Amazon, Shopclues, Paytm, Flipkart, etc.

How has the online response been?

Average. There is no way out to tell the quality of the product in an online portal, so it's natural.

Are there any plans of exploring new markets in India?

Yes, we are planning to launch ourselves in Gujarat, Karnataka, Madhya Pradesh, Uttar Pradesh and Rajasthan very soon.

I couldn't help but notice that the prices are surprisingly minimal. What is the reason behind this?

Right, we have kept it as minimal as possible. We want to reach out to everyone, every pocket from all walks of life.

Could you give us an impression of the formal trousers market in India?

I would say it's an average market. Naturally, the market is better in the metros and big cities. Especially, with the rate at which urbanisation is growing in the country, I am very optimistic about the future.

But isn't casual wear the trend now?

See, fashion keeps changing every 2- 3 seasons; and now is the time for formal wear. Just two months remain for the eight months long festive and party season and to look smart, you will have to be in formals.

×



18 FIRE & DIVYANSHI

TWO BRANDS, ONE UNIQUE VISION

Mumbai-based Divyanshi Fashion, functions with the sole vision to create clothes that inspire and empower the busy modern woman “Today, Tomorrow, Forever”. The company has two popular brands in its portfolio, 18 Fire and Divyanshi.

18 Fire brings in some of the most fresh design elements to the discerning women’s wardrobe. The brand is edgy, modern, and captures modern ethnicity in its collection weaving fashion into every lifestyle.

Divyanshi is another distinctly positioned brand in the company’s portfolio which features economic range for kurtis. The brand was launched with a unique positioning idea to capture the needs of the economic class in society.

Product Portfolio and Reach

The brand has a product portfolio of designer and exclusive kurtis,

economy collection kurtis and tops. They have recently launched a series of short tops and pants. In trousers, the brand has introduced a full crochet pants with smart styling. These trousers are stylish, have designer fits and there is a lot of play with the fabrication. The range of short tops offers smart cuts that will enhance any body type.

Looking at the upcoming festive season, the company has included exclusive wear which offers high end kurtis and assembles.

The company has aimed to produce high quality fashion products at affordable pricing which has led to its growth in the market. Today, it marks a presence pan India, covering more than 1,600 MBOs.

Autumn/Winter’16 Collection

Ethnic yet contemporary, is the overall aesthetic approach with thoughtful design details. The brands latest Autumn/Winter collection features minimalistic and basic cuts, bold prints, pastel shades, and mix and match of various fabrications. The product features a lot of innovative cuts, high neck and asymmetric flairs. Every collection has a colour story keeping in mind the latest fashion trend seen internationally. The colour themes with the hues of marsala, olive green, gold and other bright and pastel shades stand out as the USP of the brand. On the fabric front, the new collection is designed with light weight knitted and embroidered fabrics with elements like crochet and fancy laces.





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ONN CASUALZ

BE CASUAL, BE YOU

Onn Premium Wear launches Casualz, a sassy range of t-shirts, track pants, three-quarter pants and shorts for men.

In an endeavour to consolidate its market position and to further develop the relationship with its loyal customer base, Onn has extended the brand by offering new collections under 'Casualz'.

The collection offers t-shirts, track pants, three-quarter pants and shorts. With its new range, the brand promises to satisfy its consumers on the parameters—comfort, style and durability.

According to the brand, in a market survey conducted by Onn Casualz, its track pants have been appreciated by the customers for the fit and styling. Today, the youth likes apparel that gives them a relaxed yet stylish look and the new Casualz range from Onn Premium Wear fulfills their desire and demands to the fullest.

Customer And Their Demands

Lux Industries forayed into the premium men's innerwear segment five years back with the brand, Onn Premium Wear. Today, the brand has established a respectable position and has garnered encouraging market share in the category. With the retail reach of 13,000 outlets across 3,500 cities and towns in India, Onn Premium Wear is emerging as one of the fastest growing brand in the segment.

Saket Todi, Senior Vice President, Lux Industries Ltd., says, "Strong demand from the retail fraternity and the consumer has been the key factor in the launch of Casualz. The value added consumer market has been growing at a faster rate due to premiumisation and the benefits being offered. Our R&D team focused on reaching out to a greater mass understanding the consumer requirement to fulfil the brand promise of comfort, style, quality and affordability.

Quality Assurance

The t-shirts prepared under the Casualz range are made from 100 percent premium combed cotton with super absorbent fabrics which ensure freshness all day long. Available in both round neck and polo (collar) style, the Casualz range offer various options to choose from according to the consumers' style and preference. The best thing about these t-shirts is that it goes well with anything, be it jeans, track pants or three-quarter pants.

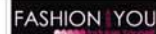
Similarly, track pants, three-quarter pants and shorts under the Casualz range are made from 100 percent premium combed cotton, offering extra durability. The collection is available in many bold colours. The bottom wear have ribbed waist band and French terry knit to give extreme comfort to the wearer. Prepared with utmost focus on style and comfort, these bottom wear offer impressive designs and guarantees calmness.





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BUMCHUMS WOMEN

WOONG ACTIVE WOMEN

Bumchums, from the house of Rupa, launches a whole new range of casualwear to curry favour with the active modern woman.



Bumchums, the casual wear brand from the house of Rupa, has launched a new range of casual wear for women. Labelled as Bumchums Women, the collection takes a fresh leap towards endorsing women who lead an active life.

Product Range

The collection presents an exclusive range of active wear, leisure wear, lounge wear and relax wear available in multiple colours and styles. Bumchums also offers cool casuals and trendy t-shirts, bermudas, loungers and capris for young men and kids.

About the Collection

“The designs are chic and classy, quite akin to the taste of young modern women who are independent, stylish, bold, fearless and are always on the go. We’ve blended superior cotton and

spandex fabric so that women can stay comfortable yet stylish all day long,” said Rajnish Agarwal, Brand President, Rupa and Company Ltd.

Furthermore, he said, “Inspired by celebrity looks and the latest catwalk trends, Bumchums Women bridges the gap between functional street-clothing and futuristic fashion. Each piece is crafted aesthetically and cut to perfection for that second look.”

Moving Ahead

Bumchums Women debuts with v-neck and round-neck tees, lounge pants and capris. The next in line of production are printed tops and bottoms with attractive pipings.



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HORIZON:

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Established in 2004 by two friends who noticed a big disconnect in the way the mid-segment casual shirt market was delivering to its customers. They knew there is a gap for products which are creative and provide latest fashion to this discerning audience. With just a handful of savings and a strong gut feeling, Mitesh and Karim quit their jobs and created Horizon, a menswear shirts brand that delivered what the market expected.

By Gurbir Singh Gulati

We spoke to Mitesh Oza and Karim Lalani, Directors, Horizon to understand how they have carved their niche positioning in the market and their future road map.

Tell me about Horizon and how it all started as a journey?

Mitesh Oza: Our partnership started with professional friendship which led to the establishment of the brand. It was a fruitful journey of growth during all these years where we believed and we did what we aspired to do. We started with shirts as we saw immense growth in this sector. We specialise in casual shirts which stand out with the wearer's personality. We are a mid-segment brand and believe in giving premium quality products with affordable pricing.

How would you define your customer?

Karim Lalani: Our clientele is always in the look out for something new in every element of their shirts. They seek new developments in checks, prints, mix and match, etc. My customer is from the age group of 18 to 40 years and belongs from the mid-segment of the society and aspires to wear quality clothing.

Tell us about your retail mapping across the country.

Mitesh Oza: We started our network with the appointment of distributors. The first state that we covered was Maharashtra. Then, we entered Gujarat which is another strong market for Horizon shirts. Apart from this, we are in Chhattisgarh, Madhya Pradesh, Uttar Pradesh, Ranchi, Kolkata, Delhi and Haryana. In total, we have 10 distributors and are covering approximately 600 multi brand outlets (MBOs).

What are your retail expansion plans?

Karim Lalani: We believe that the major expansion for a brand is possible initially through the MBOs and we will stay concentrated on this channel for further expansion. As of now, we will try and expand in the present markets in our retail network. After this is done we may look at South India. Every year we try and expand by 15-20 percent with our retail channel.

Tell us about your product portfolio and its expansion plans?

Mitesh Oza: We have profiled our product portfolio in such a way so that it has a room for expansion within the same category. In the main line we profile our shirts from the price bracket of ₹1295 to ₹1695. We saw a need and growth in the everyday wear segment wherein we have recently launched our new signature line called Horizon Everyday which is from the price range of ₹995 to ₹1195. Moving ahead we will plan to launch a premium segment of Horizon shirts which will be priced somewhere around ₹1795 to ₹2295.

Presently our product basket is divided into 50 percent denims (which have checks, plains, prints, etc.), 20 percent is in solid colours in other fabrics, 20 percent is in prints, and 10 percent in mix and match.

Tell us about your latest collection for the upcoming season?

Karim Lalani: We follow an approach where we provide all what the market needs as per the ongoing fashion trend. We have a large variety in solids, prints, denims, checks, etc. In our current collection, the main highlight for the season is towards indigos and denim shirts. Currently, if you see the European markets, they are reflecting a trend towards indigo blues. We have followed this in 50 percent of our sample sets with different varieties. We wish to educate the customer



and help him follow and wear what is international and latest in casual shirts.

In our denim shirts collection, we have given different variants with newer fabrics. We have indigo checks, plains, prints and panels with different creations of washing.

Can you share details on Horizon shirts' fits and innovations?

Mitesh Oza: We have slim, standard and comfort fits in our shirts. We have always been appreciated for our creativity, washes and finishing.

What would be your present production capacity and growth levels?

Karim Lalani: We follow a target of making 10,000 pieces per month and we try to grow this capacity by 20 percent every year. We have a strong sampling unit with us. Rest we have a network of registered units who are manufacturing for our brand. We wish to maintain our targets and grow in an organic way.



Mitesh Oza,
Director, Horizon



Karim Lalani,
Director, Horizon

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Denim pioneer Levi Strauss, to mark their 142nd year of coming into being, revealed the oldest pair of jeans in the world.

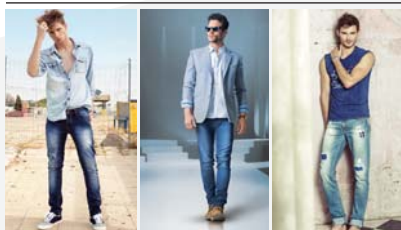
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SNIPPETS

You PROBABLY DIDN'T KNOW

A few quick facts about denims we cumulated for you.

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LEADER TALK

MEN'S DENIM TRENDS À LA MODE

The men's denim segment accounts for 85 percent of the total denim market in India. We take a look by talking to the top players.

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THE KEY TO CHIC: TRENDS IN WOMEN'S DENIM

Over the last few years, the overall Indian women's denim market is witnessing tremendous growth, both in volume and sales. Images BoF analyses the various trends in vogue in women's denim.

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CATEGORY WATCH

MAKING DENIMS YOURS TRULY

Has customisation taken over the Indian denim market or has the ball just started to roll? We speak with the leading brands to find out.

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RESEARCH

THE INDIAN DENIM MARKET: BRISTLING WITH OPPORTUNITIES

The youth driven denim market promises unmatched value as well as volume growth as perhaps no other fashion category. Experts from Technopak size the denim market.

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OPINION

THE IMPACT OF INTERNATIONAL DENIM BRANDS

With the advent of international denim brands in India, the regional and national brands are gearing up and taking a lesson or two from their international competitors.

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NEXT WAVE

SUPER PREMIUM DENIMS: THE INDIA STORY

Despite growth and visibility in this category, super premium denim is yet to achieve a significant market share, Dr. P R Roy finds out.

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CATEGORY FOCUS

KIDS DENIM: RISE OF THE LITTLE BLUE JEANS

The extension of denim brands onto kids' racks is part of the larger trend of marketing, pervading nearly every corner of the consumer marketplace.

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XX - THE OLDEST PAIR OF JEANS



"It was a dream come true, I'd gone 15 years never finding a pair older than 1890."

Lynn Downey,
Ex-Brand Historian, Levi's

Denim pioneers Levi Strauss, to mark their 142nd years of coming into being, revealed the oldest pair of jeans in the world at the Levi's Fall 2011 Fashion preview. According to Lynn Downey, ex-Brand Historian of Levi's, the weathered pair of jeans showcased, a buckle-back Levi's Strauss dungaree blue jeans, dates all the way back to 1879. The jeans resembled the ubiquitous 501 model, with a few minor differences including a narrower yoke. "It is a simpler design known as denim waist overalls, which were made with an extra side pocket used primarily by mine workers for tools," Downey said.

Considering that the the first pair of riveted denim jeans was patented by Levi Strauss and his partner Jacob Davis in 1872, this pair of jeans is only seven years older than the first pair of Levi's ever made. Downey said that the jeans were made at one of the two San Francisco factories using denim that came from the Amoskeag Mill in Manchester, New Hampshire. They probably sold for about 75 cents at the time, cheaper than the higher-quality 501 models, which sold for about \$1.25.

Photo Credits: Levi's, Mashable



The historic pair of jeans is now safely stored in a vault at the Levi Strauss & Co. world headquarters in San Francisco, carefully tucked inside a drawer of a refrigerator-like fireproof vault, covered in a white cloth. According to Downey, the jeans, which she bought for \$40,000, is now insured for \$150,000, making it one of the most prized artifact in the denim world today.

The vault also contains other pairs of 501 jeans from the late 19th century and early 20th century, with hints of their unfaded color preserved inside the pockets.

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YOU PROBABLY, DIDN'T KNOW

THERE ARE A LOT OF INTERESTING FACTS ABOUT A PAIR OF JEANS WHICH YOU PROBABLY DID NOT KNOW. HERE ARE A FEW QUICK FACTS WE CUMULATED FOR OUR READERS:

▶ In 1955, Levi's created a line of black jeans named after Elvis Presley. Called the "Elvis Presley Jeans", it was designed in compliance with the ones he wore to perform "Jailhouse Rock" in the movie of the same name. Interestingly, although the line became a huge success, Elvis never really wore one of them as jeans reminded him of his working class roots.



▲ In the '50s blue jeans were banned at certain places — like schools, theaters, and restaurants because they were seen as a form of rebellion against conformism. In 1951, singer Bing Crosby was refused entry to a Canadian hotel (until an employee recognized him) because he was wearing jeans. In response, Levi's created the "Canadian tuxedo" — a more formal look for him made entirely of denim.



▲ The orange thread that Levi Strauss & Co. uses for stitching of their jeans is trademarked. It is used as a distinguishable feature and to match the color of copper rivets.



◀ The Americans can be credited for spreading jeans throughout the world, courtesy the World War II soldiers who wore it extensively when they were not at war. In fact, the Second World War can actually be said to propagate jeans the most in the Western world.



▲ Jeans used to be called “overalls,” which was the old name for workwear. But after James Dean rocked a pair in the cult American drama Rebel Without a Cause, they became wildly popular. The kids wanted another name for “overalls,” though, since that was a term their parents used. So they started calling them jeans, which was actually a different fabric for workwear. Eventually, even the adults got on board and started calling the Levi’s denim classic “jeans.”



▲ Ever wonder why denim jeans are white on the inside but colored (usually indigo) on the outside? This is due to the fact that only the warp fabric is dyed, while the weft fabric remains white. So when jeans are produced — with the weft fabric being used on the interior — it creates this phenomenon. Keep in mind that some companies dye both the warp and weft fabric, but you’ll generally find that most jeans only have the warp fabric dyed.

▶ The most expensive pair of jeans in the world right now? It’s the Secret Circus embellished jeans which can be bought at \$1.2.million. The design of the jeans is classic enough, but the clincher here are the high quality large diamonds sewn into the back pockets of the jeans.







THE INDIAN DENIM MARKET*

BRISTLING WITH OPPORTUNITIES

The youth driven denim market promises unmatched value as well as volume growth as perhaps no other fashion category. Amit Gugnani, Senior Vice President - Fashion, and Sakshi Chillar, Research Associate - Fashion & Textile, Technopak, size the market and delve into its dynamics including a look at its online performance.

Indian apparel market has demonstrated impressive growth in the past decade. Domestic apparel market is expected to demonstrate a compounded annual growth rate of 10 percent and expected to reach ₹7,35,905 crores by 2025 from present worth of ₹2,72,666 crores. The Indian apparel market has seen growing inclination of consumer towards western wear and casualwear. Denim is a key category which has seen a positive growth.

DENIM WEAR: MARKET SIZE AND GROWTH

The denim wear market is estimated to be ₹17,661 crores in 2015 and is expected to grow at CAGR of 15.4 percent to reach ₹36,110 crores by 2020. The denim wear market in India is dominated by men's segment, accounting ~85 percent of the total market size. However, women's

denim wear segment is expected to show higher CAGR of 18.5 percent than men's segment (15.0 percent).

DENIM MARKET DYNAMICS

The denim wear market is dominated by the unorganised sector, accounting to ~65 percent of the total market. Further, unbranded denim wear products account for 60 percent of the total denim wear market and offer intense competition to the branded segment.

However, with many private labels and international brands entering Indian apparel market, the inclination towards branded denim wear is increasing in consumers. The increased consumer preference towards e-tailing is giving boost to organised and branded retail of denim wear.

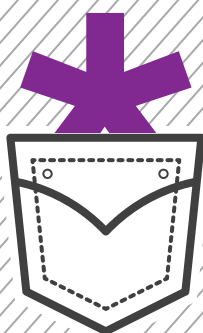
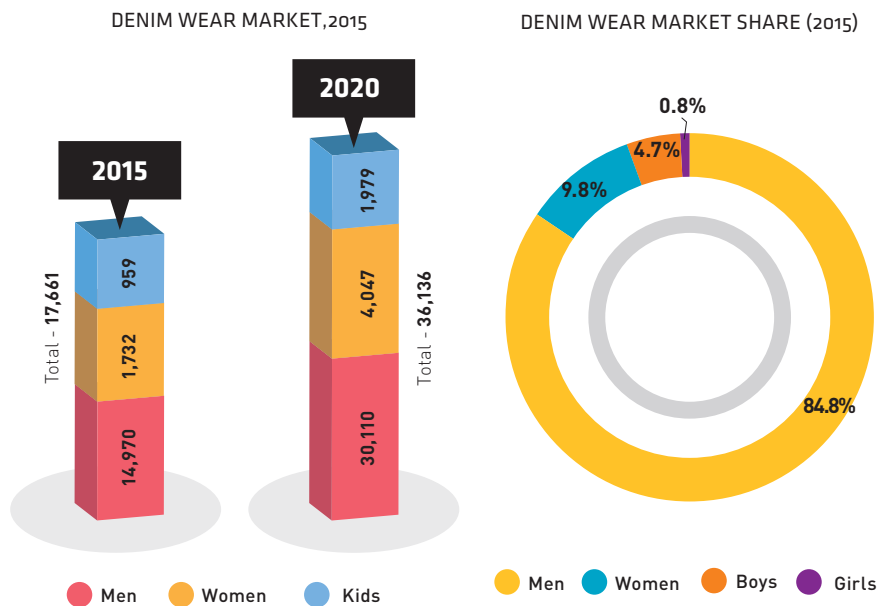
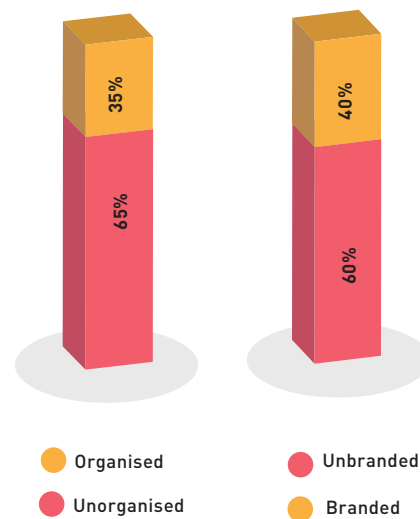


EXHIBIT 1: DENIM WEAR MARKET, 2015
(IN ₹ CRORE)

EXHIBIT 2: DENIM WEAR MARKET DYNAMICS, 2015


Online purchasing of denim wear has not yet become as popular in India as other apparel and non-apparel categories.

ONLINE PENETRATION OF DENIM

Increased penetration of digital technology cannot be ignored. Between 2015 and 2020, the number of smartphone users is expected to increase rapidly from 170 million users to a stunning 540 million users. The number of mobile phone, PC and notebook users too is also expected to surge. This deep penetration, alongside improved access to the internet, is rapidly impacting consumer behaviour. Online and mobile phone-based shopping is gaining momentum among Indian shoppers especially in the metros.

However, despite the rapid burgeoning e-commerce, it is believed that online purchasing of denim wear has not yet become as popular in India as other apparel and non-apparel categories. This is possibly because e-tail of denim jeans is indeed a challenge. Jeans represent a highly customised category; shoppers prefer to personally feel and embrace the product's fit before making a purchase decision. Also, there are various options available as per body

types and consumer preferences, which make finding the perfect pair of jeans complex. For instance, if we look at different cuts for women's jeans alone, there is the classic cut, relaxed fit, boot cut, boyfriend style, tapered, skinny jeans, jeggings etc.

Further, denim brands usually have a strong heritage and thus claim different associations with their customers. They portray themselves through diverse expressions, such as modesty, sex appeal, relaxed nature, and nonchalance. Brands' marketing strategies are based on this same set of associations in the physical store space. However, websites are not able to evoke the same degree of inspiration in the minds of the consumers and thus do not generate huge online sales. Websites of denim brands need to display brand aesthetics, image and story just like physical stores. Some global brands have been able to deploy their websites as a strong communications tool as well as a sales portal. Indian denim companies can adopt best practices from those in the west, and aim to improve their online offerings to achieve more success in denim e-commerce.



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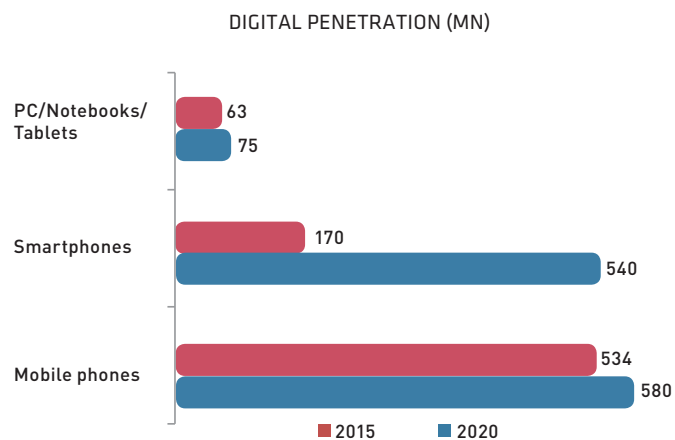
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EXHIBIT 3: DIGITAL PENETRATION



Mait, CMR, IDC, Technopak Analysis



FACTORS AFFECTING THE SUCCESS OF ONLINE DENIM SALE

What matters substantially in terms of online denim sales is the brand. Given that consumers cannot “touch and feel” or “try” the product when they buy online, companies with high degree of brand familiarity and positive brand association are more likely to achieve success.

Lucrative market opportunity has attracted many pure-play e-tailing players to the lifestyle space. E-tailing players are customising their online portal to attract the youth who seek

style and trendy look in their fashion products. Lucrative offers from the retailers like ‘cash-on-delivery’, ‘try-and-buy’, ‘easy return policy’, etc., are making e-tailing space competitive and dynamic.

GROWTH DRIVERS AND KEY TRENDS

The value growth within the denimwear owes to increased demand for enhanced product attributes: fashion quotient, stretch and lightweight fabric, varying colours, styling and detailing. This trend is emerging across both men’s and women’s segments. The above factors shall combine to drive relatively higher levels of growth of the mid-premium and premium/luxury segments.

Targeting rural and sub-urban consumers had been a challenge for denim industry. However, recent trends have indicated increased penetration of denim category across semi-urban and rural centres which shall drive volume growth across mass market and unbranded segments.



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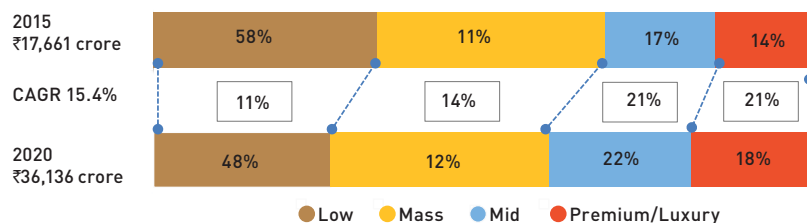
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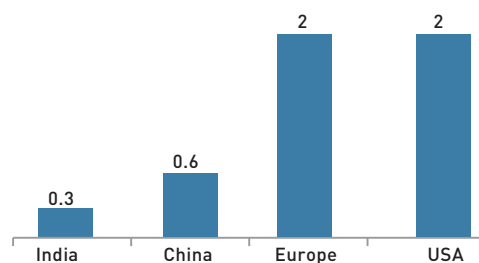
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EXHIBIT 4: DENIMWEAR VALUE GROWTH



Technopak Analysis

EXHIBIT 5: PER CAPITA JEANS CONSUMPTION



Technopak Analysis



LOW PER CAPITA

Per capita jeans consumption in India is much lower than that of developed markets; hence there is huge scope of growth in Indian market.

Youth as a growth driver: Youth (15 to 29 year olds), which make 26 percent of the consuming population, are propellers of denim consumption. Quality and brand conscious youth with higher spending power find denim as their key preference owing to its versatility as an anytime and anywhere wear.

Changing classification of consumer's wardrobe: The changing classification of consumer's wardrobe has also acted as a driving force for the

casualwear and jeans market in India. 10-15 years ago, Indian consumer was satisfied with need based purchase. The fashion basket then was dominated by formal shirts, trousers, sarees, salwar kameez etc. The key purchase parameter for these fashion items were basic function, comfort and price. However, with increasing exposure to international fashion trends, Indian fashion consumer now wants more than the need-based clothing. Consequently, fashion basket has expanded to include clothing like sports/gym wear, occasion specific ethnic wear, jeans, etc. In addition to the old parameters like basic functionality and price, better look, perfect fit and latest trend have also become key purchase parameters.

Alternative retail channel:

Alternative apparel retailing is evolving in India in a rapid pace; jeans are no exception to this trend. Direct selling, home shopping and e-tailing are gaining momentum in the market. There was a time when growth of alternative retailing of fashion was in question as experts thought touch and feel are the most crucial parameters in decision making. However, e-tailing of apparel has gained wide acceptability in India as well as across the major consuming countries of the globe.

>

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EXHIBIT 6: TRENDS



Cotton remains the fibre of choice in denim apparel. In blended denim fabrics polyester is being used as weft threads



Demand for stretch denim is growing at a faster rate in Indian market due to its comfort and fit characteristics



Colour of denim jeans is no longer limited to traditional blue colours. Indian youth has started accepting denim in different colours including green, red, yellow etc.



In the recent times industry has witnessed entrance of new fabric manufacturers which is expected to make the market for denim fabric more price competitive

Source: Technopak Analysis



Others: Increased penetration of denim category across semi-urban and rural centres shall drive volume growth across mass market and unbranded segments. Entry of more foreign jeans brands into India is expected in future, which may increase the denim market especially in terms of value.

Also, denim is finding ways into other components of the wardrobe, light weight denim shirts, denim shorts, Indigo dyed tees, accessories out of denim fabrics etc.

CONCLUSION

With growing penetration of online channels, brand recognition and quality consciousness; there is huge opportunity for growth in denim wear. The large youth population, infiltrating urbanisation and growing preference towards western wear in semi-urban and rural areas are acting as a boost to denim industry.

With right knowledge of consumer preference, opting for online channels, omni-channel retailing and global best practices, denim wear brands can exploit the available growth opportunities in domestic denim wear market.







MEN'S DENIM TRENDS À LA MODE

Men's segment accounts for nearly 85 percent of the total denim market in India. The country's market is bustling with numerous home-grown and international brands, catering to various consumer categories. A glance at current men's denim trends and the segment's growth.

By Namita Bhagat with inputs from Tanya Krishna



Denim is indeed one of the most innovative and most popular fabrics. The history of this amazing fabric dates back to 16th century and many believe that it has origins in France, while others think it was Italy. Extraordinarily strong, sturdy and durable denim made a perfect clothing choice for workers, miners and cowboys of that time. Centuries down the line, this modest attire of yore has gradually grown to be loved by one and all, around the world. In its modern avatar, denim has today become a style quotient and a must-have. Significantly, one would find many more denim-clad men than women or children. This is perhaps because its sturdiness and ruggedness goes well with their innate nature.

Just like their global counterparts, Indian men too are hung up on denim big time! As is the worldwide trend and whether it's a man or woman, of all denim wear, jeans or pants is the most worn garment. According to estimates, the men's segment accounts for nearly 85 percent of the total denim market in India, with the demand continuing to climb.

Talking about the demand, Sanjay Vakharia, Chief Operating Officer, Spykar, states, "Denim is one of the fastest growing categories in apparel in India, and therefore, we are seeing lots of new players/brands coming into the market. In denim, jeans are the most comfortable wear. Most men want their clothes to be comfy and easy going, which no other apparel can offer except denim. So, being the fastest growing category, men's denim wear is offering the best market, and there is always an increase in demand of the denim."

Manish Chopra, Vice President-Merchandising, Monte Carlo, also affirmed the strong demand trends, "We have experienced an outstanding growth in the sales of men's denim. Our best selling denim styles include five pocket twill medium wash; narrow fit in over dye; and medium blues in cloud wash, etc."

Agrees Pratik Agarwal, Director, Moustache Jeans & M Brand, "The demand for men's denim is growing day by day. From among our various collections/styles, knitted denims, destroyed denims and jogger pants - all in skinny fits - are doing exceptionally well at the moment."

Market at a glance

The Indian market is bustling with numerous homegrown and international denim brands catering to different consumer segments, and continues to attract many more. However, despite the substantial presence of brands, the unorganised sector enjoys a dominate share of the market pie. Counterfeit or fake products also pose a serious threat to the branded segment. Nonetheless, the flourishing demand has set the whole entire denim industry on the roll. Especially, the men's segment is expected to grow at a CAGR of 15 percent through the coming years, due to increased penetration of denims and rising disposable incomes in semi-urban and rural areas.

Says Vinod Kumar Gupta, Managing Director, Dollar Force, "The growth in men's denim jeans is quite significant. Until a few years ago, denim was popular with men in the urban centers only. However, it has now gradually gained favour in the semi-urban and rural markets too." As per him, the growing awareness and increasing sense of global fashion has helped to develop its market presence remarkably.

Aayush Rungta, Chief Executive Officer, Hoffmen also avers that the business has been good lately, "The growth has been steady and pretty good", and goes on to say,



Sanjay Vakharia
Chief Operating Officer, Spykar



Manish Chopra,
Vice President-Merchandising, Monte Carlo



Pratik Agarwal
Director, Moustache Jeans & M Brand



Vinod Kumar Gupta
Managing Director, Dollar Force



Aayush Rungta
Chief Executive Officer, Hoffmen



Saumar J Sharma
Business Head, Camaro

“Our current top selling styles include vintage wash which has a rugged and worn out look; hard stitched denim – denim stitched using very thick threads for authentic styling; and towel washed for bright and patchy look.”

“Sales have been reasonably good,” states Saumar J Sharma, Business Head, Camaro while apprising on his company’s best sellers. “In men’s denim category, our current best selling styles include optical difference; subtle wash; along with good quality low waist, tight leg fit. Our tapered bottoms have also received a good response from the customers.”

However, even as the denim market has been witnessing an upward trend, the going has not been smooth for everyone, as Mazhar Khan, Head - Designer, Success, explicated, “As compared to core denim brands, the growth in sales of denim has been steady yet challenging for the brands that do not have denim wear at its core. Keeping a denim segment can boost the brand’s sales to a certain extent.” He also draws attention to increased competition and customers being fickle, owing to a large number of brands offering affordable yet trendy denim varieties to retain customers, both offline as well as online.

Courting men consumers

When it comes to men, denim is at its versatile-best. With jeans constituting a lion share, the denim apparel category also has a wide array of other options to choose from, such as jackets, shirts, blazers and coats, shorts, dungarees, bermudas, etc. Relatively new additions to the category include denim chinos, joggers denim and sweaters.

There has been tremendous growth in the sales of our men’s denim wear, informs Amit Dhelia, Proprietor, Courtyard and Kraburs. He also notifies on their most selling items, “Our designer printed denims, knitted denims/joggers denim and denim chinos have been very well-received by the men denim lovers. They are available in straight, slim and regular fit, and all three fits are equally popular.”



Although denim is regarded as an everyday casual garment, for many men, simple blue or black jeans paired with a shirt or coat is formal enough. It has also gained acceptance in corporate offices, with the concept of Friday dressing catching up. Besides denim apparel, one can also pick various kinds of stylish accessories made from denim, including hats, caps, belts, gym bags, backpacks, carryall bags, etc. Denim fabric has also found application in footwear such as loafers, shoes and sandals.

Some brands have even come up with products like denim innerwear, swim wear and socks. Light denim fabric is used to make inner wear, while socks are made from a soft cotton, linen or woolen material and have denim-inspired finish. Further, more recent experiments with denim have yielded innovative products like khadi denim and silk denim. In 2015, the Khadi & Village Industries Commission, Govt. of India, had launched a new range of khadi denim products, including jeans, shirts and jackets for both men and women.

What’s been trending lately?

Fashion and denim go hand in hand. Fashion changes over time and so does denim. Since inception, it has undergone many an evolution in terms of fabric construction and product design and development.



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Sooraj Bhat
Chief Operating Officer, Solly Jeans Co.



Amit Dhelia
Proprietor, Courtyard and Kraburs



Mazhar Khan
Head Designer, Success



Sabu Joseph
Proprietor, Wert



Unita Chandan, Fashion Creative Director, Hard Currency, sheds light on the current trends. “As far as style is concerned; dooby, distressed and white denim top our best sellers list in the men’s category. In fits, banana fit, slim fit and joggers have resonated very well with them. Popular washes include vintage, distressed and acid. White, sulphur-dyed, grey, indigo, sky blue luster colours/shades are quite a hit among denim lover men.”

“Knit denims have topped our sales charts in men’s segment. Fits-wise, semi-narrow is a clear winner. Cloud wash being the popular effect, blue and black colours seem to be the men’s favourite in denim,” Atul Shah, Director, Legend & Ceaser. In his words, “The sales of men’s denim have registered a growth of 10 to 12 percent.”

“Stretch skinny fit, mid-tone washes, cotton modal fabric are our current bestsellers in men’s denim wear. Colour-wise, navy (over dyed) and mid blue are the hot picks,” states, Sooraj Bhat, Chief Operating Officer, Solly Jeans Co. Gung ho about the demand, he tells that the segment is witnessing a double digit growth in volumes and expects the trend to continue in FY ’17.

According to Nikhil Lalwani, Managing Director, Rockstar Jeans, “These days, men like to experiment and have become ever more receptive of new styles and colours in denim. Shades of indigo with top over dyed shades like purple and grey are our top selling colors, and cropped denim is the most liked effect. To mention our top selling styles in men’s denim; cross dye, cloud with tints, rip & repair, and indigo retention lead the way.”

Dhiraj Ladha, Director, Sheriff, notes that basic and smart denims appeal men the most. He elucidates on the types of men’s denim wear produced by them that have become immensely popular lately, “While basic and smart styling continues to be the top seller, enzyme and raw washed along with whiskers effect are being readily lapped up by the more fashion-oriented men. In colours, denim blue, medium blue, carbon blue, black and ocean blue are the top five.”

Every brand has its own top selling styles, opines, Sabu Joseph, Proprietor, Wert. He, however, shares, “Nowadays, narrow and regular fits are selling best in men’s denim. While denimax, stone



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J E A N S

SO WHAT!



Dhiraj Ladha
Director, Sheriff



Unita Chandan
Fashion Creative Director, Hard Currency



Atul Shah
Director, Legend & Caesar



Nikhil Lalwani
Managing Director, Rockstar Jeans



and ice washes are quite popular, tint, PMT, scrapping, tucking and cloud effects are also being appreciated. And blue, black and sky blue are the most preferred colours. Moreover, embellished jeans are also liked by many.” As per him, the men’s category has always been on upswing and would do well in future too, as denim is gaining acceptance in consumer segments – youngsters to professionals.

Notably, elements and embellishments are an important aspect in denim/jeans production. As per Khan at Success, elements such as leather tags and leather patches; metal monograms and rivets; and rubber prints for branding are being extensively used in men’s denim. “Bartacks and embroidery are also very much in vogue”, he says. Chopra at Monte Carlo notes that leather back patch is the most attractive part in any denim. Metal labels and thread detailing give an outstanding look as well. Hoffmen’s Rungta points out to metal plates and badges, leather labels, and imported buttons with branding as the current favourites in denim elements/embellishments. Courtyard’s Dhelia said that the most popular elements nowadays are belts highlighted by different fabrics, or back print of denim on belts, pockets etc. Two-way fabric is also very popular; the denim made from it is wearable from two sides.

But there are also brands that are not much into embellishments. Their denims are designed for mature, sophisticated men and therefore lack prominent embellishments. They have a collection of denims that can be worn to work with ease. Their designers keep the target audience in mind while working on the denim collection and understand the preferences of mature, cosmopolitan men well.

The ‘stretch’ predicament

One of the key denim innovations of recent times are jeans made from stretch denim fabric. Incorporating a little percentage of elastane (lycra or spandex), these jeans are ‘stretchable’ and not too restrictive as regular denim, making them much more comfortable to wear all day long. However, while women’s response to these jeans has been enormous, the men consumers initially seemed a bit wary of stretch. The men’s love for denim stems from it being tough and strong, which appeals to their masculine-self. Therefore, it’s somewhat difficult for them to relate to the softer, stretched version which otherwise looks and fits like regular denim. However, the comfort and functionality of stretch denim has led many men to buy them, especially bikers, sports enthusiasts and college goers.



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Brands	Style	Wash	Fit	Colour/Shades
Spykar	Structured, frayed, repaired, Joggers	Diffused bleach	Super skinny, joggers	
Monte Carlo	5-pocket twill, medium wash; overdyed narrow fits; medium blues in cloud wash	Ice, towel, medium rinse, green tint in sky blue, mild cloud	Narrow; skinny with ankle length	Indigo, dark grey, blue towel wash, medium cloud, green tint
Camaro	Optical difference, subtle wash, low-waist tight leg fit	Basic subtle wash with sober scraping/spray/raw PMT	Tight leg, tapered bottom	RAW/ DX/ LDX and warming tone
Hard Currency	Dobby, distressed	Vintage, distressed, acid	Banana-fit, slim-fit, joggers	White, sulphur dyed, grey, indigo, sky blue lustre
Moustache/ M Brand	Knitted, destroyed, Joggers	Ice, tinted	Skinny, Ultimate skinny	Ice, tint, cloud wash, destroyed in all colours, grey tones
Solly Jeans Co.	Stretch skinny; mid-tone washes; cotton modal fabric	Mid tone	Skinny fit	Over dyed navy, mid blue
Hoffmen	Vintage wash with rugged, worn out look; hard stitched; Towel washed	Vintage, towel, stone	Drill, Slix, C-EVO	Hues of blue, semi-bleach, ice wash, denimax blue, petrol blue, etc.
Leegend & Caeser	Knit	Cloud	Semi-narrow	Blue, black
Courtyard	Printed, knit (joggers), denim chino	Spray, whiskers, blast, scrapping, ribbed	Straight, Slim, Regular	Denim blue, medium blue, ice blue, carbon blue, black
Success	Slim/straight jeans; selvedge/ rigid slim fit; garment-dyed jeans in white shades, wheat, beige and lighter tones	Rinse, acid (very light tones), enzyme, river, cloud	Slim, regular, relaxed	Vintage dark blue, chamber; ice blue, lampblack, coated two tones
Sheriff	Basic, smart styling	Enzyme, raw	Slim	Denim blue, medium blue, carbon blue, black, ocean blue
Wert		Denimax, stone, ice	Narrow, regular	Blue, black, sky blue
Rockstar		Cross dye; cloud with tints; rip & repair; indigo retention		Shades in indigo, over dyed shades like purple and grey
Dollar Force	Slim, narrow fit	Stone, enzyme, vintage, distressed		Light blue, dark blue, black

Emerging trends to watch for!

Providing insights into the upcoming men's denim/jeans trends, Unnati from Hard Currency suggests, "Knee shredded denim, distressed black, patch embellished, coloured denims and relaxed fit are the trends to look forward to." Agarwal (Moustache Jeans & M Brand) believes that 'straight fits along with non lycra denims are expected to be back in demand as seen in the western countries' whereas Camaro's Sharma feels that 'new fits, fabric variety, subtle yet classy wash, basic design and good accessories' will be the flavours

of coming seasons. "Our AW 16 men's denim collection would comprise artisan destruction and repair techniques. We are also offering dobbly pattern weave," informs Vakharia (Spykar). "The highlight would be engineered raw edges with scratched surfaces which create unique tactile surfaces and repair technique like darn stitches, patches, mending and needle craft added to the raw and bold look," he shares.

According to Dhelia at Courtyard, "The top five trends to watch for are: magic prints, jacquards, knits, overdyed dobbly and satin with designer look"; Joseph at Wert opines, "Mid fashion would do well clubbed with good wash. New fits and value accessories will

also be trending high." Monte Carlo's Chopra says, "Twill denims, dobbys; elastane knitted denim, laser washes, basic washes with narrow fit are the top trends that will emerge in future in men's denim."

Sheriff's Ladha says that the coming seasons of men's denim will be marked by a variety of colours. "While the trend of light washes will continue to grow, eco-friendly denims will see a rise, driven by the growing awareness about environmental issues among consumers," he sums up.



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Today, denim is not just a bold fashion statement but a wardrobe staple for many women across India. No wonder, the Indian women's denim market is witnessing tremendous growth in volumes as well as in sales. Images Bof analyses the various trends in vogue in women's denim.

By Namita Bhagat

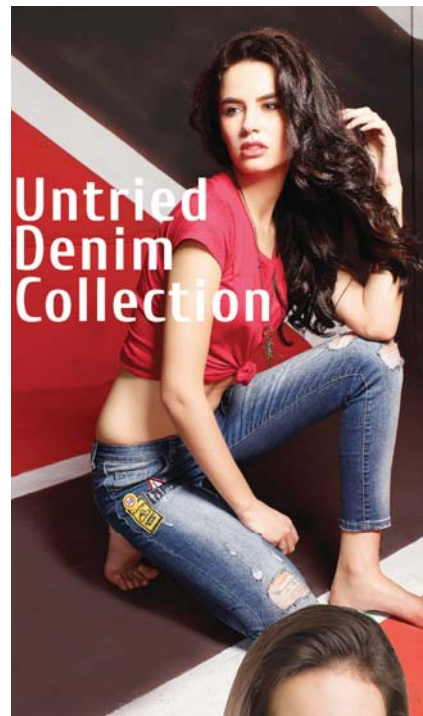
The Key To Chic

TRENDS IN WOMEN'S DENIM

From a symbol of nonconformist, young women's rebellion in 1960's, denim has traversed a long way and how! Today, denim is not just a bold fashion statement but a wardrobe essential for women across age groups all over the world. And the scenario in India is no different. With time, denim has evolved in every way—styles, fabrics & fits, products, occasions and more. These days, women have plenty of options in denim wear, including jeans, jackets, coats, shirts, skirts, shorts, capris, tunics and even dresses. Besides apparel, denim has also made inroads into women's other fashion accessories and footwear.

What's interesting to note is how the women consumers in India have developed over the last few years. The self-assured women of today won't just pick any denim or jeans; they are fashion-savvy and brand-aware, and also know a thing or two about washes, styles and fits. The rising demand and awareness has made denim brands and manufacturers to work harder to meet their expectations and win over them.

Rahul Gupta, Vice President, Jealous 21, notes, "While buying denim, women prioritise on its fit fashion, and innovation." Echoes Sameer Patel, Chairman, Deal Jeans, "For women, the most important criteria for denim is its fit and they take this factor too seriously in making a selection of the denim product."



Concurring with their observations, Zubin Thakker, Director, Recap, however, adds, "For women, wearing denim even today signifies a rush of freedom – freedom from conservative hold of society. So for them, a denim purchase may not be as simple as just buying clothes. However for men, wearing denim is a way of life."

Market at a glance

The growing fashion consciousness and influence of media and western culture have turned women's western wear segment into a lucrative and highly evolving market, states Gurcharan Singh, Managing Director, Lotus Jeans. As per him, "Due to rapid urbanisation and higher disposable incomes; the 'price-sensitive' Indian consumers have now become more brand-conscious. The women's denim wear market increased at a CAGR of around 10 percent during 2012-15."

Apropos the market size, Patel from Deal Jeans, apprises, "The Indian denim market was estimated to be ₹17,666 crore in 2015 and is likely to grow at a CAGR of 15.4 percent in the coming years. Denim is a wardrobe staple in women's wear and over the years it has dominated this category. Getting something different to this

dominant category is what attracted us majorly to the denim segment. Plus, we were aware that we could offer the masses something unique in this very category," says he.

As per Thakker at Recap, the Indian women's western wear market is estimated to surge at a CAGR of around 10 percent during 2014-17. The total denim wear market is roughly 300 million pieces a year which is expected to double to 600 million pieces by 2017. He further elaborates, "Men constitute nearly 85 percent of the country's denim market. However, various studies suggest that women's wear will dominate around 25 percent of the market by 2017. Obviously, at present, the denim wear market is largely concentrated in urban areas, while the tier-II cities are also catching up. The women's denim category has been steadily growing over the years. Even then, the share of women's segment is less than 10 percent of the entire denim market."

Not to mention that like other apparel segments, denim market in India is also largely unorganised!

>



Brands	Styles	Washes	Fits	Colours/Shades
Deal Jeans	Distressed, torn, printed	Light blue, dark blue, black, lace up, distressed	Skinny, mid-rise, slim fit	Dark blue, light blue, blue black, navy blue
Jealous 21	Super skinny, ankle length, distressed	Distressed, light washes	Ankle length	Blue, black, grey, light blue
Lotus Jeans	Embellished, high-rise waist, proper ankle length	Perfect ice wash, denim blue	High rise tapered, mid rise ankle length	Ice blue, denim blue, mid blue, black, grey
Madame	Banana fit, high waist, jeggings	Ice wash, acid, dirty, helium, cloud wash, towel	Skinny, mid-waist, high-waist, low-waist, regular	Ice blue, navy blue, semi blue, black, dark grey
Recap	Ankle length, denim short skirts, denim shirts, jeggings	Sparkling blue, super light blue, enzyme	Mid-waist, high-waist	Black, white, dark blue, ice blue
Tarama	High-waist, cropped, straight fits	Raw, cloud, distressed	Regular, high-waist	Raw, black, grey, vintage, washed out



Wooing women consumers

Bipin Jain, Managing Director, Madame, reckons that women have a very different thought process about their denims as compared to men. Mostly men like to go for regular denims, while women prefer to go for all the styles and trends from regular to skinny, high-waist to low-waist and alike. In denims, men prefer blue colour in different shades whereas women like to make style statement with different colours. Singh at Lotus Jeans also concludes that a woman is a totally different buyer as compared to man. He also underlines that they are not that brand conscious and want to explore more options before buying anything.

Describing the women consumers' choice criteria, Prem Gupta, Managing Director, Tarama, states, "Women choose fits and washes which suit their body depending on the ratio of their height, waist and hips. Basically, the kind of jeans she wears reflects her attitude towards life."

Moreover, women buyers are often hard to please than men. Deal Jeans' Patel

and Gupta from Jealous 21 couldn't agree more! Yes! Women customers are more difficult to please. Being impulsive buyers, they would want to have larger width of product options and they are quite choosy about the fabric and fit, which is one of the most essential criteria for them to make the decision says Patel. Gupta at Jealous feels that because looking good comes as a natural expectation for them, they demand for more options to choose from.

On the other side, Gupta (Tarama) is of the view that women consumers are not that difficult but since they are figure-conscious and tend to be more selective as to which style looks best on them according to their figure and which pair would enhance their personality. Thakker (Recap) asserts that any discerning customer is hard to please, be it a man or a woman. But that means we as a brand, need to strive harder so that our customer goes back happy when they purchase our product," he adds.

Recent market developments

The overall Indian women's denim market is witnessing tremendous growth in volumes as well as sales. A host of homegrown and international brands are present across various price-points. One of the key factors driving the growth is the increasing acceptance of denim among women from all walks of life.

Elucidating how the women's denim market has shaped-up in recent times, Gupta of Jealous 21 says that in present times, it's all about life-wear, comfort fit, comfort look, durability for the young while looking sexy. In short, it's about being glocal. Today's generation is a doer and denim wear backs it up in a correct manner. Denim has evolved into many categories, giving customers

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“Women choose fits and washes which suit their body depending on the ratio of their height, waist and hips. The kind of jeans she wears reflects her attitude towards life.”

Prem Gupta
Managing Director, Tarama

“Swarovski, golden chain, zippers and laces are quite popular and most accepted elements used in women’s denims.”

Bipin Jain
Managing Director, Madame

“Woman is a totally different buyer as compared to man. They are not that brand conscious and want to explore more options before buying anything.”

Gurcharan Singh
Managing Director, Lotus Jeans



multiple usage – it can go party, is ergonomic and also an essential wear. Acknowledging that denims have been gaining in sales over the past couple of years, Jain from Madame, points out, “Earlier, there were only few types and shades available in the market but today one can find loads of variety like casuals, washed off and skin denims.”

Among all types of denim wear, jeans or trousers are the most popular article in India. Small girls, young and older women of all shapes and sizes like them for their sheer comfiness, functionality and durability. Importantly, women who are not at ease with western wear or their body shapes have also taken to wearing jeans by pairing them with Indian ethnic wears – ‘kurtas and kurtis’. This ‘mix and match’ style is gradually picking up among more traditional and small town women as well.

Further, jeggings, which is a cross between denim and leggings, has also added to denim’s growing popularity. However, Singh of Lotus Jeans concedes, “The boom in women’s denim wear market was dominated by leggings during 2012 to 2013”.

What’s been trending lately?

Nowadays, the top selling denim styles are as diverse as distressed, torn, printed, embellished, high waste, proper ankle length, etc. Other well-liked styles include super skinny, cropped, high waste and banana fit. Recap’s Thakkar tells that short skirts and shirts in denim are also in a great demand these days. Madame’s Jain finds jeggings very much in vogue. In fits also, women have a slew of options ranging from skinny to slim-fit to mid-waist, high-waist and low-waist to mid-rise, etc. Gupta of Tarama also mentions that low waist jeans are now being replaced with regular and high waist jeans.

For top selling colours or shades, vintage blue, light blue, black, blue black, grey, etc., are quite popular in women’s denim. Further, a variety of washes are available in women’s denim. Most popular washes include distress, raw, light, denim blue, black, ice, acid, cloud and enzyme washes.

Of late, stretch jeans have become quite popular among women denim lovers. These jeans look and fit like regular





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“Women customers are more difficult to please. Being impulsive buyers, they would want to have larger width of product options availability and they are quite choosy about the fabric and fit, which is one of the most essential criteria for them to make that decision.”

Sameer Patel
Chairman, Deal Jeans

“High-waist, torn and distressed, clean finish, flares are the new upcoming trends that will find greater appeal among women denim lovers.”

Rahul Gupta
Vice President, Jealous 21

“For women, wearing denim signifies a rush of freedom - freedom from conservative hold of society. So for them, a denim purchase may not be as simple as just buying clothes. However for men, wearing denim is a way of life.”

Zubin Thakker
Director, Recap

jeans but are made of stretch denim fabric that contains a small percentage of elastic synthetic fibre called lycra or spandex and are apt for those who seek relaxed comfort and flexibility. About stretch jeans trend, Deal Jeans' Patel, says, "Women's stretch denim is more popular as most of the women denim products are made of stretch." Singh (Lotus Jeans) agrees, "Women denim wear have everything to do with stretch as compared to men". However, he also draws attention to the fact that in

the past few years, men's denims have become more inclined towards stretch."

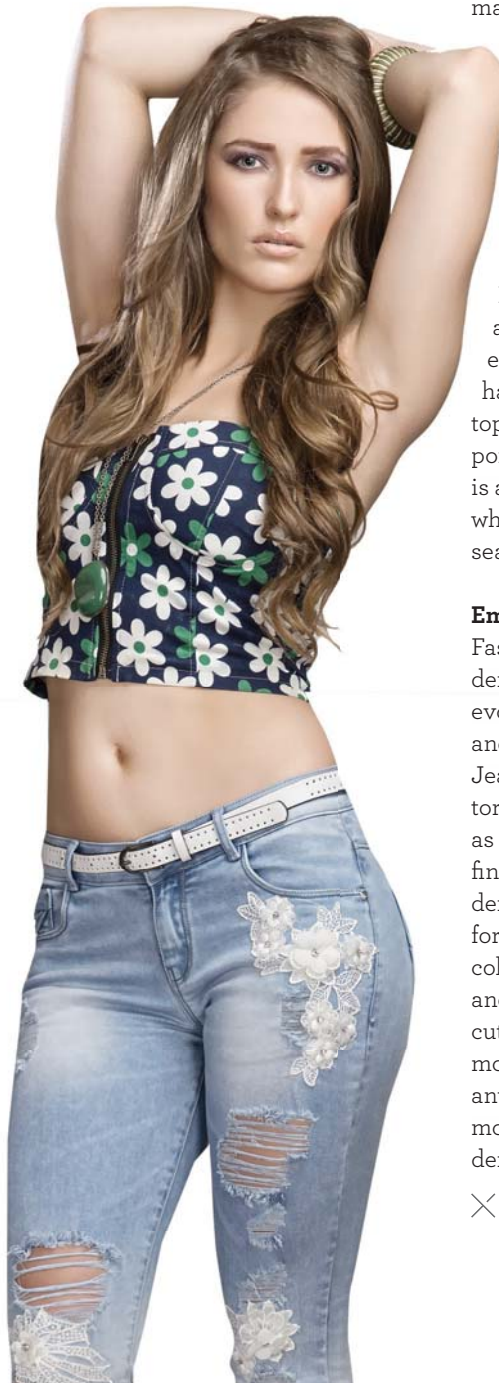
Gupta (Jealous 21) emphasises that a must criterion for a women's denim is its fit. "Jealous 21 has come up with miracle jeans, which fits like second skin with the promise of good recovery and sexy fit," he informs. Tarama's Gupta, however, rings the bell, "The stretch is indispensable till the slim and skinny fit is in. But now, rigid jeans are also making a comeback!"

Embellished denims too have grown into a craze of sorts in recent times. As per Madame's Jain, Swarovski, golden chain, zippers and laces are quite popular and most accepted elements used in women's denim. Deal Jeans' Patel opines that studs and chains are widely used and accepted embellishments. Gupta at Jealous 21 has sequins and distressed effect as top picks, while Singh at Lotus Jeans points out that innovative wash effect is always the main element of denim, while embellishments change from season to season.

Emerging trends to watch for!

Fashion is ever changing and women's denim styles and fits too keep on evolving. Even denim fabrics, colours and other elements tend to change. Jealous 21's Gupta foresees high-waist, torn and distressed, clean finish, flares as the new upcoming trends that will find a greater appeal among women denim lovers. Lotus Jeans' Singh roots for high crystal embellishments, bright colour threaded detail, worn out look and sporty look. He also sees the boot cut fit becoming popular in the coming months whereas Gupta of Tarama anticipates that one will see a lot more of slouchy and wide legs in rigid denims in the future.

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MAKING DENIMS YOURS TRULY!

It is the world of 'bespoke' once again. Has customisation taken over the Indian denim market or has the ball just started to roll? We speak with the leading brands to find out.

By Zainab S Kazi

Customisation of denims is not something new. Much before brands in India entered this genre, there were individual tailors who were offering bespoke services thus giving customers a chance to choose their fabric, cut, buttons, threads, etc. Now, with retail dynamics changing in India, quite a few brands have pulled up their socks and have started offering bespoke services to their consumers across the globe. In 2013, Arvind launched Arvind Denim Lab that offered made-to-measure services exclusively for denim jeans. Pepe Jeans has recently started with its 'custom studio' and then there are more to the list as well. On the topic of customisation and what makes it an accepted phenomena globally, Neha Shah, Senior Marketing Manager, Pepe Jeans, shares, "For a customer, it is about creativity and personalisation – about creating a bespoke piece. For a brand it is about giving the customer a unique and one-of-its-kind experience."



“The significance of this trend can be understood with the fact that unbranded denims constitute a higher share in the overall market in India as they are catering to the customised demands of the consumers.”

Narinder Singh, Chief Managing Director, Numero Uno



“Customised denim is having a moment world over. For a customer, it is about creativity and personalisation – about creating a bespoke piece. For a brand it is about giving the customer a unique and one-of-its-kind experience.”

Neha Shah, Senior Marketing Manager, Pepe Jeans



Customisation of denims includes embroidered, worn-out, crumpled, hand painted, and distressed denims. Fittings like slim, skinny and different shapes also come under customisation, which is constantly reworked and refreshed until consumers get a desirable fit and look. **“The significance of this trend can be understood with the fact that unbranded denims constitute a higher share in the overall market in India as they are catering to the customised demands of the consumers,”** said Narinder Singh, Chief Managing Director, Numero Uno.

Tejinder Singh, Chief Operating Officer, Creyate rightly points out the reason for customisation in denims witnessing more buyers, “Denim today has become a lifestyle product and it has an important place in consumer’s wardrobe. It is not just a mere casual option for today’s gentleman but also a staple one would like to use for teaming with their work-wear looks. So it has to be exactly as per the customer’s choice and liking.”

Has the concept of customisation really taken off in India?

Aptly elaborating on this, Singh of Numero Uno, shares, “The western lifestyle and impact of artists and celebrities has accelerated the trend of customisation across the globe. This trend was further boosted with the trend of casual fashion apparel like denims, dress shirts, tees, casual shirts becoming mainstream in markets like India. However, Indian consumers have lower denim items in comparison to their counterparts in western markets. This creates a scope and huge potential for denim brands to capture the domestic market.” Shah adds, “Internationally denim customisation has taken hold of every cuff, collar and back pocket worth its grommet and buttonhole. We see the rise of bespoke prints, monograms and personalised patches.”

Adding further to the discussion on the trend having a better response internationally than in India, Hitesh Sodhiwala, Co-Founder and Manager,





“Customisation has a larger scope in smaller cities as there are less options in these cities. If priced right these ventures in these cities could prove to be profitable.”

Tejinder Singh,
Chief Operating Officer, Creyate



“People pay over \$100 for a pair of customised jeans. This trend has a lot of scope in the international market.”

Hitesh Sodhiwala,
Co-Founder & Manager, SQ Jeans



SQ Jeans is of the opinion that in India, people do not value customised jeans like they are in the European countries, USA, Canada and Australia. He shares, “People pay over \$100 for a pair of customised jeans. This trend has a lot of scope in the international market.”

Understanding the target audience

Without a doubt, the customers who opt for bespoke clothing are the ones who prefer exclusivity. They prefer standing out and making a statement with their dressing. This is evident from the fact that in this age of easy availability of readymade garments, that too the best in the world, we still have master tailors crafting exclusives for the selected few. Also, an increasing number of established brands are getting into the made-to-measure segment.

Tejinder Singh of Creyate shares an interesting take on why this genre can do especially well in the smaller cities and towns in India as compared to the metros. He explains, “Customisation has a larger scope in smaller cities as there are less options in these cities. If priced right these ventures in these cities could prove to be profitable.”

Narinder Singh of Numero Uno explains, “Consumers who opt

for customisation are versatile, experimental, trendy and style-loving. They go for customised denims to get the perfect jeans they personally desire – worn, torn, slim, skinny, slouchy, rolled up, cut off look – the list is endless, especially as denims are endlessly customisable. Also, it caters to every consumer segment, be it students, college goers, fashion lovers, professionals or travelers.” Neha Shah adds to this, “They are extremely fashion forward young adults who are not afraid to loosen their purse strings for a more bespoke product.”

What’s trending?

As pointed out by Narinder Singh, tapering is one of the most popular requests that brands receive when it comes to customisation. Distress denim is everywhere right now and rapidly catching the pulse of the market. The ultimate vintage look goes well with



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In India, brands that offer customisation have consciously kept the pricing affordable to attract more customers. Where Pepe Jeans charges a premium of ₹250 for each value addition opted for by the customer, at Creyate, the cost for the final output goes up by almost 20 percent.



every style. Contrast trim on bottom hem is also a new category creating space in wardrobe. He elaborates, “Consumers now want to fabricate their favourite jeans with subtle-yet-striking DIYs. Playful prints are also making a fun addition to the cuffs of denims. In summer, custom cut-off becomes popular with fashionistas.” He further shares, “The demand for customised denim is growing at a faster rate in the Indian market due to its comfort and variety characteristics. Today, the colour of denim is no longer limited to traditional indigo blue. Indian youth has started experimenting with different colors including green, red, yellow, etc. In India, denim brands focus on the domestic markets, as the value realisation remains higher in the domestic market, thus making the market more price competitive.

Shah adds, “Customised denim is having a moment world over. Popular DIY trend of the day, as seen on international runways, are patches and edgy studwork.”

Tejinder Singh, revealing trends based on what is seen at Creyate, said, “Today customisations are available until the last detail possible. Creyate offers more than 50 washes one

can pick from to start with. Right from front pockets, back pockets, zip fly, buttons, rivets and leather patches to inner details, one can customise just everything. There’s even the option of putting one’s initials and name on a customised pair.”

Reach

On the spread of target audience for customisation, Narinder Singh is of the opinion that customers in metros are more likely to opt for the same. He explains, “The customisation services for denim are skewed in favour of metros and tier-I cities, which account for almost half of the total denim market.” Though, he further states that the markets of other urban areas and sub-metros are also contributing high in volume, creating new avenues for the custom denim market to flourish. As denim trend and quality consciousness increase in these smaller cities and rural India, the market value will start increasing with consumers willing to pay more for premium quality design and fits.

In India, brands that offer customisation have consciously kept the pricing affordable to attract more customers. Where Pepe Jeans charges a premium of ₹250 for each value addition opted for by the customer, at Creyate, the cost for the final output goes up by almost 20 percent. The Indian shopper has long been known to be value conscious and hence, these kind of a pricing schemes with sensitivity towards cost will surely help the concept flourish.

On a positive note, Narinder Singh concludes, “Brands are helping the conscious shoppers in their denim pursuits. They are designing jeans that are custom-sewn to each person’s specific statistics and can be easily customised according to the style and taste of each consumer. This trend is expected to increase, as more and more people are opting for casual or semi-formal look for daily wear now.”





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With the advent of international denim brands in India, the market dynamics for denims have changed, if not overtly, it has at least caused a ripple effect. Regional and national brands are gearing up and taking a lesson or two from their international competitors. We speak with Neha Shah, Senior Marketing Manager, Pepe Jeans; Hetal Kotak, Chief Executive Officer, Lee Cooper; and Sooraj Bhat, Chief Operating Officer, Solly jeans to find out what they think.

By Zainab S Kazi with inputs from Rosy Ngaihte Sharma

Competition always helps one get better. It comes as a blessing in disguise making us pull our socks and tie lose ends. With more and more international brands foraying in India, we have seen national brands stand at par in terms of offering better product and better shopping ambiance. This has been the case with denim brands as well. Neha Shah, Senior Marketing Manager, Pepe Jeans, shares, “Many changes were witnessed in the last decade or so in the denim market in India. Global brands foray in to India has truly opened up the market, thereby getting domestic brands to further push the envelope when it comes to design, quality and experience. She rightly points out that the advent of international brands has surely given the Indian denim market a boost.

THE IMPACT OF INTERNATIONAL DENIM BRANDS



Neha Shah
Senior Marketing Manager, Pepe Jeans



Hetal Kotak
Chief Executive Officer, Lee Cooper



Sooraj Bhat
Chief Operating Officer, Solly Jeans Co.

Hetal Kotak, Chief Executive Officer, Lee Cooper is of the opinion that with global boundaries diminishing, thanks to the virtual or digital world which brings fashion on the finger tips of an individual, the Indian consumer is constantly upgrading his wardrobe choices. He shares, “As a global brand, Lee Cooper believes that the advent of global brands has not only helped delight the customer better by giving him more variety to choose from but also helped to increase the overall pie of the denim market.”

Picking the thread from there and elaborating on the changing and evolving sense of fashion seen in India, Sooraj Bhat, Chief Operating Officer, Solly Jeans Co., says, “The apparel market has grown. The global brands have brought a fresher sense of fashion. They have introduced different approaches, e.g., Levis was more classic, but with the entry of brands like Jack & Jones, Tommy Hilfiger and Gas, it has made the apparel market more fashion focused in terms of the choice of fabric, articulation of styling, etc.”

Learning – a two way street

Besides bringing in fresh fashion from across the globe, international brands have come with a learning book for Indian brands to pick and follow, that is if they choose to. Shah says, “International brands have taught

Indian brands the importance of a winning product, the need to invest in market research and a strong business strategy.” This very well points out the need to invest in market research. Bhat points out another interesting learning that international brands have brought with them. “They have taught us about better fabrics and different styling techniques. Basically they have taught us to gear up for competition, with focus on improved fit and use of better fabric,” he said.

Learning is a two way process. Where we have picked up the focus that was missing or was being ignored, the international brands too have learnt some lessons that have helped them grow. Shah points out one such learning, “Indian brands are capable of adapting to unpredictable market scenarios.” Kotak adds on the learning’s adopted by them as they operate in the Indian market, “We are ‘glocal’ in our approach to the Indian market, i.e., a ‘global’ brand aligned with ‘local’ needs. We have enjoyed high loyalty and repeat purchase from our consumers in India.”

Bhat makes an interesting observation on what he feels is the learning adopted by international brands. “The international brands have started to respect regional sensibilities,” he shared.

Getting the armour right

In India, we love all that is imported. And with the easy availability of imported brands, the pressure on national brands to be one up against them or at least be at par with them has certainly grown multifold. What then should be the strategies that need to be adopted by the domestic brands to compete? Shah responds, “Competition is always good, as it keeps brand owners alert with regards to what consumers are looking for. Of the entire retail trade in India, only 10 percent is organised. The fashion sector is not highly penetrated. As a result, there is scope for everyone and it is important for brands to find and create opportunities for themselves.” Bhat brings in the pricing factor stating, “International brands have huge price points, whereas Indian brands are not that expensive. Indian brands will have to up their quality standards to appease the consumer. We can’t remain inclusive anymore, we have to be more agile and adapt to the changes in the market.”

Market penetration

With smart phones and easy availability of internet, the tier -II and -III cities and towns are gearing up and showing a good appetite for branded clothing which include branded denims





Tier -II and -III markets are the definite growth drivers for the future and a good local market intelligence framework would help in the successful ascension in this market.

as well. But then are they truly ready for international brands keeping in mind the pricing factor? Kotak talks about the strategy adopted at Lee Cooper to satiate the need to patrons in smaller cities and towns, "Pricing is definitely a key decisive factor and with a view to capture this audience effectively, we have launched a different line 'Lee Cooper Originals' which is high on fashion and fairly affordable." He adds, "We believe that the fashion aspiration in tier -II and -III towns is continuously growing and is definitely moving closer to acceptability levels in a metro. These consumers are increasingly aspirational to have an international brand in their wardrobe."

Shah shares a word of advice to international brands planning to set foot in tier -II and -III cities, "One cannot treat the tier -II and -III markets, simply as an extension of their tier-I markets. International brands that are looking to penetrate tier -II and -III markets need to develop appropriate products, sales and marketing strategies and business models, suited to the market." She goes on to share that the tier -II and -III markets are the definite growth drivers for the future and a good local market intelligence framework would help in the successful ascension in this market.

Luxury calling?

India remains to be a price sensitive market. Where luxury clothing and products are aspired, the translation to sales is yet to see a major churn. To talk specifically of the denim category, there is a new category of premium and luxury denim brands that has entered India. It will be interesting to note the impact that these will have on the Indian denim market. Shah shares her views, "In India, the basic degree of difficulty in acquiring luxury and premium products is five-six times



more than in Europe or the Far East. That said, the Indian market has slowly witnessed a change in demographics. Indians are value shoppers. You have to recognise the market and have competitive pricing." Sharing an optimistic take on this, Kotak is of the opinion that, "Every brand has a core target group. Likewise luxury denim brands are catering to a niche audience. As an International premium brand, we believe that presence of the other premium and luxury brands will help increase the denim pie because our customers can consume 'more' of their brand through purchases made within the country."

Road ahead

One thing that comes clear is that the appetite for denims in India is growing. Where we have national brands like Spykar, Deal Jeans and established international brands like Levis and Pepe; the scope that new brands like Jack & Jones, Gas, etc., remains immense. The market for denims is ever growing and there is scope for a lot many more players to enter.



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Image courtesy: Meri Media

SUPER PREMIUM DENIMS

The India Story

Any fashion jeans beyond US\$ 250 today come under the super premium category. Despite growth and visibility in this category, super premium denim is yet to achieve a significant market share.

By Dr. P R Roy and Nirav Shah,
Diagonal Consulting (India)

All denim watchers wonder “what super-premium denim is?” Is this only a jargon of word or it really exists? The history of denims from the period of James Dean and Marlon Brando in Hollywood to the advent of Gloria Vanderbilt and Calvin Klein, as designer jeans, saw a sporadic upward movement of denims in terms of price, through better cuts, styles, fits, etc. No one dared to define a cut-off price to describe super-premium denim. A price of US \$75 got tagged with the premium denims, whereas super-premiums still remained elusive in its definition till the beginning of new millennium. Today, any fashion jeans beyond US\$ 250 come under the super premium category.

Meanwhile, luxury world got a bombshell from “Z tyre” of Dubai sometime back, by their announcement of “world’s most expensive car tyre” sold for ₹4 crores. Embedded with 24 carat gold and specially selected diamonds, a set of 4-tyres was recently sold for US\$ 600,000 setting the Guinness World Record for the most expensive set of tyres. They were decorated by Italian artisan jewellers and designed in Dubai.



Image courtesy: Dolce & Gabbana

Top 10 Super Premium Jeans Brands In Western Europe

	Brand	% Market Share	Country of Origin
1	Diesel	7.6	Italy
2	7 For All Mankind	6.5	USA
3	J Brand	3.4	USA
4	Armani Jeans	2.6	Italy
5	G-Star	2.3	Netherlands
6	Levi's	2.0	USA
7	Replay	1.9	Italy
8	True Religion	1.6	USA
9	Lee	1.4	USA
10	Nudie	1.3	Sweden

Top 10 Most Expensive Jeans in the World 2016:

Secret Circus	USD 1.3 Million
Dussault Apparel, Thrashed Denim	USD 250,000
Levi Strauss & Co, 501	USD 60,000
Escada	USD 10,000
APO Jeans	USD 4000
Gucci	USD 3100
Dolce & Gabbana	USD 1200
Roberto Cavalli	USD 1200
Ernest Sewn, Custom Fit	USD 1000
7 For All Mankind	USD 298

Denim aficionados, particularly in the fashion world, being challenged by such unprecedented development would love to review the world of super premium denim.

It is highly exciting and interesting to know that a pair of jeans outsmarted a set of record breaking tyres and many other global luxury items. Kudos to the open secret!!

In fact, in the beginning of 90s, Diesel reigned as a global leader in the field of super premium denims, though not being a part of the above table today.

Premium denims continued their ride in the 1990s till the global recession in 2008 when

US denim was hit hard. Western Europe showed strong resilience to recession and displayed appreciable year on year growth. Super premium denims, in the recent period showed the fastest growth and are continuing as shown below.

In 2013, EU imposed additional import duty on US made girls' and women's jeans that adversely affected US export of super premium categories. However, made in Los Angeles, United States tag generated continued interests in EU denim fans for True Religion, J Brand and 7 For All Mankind like Bestsellers.

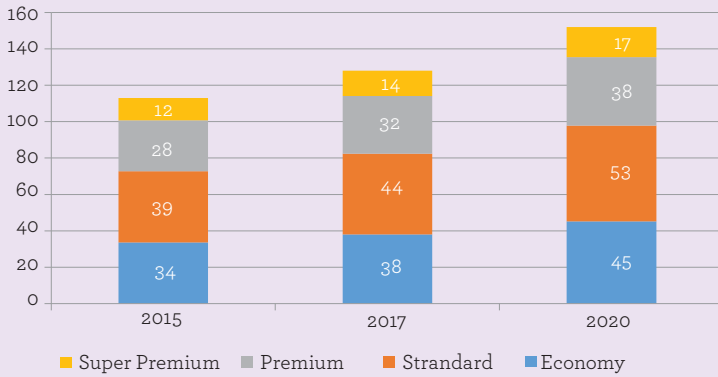
Today's consumers look beyond good look, great feel and solid





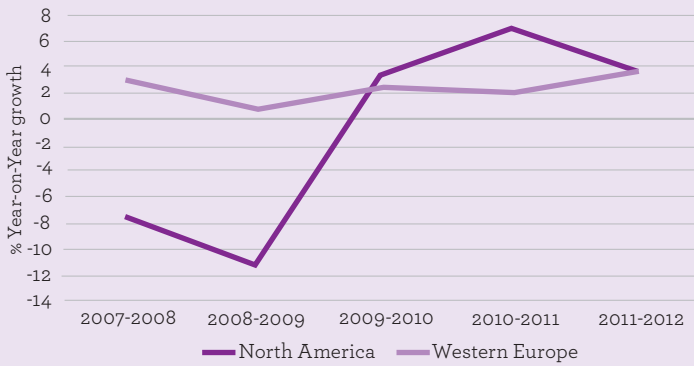
Image courtesy: AG Jeans

GLOBAL JEANS SALES IN USD (BILLION)



Source: ITMF & Diagonal Consulting (India) Analysis

PERFORMANCE OF SUPER PREMIUM JEANS IN WESTERN EUROPE VERSUS NORTH AMERICA 2007-2012



Source: Euromonitor International

performance to environmentally sustainable wears. Cone Mills, USA, once world's leading denim fabric producer and original supplier of Levi's 501 denim, being under high pressure for survival at the beginning of the millennium, bounced back through sustainability and bringing age old selvedge denim as super premium denims.

Other than the established super premium denim brands and retail players, a whole host of new entrants like D-Bar, a sub terranean denim lounge at Beverly Hills, Destination Denim - Shopping Centre at Selfridges, Swedish Cult "Nudie" Jeans, MiH (Made in Heaven) have made their presence felt in this category. Heavier authentic denims are also back into fashion.

True Religion, as a part of its fall marketing campaign, recently showed its luxury 'Phantom' to retailers. High-priced super-premium denim lovers, in their current preference to antilogo trend in fashion, are accepting Phantom as 'newest and hottest'.

Benzak, a super premium Japanese jeans brand now produced in Europe, is meeting high expectations of European buyers.

Gucci brings back specialised acid wash once again in 2016.

Despite growth and visibility in this category, super premium denims is yet to achieve a significant market share. The world of fashion and the role it is expected to play in its growth are yet to be explored adequately by the leading designers, brand makers and retailers. Rich natural fibers like wool and silk are yet to see their presence amongst this category.



ABOUT DR. P. R. ROY

Dr P R Roy is a PhD in textiles from the University of Manchester, United Kingdom and a former Group Chief Executive (Textiles) of Arvind Mills Ltd., based in Ahmedabad, India. Roy has a rich experience in industry, research and teaching of over 40 years. As management consultant (textiles), he is currently advising various textile mills to shape up their future and also extending them technical and managerial support. He is an expert in textiles and is also revered as "Father of Denim in India". Dr Roy spearheaded the major development on indigo wool and silk at Malwa Industries, Ludhiana that was subsequently patented by Malwa.

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KIDS DENIM

RISE OF THE LITTLE BLUE JEANS



The denim industry is the most fragmented out of the total apparel industry. The extension of denim brands onto kids' racks is part of the larger trend of marketing pervading nearly every corner of the consumer marketplace. Also there are specific kidswear players who are looking at the denim segment quite seriously.

By Gurbir Singh Gulati

Denim has almost become a necessity in the present scenario. By age, jeans wear sales have increased significantly in the 2-14 and 14-17 age groups. Denim is one of the high growth categories within this segment and is expected to register CAGRs of 15 percent over the next decade. It is evident that the denim category is growing faster than traditional categories in the market.

Kids' denim market in India and its growing prospects

The factors fuelling the growth of the kidswear segment include the high population base of children and the growing exposure of both parents and children towards fashion trends. Furthermore, increasing number of double income parents leading to higher household incomes and, consequently, higher disposable incomes also favored the growth of this segment. Traditionally, the unorganized players which offered a wide range of styles at low prices dominated this market. However, this is gradually giving way to branded clothing becoming the popular option for kidswear. Many domestic and global companies are extending their portfolios, and expanding their geographies, in order to leverage the growth of the kidswear market in India.

Across both boys wear and girls wear, denim remains the fastest growing category. Both children and parents consider denim fabric and style more fashionable as well as wearable. As a result, brands are increasing the share of their denim merchandise in order to tap into this lucrative opportunity.

Giving a perspective on the market Neel Sawhney, CEO, One Friday, says, "Since the introduction of denim in India in 1986, the industry has evolved continuously, witnessing a healthy positive growth for the past decade. Denim is of the most promising category in India's apparel market. In 2013, the denim market of India was worth ₹13,500 crore, which accounts for 5 percent of the total apparel market of the country. The market is projected to grow at a CAGR of 15 percent to become a ₹27,200 crore market in 2018. The denim market in India is skewed towards men's segments with 85 percent contribution coming from it. Women's denim segment contributes 9 percent to the market and the kids segment contributes 6 percent. The women's and kid's denim segments are expected to witness higher growth rates due to their lower base and increasing focus of brands and retailers on those segments."

India is becoming a better place for children to live in with top global retailers eyeing the market here. International players like The Children's Place, GapKids, Next, Mothercare, United Colors of Benetton Kids, Tommy Hilfiger Juniors, Poney, etc., are now flourishing in India.

Pepe too have ventured into kidswear where it now redefines fashion for your little ones. It showcases the most comprehensive and trendiest collection of denims and casual wear in its collection under Pepe Kids.

Discussing on the growing prospects of the denim market for kids Kavindra Mishra, CEO & MD, Pepe Jeans India says, "Kids apparel market is more unorganised than any other segment of apparels. A huge volume of kids apparel in India is dominated by local and unorganised players. However the dynamics of this category is changing as the market and consumers continue to evolve. Increase in the amount of disposable income, and retail blitz has brought a sea change in the Indian kids apparel industry. With kidswear being considered as a part of the lifestyle segment, a strong emphasis is being placed on brands. Branded kids wear is one of the most propitious markets in India."





“Companies moving to markets in smaller cities in India need to develop new strategies and formulas for these markets as they have some inherently different characteristics.”

Kavindra Mishra,
CEO & MD, Pepe Jeans India Limited



“Kidswear industry has grown leaps and bound from the earlier years. With the influx of international retail brands, customers have become more open to fast-fashion brands.”

Manish Mandhana,
Managing Director, Mandhana
Industries (Being Human Boys wear)



“In India unbranded denim products dominate the market with around 60 percent share of the total market. The share of brands in denim market stands at 40 percent. The share for children’s denim wear is low and branded denim wear is even lower.”

Neel Sawhney,
CEO, One Friday



Scanning through the streets of any town or city, one can see a mind boggling array of kid’s apparels. Kids fashion is a diminutive version of adults wear. There segment is no behind when compared with the adult sector. Children these days have become brand and style conscious more than the previous generations. They hold their own choices when it comes to selection of clothes and colours. This metamorphosis of children; becoming independent buyers is enhancing the kids wear market. Manish Mandhana, Managing Director, Mandhana Industries (Being Human Boyswear) shares the insights into the segment as he quotes, “Kidswear industry has grown leaps and bound from the earlier years. The segment was mostly dominated by local stores which were part of the large unorganised retail setup in India. But with the influx of international retail brands, customers have become more open to fast-fashion brands. With the growing trend of denim in the fashion industry, the same has been hugely incorporated in kidswear as well.”

Kids denim market- its geographical positioning

Constructive demographics play a vital role in pushing the demand for denim’s in the kidswear segment. With 18 million new births each year in the country and nearly two-thirds of the population under 35 years of age, consumption demand is expected to rise, ultimately trickling down to a spurt in kids’ wear demand (premium and super premium segment). Branded wears are well established in tier I cities and are now budding into the tier - II and - III cities as well. In tier - I cities, kids boutiques are emerging to be a popular trend. Consumers suppose these retailers to have a cutting-edge denim styles, and exclusive collection of clothes.

Looking at the market experience, Pepe Kids is maintaining their focus in the key metros. Mishra explains as he says, “We also understand the importance of tier - II markets. One cannot treat the tier - II and - III markets simply as an extension of their tier - I markets.”

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Earlier, the usual occasions of buying branded children's wear products were restricted to mainly festival periods or special occasions such as birthdays. This has changed as the economy performed well and income levels rose. Urbanisation has led to retail expansion and internet retailing has also picked up in kidswear.

Specialty stores are successful in this section as they are focused on a particular section in the apparel segment. Few retailers control the kids' apparel market in any one particular area. Looking at the market experience Sawhney says, "The trend of spending on branded children wear products is strong amongst parents living in metro cities and tier - I and - II cities making urban India the bigger market for kids' denim wear. This is due to the higher presence of both organized and unorganized sectors of retail in these areas."

Being Human Boyswear has also seen a great response from metros and tier II cities alike with their kids denim range.

Kidswear no more a conservative market- denim's adding growth

If we look back, parents' spending on

branded children's wear was not such a big trend in India. Indian parents considered spending on branded products for their children more as a luxury than as a necessity. The usual occasions of buying branded children's wear products were restricted to mainly festival periods or special occasions such as birthdays. The availability of branded children's wear products was also very restricted. This has changed as the economy performed well and income levels rose. Urbanisation has led to retail expansion and internet retailing has also picked up in kidswear.

Kidswear segment has started opening up and there are players like The Childrens Place, GapKids, Pepe Kids, Being Human Boyswear and many more who are looking at a promising growth in this market. However, this is only the organised part of retail as Mandhana explains, "Kidswear segment in retail is a highly scattered market and a part of the audience still prefers the local players. However, the same audience indulges in buying branded products for the sole reason that they offer high quality products that tend to last longer along with the annexed benefit of brand image. The only thing that attracts the customers towards local players is being able to afford a higher quantity of products at a cheaper price."

The only challenge identified is that most consumers in India are still going for the same pricing and styles to the mom and pop shop retailers, who aren't brand conscious. Also, most of the unbranded players operate on the lower price segment of the market where awareness of quality of fabric, finishing and washes, design and fit are relatively low. In addition to this, there is the lack of awareness in a majority of the

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population about brands and what they have in store to offer in terms of quality, fabric etc.

Mishra of Pepe Kids believes that the kidswear industry is no longer a child's play. "It has come to assume a competitive position among the men's and women's apparel industries in India. Denim and casual wear brands have come to realize the opportunity as the market is now ready for premium fashion. Newer styles take no time to rush to the kid customer who is no more influenced by the choices and preferences of their parents while shopping. Kids, today are more aware of the ongoing trends and the latest fashion," he said.

Kids' apparel market is still a price sensitive segment. Higher input costs add to the prices of the apparels. With the increase in the purchasing power of parents, it is expected that they will sustain the business in the long run. As kids have the tendency to grow up very quickly, new offerings are required before long. This raises two concerns — one of range, and second of pricing. An effective combination of both determines the future of the brand. Deciding the price of the apparel mainly depends on defining the target group and identifying buyer behaviour. The price of garments in tier - I cities, and exclusive outlets have a vast difference than that of the clothes sold in normal retail outlets and tier - II and - III cities.

Kids denim also does not come at a easy price. Quality, wash, trend, performance all adds up to the costing for a good pair of jeans. Infact it is

noticed that the price segments of good pair of jeans in the kidswear category go close to the price segment of adults.

Commenting on the price sensitiveness, Sawhney, says, "People in India are still going for the same pricing and styles to the mom and pop shop retailers, who aren't brand conscious. Also, most of the unbranded players operate on the lower price segment of the market where awareness of quality of fabric, finishing and washes, design and fit are relatively low. In addition to this, there is the lack of awareness in a majority of the population about brands and what they have in store to offer in terms of quality, fabric etc."

Future of this segment

Denim is the strongest segment in the apparel segment in India. With the same aspect, the kidswear players too are taking this product category seriously.

Children's wear is expected to significantly surpass the growth of men's wear and women's wear over the forecast period. The primary reason for this strong growth of children's wear is the fact that the sales are still small and the share of the unorganised market is still very high. A large number of consumers are expected to switch from the unorganised market to the organised market as more children's wear retailers open stores across the country.

Justifying the same, Mishra explains, "With parents and children becoming more conscious about kids fashion and trends, the complex kidswear segment in India is drawing attention anew. The



emergence of different modern retail formats has spurred organised retailing in the category that is spiralling up further due to the rise of e-commerce. The segment is currently estimated at worth ₹45,220 crore (\$8.2 billion) and is projected to reach ₹1,23,030 crore (\$22.3 billion) by 2023."

With all in place the study reflects that the companies need to enhance the online presence of local retail outlets in the country. Mobile shopping has become one of the most prevalent modes of revenue in the country. Local brands in the country should look to sell their products through online channels and mobile channels in order to diversify their income sources.





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PEPE JEANS- KIDS

Flaunts Trendy Styles With Kidswear

Pepe Jeans London was launched in India in 1989. Looking back, over the last 25 years, the brand has flourished and continues to expand throughout the country, in sync with its global identity. The new store layouts are a replica of the brand's international stores. Pepe Jeans London is setting a new benchmark of the ultimate international retail shopping experience. With the recent launch of their kidswear collection, the brand has redefined fashion for your little ones too.

Core Audience: The kids collection caters to children from 4 to 12 years of age; as well as teens (14 to 16 years of age) and consists of classic casuals and fashion denims. The collection incorporates bright colours, creative themes and is wearable and comfortable.

Product Portfolio: Denim will always continue to be at the core for Pepe Jeans. It has stylish denim jackets, jeans and cool printed t-shirts and shirts for boys; and cute denim shorts and skirts, bright coloured jeans,

playsuits, tops and dresses for girls. For little girls, designs are easy to wear, trend-led and full of precious details and delicate prints. Cool washes on the jersey range with strong graphic prints are the highlight of the boy's collection.

Retail Geography: The brand is currently present in all key metros.



ONE FRIDAY

A New Kidswear Brand On The Block

One Friday is a stylish kids wear brand that amalgamates high fashion and affordability in their designs and clothing. The brand that celebrates the spirit of childhood by bringing in a perfect balance of style through complete wardrobe choices ranging from casual wear to occasion wear. It was launched in November 2015 and grew with the intention of providing international quality clothing and fashion for the Indian tiny tots. One Friday's journey has had a fruitful journey and now they are opening their eyes to the rest of the world, in discovering new fabrics and trims in China, designing from Italy and taking new trend inspiration from cities such as Paris, Milan and London.

Core audience: The brand is targeting the urban, aspirational and experimental customer base and provides a collection that is truly inspired by their adventurous childhood. The brand is born out of love for the whimsical wonder-world of the tiny tots and appeals to their style-conscious attitude.

Product Portfolio: The brand has wardrobe choices ranging from casual wear to occasion wear for kids.

New Season's Collection: One Friday's summer collection is inspired by the West Coast of America, LA and San Diego, where surfing and skating from sunrise until sunset is a way of life. The brand has a boy's vintage collection which has tropical print shirts and surf themed graphics. For girls, the collection has dip dyed sun dresses, brightly coloured prints and

sequin tees. The colour palletes focus on neon pops throughout the collection to match One Friday's optimistic, happy high summer mood.

Retail Geography & Expansion: Currently, One Friday has established 3 EBOs in Delhi-NCR and recently, they have opened their fourth store in Kanpur. The brand has aggressive plans to expand throughout the country especially in Tier I and Tier II cities like Bengaluru, Chandigarh, Kanpur, Varanasi, Mumbai, Indrapuram, Pune, Jaipur, Lucknow and Bareilly. The company has a vision to open 20 new stores by the end of this year. The brand has planned to invest ₹40 crores in the time span of three to four years.





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SPARK & BUTTON NOSES

Two Brands for Diverse Economic Sections



Spark is a leading manufacturer and exporter of kidswear. The brand started its journey in 1983 from central India. The objective of the brand is customer satisfaction. It aims to offer quality and comfortable wear to the kids. This belief drives the brand and acts as a fuel in its growth. The fabric is sourced from reputed vendors in the market and processed by fully automated machines that are at par with the best available in the world. The brand goes an extra mile to win the trust of mothers in order to increase its loyal customers.

Core Audience: The brand caters to children in the age group of 1-14 years. Though kids are the end customers,

but parents are major influencers in the buying process. This makes increasingly important for the brand to provide all the varieties in the segment, under one umbrella.

Product Portfolio: The brand deals in a variety of kidswear clothing. Spark offers fashion t-shirts, basic t-shirts, cargos, trousers and lowers as separates. Other offerings include infant sets, trouser sets, textile sets, denim sets and three-piece sets.

New Season's Collection: The collection focuses on basic designs and light shades, which is also its USP. With Spark, which is a brand offering economic range, the company launched another brand, Button

Noses to tap the premium consumers. The brand was launched six-months ago and the company is excited on receiving an encouraging response from the market.

Retail Geography & Expansion: North India is its primary market including Delhi, Punjab, Haryana, Himachal Pradesh and Uttar Pradesh. It also has strong hold in Rajasthan and Maharashtra. Internationally, the brand is available in the Gulf countries. It has plans to enter the Far East countries and strengthen its export business.



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BLOOD: For The New Breed

Blood Jeans is known throughout the eastern region for delivering quality wear at an affordable price range. In an exclusive interview with Images BoF, Paras Rampuria, Proprietor, Blood, talks about the brand's plans to expand its product array in different categories, washes, etc. and also about its strategy to penetrate deeper into the eastern regions of the country.



Incepted in 1997 with an office at 29B Rabindra Sarani, Kolkata, from the house of P P international, Blood started production of jeans, chinos, formal pants and shirts. Blood always had its core in men's bottom wear. The company went into an expansion mode in 2006 and added a new office at 16, Bonfield Lane, Kolkata, and extended its product range to encompass a contemporary range of men's bottom wear with its strength in producing designer jeans. Adding

another feather to the crown, Blood has recently launched men's shirts in its product portfolio.

Product Portfolio

The brand's product basket comprise of basic jeans, fashion jeans, cotton trousers, formal trousers, chinos, corduroy jeans and 100 percent cotton shirts. While the share of denims in bottom wear in 60 percent, the brand is still planning to soon launch its denim shirts the coming winter.

Core Target Audiences

Blood targets youth in the age group of 18- 35 and adults who are 35 years or above in age. The brand basically targets people from metros along with Tier I and Tier II cities.

Retail Presence

The brand retails through more than 350 MBOs.



Paras Rampuria,
Proprietor, Blood

What are the new denim collections that you have planned for in the forthcoming season?

For the forthcoming season, we are planning on bringing 10 different styles of fashionable corduroy jeans, neo-corduroy. Also, the plan is on to launch ladies denims soon.

Did you witness any major change in demand in denim?

Denim demand has been ever increasing and has drastically increased in the past year. The rise can be estimated to be around 20-25 percent.

What are your plans regarding new denim product range or denim category expansion?

We are working to launch denim

shirts this winter season. Apart from that, we will launch ladies denim the next season.

What are your plans for exploring new markets in India?

The markets we are present in still has lot of scope. Hence, we will penetrate deeper before moving to other region.

What has been your CAGR growth over last 3 financial years and what is your brand aiming for in the next 2-3 years?

Blood is constantly growing at the rate of 20- 25 percent every year. We would like to increase the figure with more product lines coming in.

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CAMARO: *Exploring Innovative Designs*

Camaro was founded with the belief that making jeans could be imbued with integrity and creativity. Saumar J Sharma, Business Head, Camaro, talks to Images BoF, about the brand's commitment to bring in new and creative designs with the help of extensive research and development.

Camaro was launched in the year 1991 and since then, has grown tremendously to become a leading name in the fashion world. Starting off in a modest way with just men's jeans, the brand, today, has grown humongously, offering wide range of styles and designs for men, women and kids. Design and development being the key factor for any garment brand, Camaro's team of designers put in extensive work in research and development across all areas of fashion in order to create a collection that is more thematic, soulful and most importantly, more trendy.

Product Portfolio

The brand's product basket comprises of denims which occupies 50 percent of the overall product category, trousers which has a share of 20 percent, t-shirts occupying 20 percent share, while coat/ suit comprising 10 percent of the overall share.

Core Target Audiences

Camaro targets working professionals with a standard

pocket size. The target audience of the brand are men who are aware of good products and belong to the age group of 25- 45 years and above.

Retail Presence

Camaro predominantly retails in markets of eastern Uttar Pradesh, Bihar, Jharkhand, North Bengal, West Bengal, Odisha, Sikkim and the seven sister states of the Northeast.



Saumar J Sharma,
Business Head,
Camaro

What are the new denim collections that you have planned for in the forthcoming season?

Neo Jeans and velvet Jeans would be our focus in the coming season. The new collection will majorly play with variety of washes, giving a good hand feel.

Did you witness any major change in demand in denims?

Yes, the demand in denims has grown up substantially in last few seasons and has given a big hit to the trouser and cotton semi formals market. But I still believe that trousers would get back to fashion very soon.

What are your plans for exploring new markets in India?

We have started exploring markets of Madhya Pradesh and Chhattisgarh and talks regarding expansion in south India is also on the cards.

What has been your progress through online retail?

We are not selling online as of now, but have a strong social media presence via Facebook, Pinterest, Google Plus, YouTube, Twitter, etc. And our website has quite good foot falls, which has encouraged us to launch our own web store shortly.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

We are at 65+ as on date, and are targeting average 20 percent growth in the next few years.

CDF COLUMBIA: *Fast Fashion & More*

In a candid interview with Images BoF, Dharmendra A Vyas, Jayant D Trivedi and Vijay A Vyas, Partners, CDF Columbia, share about their forthcoming collection, premium washes and trendy look.

Established in 1989, CDF Columbia is a Mumbai based denim brand. It all started when, Dharmendra A Vyas, Jayant D Trivedi and Vijay A Vyas were looking for good business to start with. Before launching the brand, they studied the denim market and found it promising and emerging. It was the time when denim market was at its nascent stage and very few brands were around. Even till 1995, denim brands were not advertising its products.

Today, CDF Columbia is an established brand. Although its primary market is Mumbai, but it is available all across the country.

Product Profile

CDF Columbia offers denim wear. It has both fast fashion and basic jeans. The product range also includes trousers in cotton, linen, structure, coduroys and shirts in denim, cotton and linen range. It offers products with waistline starting from 28 inches to 60 inches, which is also its USP.

Core Audience

The targeted age group is from 18 to 55 years old.

Retail Presence

The brand has presence in more than 1,500 multi-brand stores across the country. However, it has not yet opened any exclusive outlet and is also shying away from online retailing as well.



Tell us about the new denim collections that you have planned for in the forthcoming season?

In the forthcoming season, we will emphasize more on knitted denims with high density Lycra offering premium washes such as towel and foam wash. The collection will be high on fashion with worn out look and many more.

Did you witness any major change in demand in denim?

The demand for denim will increase more. With the influx of foreign denim brand in the market, there will be a huge demand in designer and basic denim products.

What are your plans for exploring new markets in India?

At present, we are exploring the markets of Maharashtra, Andhra Pradesh, Karnataka and Tamil Nadu. Also, soon we have plans to go to Madhya Pradesh, Gujarat, Punjab and Haryana.

Who are your top retailers?

Our main dealers are MBOs. We have tied up with more than 1,500 multi-brand stores across the country. Our top retailers include Alfa, MDS, Janta Bazaar, Jean Junction, B S Channabasappa, J C Retail, etc., to name a few.

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Killer believes in #TogetherAsOne the concept of 'TAO' - Harmony. This shoot with the wild animals was carried out abroad under the supervision of experts & professional animal trainers. No animals were ill-treated, harmed or sedated in any manner during the shoot which is a collaborative effort of the brand, along with a renowned artist & photographer Katerina Plotnikova to depict that humans and animals can co-exist peacefully.

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COURTYARD/KRABURS: The GenNxt Fashion Driver

Courtyard and Kraburs has proved their mettle in the fashion industry in a very short span of time. Talking exclusively to Images BoF, Amit Dhelia, Proprietor, Courtyard/ Kraburs, shares insights about the commitment and work that brought the brands to this level. He also talks about different fits and finishes that today's denims lovers demand.



Courtyard, a new brand in the denim industry, was established in January 2015 by Artex Creation. The brand is a one stop destination for all the denim needs. While Courtyard specifically designs for men, Kraburs from the same company, caters to female customers. Although new, the two brands has been appreciated in the market among dealers, retailers and

the end consumers for its fit, style and affordable pricing.

Product Portfolio

The brand's product basket comprises denims, formal trousers, chinos, blazers, suits under Courtyard; while denims, chinos and shirts for women under Kraburs. The product portfolio consists of designer jeans with magic prints, jacquards and abstract prints. The basic concentration for the season is on print denims.

Core Target Audiences

The brand targets men and women from all age groups. The focus is mainly on teenagers and youngsters in the age group of 16 to 24 years, preferring sober designs with best of quality at a reasonable price.

Retail Presence

Currently, the brand retails through more than 185 MBOs along with 5 large format stores.



Amit Dhelia,
Proprietor,
Courtyard/Kraburs

What are the new denim collections that you have planned for in the forthcoming season?

For the forthcoming season, the denim collection will focus mostly on prints. Designer wear with magic, hidden and abstract prints along with jacquards will be on the list. Knitted products with mercerized finish will be in huge demand. For men, straight fit and for females, slim fit will likely be in demand.

Did you witness any major change in demand in denim?

Denim has always been an all time favourite among all age groups, particularly among the young and the teenagers. It's one such product, which can never go out of demand and the demand will always increase year on year. The stability and durability of the fabric makes it acceptable in all seasons, occasions while the trend keeps on changing from casual to formal and festive wear.

What are your plans regarding new denim product range or denim category expansion?

As the saying goes, variety is the spice of life, it works with denims too. It is mandatory to offer new denim range for survival in today's market. We are

looking forward to knitted denims, jacquards, hidden and magic prints in our denim category expansion, with various fits and styles, as per the consumer needs.

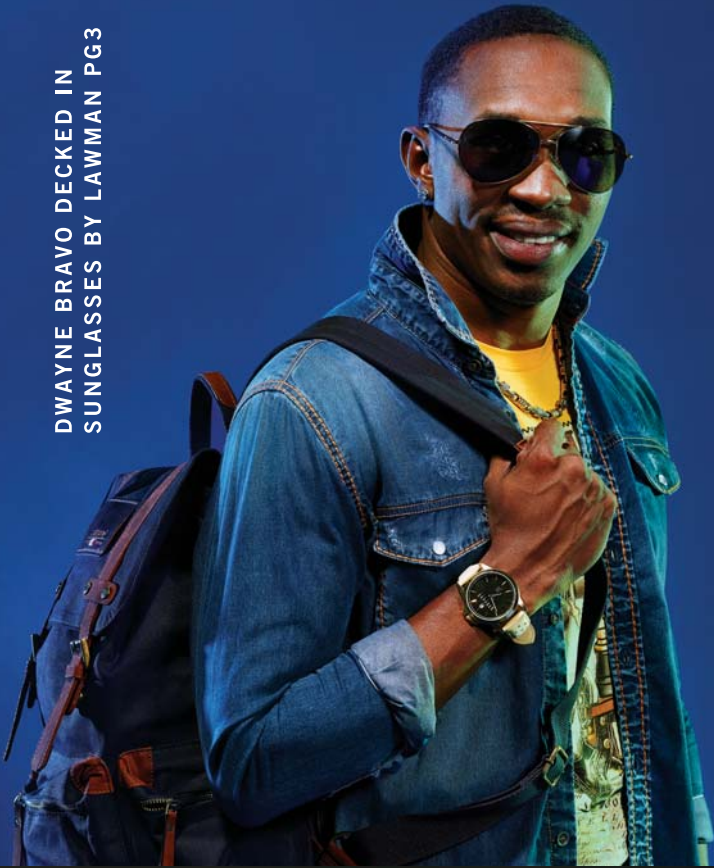
Who are your top 5 retailers?

Our top retailers include Shree Shoppers of Kalakar Street in Kolkata, Citi Choice in Serampore, Take Chand and Grandsons in Balurghat, Lifestyle in Durgapur and Poshak of Jhargram in Midnapore.

What are your plans for exploring new markets in India?

We are basically eyeing to appoint new agents and distributors to cater to the entire north eastern states, with special focus on Uttar Pradesh.

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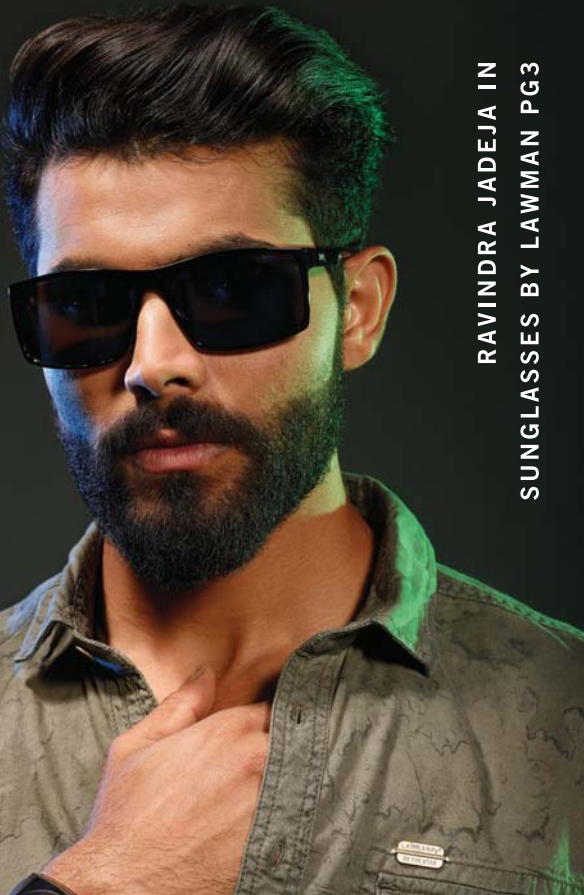


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CREYATE: Creating Premium Bespoke Denim

Tejinder Singh, Chief Operating Officer, Creyate, shares his plans with Images BoF, to launch premium denim line as there is a lacunae in the market for premium evolved denims.



With its headquarters in Bengaluru, Creyate was launched with a core promise of mass customisation. A bespoke tailoring clothing brand, it strives to provide the best ingredients from across the world for the market. The brand has received a tremendous support from its loyalists and patrons and enjoys 35 percent regular customers. Its passion of perfecting first time right product to the customer have aided in providing a brilliant personalised experience.

Product Portfolio

Denim category accounts for 20 percent of its sale and 70 percent of it is through bottom wear. While it may seem less but it is essential for the brand profile as Creyate offers and suggests wardrobe customisation proposition to the customer.

Core Audience

It targets the evolved, global, mature male between 30- 40 years. The ideal customer is a perfectionist and a man of individual style and preferences which Creyate aims to fulfill completely.

Retail Presence

It has seven exclusive brand outlets at Ambience Mall (Gurgaon), Mall of India (Noida), Phoenix Mall (Bengaluru), Infiniti Mall (Mumbai), Elante Mall (Chandigarh), Alphaone (Ahmedabad) and Nitesh Hub (Pune). It also has presence in Camac (Kolkata) and Jayanagar (Bengaluru).



Tejinder Singh
COO,
Creyate

What are the new denim collections that you have planned for in the forthcoming season?

Creyate plans to offer maximum range in premium selvedge denims and sustainable denims which are exclusive and rare. There would also be a luxury denim line from Japan which is inspired from the rich Japanese denim fabrics that have been crafted in traditional Japanese looms.

Did you witness any major change in demand in denims?

The category has bounced back as compared to couple of years back when coloured chinos had become a rage. As the rage subsided, classic denim has come back with vengeance. Customers are looking for cleaner and classic denims for their wardrobe and every brand is developing a wear to work denim look.

What are your plans regarding new denim product range or denim category expansion?

Creyate plans to launch a premium denim line as there is a lacunae in the market for premium evolved denims.

What are your plans for exploring new markets in India?

We plan to open over 20 EBOs and 10 SIS by the end of FY '17 in all metros and Tier II cities including Ahmedabad, Delhi-NCR, Bengaluru, Mumbai, Chandigarh, Chennai, Kolkata, Lucknow, Amritsar, Jalandhar, Jaipur, Ludhiana, Kochi, Pune, etc.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

We plan to be a ₹60 crore brand by next fiscal.



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A LEADER IN THE FASHION INDUSTRY

DEAL:

Empowering Women With Fashion

Deal has been, from its very inception, helping women bring out the most defining aspect of their personality, making them excruciatingly attractive than the rest of the crowd. Sameer Patel, Chairman, Deal, talks to Images BoF about the brand's expansion strategy and also shares its plans on introducing new denim range for the trendy women.

Deal, a retail venture of Deal Global Fashions Pvt. Ltd., is a renowned fashion house with an aim to express an innate desire of every girl to be in-trend, making her fashion sense speak her mind out. The brand's journey started with making formal wear for women and gradually they shifted their focus to designer denims. Moving ahead with consumer demands, Deal introduced denims for girls (kids) and tops for both ladies



Sameer Patel,
Chairman,
Deal

What are the new denim collections that you have planned for in the forthcoming season?

Deal, being a fast fashion brand, regularly updates itself with fresh designs. The major chunk of ideas in designing comes by travelling and exploring fashion embraced by women around the world. Our season's patched and distressed denims are undoubtedly the trendsetters this year, while we look forward for stones and studs embellished denims for party picks and basic denims with ripped and patches for day-to-day wear.

and girls in the year 2008. With over 15 years of experience in the fashion industry, Deal has emerged as one of the most influential brands of the country today.

Product Portfolio

Deal's SS '16 collection is a blend of designer denims, stylish summery tops and party dresses. Around 1,500 artistic styles are designed every year, bifurcated in two seasonal collections- SS '16 and AW '16. Having a strong hold on craftsmanship of denim wear, 32 percent of the brand's collection comprises of designer denims.

Did you witness any major change in demand in denims?

Demands in this product category are forever growing. The only change we see in demand is that women are willing to adopt western fashion with much ease.

What are your plans regarding new denim product range or denim category expansion?

Our new denim product range for the coming season would have various new washes, prints and fits. Since the distress and torn effect has worked well for us this season, we plan to continue this trend for the coming season. The product category in denims would expand with jackets in new and different fits.

Who are your top retailers?

Our top retailers include Shoppers Stop and Central.

What are your plans for exploring new markets in India?

We are exploring opportunities in tier -III and -IV cities in India.



Core Target Audiences

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

Retail Presence

Deal has presence in 3 exclusive outlets. The brand also retails through over 1,200 MBOs and 123 large format stores across the country.



What has been your progress through online retail?

Continuous growth in online shopping has helped us to establish the brand much faster. There is no geographical boundary anymore, and we foresee immense potential in this channel.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

The current turnover of the brand is ₹148 crores. We are definitely gunning for around ₹168 crores in the next 2 years and ₹194 crores in the next 3 years.

What has been your CAGR growth over last 3 financial years and what is your brand aiming for in the next 2-3 years?

In the last 3 financial years, Deal has recorded an annual growth rate of 12 percent. The brand is aiming at a growth of 20 percent in the next 2-3 years.

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FORCE DENIMS: *Innovating Denims For Youth*

Innovation and insight are ways of life at Dollar and they are minutely followed for Force Denims too. Vinod Kumar Gupta, Managing Director, Force Denims, in an exclusive interview with Images BoF, shares insights about the brand and its expansion strategy.

Force Denims, an offering from Dollar Industries Ltd., is a part of the company's diversification in outer wear garments. The company firmly believes in gaining insight into consumer's need which is their only mantra to grow. The very fact that the brand is selling since the last 5 years is a testament of their customers' faith and commitment towards the quality and value products that Force Denims offer. Dollar has been on one of the top positions since years, courtesy a saga of business transformation, dedication, courage and confidence to swim against tide, going beyond the call of duty.

Product Portfolio

The brand offers regular, slim and narrow cut jeans, cotton trousers and corduroy pants.

Core Target Audiences

Force Denims targets young population who thrives for fashion and comfort at the same time.

Retail Presence

All tier-I and metro cities are primary markets of Force Denims. The brand is spread across the country with a retail

presence in 26 states. Currently, the brand does not own any exclusive store but plans for the same are on the cards. Force Denims has MBO presence in states like Rajasthan, Chhattisgarh, Bihar, West Bengal, Odisha and Jharkhand, with store count of more than 1,000.



Vinod Kumar Gupta,
Managing Director,
Force Denims

What are the new denim collections that you have planned for in the forthcoming season?

Stone wash, faded and distressed jeans will always have market. So, we keep trying to introduce new variants of such styles, keeping in view the latest trends globally. The quality too is being improved with every passing year.

Did you witness any major change in demand in denims?

Denims can be called as second skin for youth. So, demand of denims in market is like an ever flowing stream with a new look every season. Few years ago, it was only a fashion wear but now it has become a daily wear among the youth, considering its longevity and comfortability.

What are your plans for exploring new markets in India?

Inventing and manufacturing new products as per the global trends and aggressive marketing and advertising are our two main ways to explore new markets in India.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

Dollar Industries has recorded a turnover of ₹810 crores in FY 2015-16 and is expected to reach ₹1,000 crores in the coming years. Force Denims brings in 5 percent of the total revenue of the company.

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FOCUS JEANS: *Denim With Passion*

Focus Jeans was born from passion - passion for inimitable style, passion for superlative finish, passion for perfect class. Yogesh C Kurub, Proprietor, Focus Jeans, talks to Images BoF, about the brand's ambition to grow its business pan India.

Launched a decade ago with a mix of traits of instinctive entrepreneurship, innovative fashion ideas, and impactful implementation, Focus Jeans is currently present in more than 2,500 outlets across multiple states. It is today seen not only as one of the most contemporary and stylish brand at par with any international brand, but also delivers better value for money.

Product Portfolio

The brand's product basket comprises of more than 100 different styles, shades and fits, catering to each and every need and taste of a woman. The product range is classified into 8 different categories as per style and price segments. They are classified as: Classics, TrueBlues, Premium, Vogue -Designer Jeans, Exclusive Jeans, Jeggings, Cottons, Hotties (Capris) and more. The product line consists of basic jeans, trendy jeans, ankle



lengths, capris, shorts, jeggings and cottons.

Core Target Audiences

Focus Jeans aspire to dress up today's women, both young and the young at heart. The target audience fall largely in the age group of 18-36 years but the brand concentrates more at women aged 22-32 years.

Retail Presence

The brand is present in mini metros and large and small towns. Recap sells through more than 2,500 retail outlets and are also present in a number of MBOs and LFS.



Yogesh C Kurub,
Proprietor,
Focus Jeans

What are the new denim collections that you have planned for in the forthcoming season?

Apart from our entire range of Classic Jeans - that is probably one of the largest range available in the market - Focus Jeans launches a new collection every season that captures the flavour of the season and matches with the new trends. Our experienced stylist plays with amazing shades, washes and fabrics to create some of the best pair of jeans every season - which usually not just gets acknowledged for the style or fit but also for their feel, finish and effects.

Did you witness any major change in demand in denim?

We believe that the denim segment has been and will continue touching growth of 6 percent for the next couple of years. One of the greatest visible change is emerging and growing demand of jeggings. Regarding the market, we believe that denim wear and jeans are set for revival.

What are your plans regarding new denim product range or denim category expansion?

Like every year, we will keep on offering new product line ups, introduce new seasonal styles and finish, and increase the width of our price segment on the top as well as the bottom wear segment.

What are your plans for exploring new markets in India?

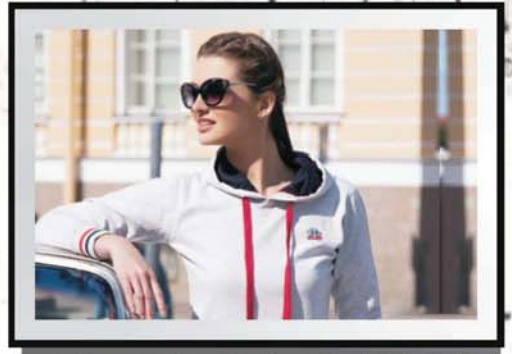
We want to be present in almost 4,000 to 5,000 outlets across the nation within a couple of years. We are seeking distributors and agents nationwide who will partner in our growth for long term.



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HARD CURRENCY: *Excelling In Men's Denim*

In a candid interview with Images BoF, Unita Chandan, Fashion Creative Director, Hard Currency, talks about the brand's plans to enter a new category in denims and also about plans to expand business in India.



Hard Currency Jeans was established by Paresh Chandan in Bengaluru in 1995 as an exclusive denim wear brand for men. The brand, started on a very small scale, soon grew up into a company quipped with modern machinery and a production capacity of half a million pieces per annum, in a very short span of time. Hard Currency has become both an established modern classic for its sophisticated fits as well as a leading trendsetter with the latest fashion forward washes and custom-made designs, paying much attention to quality.

The brand has a very strong presence in Kerala and Karnataka. Hard Currency is currently available in more than 450 multi-brand outlets across India and also has presence in the Middle East.

Product Portfolio

The brand's product portfolio comprises of jeans for men only. Hard Currency have three ranges of jeans, namely 'Core', 'Fashion' and 'Premium'.

Core Target Audiences

Hard Currency primarily targets the middle income fashion conscious customers in the age group of 16- 50 years, who appreciate quality products.

The company's economy range '10 Pound' targets the price conscious customers. The Men's Denim Brand will also introduce 'Hard Currency Originals' which will focus on best of fabrics, with basic washes that can be worn as Friday Casuals.

Retail Presence

The brand has a very strong presence in Kerala and Karnataka. Hard Currency is currently available in more than 450 multi-brand outlets across India and also has presence in the Middle East.



Unita Chandan,
Fashion Creative Director,
Hard Currency

What are the new denim collections that you have planned for in the forthcoming season?

We will soon be introducing 'Hard Currency Originals' which will focus on best of fabrics, with basic washes that can be worn as Friday Casuals. The brand will also focus on dobby denims, knit denims, vintage washes, distressed denims and coloured (sulphur dyed) denims.

Did you witness any major change in demand in denims?

No, there has been no drastic change as such in this category.

What are your plans for exploring new markets in India?

We are adapting to tastes and preferences of other major markets in India apart from South. Hard Currency is looking forward to expanding pan India for better business.



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HOFFMEN: *Getting Stronger With Time*

Hoffmen, since its very inception in 1991, has been working to gain a ground in the denim industry in India and has travelled far to reach where it is today. Talking to Images BoF, Aayush Rungta, CEO, Hoffmen, shares insights about the brand's journey till date and also about expansion in its product basket.

Hoffmen's journey started in the year 1991, with a humble beginning to offer the basic heavy jeans for men across the social strata. This was the first jeans to be manufactured, in time, which became popular as the Essential Jeans. Hoffmen has marched with the time to expand its presence and services across the nation and beyond, as well. Later in March 2011, the brand also introduced Ms HFN for women, which offered a complete line of apparels for women.

Product Portfolio

The brand's product portfolio for men comprises of denims, shirts (casual and semi-casuals), t-shirts and casual cotton trousers, khakis and chinos. For women, Hoffmen offers denims, t-shirts, woven tops, etc. Denim occupies 40 percent share of the total product range.



Core Target Audiences

Hoffmen targets males and females in the age group of 18- 35 years from the middle and upper income group.

Retail Presence

The brand primarily sells in east India and in states like West Bengal, Assam and other northeastern states, Odisha, Jharkhand, Chhattisgarh, Bihar and Uttar Pradesh. Hoffmen retails through a total of 70 exclusive stores and 600 MBOs. The brand also has presence in 18 large format stores.



Aayush Rungta,
CEO,
Hoffmen

What are the new denim collections that you have planned for in the forthcoming season?

For the forthcoming season, new collection includes joggers for men, knitted denims with better flexibility and fit, and denim shorts. We will also be launching a comprehensive range of denim fashion shirts with cloud washes, towel washes, reversible, etc., which are priced between ₹1,895- ₹2,295.

Did you witness any major change in demand in denim?

The demand shall only grow in denims.

What has been your progress through online retail?

Although it was initially slow when we started a year back, but its been picking up gradually and now, we are doing reasonably alright. We are available at e-commerce portals like Flipkart, Jabong, Amazon, Snapdeal, Paytm, etc.

What has been your CAGR growth over last 3 financial years and what is your brand aiming for in the next 2-3 years?

Hoffmen has been growing at CAGR of 15-20 percent over the last 2-3 years.



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HIPS JUST DON'T LIE FOR

JEALOUS 21 JEANS

Jealous 21, an exclusive women's wear brand from Indus League division of Future Lifestyle Fashions Ltd., has been a pioneer in the women's wear category and continuously innovated something great for today's trendy and confident women. The brand has always stood for more than great clothes and reflects the hip, unapologetic young girl of today, empowering her to stand up for what she believes in. Rahul Gupta, Vice President, Jealous 21, talks to Images BoF, about the brand's new and innovative range in women's denim category which is proving to be a great solution for all the denim fit problems. **To address the problem of fits, Jealous 21 has introduced a unique concept of 3 hip sizes for every waist size - Hottie for the slim hips, Hour Glass for the regular hips and Bootilicious for the curvier hips.**

Tell us about your present product portfolio.

Jealous 21 has expertise in women's denim fits, wherein, it has introduced the concept of hip fit jeans - Hottie for the slim hips, Hour Glass for the regular hips and Bootilicious for the curvier hips. To team up those fabulous fitting jeans, we also offer tees (digi tee, maxi tee, back to college tee, doodle tee, crop tee, fun printed, etc.) The product portfolio comprises of skinny, oomph jeans (pastel colours), high waist, different ankle length, cropped denim, distressed jeans, patch wash (tonal jeans), boyfriend jeans, jeggings, cropped jackets, innovation jeans with laces, studs embellishment badges and embroidery, acid and stone.

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"We have collaborated with the Miss Universe Organization. The MU collection offers young girls the opportunity to feel beautiful and confident and to experience the style and the glamour of wearing a collection endorsed by Miss Universe."

—Rahul Gupta,
Vice President,
Jealous 21



Who are your core target audience?

Jealous 21 targets college girls and young working women aged between 16 to 25 years, who want to look trendy and fashionable in casual wear whether at college, in office, at a mall, or at a party. She is young, bold, self assured and an independent girl. She has the confidence to take on the world and fight her own battles. While she follows the latest trends, she has the courage to dress in clothes that make her look as sexy as she feels. She is proud of who she is and does not like to hide.

Tell us about your primary markets. Elaborate about your retail presence.

The primary markets of the brand are Bengaluru, Pune, Lucknow, Mumbai and Kolkata. Jealous 21 retails through 33 franchisee EBOs and are also present in 212 large format stores.

What are the new denim collections that you have planned for in the forthcoming season?

We have collaborated with the Miss Universe Organization. The MU collection offers young girls the opportunity to feel beautiful and

confident and to experience the style and the glamour of wearing a collection endorsed by Miss Universe. Also, Jealous 21 came up with three innovation jeans listed below:

1. **Miracle Jeans:** The jeans savours slim body curving silhouette with perfection, making it easily one of the hottest denim.
2. **Denim Glory:** These jeans shape and sculpt your curves giving you a smooth, sexy and beautiful silhouette.
3. **Back-Pack Jeans:** These jeans stand up to the demands of an active lifestyle and everyday wear and tear. Infact, it gets better looking with every wear.

Did you witness any major change in demand in denim?

It's observed that jeans has taken a new avatar from basic 5 pocket jeans to distressed, torn, cropped and high waist. Jeans demand has been increasing from past few years in fashion women's wear segment too.

What are your plans for exploring new markets in India?

We are planning to target Tier II cities of the country and also online market.

What has been your progress through online retail?

We were exclusively in partnership with Amazon so far. Going forward, we are partnering with more online aggregators like Jabong, Myntra and Flipkart. We hope to see our sales numbers going high with these partnerships.

How has the women's denim market shaped-up in the recent years?

With the trending time, it's all about life-wear, comfort fit, comfort look and durability while looking sexy. In short, it's about being 'glocal' (global + local). Today's generation is a doer and denim wear backs it up in the correct manner.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

Last year, that is, FY 15-16, the brand recorded a turnover of ₹156 crores and we are aiming at ₹300 crores in next 2-3 years.



Spark Aw' 15 Collection

T-shirt

•

Shirts

•

sweatshirts

•

Denims

•

Cotton Trousers

•

Coudroys

•

Suits

•

Lowers/Fancy Lowers



LEE COOPER: Satisfying Trend Savvy Indian Consumers

In a candid interview with Images BoF, Hetal Kotak, CEO, Lee Cooper, shares about the brand's journey in India and about being a preferred brand for men, women, boys and girls.

An authentic British denim brand, Lee Cooper caters to the youth and their celebrity icons since 1908. Innovation, originality, style, attitude and comfort have been the ideologies that have always been at the core resulting in the creation of jeans such as flexible denim, water resistant denim and reverso jeans. Lee Cooper entered India through Future Lifestyle Fashions Ltd. licensee arrangement in 2007. Today, Lee Cooper is retailed out of more than 6,000 outlets worldwide in nearly 100 countries.

Product Portfolio

The brand takes a lot of effort and pride in providing a comprehensive range spanning across multiple fits and product categories in men, women, boys and girls segment. Almost 98 percent of its SS'16 sales has denims in the bottomwear category and denim shirts and tops will contribute to approximately 10-15 percent of the total upper-wear category.

Core Audience

Being the original British denim Brand, Lee Cooper considers the



young and youthful, who exuberate attitude and confidence at all times as its 'core target group'. Looking cool without trying too hard is the mindset its customers live with.

Retail Presence

Lee Cooper has a strong foothold in India with presence in more than 143 cities. It is also present across all key retailers such as Central, Lifestyle, etc., with nearly majority of its business coming from department stores.



Hetal Kotak,
CEO,
Lee Cooper

Tell us about the new denim collections that you have planned for in the forthcoming season?

The upcoming seasons will be very exciting for our consumers as they will experience a wide range with an increased number of cuts with more colours and wash options in each of them; like, evenly washed, coated mid-blue, vintage and resin coated denim for men. While, women's will sport flared, skinny rock

denims with multiple zippers style and character, cropped, hyper stretch and knit denims.

Did you witness any major change in demand in denim?

We have experienced that the demand for fashionable jeans wear has been on a rise since the last few years. Consumers are a lot more aware and receptive to changing fashion trends.

What are your plans regarding new denim product range or denim category expansion?

In the upcoming season, our focus has been on bringing premium quality denim fabrics sourced from the best denim fabric producers internationally as well as from some renowned mills within the country. We have entered into a long term partnership with the best

European washing consultant, who will help us make our products a lot more in tune with the global trends. We see possibilities to widen the offering by including shorts and joggers for men; shirt dresses, dungarees, shorts and skirts for women; hoodie shirts for boys; and shirt dresses for girls.

What are your plans for exploring new markets in India?

We plan to add around 150 doors spread across LFS and EBO channels within the current financial year.

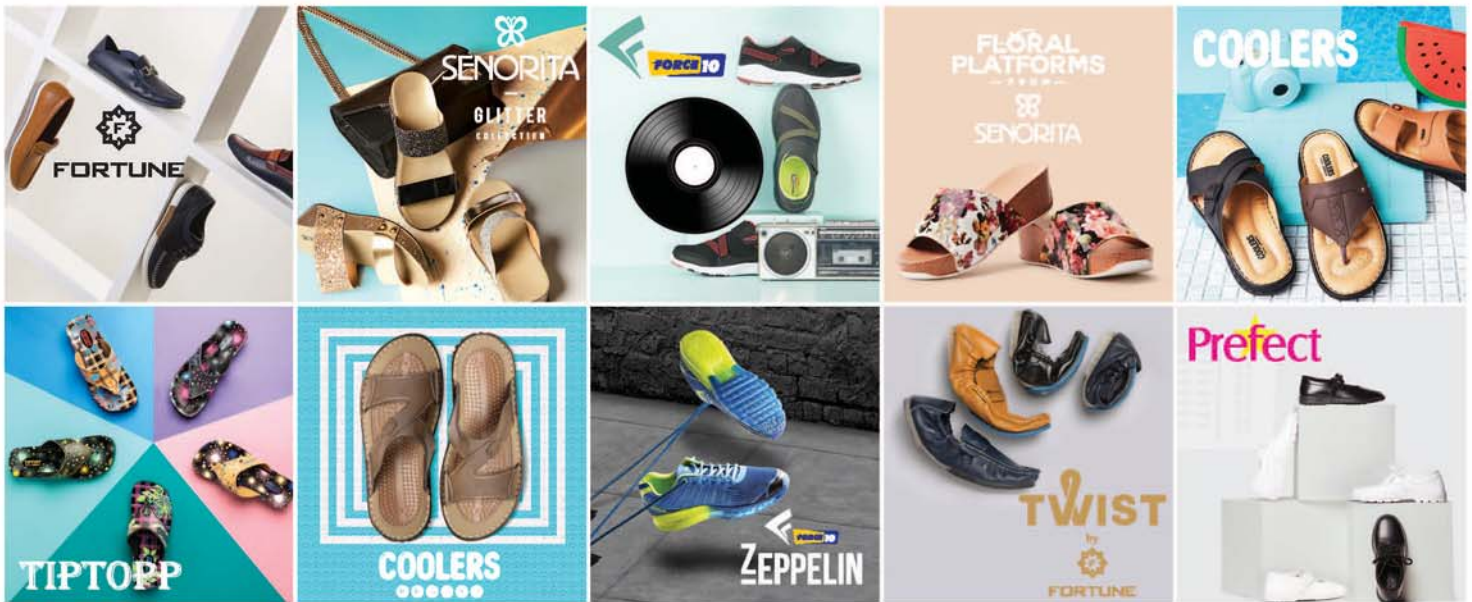
What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

We are looking at doubling the current turnover of the brand to ₹900-₹1,000 crore in the next 3-4 years.



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LEEGEND & CAESAR: *Being Simple Yet Offbeat*

In a quick chat with Images BoF, Atul D Shah, Director, Leegend & Caesar, shares his insights on the denim wear market today.

Leegend, the men's bottom wear brand from the house of Charchit Apparels, was launched in 2001 by Atul D Shah to enter the men's wear category. Later in 2008, he launched Caesar brand, through which he added denim and corduroy trousers to the collection. Shah comes from a family who runs garment business and is into manufacturing since the 90's. With his brothers Amit and Ashish who handle the designing and production respectively, of the brands, he made

Leegend and Caesar popular among the masses.

Product Portfolio

Under the brands Leegend and Caesar, Charchit Apparels offers cotton trousers, corduroy pants and denims.

Core Audience

The company's target consumers are men between 20-30 years of age. They are usually from middle-class and upper-middle class income group.



Retail Presence

At present, the company does not have any EBO. The brand is sold from over 500 MBOs and through distributors in every region; From there, the retailers pick the products for selling to the consumers.



Atul D Shah,
Director,
Leegend & Caesar

Tell about the denim collection that you have planned for in the forthcoming season.

Our collection focuses on simple style and pattern. We offer perfect fitting and elegant look that go unaffected by changing market trends. Also, we usually avoid jazzy and loud design as it does not go down well with our target client.

Did you witness any major change in demand in denim?

Consumers' awareness about garment quality and styling has given a boost to the denim market in India. Today, consumers are not ready to compromise; they want full value for the money they spend. International denim brands, which were earlier out of the reach of Indian consumers, are now easily available in the market. The style, look, material, etc., have a deep impact on the choices of consumers.

Who are your top retailers?

We are doing business with renowned retailers like Pothys, RMKV and G3, to name a few.

What are your plans for exploring new markets in India?

We target middle-class and upper-middle class income group. Therefore, Tier II cities are our main markets. However, at present we are focusing on Surat.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

We achieved a turnover of ₹22 crore in the last fiscal year and the brand aims to grow at 15-12 percent year-on-year.



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LOTUS JEANS: *Blossoming Denims For Women*

In an exclusive interview with Images BoF, Gurcharan Singh, Managing Director, Lotus Jeans, talks about the brand's plans to penetrate further into the Indian market and its plans for online retailing.

Lotus Trends Company started with a dream of creating a world class garment company which would be grounded on the principle of excellence. Since its inception in 1989, the company has been creating new fashion trends in ladies denim wear. The brand claims to function on the motto of "right merchandise at right place."

Product Portfolio

Lotus Jeans is a complete bottom wear brand and offers mostly denim wear to its discerning customers. Almost 90 percent of the collection comprises of denim wear.



Core Target Audiences

Lotus Jeans is basically a youth centric brand with its target audience in the age group of 18- 30 years. The brand also makes plus size garments for girls and women from all age groups.

Retail Presence

The women denim major is present nationally in all leading MBOs. Lotus Jeans is also planning to enter into large format stores like Shoppers Stop and Lifestyle.



Gurcharan Singh,
Managing Director,
Lotus Jeans

What are the new denim collections that you have planned for in the forthcoming season?

Being a forward looking brand, we categorise our collection in different phases, that is, the brand introduces monsoon collection in mid July , pre winter collection in September , festive collection in October followed by a refreshing new year celebration and winter collection in December .

Did you witness any major change in demand in denims?

There is a decline in sale of basic core denim but the demand of fashion denims is ever growing.

What are your plans regarding new denim product range or denim category expansion?

We are planning to start upper wear segment in future. However, denim will be the core in the segment.

Who are your top retailers?

Lotus Jeans is available at Chunmun and Incense in Delhi and Punjab, to name a few.

What are your plans for exploring new markets in India?

We are trying to penetrate deeper into the Indian market. Lotus Jeans is planning to expand more in southern India.

What has been your progress through online retail?

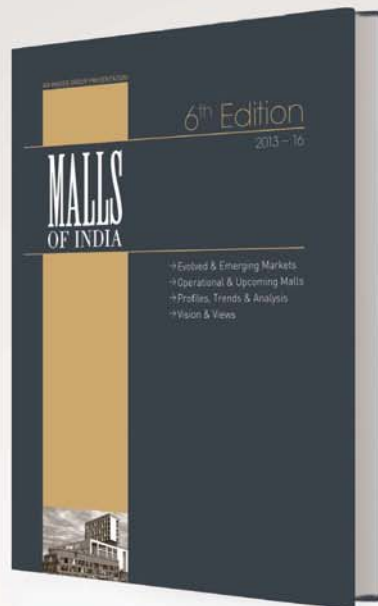
We started online retail from the previous year and till now, we have received a decent progress. We hope to do good in the times to come too, as our sales graph is going up every month.

MALLS OF INDIA

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SUSIL S DUNGARWAL
Beyond Squarefeet

Images Research had pioneered the development of credible information, study, and knowledge in the retail and shopping centre industries in India. Images Research brought out the first ever Malls of India in the year 2004. Subsequent editions have firmly established the report as by far the most referred and comprehensive guide on the malls and shopping centres in India.

In its 6th Edition, the Malls of India 2013-16 documents the current status of the the shopping centre industry, studies it & presents the most detailed analysis so far.

Images Research team tables a report indispensable to all interest groups in the shopping centre, retail industries, packaged as a classy collector's edition.

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EXECUTIVE SUMMARY



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MADAME: *Fashionable Feminine Fashion*

In an exclusive interview with Images BoF, Bipan Jain, Managing Director, Madame, talks about the brand's journey till date and also shares its plans on introducing new trendy collection for women.

Madame, launched by Jain Amar Clothing Pvt. Ltd., was introduced in the early '80s with a foresight to dress the young females with the latest fashion and style. The brand has been steadily marching ahead to meet the challenges of the fashion-conscious woman and has emerged as an elegant trendsetter for the feminine apparel industry. The major focus remains on quality and design which has earned the company the repute and appreciation of its customer. Jain Amar, founded in 1939 in undivided India, is a clothing and accessories company providing fast, affordable fashion for women, men, teenagers and children.

Product Portfolio

Madame is best known for its quality product. The brand offers all western wear clothes. In upper wear, Madame deals in blouses, shirts and tunics,



while in bottom wear, the product basket includes variety of skirts, denims, palazzos, culottes and jeggings. Madame also offers maxis, playsuits and jumpsuits. Denim occupies about 8 percent in overall product categories while in bottom wear, denim has a share of 30 percent.

Core Target Audiences

Madame is a fashion forward brand that promises to dress girls from their innocent teen years to their confident and happening adulthood.

Retail Presence

Madame retails through a total of 103 exclusive stores in India. The brand also sells through 600 MBOs and 10 large format stores.



Bipan Jain,
Managing Director,
Madame

What are the new denim collections that you have planned for in the forthcoming season?

Autumn season will see newer innovations in terms of more variety in maxi-outfits, better finishes in denims and newer trends in leg wear by Madame.

Did you witness any major change in demand in denim?

Denim is in fashion from the past 20 years. Earlier, there were only few styles like regular and high waist, which were in demand but with the passage of time, there have emerged lots of styles and fits for the discerning consumers. Also, now denims are not just limited to bottom wear. Denim shirts, skirts, jackets and jumpsuits, etc., are high on demand. Demand of denims increased since winter 2015.

Which are your top stores?

Madame's top stores include Model Town in Rohtak, Kamla Nagar in New Delhi, Mall Road in Shimla, Leela Bhavan Market in Patiala, and 17-C in Chandigarh city.

What has been your progress through online retail?

E-commerce has acted as an alternate vertical for business development and strategic practices have helped liquidate minus season inventories majorly. Madame has its own online portal www.madameonline.com.

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MEXICO JEANS: *Denims With Ultimate Fit*

Dinesh Agarwal, Director, Mexico Jeans, believes that however stylish the product may be on the rack, unless it gives the right fit, it will not be accepted by the buyer. This has formed the basis of this evolving denim brand. Talking to Images BoF, Agarwal shares about the brand's journey till date and also about its expansion strategy.

Mexico is a family owned company producing quality denim for men for nearly a decade now. It started its business in 2004 when the concept of fashion just entered this category and the market was flooded with basic jeans. Jeans were being produced mainly in blue with a bit of black. There were just three fits, comfort, slim and straight. The brand quickly caught on the fashion concept and introduced new fits, fabrics and innovative washes. Mexico Jeans gives an extra attention to fits, which helps the brand rule the charts.

Product Portfolio

The brand's product basket comprise of denims for men in the price range of ₹999-₹1,999. Mexico offers two segments- Basic and Fashion. While the 60 percent of the products are from the Fashion category, 40 percent falls in the basic category.



Core Target Audiences

Mexico Jeans basically targets men in the age group of 20-45 years. Most recently, the brand has also started to cater to fashion conscious women in the same age bracket.

Retail Presence

The brand is available in states like Tamil Nadu, Delhi, Andhra Pradesh, Haryana, J&K, Himachal Pradesh, Assam, Nagaland, Manipur, Punjab, Kerala and Maharashtra. Mexico retails through about 500 MBOs and around 15 large format stores around the country.



Dinesh Agarwal,
Director, Mexico Jeans

What are the new denim collections that you have planned for in the forthcoming season?

Cloud wash in denim is in trend. For the forthcoming season, we will be introducing cloud wash, linen and knitted fabric for our consumers.

Did you witness any major change in demand in denim?

There is a continuous year on year change taking place in the denim segment. Initially, there was demand of heavy denims, then there came light denims which was taken over by different stretches in denims and so on.

Who are your top retailers?

Our top retailers are Saravana Stores and Sri Kumaran Stores in Chennai, Shree Devi Textiles in Coimbatore, Sarathas in Trichy, Bindals in Delhi and JC Brothers in Hyderabad.

What are your plans for exploring new markets in India?

We have recently penetrated the markets of Kerala and in the next focus is on introducing Mexico in Andhra Pradesh.

What has been your progress through online retail?

The brand is planning to start its own online portal in the years to come.

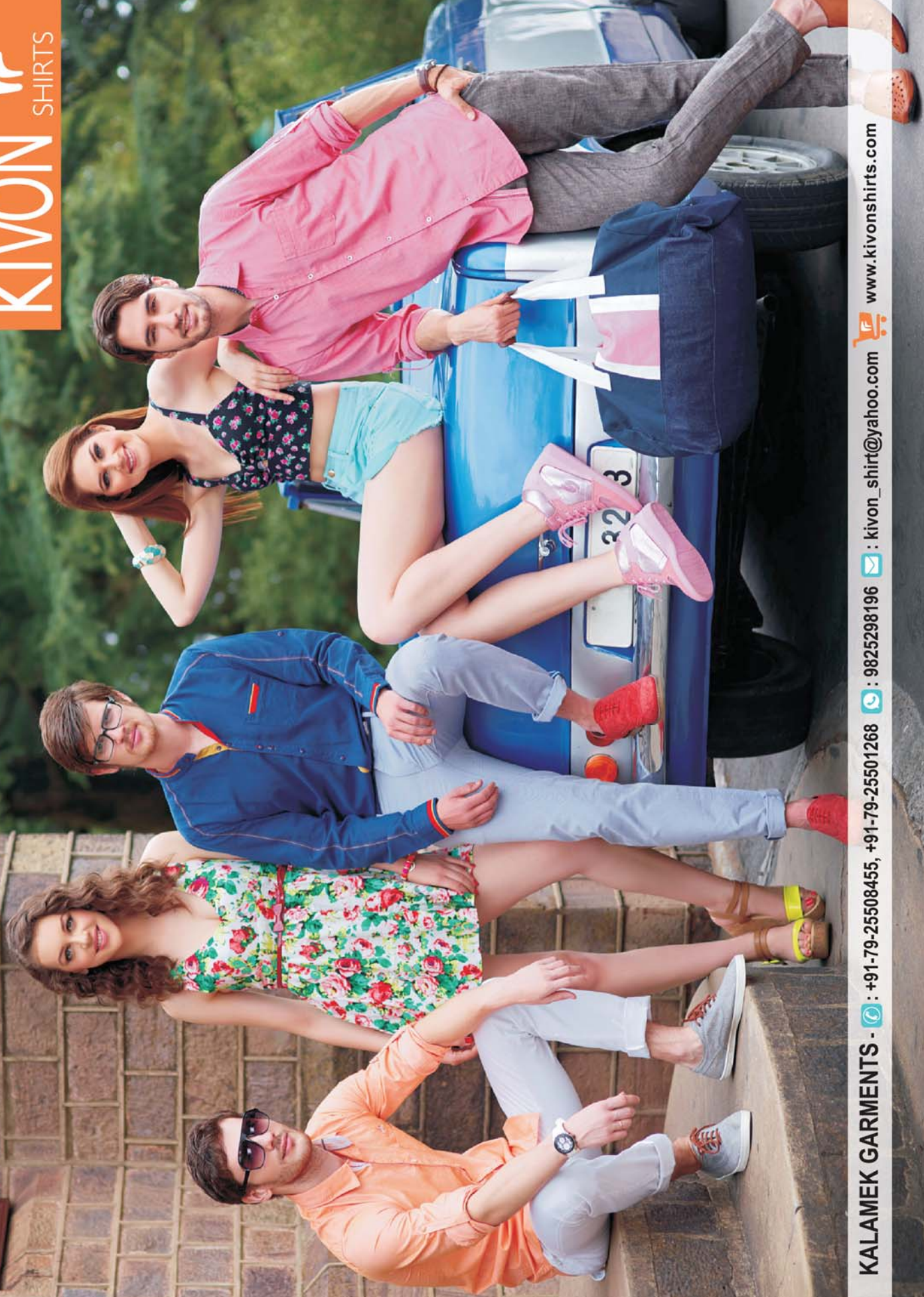
What has been your CAGR growth over last 3 financial years?

We have recorded a CAGR growth of 30-35 percent over the last 3 financial years.





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MONTE CARLO: *Denims With Ultimate Warmth*

Monte Carlo has been a renowned name in the fashion industry since years and the brand has gone a leap forward to excel in the denim sector too. Manish Chopra, Vice President (Merchandising), Monte Carlo, in an exclusive interview with Images BoF, talks about the brand's success story in the category and also shares its expansion plans.



Monte Carlo Fashions Ltd. was launched in 1984 by Oswal Woolen Mills Ltd., the flagship company of Nahar Group. Since then, Monte Carlo's name is synonymous with finest quality and wide variety, and it has emerged as the first choice of the fashion conscious customers when it comes to purchasing value for money products. The brand's tagline 'It's the way you make me feel', is an expression



Manish Chopra,
Vice President (Merchandising),
Monte Carlo

What are the new denim collections that you have planned for in the forthcoming season?

We have planned different innovative concepts for the forthcoming season, which will be unveiled during the collection launch.

Did you witness any major change in demand in denims?

Denim is expected to continue to be popular in India. Consumers shifting

perfectly reflecting the love, warmth and care that Monte Carlo has always delivered ever since its inception

Product Portfolio

The brand offers t-shirts, shirts, trousers, Nehru jackets, tracksuits, dresses, lowers, denims, tops, shorts, kurta/ kurtis, etc. The percentage of denim in bottom wear in the brand's product portfolio is 40 percent as against 20 percent in the upper wear range.

Core Target Audiences

Monte Carlo targets men, women and 'tweens' who prefer upscale fashion

at an affordable price. The brand's target audience are from the fashion conscious group who like to keep their wardrobe updated with latest trends and styles.

Retail Presence

Currently, Monte Carlo is available at more than 225 exclusive brand outlets. The brand also retails through more than 1,500 MBOs in India and abroad. Monte Carlo has also marked its presence in Nepal and Bangladesh with its exclusive outlets. It also has a wide presence in large format stores like Shoppers Stop, Pantaloons, Central, etc.



from the unorganised market to the organised market, rising disposable incomes, rapid urbanisation, growth of the organised retail sector, growth of online retailing and the continuing trend of westernisation amongst urban youth, are expected to be the primary drivers of growth for denims over the forecast period.

What are your plans regarding new denim product range or denim category expansion?

Similar to our concept planning for AW 16-17, we are also planning to expand individual concepts for the denim category.

Who are your top retailers?

Our top five retailers in India are located in Ludhiana, Patna, Chandigarh, Delhi and Jaipur.

What are your plans for exploring new markets in India?

We are planning to explore south India and major parts of west India in times to come.

What has been your progress through online retail?

The brand retails through its official online store www.montecarlo.in. We are also available on other leading e-commerce portals such as Jabong, Myntra, Snapdeal, Amazon, etc.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

Last year, that is, FY 15-16, the brand's turnover was ₹581 crore. We are aiming at a sustained growth of 20 percent in the coming years.



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MOUSTACHE: For Young & Young At Heart

Moustache is a leading readymade garment manufacturing brand with a great reputation in east India. Pratik Agarwal, Director, Moustache & M Brand, talks about the commitment of both the brands, to being trendy and fashion savvy and also shares its plans to expand further for business growth.

Moustache, one of the leading denim brands established in 1984 by Late Hari Narayan Shah, was initially a fabric company which was later conceived as a ready to wear brand. The brand which earlier was predominantly a men's denim brand, has evolved over the years and has most recently launched a range in women's casual wear category under the name "M- brand". Today, the brand is considered as a market major in the casual wear segment manufacturing for both men and women.

Product Portfolio

Moustache offers denims, trousers, shirts, t-shirts, jackets, socks and everything related to casual wear. M brand, exclusively designed in New York, caters to women. M brand initially offered only denim and cotton trousers but later forayed into tops as well.

Core Target Audiences

The brand's target customers are people who are young at heart. The customer can be a 14 year old boy or a

60 year old man. The target audience are fashion savvy and keep a tab of the latest trends.

Retail Presence

Moustache is present in almost all big MBOs in east India. The brand retails through 55 exclusive stores. The brand is also present in more than 380 MBOs and 3 large format stores.



Pratik Agarwal,
Director,
Moustache

What are the new denim collections that you have planned for in the forthcoming season?

Our designers work extensively to create fresh fashion products. We are introducing new designs in denims, shirt and t-shirts. Dobby and knitted fabrics are in trend. Denim is about washes and one can have 10 different washes on one fabric. So we are working on this concept. We have introduced water repellent, stain repellent, dust

free, cool comfort and eco-friendly jeans, which are on high demand.

Did you witness any major change in demand in denim?

Denim market in India is growing day by day. The demand in denims is ever increasing with the acceptance of working denims at workplace too.

What are your plans regarding new denim product range or denim category expansion?

Denims have a wide range of collection in today's date. Apart from normal basic denims, we have fashion denims, knitted denims, jogger denims, doobby denims, which are in high trend right now.

Who are your top retailers?

Our top retailers include, all Reliance Trends outlets, Pantaloons, Horizon in New Market of Kolkata, Forum Mall

in Bhubaneshwar and LuLu Mall in Kochi.

What are your plans for exploring new markets in India?

We are trying to grow our market base in south India and further expand our east India presence in Tier II and Tier III cities.

What has been your progress through online retail?

We started with a zero base in e-commerce and are gradually gaining hold in the sector. We are looking at reporting online revenue of about ₹4 crores this year.

What CAGR growth is your brand aiming for in the next 2-3 years?

We are expecting 20-25 percent growth this year, up from 18 percent last year.



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NUMERO UNO: *Denims Becoming More Functional And Versatile*

In a candid interview with Images BoF, Narinder Singh, Chairman and Managing Director, Numero Uno shares that with the changing trends denims are becoming more acceptable and their utility is increasing day by day.

Numero Uno is one of the most admired brands of jeans wear in India. With its headquarters based in Gurgaon (Delhi NCR), it is one of those very few names in the country, who design, manufacture and market its own denim. The brand's exponentially growing market dominance is backed by its two state-of-the-art manufacturing units - in Gurgaon and Dehradun. Steadfastly focused towards quality, innovation and serving the mid-premium to premium segment, the brand is growing by leaps and bounds.



Narinder Singh,
Chairman and
Managing Director,
Numero Uno

Product Portfolio

Numero Uno is a complete wardrobe brand today and denim being its core product, other products are very much co-ordinated with it. Denim bottom wear contributes about 40 percent of the overall product portfolio.

Core Audience

The brand's core audience are today's go-getter consumers who believe in experimenting with their looks and dare to try a variety of fits and patterns to suit all their style needs. Designed for fashion conscious men and women, the 'Blue Planet' denim collection is ideal to flaunt your summer style.



Retail Presence

As of now, Numero Uno's primary market is north India. The brand has presence throughout India, with its products being sold in Maharashtra, Madhya Pradesh, Gujarat, Tamil Nadu, West Bengal, Bihar, Jharkhand, Karnataka and other parts of the country. It has over 220 EBOs and is present in more than 650 MBOs and 30 LFS.



What are the new denim collections that you have planned for in the forthcoming season?

The new range is as wide as your imagination. There are cool and stylish shades. The new denim collection will sport latest patterns and designs.

Did you witness any major change in demand in denims?

Yes, there is a major change in the denim business. With the change in the trends, denims are becoming more functional and versatile. Thus, the acceptability and utility of denims is increasing day by day. Customers are finding themselves more comfortable and feeling good in a pair of denim as compared to non denims.

For example, the jogg denims are really going strong and showing no sign of fading away from the market due to its characteristics like look of a denim and functionality of a knit.

What are your plans for exploring new markets in India?

We have already started expanding in west and south India. Soon, we will be there in almost every major cities of the country.

What has been your progress through online retail?

Its being tremendous. We have our own e-commerce portal and we are now present on all major online platforms like Myntra, Jabong, Flipkart, Snapdeal, etc.



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PEPE JEANS: *Keeping Up With The Demand For Stylish & Trendy Jeans*

Neha Shah, Senior Marketing Manager, Pepe Jeans, shared with Images BoF that the men's and women's denim wear collection this year will consist of interesting washes with stylish fits.

Founded in 1973, Pepe Jeans is a brainchild of Shah brothers from Kenya—Nitin, Arun and Milan Shah—who revolutionised London's fashion scenario by creating stylish and trendy jeans, unlike the customary ordinary looking denims available in those days. In 1989, Pepe Jeans entered India and quickly captured the imagination of fashion starved consumers across the country.

Product Portfolio

Pepe Jeans India manufactures a wide array of chic casual



wear for men, women and kids. Jeans is their core product and is very popular and sells extremely well. Jeans come in a variety of fabrics, washes, fits and colours. The brand's product portfolio also includes t-shirts, flat knits, sweaters, sweat shirts, jackets as well as woven merchandise. The accessories range consists of bags, wallets, caps, socks and footwear.

Core Audience

Pepe Jeans is for the young at heart. The brand caters to the fashion forward. He/she, who wants stylish and trendy denims that fit well and are reasonably priced. The quality, fabric, fit, colour, wash, price, feel, etc., together influence the customer's purchase decision.

Retail Presence

In India, Pepe Jeans retails through 162 exclusive brand stores, is present in over 237 large format stores and is available at 1,029 MBOs across the country.



Neha Shah
Senior Marketing Manager,
Pepe Jeans

Tell us about the denim collection that you have planned for in the forthcoming season.

Men's and ladies denim wear will consist of interesting washes with stylish fits. The women's collection will be an ode to the 70s, with high-waist boot cut, light wash denims and high-waist shorts with details, relaxed and straight fits, French boyfriend jeans, culottes, denims with frayed hems or fringe, biker jackets and mini skirts. The collection will also consist of interesting washes and detailing such as laser printed denims, spray painted denims, jeans with embroidered details or studs, patch work denims with mix-and-match fabric concepts, wash patch and foil print denims. While, the men's collection will have severely distressed light denims, jeans with laser wash effect or screen printed patch; and vintage wash denims with heavy destruction.

What are your plans regarding new denim product range or denim category expansion?

Innovation is at the heart of everything we do. At Pepe Jeans, it is our constant endeavour to introduce products that are in keeping with the latest trends and ensure maximum comfort.

What are your plans for exploring new markets in India?

We are currently in the process of opening multiple stores in key tier -II and -III cities such as Bikaner, Shimla, Siliguri and many more. Pepe Jeans has approximately 200 stores at present, and there are plans to increase it to 450-500 in both metro cities and growing tier -II and -III cities, with an increased focus on brand outlets.

What has been your progress through online retail?

Consumers today, buy from varied channels, for instance, an EBO, departmental store or online. E-retail and brick and mortar stores are not competing ideas. It is our constant endeavour to understand our customers and leverage technology to evolve the customer experience. Currently, Pepe Jeans e-retails through partners like Myntra, Jabong, Amazon and Flipkart. Our objective is to ensure that our consumers have a 'wow' experience every time they shop from Pepe Jeans - be it through our stores or via e-tail.



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PUFF: Internationally Trendy Men's Denims

"Fashion" with "Excellence" is the cornerstone of each collection introduced by Puff. On the same, Anil Mehta, Managing Director, Puff, talks to Images BoF, about the brand's strong fashion forecasting and trendsetting abilities which has given Puff an international standard.

Launched in 1989, Puff is the flagship brand of the company Mehta Garments Pvt. Ltd. The brand that is youthful, stylish, vibrant and with an attitude, is exposed to global standards in quality, technology, marketing and branding. The "Fashion" range in the Puff brand is constantly innovating. Each collection is exciting and different in washes, treatments and styles. The R&D team works on over 400 designs a year from which few are selected to form the new seasons stylish collection.

Product Portfolio

The power brand enjoys a leadership position in the premium men's wear category. The brand's product basket comprises of jeans, trousers, casuals and cargos.



Core Target Audiences

Puff targets men in the age group of 18- 50 years.

Retail Presence

With a distribution network of 16 distributors and over 700 retailers and chain stores, Puff has incomparable penetration into the domestic market.



Anil Mehta,
Managing Director,
Puff

What are the new denim collections that you have planned for in the forthcoming season?

Innovation has been the hallmark of the company. A marriage of design and technology, the company has constantly introduced new fits, finishes and fabrics. For the forthcoming season too, our R&D team is working strongly with designers and is innovating - creating an electrifying array of product lines in a variety of fabrics, washes and cuts, using the latest technology and processes.

Did you witness any major change in demand in denim?

No, denims are a wardrobe staple, which will continue to be in demand among the consumers.

What has been your progress through online retail?

Online retailing is the new trend in the fashion industry and is growing more than ever. Puff still sells through its stores and have no plans right now, to go online.

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RECAP: Young, Trendy Fashion For Women

Talking exclusively to Images BoF, Zubin Thakker, Director, Recap, shares the brand's plans on expanding its reach in tier-II and -III cities and also through e-commerce portals.



R Brands Lifestyle Pvt. Ltd. was started as Recap Sportswear Co. in the year 1998. The brand Recap was launched in the year 2000 and has grown from strength to strength since then. Recap has always tried to explore themselves, providing young, sporty and trendy collections for the fashion czars of today.

Product Portfolio

Recap offers at least 8 different fits in their jeans portfolio. The brand's product basket also comprises of

capris, shorts, ankle lengths, both cotton and denim, pedal pushers, denim and cotton skirts, jackets (plain and printed), maxi dresses along with a wide array of shirts and t-shirts. Recap also claims to be the first to introduce jeggings in the Indian market and continues to hold the number one position in the section today. The brand has also recently introduced comfort fit, plain and printed pajamas.

Core Target Audiences

The brand caters to young Indian women in the age group of 16- 35 years.

With more and more Indian women taking to jeans and jeggings, Recap products has also found a consumer base in women in the age group of 35- 50 years.

Retail Presence

Recap has a pan India presence. The brand supplies to 20 states and almost 40 cities throughout the country. It retails through 1,500 MBOs and are also present in major large format stores like Pantaloons, Central, Globus, Reliance Trends, and many more.



What are the new denim collections that you have planned for in the forthcoming season?

For AW '16, we have come out with a more fashion based denim collection. With newer washes, better fits, gamut of colours, our new collection has something for everyone.

Did you witness any major change in demand in denims?

The growing fashion consciousness, and influence of media and western culture have turned women's western wear segment into a lucrative and highly evolving market. The total denim wear market is about 300 million pieces a year, which is expected to double to 600 million pieces by 2017. While men constitute almost 80 percent of this market, it is estimated, in various studies, that women's wear will dominate about 25 percent of the market by 2017. So, there is only one way for the market to move and that's upwards.

What are your plans for exploring new markets in India?

With rising disposable income and penetration of television and internet in tier-II and -III cities, women are accepting western wear more openly. We, therefore, plan to increase our reach in smaller cities through large format stores and MBOs making inroads into a nascent and fledging market.

What has been your progress through online retail?

Our entire online venture is in its first stage. However, we do believe that the online spectrum is where the future lies and we plan to get more aggressive in this sphere in times to come. We are present on Flipkart, Limeroad, AJIO, etc. Plans to start our own website is on the cards as well.



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ROCKSTAR JEANS:

Rocking The Men's Denim Category

Rockstar Jeans has continuously managed to shelf the most recent fashion trends, ensuring consumers to have first hand access to the latest in fashion at an affordable price range. In an exclusive interview with Images BoF, Nikhil Lalwani, Managing Director, Rockstar Jeans, talks about the new collection the brand is working on for the forthcoming season. He also talks about the brand's expansion plans in the times to come.



Rockstar Jeans was born not to sell, but to be excited about every sketch, every stitch, every fabric and every work of art. Within seven years of inception, it has a solid presence in almost 1,800 MBOs. Partnered with leading national retailers, Rockstar Jeans is driving its product line comprehensively into every nook and corner of India. Currently, the brand is manufacturing over 1.8 million units per year.

Product Portfolio

The brand's present product basket comprises of a wide range in knitted

and structured fabric with different surface finishes and 100 percent stretch fabric. Washes include cross dyed, cloud with tints, rip and repair and indigo retentions.

Core Target Audience

The brand targets men in the age bracket of 16- 35 years.

Retail Presence

Rockstar Jeans is present in 15 states across the country. The brand retails through 4 exclusive outlets and about 1,800 MBOs.



Nikhil Lalwani,
Managing Director,
Rockstar Jeans

What are the new denim collections that you have planned for in the forthcoming season?

The forthcoming season being Spring/Summer, a lot of emphasis will be on medium weight coarser

count fabric, which includes high density knitted and satin fabrics. The colour grey has a very strong dominance, so weft dyed fabric plays a great role. The washes planned for the season are heavy pumic with pigment spray, light stone with ripped, and many more. The style details are minimal as more emphasis is on base fabric and innovative wash.

Did you witness any major change in demand in denim?

One prominent change that is visible in the category is cropped denims, the second change visible is variation in shades of indigo, and top over dyed with

shades like purple and grey. This gives a two tone effect.

What are your plans for exploring new markets in India?

We aim at acquiring better market share from the existing territories and also planning on adding new geographical locations to the brand's ambit, along with expansion in online retailing.

What has been your progress through online retail?

The brand caters to its online customers through all the major e-commerce portals. The fashion brand also retails through its own online store.

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SHERIFF: *Trendy Men's Denim*

Sheriff is known for its competitive prices and strict quality policy. In an exclusive interview with Images BoF, Dhiraj Ladha, Director, Sheriff, talks about the brand's growth strategy and also about its promising product category.

Sheriff, a men's wear brand by C K International, has covered a long journey since its inception in 1985. The brand started from manufacturing shirts and then added t-shirts to its portfolio and over the years, revolutionized the men's fashion wear category by creating lifestyle products at affordable price points. By using the best fabrics and offering the finest cuts and style, the brand has made a strong hold in the northeast terrain.

Product Portfolio

Sheriff offers shirts, trousers, denims, t-shirts, blazers and gilets.



Core Target Audiences

The brand targets the young aspiring male in the age bracket of 22-45 years. Sheriff customers have good taste for fashionable and trendy clothing.

Retail Presence

Sheriff retails through a total of 10 exclusive outlets. The brand is also available in around 400 MBOs across the country.



Dhiraj Ladha,
Director,
Sheriff

Did you witness any major change in demand in denim?

Yes. There is an enormous growth in demand of denim.

What are your plans regarding new denim product range or denim category expansion?

We are planning on focusing on denim in knits and dobby and prints, which are constantly gaining demand. The demand for classic denims is always on the rise

and so, we are concentrating there too.

What are your plans for exploring new markets in India?

We are working on opening two retail outlets in the couple of months and will announce the launch soon.

What CAGR growth is your brand aiming for in the next 2-3 years?

We are expecting a growth of more than 25 percent in the next 2-3 years.

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SOLLY JEANS CO.:

Denim Excellence

Madura Fashion and Lifestyle has continued to set high standards in its clothing line with brands like Solly Jeans. Talking exclusively to Images BoF, Sooraj Bhat, Chief Operating Officer, Solly Jeans Co., shares insights on the brand's collection and also on its expansion strategy.



Sooraj Bhat,
Chief Operating Officer,
Solly Jeans Co.



Solly Jeans Co., was launched in SS '14 under the banner of Madura Fashion and Lifestyle. SJC is the new vehicle of growth for brand in jeans wear category and is a growing category. With SJC, the brand has been able to tap into the younger category and has led to significant changes such as launching standalone stores.

Product Portfolio

The brand's product basket comprises of shirts, t-shirts, trousers, jackets and shorts.

Core Target Audiences

Solly Jeans Company largely targets men in the age group of 18- 24 years. The brand's consumers are from Section A1 of Tier I and Tier II cities. They are young adults, travellers, explorers, bikers and are adventurous by nature.

Retail Presence

SJC is present across 200+ retail stores throughout the country. SJC has 6 exclusive stores. It also retails through a total of 25 large format stores and 100+ top MBOs across the country.



What are the new denim collections that you have planned for in the forthcoming season?

The upcoming collection features distressed denims, BCI- Better Cotton Initiative- which is a sustainability model, in association with BCI to enable sustainable cotton production and the use of this sustainable cotton in the collection, ultra flex, denim joggers, voynich themed collection which are inspired from the Voynich manuscript. This particular collection bears motifs and themes from 15th century script.

What are your plans regarding new denim product range or denim category expansion?

For the category expansion, we are experimenting with newer washes, over dyed colours in denims and are focusing mostly on stretch.

Who are your top performing stores?

In EBOs, our top retailers include Connaught Place and Saket in Delhi, Banjara Hills in Bengaluru and Oberoi Mall in Mumbai.

What has been your progress through online retail?

E-commerce is the way forward. We are now focusing more on developing the e-commerce market for the brand.

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SPYKAR: Moving Ahead With Exciting Denims

Talking exclusively to Images BoF, Sanjay Vakharia, COO, Spykar, speaks about how the prestigious brand transformed itself from a denim wear brand to a full fledged fashion brand. He also shares the brand's plans for the next 2-3 years.

Spykar's journey started way back in 1992, when the brand was launched by Prasad Pabrekar. From the very beginning, Spykar, a brand which embodies passion, creativity and youthfulness, focused at a very young audience. Primarily a denim wear brand, Spykar has evolved gradually adding trousers, shirts, t-shirts and finally winter wear to its range. The brand is firming on women's wear and accessories as well, in the near future. Spykar has come a long way in establishing itself as India's most trusted denim brand amongst the youth and has also been voted as the 'most exciting Indian brand' by Economic Times (Brand Equity Survey). The brand believes in evolving everyday with the ever evolving fashion world.

Product Portfolio

Spykar offers denims, trousers, track pants, t-shirts, shirts and winter wear. The brand also deals in accessories like bags, belts, wallets, socks, deodorants and perfumes. Of all the categories, denims contribute to about 90 percent in bottom wear and 25 percent in all other categories.

Core Target Audiences

The brand's core target audience is the youth in the age group of 18- 30 years. Spykar's customers are primarily fashion lovers who would like to try trendy apparels and stay at par with the current styles in the market.



Retail Presence

Currently, the brand is present in more than 200 exclusive stores and 5 large format stores including Pantaloons, Shoppers Stop, Central, Lifestyle and Globus. Spykar also retails through over 900 MBOs. The brand's primary markets are Delhi NCR, Haryana, Lucknow and Chandigarh in the North; Guwahati, Kolkata, Bhubaneswar, Patna and Ranchi in the East; Bhopal, Raipur, Indore, Pune, Mumbai, Ahmedabad, Surat and Jaipur in the West; and Hyderabad, Bengaluru and Chennai in the South.



Sanjay Vakharia,
COO,
Spykar

Did you witness any major change in demand in denims?

The IMRB study, commissioned by Spykar Lifestyle, says that close to 3/4th of the sample population (72 percent) associate jeans with casual wear. We believe that, unperturbed by the fashion dynamics, Jeans has retained the evergreen status for the majority. In fact, the ground reality backs the findings too. The demand for denims has seen an upward movement year on year. The comfort, versatility and the style quotient offered by this apparel is unparalleled.

What are your plans for exploring new markets in India?

We are looking forward to adding 40-50 Spykar stores every year. We are exploring the untapped markets of the country. Now, the brand's key focus is on Tier II and Tier III cities.

What was your turnover in last FY (15-16) and what is your brand aiming for in the next 2-3 years?

The turnover for FY '15-16 was ₹240 crores. We were aiming at a growth rate of around 30 percent over the last financial year. Likewise, in the next 2-3 years too, Spykar will grow at the same rate.



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SQ JEANS: Offering Bespoke Jeans

In a short chat with Images BoF, Hitesh Sodiwala, Co-founder and Manager, SQ Jeans, shares what it takes to be a pioneer in bespoke denim manufacturing in the country.

SQ Jeans is a registered brand of the company, SQ Jeans and sister concern of Sequeira Tailors & Jeans Makers. With its headquarters in Surat (Gujarat), Sequeirs Tailors & Jeans Makers was established in 1967, initially as Sequeira Tailors.

SQ Jeans started making custom-made jeans for its customers in 1992. On getting an overwhelming response, it further expanded its manufacturing unit by installing latest heavy weight fabric machines and a garment processing laundry. Today, SQ Jeans is a group of young and intelligent professional designers in the field of tailor-made jeans. It manufactures and exports high quality bespoke jeans for men and women at affordable prices.

Core Audience

Its core audience comprises people who need good fitting jeans and can't find the jeans from the racks. The ideal customer is people who want their jeans with their own style.

Product Portfolio

SQ Jeans manufactures and exports denim wear and specialises in bottom wear range as well.

Retail Presence

The business is primarily operated through its own website www.sqjeans.com and the partner tailors in the USA, Canada, Australia and Europe.



Hitesh Sodiwala,
Co-Founder & Manager,
SQ Jeans

Tell us about the new denim collections that you have planned for in the forthcoming season?

We are different from readymade garment manufacturers. We make bespoke jeans. We offer a wide range of denims for men and women. We use almost all kinds of denim fabrics from the best denim mills in India, who supply denim fabrics to the best brands in India. We have the finest 8.00 oz (for light weight denims) to the thickest 16.50 oz (for heavy weight denims). We use stretchable fabrics, especially for women and some stretchable fabrics are used for both men and women.

Did you witness any major change in demand in denims?

Since 1979, the demand in denim is same as it was. Although, people have got more attracted to denim wear now. Henceforth, SQ Jeans have come up with the idea of providing custom made and designed jeans for our customers especially and for those who usually cannot get jeans that fit them as per their measurements. We also offer "copy my jeans" option to clone their old and favourite jeans.

What are your plans regarding new denim product range or denim category expansion?

We are already using more than 25 kinds of fabrics and we keep on adding new denim fabric qualities whenever available.

What are your plans for exploring new markets in India?

People in India know us through our website www.customjeansindia.com.

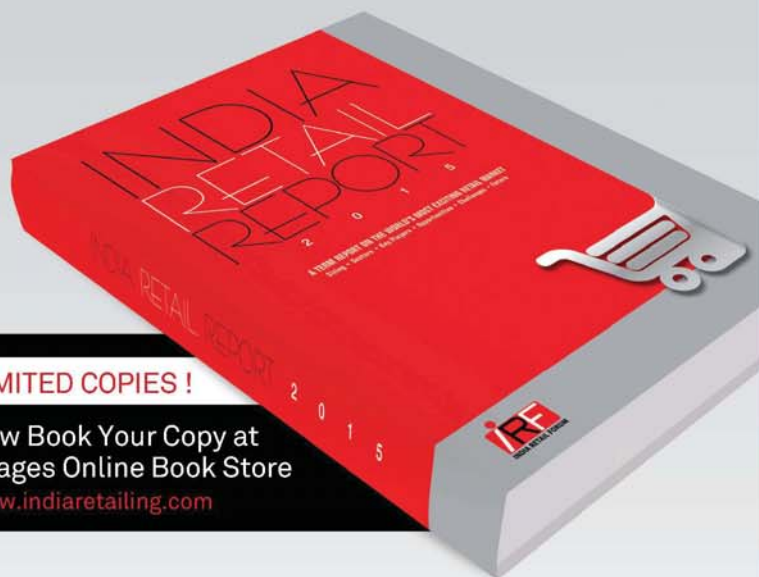
What has been your progress through online retail?

Our business is primarily run through our online portal. We are gradually growing our reach through it.



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Smt. Nirmala Sitharaman
Minister of State
(Independent Charge)
Commerce & Industry, India

“ Today the economic sentiment is upbeat and the domestic and the foreign businesses are beginning to view prospects in India much more favourably than they had done in the past few years.

India is the fastest growing, most exciting and challenging retail market for the world today...I believe that, in addition to *large scale national chains*, opportunities to create *speciality and regional retail concepts* are also immense. Localised models operated *with global best-in-class systems* can be highly lucrative in practically every time part of the country.

The **2015 edition** of the **India Retail Report** comes at the cusp of the economy looking up. I expect that in coming years the growth in the Indian retail sector would *supplement and complement the growth in Indian manufacturing* in a very significant manner. ”

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SUCCESS: *Riding The Trends*

In an exclusive interview with Images BoF, Mazhar Khan, Head Designer, Success, talks about the brand's capability at adapting the changing trends in men's fashion and putting forth the finished product, instantaneously.

Success was established in the year 1996 by Rajnish Sethia. Having started out as a trouser manufacturer, today, the brand 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.

Success, as a brand that promptly adapts to fashion, has not only stood its ground firmly but has also evolved with each passing milestone.



Mazhar Khan,
Head Designer,
Success

What are the new denim collections that you have planned for in the forthcoming season?

For the forthcoming season, we are focusing on jeans with subtle yet trendy prints, knitted denim fabric varieties for ease of comfort and fit, jacquard style

Product Portfolio

Success offers suits, blazers, waist coats and trousers. The brand's casual jackets, waistcoats, denims, shirts, t-shirts and accessories are also in great demand. Denim occupies a considerable percentage of its bottom wear category every year with seasonal varieties in denim upper wear, primarily in shirts.

Core Target Audiences

Success believes that paradigms dictating changing wardrobe preferences with age have somewhat melted and so, they offer trendy

weaves in patterns of camouflage and twills, and minimalistic details and clean washes for the semi-casual segment.

What are your plans regarding new denim product range or denim category expansion?

We are coming up with blazers and waist coats which are unlined, lightweight and in a very affordable price category, either in indigo washes/ finishes or with lycra mix. The fit, colour, detailing and finishes have been kept subtle, offering easy choices for casual outings.

What are your plans for exploring new markets in India?

With the unveiling of our new flagship store in Bhubaneswar this year, we are



merchandise for young men as well as garments of a classic taste keeping in mind their loyal customers as well as attracting new ones.

Retail Presence

The brand retails through more than 25 exclusive stores and over 375 MBOs. Success is also available in 36 large format stores like Central, Brand Factory, etc.



planning to open 7-8 new stores in the coming year. We are now looking to expand our visibility in Tier I and Tier II cities on pan-India basis.

What has been your progress through online retail?

We have a remarkable presence in online portals like Flipkart and Myntra. We also retail through our own website- www.successonline.co.in. Having received a fairly good response keeping in view the fact that our online presence is in a state of constant innovation, growth and learning, we are also looking forward to tie-ups with Jabong and other such big players very soon.

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TARAMA: Quality Denim For Women

With the changing times, women have revolutionised the denim industry and are taking this garment category rather too seriously. In such a scenario, Tarama is bringing in all the quality options for a trend savvy and stylish woman. Prem Gupta, Managing Director, Tarama, talks to Images BoF about the brand and the segment.



Tarama is a denim centric women's wear brand from the house of Miracle Lifestyle Ltd. Launched in the year 2013, the brand is centered around subtle fashion with great emphasis on styling, fit and fabric quality. Tarama has initiated to sell exclusively through India's first cash and carry B2B portal for apparel at www.taramajeans.com. The idea of Tarama is to evoke a mindset. Immediate designing and producing latest fashion jeans that are tailored to the inch to fit the female body perfectly at every angle, gives Tarama an edge of uniqueness.

Product Portfolio

The brand's product basket comprises of jeans in various fits, that is, slim, slouchy, high waist, push up, joggers, dungarees, dress, jackets, etc. The

brand's tops collection are mainly in rayon, knitted, crepes and denims.

Core Target Audiences

Tarama is meant for women who love the way their jeans fit, feel and look. The brand's consumer while being trend savvy, also demands comfort of quality fabrics and perfect fits. The consumer is also adventurous with her style, trying out different silhouettes, from dresses to hoodies.

Retail Presence

Tarama is available in more than 100 exclusive outlets and a few shop-in-shops like Lulu, Topsy Topsy, etc. Being a new brand, the brand is also tying up with like-minded partners for business expansion.



Prem Gupta,
Managing Director,
Tarama

What are the new denim collections that you have planned for in the forthcoming season?

The brand's AW 2016-17 collection is mainly jeans with patching, distress, raw, high waist, cropped, flares and regular. There are also tops with a lot of lace, bell sleeves, boxy in printed and plain rayon and crepes. We will also introduce the

Push Up fit in times to come. This is a body shaping jean which uses a special high stretch but sturdy denim fabric and is crafted/ engineered in a way where the hips look full and lifted. Basically, it does to your hip what the bra does to the bust.

Did you witness any major change in demand in denims?

The demand is and will always be there due to preference for newer fits and washes.

Who are your top 5 retailers?

Tarama's top retailers include Lulu Mall in Kochi, Jagz in Surat, Bharne Creations in Goa, Uptown in Shillong and Topsy Topsy in Vijayawada.

What are your plans for exploring new markets in India?

We are constantly looking for like-minded partners to expand further in the country.

What has been your progress through online retail?

E-commerce is a very good platform and has enabled us to reach a lot of customers based all over the country.

What is your brand aiming for in the next 2-3 years?

Tarama is a new brand and at the moment, it is more important for us to be available at the right place. We are looking at reaching 100 million mark in the next 2 years.



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TWILLS:

Enhancing men's style quotient

In a candid interview with Images BoF, G S Naveen, Director, Twills shares that when it comes to styling, Twills takes casualwear seriously and transform semi-formal into powerful style statements.

Twills, the mid-segment menswear brand is driven by a passionate team of in-house trendsetting designers who are known for their exclusivity. Be it casuals or semi-formal, its each collection is a perfect mélange of fun and fashion at its best. By offering superior quality collection at competitive prices, It has made best-in-class style affordable and accessible to the trendy youth across India.



G S Naveen,
Director,
Twills

What are the new denim collections that you have planned for in the forthcoming season?

With various fabrics our design team comes up with various washes which is the key element, such as, indigo. Printed, knitted, stretch, joggers and shorts are the products that we are offering at the moment. We are coming up with an innovative concept called, Yoga, for this season. Most of the fabrics used has lycra, which has stretch properties. We are using this concept to promote people performing yoga by wearing these garments.

Product Portfolio

From 100 percent cotton to 100 percent linen, Twill offer various designs in shirts and trousers. In Denims, it offers cotton, stretch and knitted denims. The denim share comprises 60 percent in bottoms and 30 percent in shirts.

Core Audience

The brand's core audience are youngsters, but they are also catering to middle age group. Its various fits give the customers a chance to choose from.



Retail Presence

Twill has presence in more than 3,000 multi-brand outlets and 90 exclusive brand outlets. It also has presence in large format stores like Reliance and Central.



Did you witness any major change in demand in denim?

Denim market has been increasing drastically. In shirts, compared to last year, we achieved 100 percent business.

What are your plans regarding new denim product range or denim category expansion?

Various washes on printed, vintage, pattern peaching, laser denims are few developments which are in our R&D process. Very soon we are going to come up with the best of the collection that fits the Indian market which will have value for money.

Who are your top retailers?

We have major retail partners such as Gurram (Telangana), Kalyan Silks (Kerala), Lohia Brothers (Orissa), Oberoi (Delhi), etc.

What are your plans for exploring new markets in India?

Our primary market is South India. We have, recently, introduced ourselves in North India. We have been expanding our network on regular basis across the country. Our aim is to have an EBO in every state capital and in every district in India.

What has been your progress through online retail?

We have a remarkable presence online. We are present on Flipkart, Snapdeal, Jabong, Myntra and are doing business through our retail portal twillsonline.in. However, majority of our customers like to walk into our brick-and-mortar stores, which is also the traditional method of shopping.

What was your turnover last FY (15-16) and what is your brand aiming for in the next 2-3 years?

In the fiscal year 2015-16, we achieved Rs. 140 crore. We are aiming at 30 percent increase year-on-year.



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WERT JEANS: *Offering Fast Fashion For Male Fashionistas*

In a candid interview with Images BoF, Sabu Joseph, Proprietor, Wert Jeans, shares his plans for expansion and exploring new markets for the brand. He is also launching another brand, 'Trew' which is a premium brand, this season.



Mumbai based Wert Jeans was launched in 2009. From being a basic denim brand, today it has branched out as a complete lifestyle brand revolving around youth centric denim products.

The journey began in 1998 when Sabu Joseph, Director of Famous Fashions, started manufacturing for reputed brands like Pepe Jeans, Lee Cooper,

Spykar, etc. In no time, Joseph was churning out the best quality jeans for these brands. Finally, in 2009, Joseph decided to launch his own brand, a brand that will not just sell clothes but will create a cult of style trendsetters and this is how Wert Jeans came into being.

Product Portfolio

Wert Jeans offers denim range in bottom wear. It also has cotton trousers and the brand will soon venture into shirts category.

Core Audience

The brand targets male audiences between 18 to 40 years old.

Retail Presence

Wert Jeans has a strong presence in leading MBOs across the country. It will soon partner with major large format stores. At present, it does not have any exclusive outlets but the brand has plans to open its EBOs.



Sabu Joseph,
Proprietor,
Wert Jeans

What are the new denim collections that you have planned for in the forthcoming season?

We are working on new themes every season and this is our USP.

Did you witness any major change in demand in denim?

The consumption of denim is on an upswing year-on-year. Today, it is being accepted as a major outfit by the consumers.

What are your plans regarding new denim product range or denim category expansion?

As mentioned earlier, we have a new product offering every season. However, we will be launching 'Trew', a premium brand, this season.

Who are your top retailers?

We have been doing good business with most of the esteemed retailers across the country. Our top retailers are Chunmun, Pothys, Jayalakshmi, R S Brothers, J C Brothers, Cillai, etc.

What are your plans for exploring new markets in India?

We have plans to enter the eastern markets this year. Also, we are looking for channel partners, who have strong

repute and expertise in handling national brands.

What has been your progress through online retail?

It is very encouraging. We have a good online presence through Amazon, Flipkart, Snapdeal and Paytm.

What was your turnover last FY (15-16 and what is your brand aiming for in the next 2-3 years?

The turnover for the financial year 2015-16 stood at ₹20 crores. We aim to reach ₹50 crores by 2018.





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X BLUES: Denims With The X Factor

X Blues claims to offer the trendy in-vogue fashion bottom wear to the fashion conscious women. Talking to Images BoF, Jagtar Singh, Managing Director, X Blues, speaks about the brand's category expansion and also shares insights about the relevance of denims in the fashion segment.

Delhi-based women's wear brand, X Blues was launched in 1997. The brand aims to provide a complete wardrobe solution for women. It offers a new range of innovative designs every season, which are in sync with national and international trends. Innovation in style, designs and crafting of the products contribute in building a strong value of the brand. The brand's USP lies in being innovative and

relevant to the consumers and giving value for money.

Product Portfolio

X Blues offers all fashion bottom wear including jeans, capris, jeggings, shorts, joggers, etc. for the fashion conscious women.

Core Target Audiences

The brand targets women in the age group of 15- 25 years. The brand's consumers majorly belong to mediocre families.



Retail Presence

Keeping in view its USP of providing quality fashion at an economical price, the brand caters to markets of metro cities and Tier I, Tier II and Tier III cities of the country. X Blues retails through around 1,400 MBOs and is also present at around 10 large format stores like Chunmun, Rituwears, etc.



Jagtar Singh,
Managing Director,
X Blues

What are the new denim collections that you have planned for in the forthcoming season?

For the forthcoming season, we are introducing denims in different fabrics and imported washes, which are in vogue in the international market.

Did you witness any major change in demand in denim?

Yes, there has been a drastic change in the demand in denim. India is

moving towards westernised fashion and now, instead of one generation, three generations are wearing denims in their day to day life. Like superstars Amitabh Bachchan and Dharmendra, denims too are strong, dependable and evergreen and they just cannot go out of fashion.

What are your plans regarding new denim product range or denim category expansion?

Currently, we are focusing on rugged washes and joggers which are in trend.

Who are your top retailers?

Our top retailers are Chunmun, Appeal, Incense and Bindals in Delhi.

What are your plans for exploring new markets in India?

We are planning to expand to south

India. Apart from that, we are also looking forward to expand our business in northeast India, especially in Assam.

What has been your progress through online retail?

X Blues is present in all the key e-commerce websites including Myntra, Jabong, etc. and are making good profits too.

What has been your CAGR growth over last 3 financial years and what is your brand aiming for in the next 2-3 years?

For the last few years, we are recording a growth of around 40 percent and are hoping to grow at a much higher rate in the times to come.

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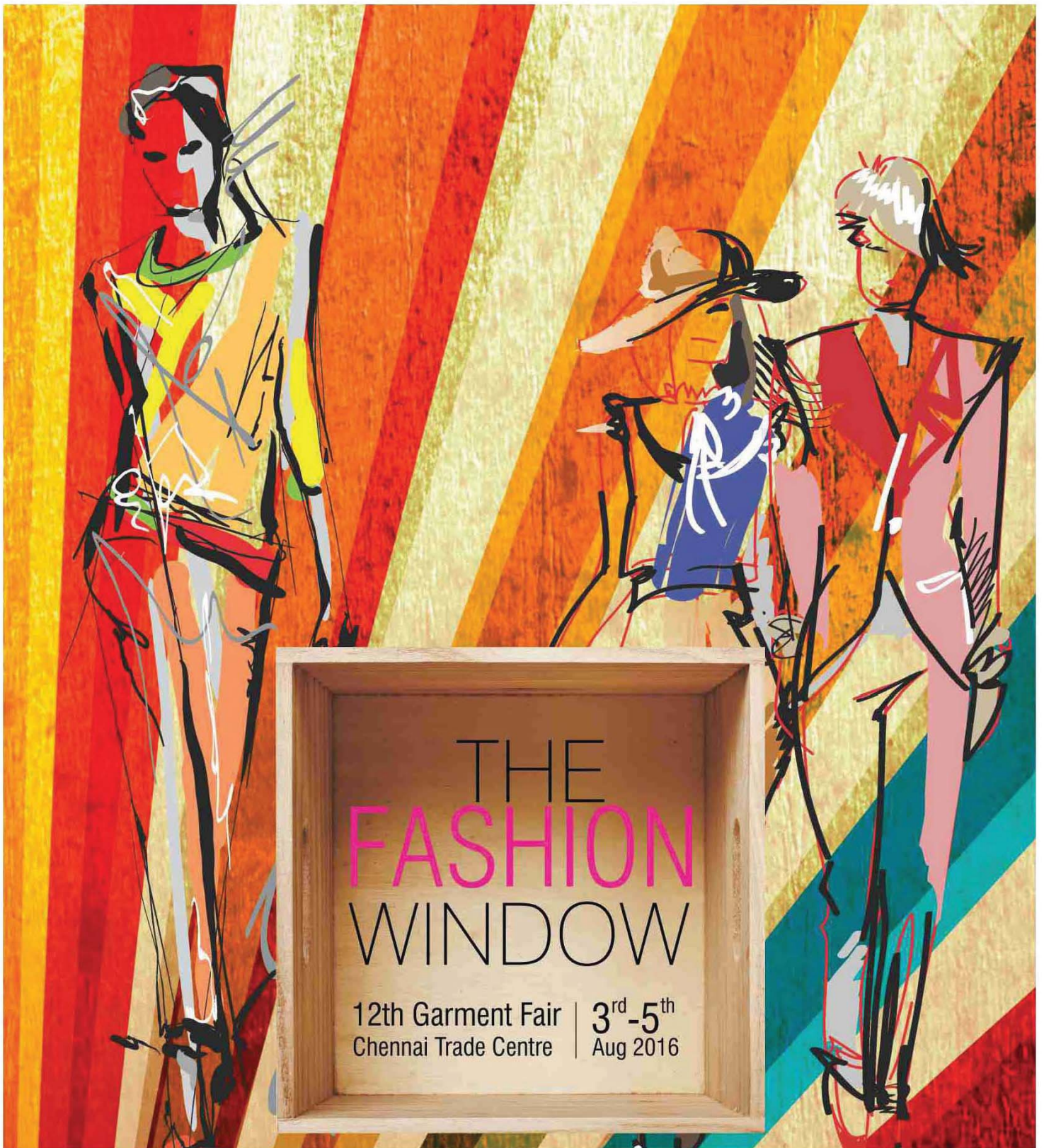
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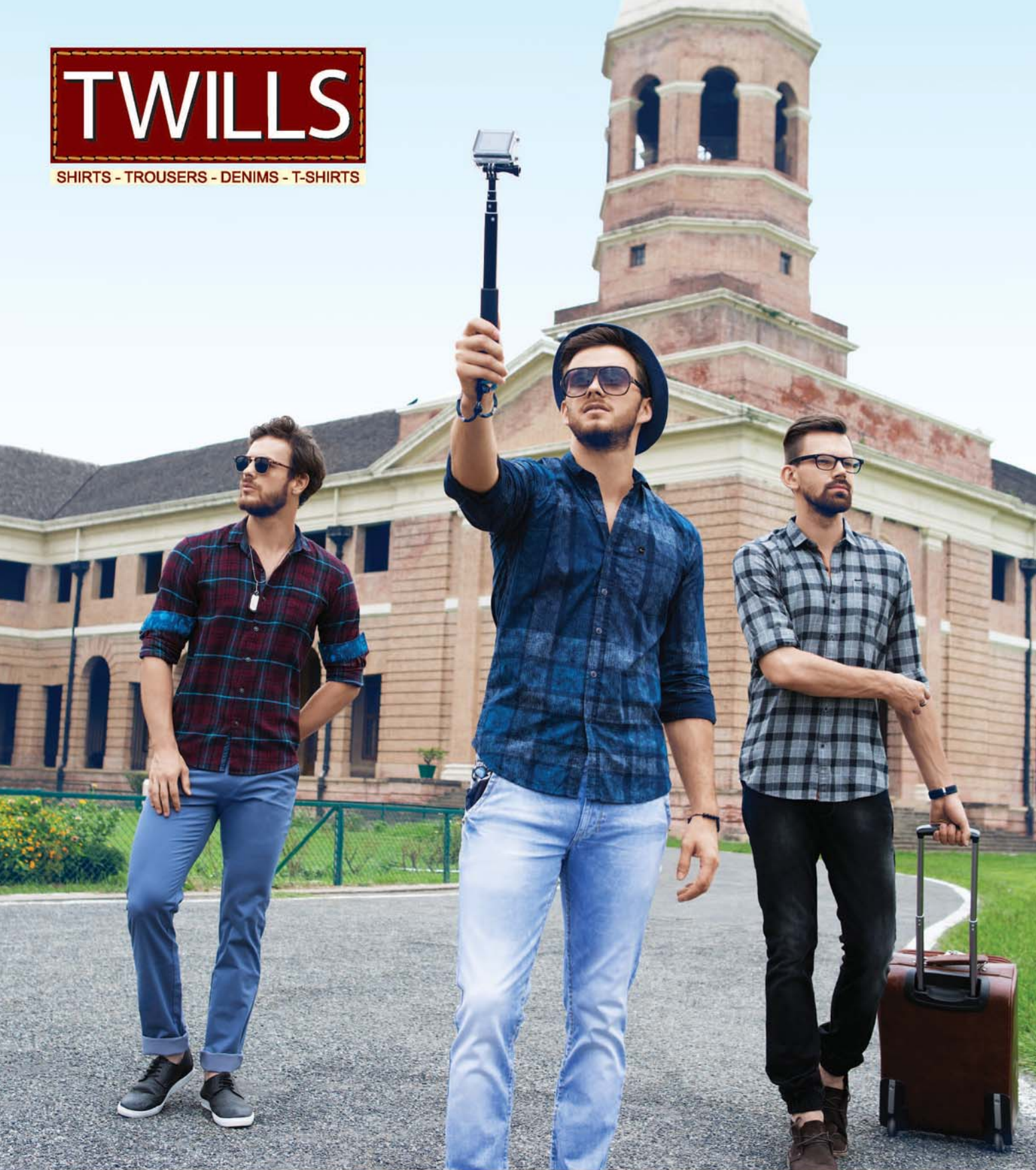
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AUTUMN WINTER 2016

A close-up photograph of denim fabric, showing a pocket and a button. The denim is a dark blue color with visible stitching and texture. The pocket is on the right side, and a button is visible on the left. The lighting is dramatic, highlighting the texture of the fabric.

FASHION *CREATION*

DENIM FABRICS AND THEIR FUTURE

**TOP
DENIM TEXTILE
PLAYERS**

**H&M'S
RESPONSIBILITY DRIVE**

**WGSN
ON SUSTAINABILITY**

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SOCIALLY RESPONSIBLE DENIM TRENDS: CURRENT OUTLOOK

WGSN looks into the top socially responsible denim trends that evokes all the right feelings related to ethics and social responsibility.

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SUSTAINABILITY

DENIM STYLES AT H&M HELP CLOSE THE LOOP FOR SUSTAINABLE FASHION

H&M introduced 16 new denim styles made using recycled cotton from textiles collected in the Garment Collecting initiative in H&M stores. Each of these denim pieces use up to 1,000 fewer litres of water compared to using only conventional virgin cotton.

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DYK?

INNOVATIONS TAKING OVER THE DENIM WORLD

Jeans have evolved from just another pair of straight fit denims to much more. We trace out a few uber-cool and innovative denims doing the rounds in the international arena now.

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INNOVATION

LEVI'S LIVING UP TO A LEGACY

Keeping up with the new generation's affinity for athleisure, Levi's has come up with a fabric with just the right amount of stretch in the right places, that promises to "flatter, hold, and lift".

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DESIGNER TALK

ELEGANCE IS THE WATCH WORD

In an exclusive interview, veteran denim Designer Leopoldo Durante talks at length about the global denim market dynamics, trends and issues, and his own brand Care Label.

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DENIM TEXTILES

BLUE BLOODED DENIM FABRIC & ITS FUTURE

The continuing appeal of denim apparel, especially jeans, has ensured that the demand for denim fabric remains robust. In turn, robust demand has resulted in sizeable trade flows in denim fabric across markets.

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KAPIL RAYON: GROWING ITS FUTURE WITH QUALITY AND INNOVATION

Pinkesh Shah, Managing Director, talks about his company Kapil Rayon (India) Private Limited that specializes in shirting fabrics which it markets under the brand name Fab-Berry.

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Value addition

WHAT IS YOUR WASH?

What is it about washes that attract shoppers to a pair of jeans or a denim top-wear? We speak with a few leading brands to find out about their views on the dynamics of washes in denims.

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Sustainability

ARCHROMA: CHALLENGING THE STATUS QUO TOWARDS MORE SUSTAINABLE TEXTILES

Archroma makes a positive contribution by helping brands and manufacturers with environmentally responsible processes.

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SYMBIOSIS

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We take a look at the changing market dynamics for denim bottoms in India and the increasing popularity of denim jeggings.

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CELEBS

BREAKING IN #YOURDENIMS

Bollywood's denim lovers share the secret of 'owning' their jeans.

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LIMELIGHT

GLOBALLY YOURS

Get inspired by the best denim looks worn by the most stylish stars and models from all over the world.

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SOCIALLY RESPONSIBLE DENIM TRENDS: CURRENT OUTLOOK

Sustainability in denim is a term that evokes all the right feelings related to ethics, savings and social responsibility. However, the word itself speaks more to an end result when in fact, the industry as a whole is moving towards sustainability while embracing social responsibility. WGSN looks into the top socially responsible denim trends.

By Dio Kurazawa,
Director of Denim

WGSN
WGSN.COM

As denim is a bit more complicated and requires a great deal of care and love during the production process, more than other garments, denim receives a very negative wrap when the strain on water, chemicals and energy is considered. That being said, we've recently seen major developments in almost all areas of production as innovations meet the demands of brands, demanding a more aggressive position on a sustainable future.

There is a major shift in socially responsible trends successfully translated into designs that mass market retailers and their consumers are embracing. The key has certainly been to offer products that are not only created in a socially responsible manner, but are also on trend and aesthetically sit next to other trendy garments created in a less than ethical manner, thereby offering the consumer a truly socially responsible alternative.

THE OVERVIEW

There are new fabric innovations effecting denim fabric mill production like, new production machinery developed to aide reduction of water,

chemical and energy dependency, and quite excitingly, there are brands that have redesigned products that focus on reducing, reusing and recycling denim to create new looks. As brands target millennials quite familiar and passionate about social responsibility, the industry (fabric mills, cut sew facilities and denim wash houses) responds with these new innovations in order to further promote a move towards a sustainable future.

FABRIC INNOVATIONS

Very exciting developments have come out of the Levi's camp in the recent months. Levi's has created the world's first pair of jeans made from regenerated post-consumer waste cotton in collaboration with textile technology startup EVRNU. Using five discarded cotton t-shirts and 98 percent less water, Levi's has made amazing strides by creating a circular economy that enhances the life of cotton and reduces waste by pumping new life into used clothing. Levi's has also partnered with ECONYL® to create a new men's collection made from regenerated nylon from waste materials such as fishing nets and spent carpets. ECONYL® collection with Levi's is another evidence of the brand's commitment to a sustainable supply chain.



RESPONSIBLE MANUFACTURING

New developments in denim production help to conserve natural resources and reduce chemical dependency. In some cases, new developments are mere improvements or updates to existing innovative technology in terms of production machinery. Levi's continues to lead denim innovations with their latest Tonello collaboration. The product is Nostone, a product created to eliminate the use of pumice stones

used to create stonewash jeans. The savings are immense. The need for stones is eliminated, which also reduces critical steps in the washing recipe which relates to adding and removing the stones, a rinse step to clean the jeans and an additional rinse step to wash away chemicals. The look is amazing. The usage of ice-blasting is certainly not new to denim. However, strides have been made to enhance machinery in an effort to add greater detail to dry processing.

The same is true for new innovations in laser technology. Many factories are moving towards 100 percent reusable water through advancements in water treatment. These advancements are clear evidence of a shift in the industry, based on consumer demands and brand's positive response to social responsibility. I believe its worth mentioning that these developments also extend to factory workers, reducing exposure to harsh chemicals while reducing demanding manual processes.

In the last year, brands have started to offer refurbished and reshaped Levi's 501s, providing new takes on original fits. The indigo colour-block trend diversifies, tapping a range of inspirations to update this perennial trend. Retro themes drive 1970s-style patchwork in fitted trucker blocks. Driven by the strong remade trend, brands explore reworked cut-and-sew updates, inspired, of course, by Levi's but also by at the moment brands Vetements, Redone, Off White, Frame Denim and high street brand H&M. These designs focus on reducing, reusing and recycling. The designs are certainly socially responsible as they promote the use of existing denim garments to create new and fashionable looks. High street brands offer such looks, in mass production, by combining and washing varying shades of fabric and strategically patching them together to help create a more cost effective option, without the use of actual vintage garments. These efforts help achieve the remade look, but do very little to advance reducing reusing and recycling. However, it is very promising that high street brands promote this aesthetic.

As there are no current guidelines for brands and the industry professionals to follow, sustainability remains a very hot topic. I believe its very important for the industry to build a governing body, charged with building a foundation that assist brands and sourcing partners with a clear understanding of how to create socially responsible garments.

For a full seasonal overview of the trends for Denim, please visit WGSN: www.wgsn.com



DENIM STYLES AT H&M HELP CLOSE THE LOOP FOR MORE SUSTAINABLE FASHION

H&M has taken an initiative to make sustainable fashion accessible to as many people as possible. The brand not only claims to have a passion for fashion, but also for the planet. Being conscious in every part of the fashion making process is at the core of this brand's business.

Producing cotton and denim is a water intensive process having impact on environment, which is not sustainable. We also know that a large amount of textiles are thrown away and end up in landfills which further have negative impact on environment. There is only a small amount of clothing being reused or recycled although as much as 95 percent of textiles and clothes that are thrown away globally, can actually be used again.

In fall 2015, H&M introduced 16 new denim styles made using recycled cotton from textiles collected in the Garment Collecting initiative in H&M stores. The pieces for men, women and kids, were the steps towards H&M's goal of creating a closed loop for fashion. We estimate that each of these denim pieces uses up to 1,000 fewer litres of water compared to using only conventional virgin cotton.

The denim pieces, made from recycled and organic cotton, included styles for women, men and kids. For women, the collection included skinny to distressed 'girlfriend' jeans, denim jackets, flared dungarees and denim jumpsuits. The men's collection included zip-up denim

jackets alongside two distressed slim leg styles, and joggers in coated denim. The kid's collection included zip-up hoodies with cute animal ears, along with stretch jeans sequined at the knee, or street style hooded shirts, with distressed jeans.

H&M wants to create a closed loop for its textiles, in which the fabrics from unwanted clothes can be recycled into new ones. The aim is to reduce the environmental impact of the fashion industry, by limiting waste that goes to landfill and saving on natural resources used in the production of fabrics.





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Since 2013, H&M customers worldwide, have been able to bring unwanted clothes from any brand into its stores as part of its Garment Collecting Initiative. H&M was the first fashion company to have this initiative worldwide and so far, we have collected more than 28,000 tonnes. Customers receive a discount voucher for every bag of unwanted clothes and the clothes that are returned, are collected and reused or recycled into new garments. Our aim is to reduce the environmental impact of the fashion industry. In short term, we have a clear vision to minimize the waste that goes to landfill. In the long term, we want to find a solution for reusing and recycling all textile fiber for new use.

In 2014, we launched our first products made of recycled textile fibers from unwanted garments. In Autumn 2015, we introduced ten new denim styles made using recycled cotton from garments collected in H&M stores, helping to close the loop in fashion. Another example is the 2016 Conscious Exclusive Collection that contained accessories made out of denimite – a material made out of recycled, worn out denims. This collection, made out of more sustainable and innovative materials, shows how fashion can be sustainable.



At H&M, we have set a goal to ensure that all cotton comes from sustainable resources by 2020. This means only organic, better cotton and recycled cotton. Today, H&M is already one of the world's largest user of organic cotton and we are positive that we will reach our 2020 goal.

Working with recycled material is as good as using new textiles and our aim is to use more material from recycled garments in the future. Technological inefficiency currently do not allow for more than 20 percent of recycled cotton without quality loss which is a challenge. To overcome this, we are investing in technology needed to increase this amount without losing on quality. By creating demand for solutions and actively working with innovators and scientists through different initiatives, we are positive to overcome the challenges on the way towards a closed loop.

X



ABOUT ELIN ÅSTRÖM

Elin Åström is currently heading the Sustainability program for H&M India retail operations. Prior to this, she worked as Sustainability Business Expert at H&M Head Office with focus on stakeholder engagement and social impact of H&M global social sustainability program. She has previous experience from working in the areas of international development and corporate sustainability at Swedish International Development Cooperation Agency and civil society organizations. She holds a MSc in Human Rights from Uppsala University and a BCs in International Business and Economics.

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INNOVATIONS TAKING OVER THE DENIM WORLD

Jeans have evolved from just another pair of straight fit denims to much more. We trace out a few uber-cool and innovative denims doing the rounds in the international arena now.

By Tanya Krishna



Stain Repellent White Jeans

White jeans are always elegant and trendy, but there is always a fear of staining the pair. Accidents are just inevitable sometimes, and a lot of us are familiar with stubborn red wine stains. But now, thanks to developing technology, you can forget about stains and flaunt your white jeans with flair. Joe's Jeans has come up with a revolutionary stain repellent white jeans that utilises nano technology to repel stains. The collection apparently resists water, coffee, soda and other liquids.

Courtesy: Cosmopolitan

Moisturizing Jeans

How would you relate the two words, "Denim" and "Spa"? The answer lies in Wrangler's "Denim Spa" collection, which immediately turned the market's attention to an unusual and intriguing innovation in the category. Women are too fussy about their skin and about hydrating them during the dry winter season and here is something that would definitely be a 'fascinating buy' for all. According to the Huffington Post, the skinny jeans introduced by the brand is supposed to moisturize dry legs, thanks to a fabric infused with skin care ingredients like shea butter, aloe vera and apricot kernel oil. The line's Smooth Legs moisturizing jeans claim to reduce cellulite too.



Courtesy: Wrangler



Courtesy: DSFK

Anti Microbial Jeans

It's like a dream come true if one gets a pair of jeans which hardly gets dirty and keeps bacteria and odour at bay. If you are an adventure seeker who believes in travelling light—this one's for you. DL1961 recently launched their women's denim collection that features the 'intelligent' microbial control system. These get to work when it senses unwanted bacteria and help fight off odours, so they can stay fresh longer.



Scented Jeans

Let's give our consumers something that makes them smell fruity fresh all day with the innovative 'scented jeans'. Colette Fragrance jeans are the brain-child of Portuguese fashion brand Salsa. According to the brand, these fragrant jeans have a medium waistline and a slim leg, but does all these really matter? Because you can ofcourse offer the fits in the other collection but not the fragrance. Salsa promises 20 washes filled with a fab fruity scent. The jeans are each coloured in accordance with the fruit scent they exude – blueberry jeans are blue, lemon jeans are yellow and so on. Salsa claims that the scent is slowly released by "microcapsules" that have been developed using a mysterious "innovative technology" and will last up to 20 washes.

Courtesy: Salsa Jeans



Storm Water Repellent Denim

The monsoons are just round the corner and here is a great opportunity for all the retailers out there to stuff the store with these Storm Water Repellent denims. These innovative pair repel water and do not get wet, courtesy the Storm Denim™ technology from Cotton Incorporated, which is a water-repellent finish that offers protection from rain and snow, giving full freedom on a rainy day. The Storm Denim™ finish offers improved performance over typical durable water-repellent treatments by maintaining excellent repellency performance throughout the life of the garment and does not inhibit cotton's natural ability to breathe.

Maternity Jeans

There are women who practically live in her jeans, and pregnancy takes away the freedom to slip into any denim whatsoever. Maternity Jeans comes as a boon for these expecting mothers and also for the retailers who see a buyer in them. Now, many different brands offer maternity jeans with different fits and styles. Amongst them all, Old Navy deserves a special mention as it offers a large assortment of these jeans with added features like smooth panel back waistbands, faux fly, contrast top stitching and ultra-comfortable panels.





Silk Denims

Another recent innovation that has successfully caught the attention of the high end fabric enthusiasts is Silk Denims. Silk Denim is a very successful effort in innovation upon silk. Silk denim garments are soft to touch, lighter in weight, comfortable to wear in all seasons, in addition to the luxury and smooth feel of silk.

Khadi Denims

Another must-haves for all retailers this season is Khadi denim – the new rage in the fashion world. A hand spun and hand-woven soft-feel eco-friendly fabric, it has emerged as one of the most promising innovations in denims from the home front. The Khadi & Village Industries Commission (KVIC) is taking various measures to promote this skin-friendly and highly breathable fabric among India's youth. Even, Prime Minister Narendra Modi took an extra effort to encourage the use of Khadi by the youth.



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With people getting more aware about sustainable development, there is also a rise in demand of organic clothing. These sustainable denims are made with 100 percent organic cotton and are free from chemical fertilizers, pesticides and insecticides. The entire production of the fabric adheres strictly to ecological standards: from spinning, dyeing to finishing of the denim. It involves non-toxic fiber processing, colorants and fabric treatments ensuring that no damage was caused to the environment during production.

Courtesy: Redale's



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LEVI'S

LIVING UP TO A LEGACY

Keeping up with the new generation's affinity for athleisure, Levi's has come up with a fabric with just the right amount of stretch in the right places. The result is the new Levi's 700 Series stretch denim that are designed to "flatter, hold, and lift".

By Aarti Kapur Singh

Two decades ago, Levi's was bigger than Nike, with revenue exceeding \$7 billion. Sales have since sagged to \$4.8 billion. The company, founded in 1853, has survived the Civil War, the Great Depression, and other epochal threats, but in the last two years it's been tormented by an enemy none of its executives saw coming - yoga pants. Much before yoga pants happened to the fashionable men and women, 'loungewear' was perhaps restricted to denims. But with the introduction and quickly rising popularity of clothing that was functional and yet chic and comfortable, the giant had to reinvent.

Levi Strauss may have invented jeans, but it never saw yoga pants coming. Eva Mendes, the actress and style icon, told a fashion blog that if she was seen wearing jeans, it could only mean that her softer pants were dirty.



“The customers loved the skinny and midrise jeans with additional soft and stretchy material. It raised our hopes and later was a reboot for the women’s category.”

– James Curleigh,
President, Levi’s



“There’s not another piece of apparel in the world—probably in the history of mankind—that has remained virtually unchanged and still provides function,”

– Bart Sights,
Sr. Director Levi Strauss & Co.

As a laggard, Levi’s has only recently begun making consistent efforts to win back the hearts, and butts, of shoppers. “When they started expanding their stores, that’s when they started to think about being fashionable and participating in the top end of the market and keeping up with the style changes,” says Greg Ellis, from the consulting firm Kurt Salmon, on why Levi’s was compelled to think of a strategy to keep up with times that changed every fashion season.

In San Francisco, Bart Sights, Sr. Director of the Global Development Network at Levi Strauss & Co., is constantly creating new recipes for the denims. Sights, who also consults for denim mills in India, began getting the workers to load jeans onto inflatable legs to experiment with creating different distressed looks. The best techniques, known as “recipes,” were then replicated on a larger scale.

Over several years, Sights has been searching for a way to give the fabric just the right amount of stretch, in just the right places—enough to flatter the figure, but not so much that they stop looking like jeans. The “denim

scientist” as he calls himself has been experimenting to make jeans that are more comfortable, yet retain their 19th century essence. Take for instance, the ‘contouring technique’ thought up by Sights. Inspired by the makeup industry, Bart used lasers to scratch away the surface layer of indigo, to highlight the centre of the leg so the inner and outer thighs appear to recede into the background, helping the leg look slimmer. The whisker patterns on the thighs are applied in a way that draws the eye away from the edge of the hips, while chevrons run along the legs to give an elongated impression. “There’s not another piece of apparel in the world—probably in the history of mankind—that has remained virtually unchanged and still provides function,” Sights says, adding, “So it was a challenge reinventing something that was iconic.”

Rooted in masculinity and American work-wear, Levi’s have been manufacturing men’s jeans for 140 years - but the women’s business is also the oldest in the world, with more than 80 years worth of jeans for girls in the brand’s history. Chip Bergh, who took over as CEO in 2011, reveals, “We got





"This was what attracted me to the project. My personal jeans slogan is, 'If it ain't tight, it ain't right.'"

— Alicia Keys,
Brand Ambassador, Levis

just about 23 percent of our business from women, so that for me was the biggest upside opportunity."

Women wanted to wear clothes that were great to go shopping in, walking the dog or having tea with the friends. "It wasn't about 'athleisure-wear' that was simply soft, or tight in the right places. It was about advanced materials that enhanced physical attributes, hid the bad features, were long-lasting as well as both stylish and casual. As we saw 'casualization' continue even further, the customer basically told us that they had enough denim until something really unique and innovative came along. So there was a big difference between the product that we had on the shelves and what the women was looking for," admits Bergh.

The new fabrics needed to do many things. "Designers demanded comfortable, forgiving materials that could accommodate different body types. Adding stretch into denim, can make it lumpy or baggy in tight spots, such as the waist and knees. So the material also needed long-lasting recovery," says Sights. Jargons such as "stretch and recovery" and "ping back" pepper his conversation, and it's obvious that Sights is passionate about the resurgence of the iconic brand.

Levi's introduced a new line in 2015 that was inspired by and a tribute to

the original women's jean, Lady Levi's Lot 701, introduced in 1934. The new one - Lot 700 - features the retro "Two Horse" leather logo patch on the rear waistband and adds larger back pockets to accentuate the seat. Another style, Lot 300, uses a more girdle-like design for a different shaping effect. James Curleigh, Levi's President, admits it was a good move to rush some of the material into the market earlier than the official launch, and says, "It helped us get feedback, that was mostly good. The customers loved the skinny and midrise jeans with additional soft and stretchy material. It raised our hopes and later was a reboot for the women's category."

The brand ambassador for the line, Alicia Keys, swears by its "yoga-worthy flexibility" and says, "This was what attracted me to the project. My personal jeans slogan is, 'If it ain't tight, it ain't right.'" The singer goes on to elaborate by saying, "It's so much better because the stretch is really comfortable. I have just had my second baby. You don't have to lie on the bed to get them up. You know, I'm a very shapely woman, and often a lot of fashion does not seem to celebrate a shapely woman. But that courtesy should be present in everything we wear."

With the 700 series classification, it is easier than ever to find the perfect fit, shape and wash: 710 is the Super Skinny; 711 is Skinny; 712 is Slim; 714 is Straight, 715 is Bootcut and 721 is the High-Rise Skinny.

The skinny fit feels like a favourite pair of going-out pants that has found favour with the denim lovers in India too, where it was launched in September last year. Self-confessed denim lover Shilpa Shetty Kundra says, "These are more comfortable than the soft work pants that a business-woman is expected to wear. The fabric is supple, yet it feels like denim. Finally, I can wear jeans to work!"





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Care label®

ELEGANCE IS THE WATCHWORD

In an exclusive interview with Images Business of Fashion, veteran denim designer Leopoldo Durante talks at length about the global denim market dynamics, trends and issues and his own brand Care Label.

By Namita Bhagat

Leopoldo Durante is an Italy-based designer and developer for denim brands and is a veteran with more than 25 years of experience. He has worked with some of the most renowned brands in the industry, viz., See by Chloe, Martelli, Evisu, Hellenic Fabrics, Benetton, Sixty Spa, Versace, Mustang among others, as an expert designer. He went on to launch his own denim brand, Care Label, besides running his own consulting firm, Indigoscape, which gathers different stylistic professionals in order to meet the needs of the jeans and denim industries.

How did you get into denim and what makes you love it so much?

Leopoldo Durante (LD): Since I was a young art student, I was fascinated by the color effect of the jeans. At that time there were still no laundry treatments as we know it now, I realised then that indigo was a lively color that turned in time assuming the peculiarities of the wearer, then I decided to study textile technology to learn everything there was to know about indigo and denim. Since then I have dedicated my entire life to this wonderful world.

Share your overview of the present dynamics of global denim market.

LD: My personal point of view is that contrary to globalization, the jeans market has dramatically divided into three areas: Europe, America and Asia. In Europe, the idea of designer jeans with high fashion image is increasingly dominant, whereas in America, the “premium jeans” concept has taken over the concept of basic, with more emphasis on the celebrities associated with



Leopoldo Durante,
Owner, Indigoscape and Co-owner, Care Label



the brand than the product. However, in Asia, we still have a lot of respect for the heritage and the intimate nature of denim.

I suppose, the big difference now is that, despite attempts from the multinationals to standardize the market, (fortunately) a wide variety of tastes still exist amongst consumers. It also matters because of the different bodies standards in different regions of the world. That is why, even though I believe in global brands, I reason in terms of local style proposals.

How has the market changed through the years? What are the key factors driving the evolution of denim and jeans wear?

LD: The key factor above all is the research and development of new technologies in the textile and ennobling industries; just think of the evolution of the elastic fibers or new resins available.

Getting a denim that had 30 percent of elasticity was unthinkable some five years ago; or using a resin that fixes indigo, allowing washes to achieve the right softness of fabric without losing the raw appearance. The market has changed radically for jeans, especially for women.

According to you, how has innovation impacted the denim industry in the recent years?

LD: As I said before, production and finishing are the two areas that have dictated trends the most. I think we must thank the denim industry for the successes of our brands.

There is a lot of talk of sustainability in denim production these days. How do you see the brands addressing this issue?

LD: Despite of all talk, in practice, the profit often conflicts with good intentions. Often, designers are more attentive and visionary on this issue, but the companies that produce denim, don't really follow their vision. Sustainability is our precise responsibility and each of us will have to engage in pursuing it in everyday life, without great proclamations for commercial use.

Blue jeans are "timeless", but can you tell us about new washes and color trends that might be in vogue in the next season(s)?

LD: The watchword is — elegance. The most difficult exercise in washing is to create something natural and refined. Indigo will again have a green





What could be the next market challenge? What can you predict about the future of denim in the next five years?

LD: The future challenge consists more in innovative sales models. I think that retail will change a lot in the next five years. I think more and more direct sales models, customized to the needs of the customers till to the extreme of the tailor-made. However, on this, I have no competence.

Tell us about your own denim brand, Care Label. How did you come up with the idea? In which markets is the brand sold currently?

LD: The idea behind Care Label was to create a denim brand which takes care of its customers, and above all, a collection that did not glamorize the brand, but rather concentrates on getting intimate with the consumer. My dream was to create a durable brand that will arrive to the future generations as Levi's came up to us.

The brand is currently sold in all of Europe and in Japan, with more than 300 selected doors. Our target customer is the influencer, the denim's lover, everyone who has actually edited the originality for his personal style. Rather than a group of people oriented by the consumption, I think of a set of individuals who share the same tastes, the same passions, the same attitude in their life.

Would you consider launching your brand in India? What is your understanding about the country's market?

LD: We have not yet addressed the Indian market. It is such a vast market and we understand that it's better to go through a local partner. If and when we will find an appropriate one, then we'll decide what to do.

Finally, what are your favorite denim brands?

LD: My own. (LOL)



cast prevalence in accordance with the prevailing idea of sustainability. I furthermore think that for a long time jeans collections will still have, within their proposal, a substantial portion of denim color. For me, colors should always respect the image of nature that surrounds me. So my proposal for the next season is developed on tones of sand, mastic, grey sidereal, olive green, clay, anthracite, golden cork, buttermilk and the essential black, off white and royal blue.

What can you say about denim moving beyond jeans? What potential do other denim fashion products hold?

LD: Chino's fabrics. A large number of articles such as combed and twisted cotton are already in use, particularly in menswear, for this wide trend called "Hipster". I believe the beard will go away, but the way of dressing nostalgic and retro will continue to ply our cities.

Wearable technology is said to be the biggest game-changer in fashion in near future? How does denim fit into this space?

LD: Denim has never changed its nature in more than two centuries, this makes it a myth! Myths do not need wearable technologies! I do not think that people want to wear batteries and chargers in the future; rather they will want to be more and more beautiful. This is the nature of fashion.





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BLUE BLOODED DENIM FABRIC & ITS FUTURE

The continuing appeal of denim apparel, especially jeans, has ensured that the demand for denim fabric remains robust. In turn, robust demand has resulted in sizeable trade flows in denim fabric across markets.

By Gurbir Singh Gulati

Denim's share in organized retail and fashion trade is on a constant increase, and Indian denim producers have kept pace with increasing denim production to meet the demand.

DENIM INDUSTRY IN INDIA & ITS GROWTH

India's present installed denim capacity is around 1326 meters per annum, and is estimated to record at 2000 million meters in the next two to three years.

However, while India's share in the overall textile and clothing trade is 5 percent at present, its share in the global denim trade works out to only 2.5 percent. With the resource advantage of all types of cottons and MMF fibres such as polyester produced in India, the induction of state-of-the-art technology and plants, and the world leadership of companies, India surely has the potential to grab a higher share in worldwide denim production. As per international MNC buyers and trade experts, the denim sector in India is capable of ensuring an average 10 percent per annum growth for the next 10 years. The sector thus offers a good opportunity and



“Bangladesh and Pakistan are fast becoming vertically integrated, taking advantage of duty free access to EU. Nevertheless, we are losing business to Vietnam joining Trans-Pacific Partnership (TPP).”

S K Gupta,
Group CEO, Raymond UCO



“The domestic denim fabric industry has seen a steady growth of 15 percent over the past 3 years. There has been a consistent increase in demand for denim fabric in the last three years.”

Vijay Shrinivas,
Chief - Sales & Marketing, Arvind Ltd.



“Denim fabric Industries are increasing tremendously. The overall demand has also increased compared to the last 2-3 years. The actual demand in the domestic market is 70-75 percent whereas in the export market, it is 20-25 percent.”

R C Panwar,
Jt. President (Marketing),
Century Textiles

timing to both the existing players and the new denim projects.

Talking on the growth levels Vijay Shrinivas, Chief - Sales & Marketing, Arvind Limited defines, “The domestic denim fabric industry has seen a steady growth of 15 percent over the past 3 years. There has been a consistent increase in demand for denim fabric in the last three years.”

Riding high on upbeat demand for denim in India, the denim sector is on a growth path vis-a-vis other sectors of the textile industry; and many existing players are also expanding their capacities. Similarly, new ones are making investments so as not to miss the Technology Upgradation Fund Scheme (TUFS) subsidy and concessions from state governments, and doling out concessions and special incentives to get investments from textile corporates and projects.

R C Panwar, Jt. President (Marketing), Century Textiles highlights on the fact that, “Denim fabric Industries are increasing tremendously. The overall demand has also increased as compared to the last 2-3 years. The demand supply gap is there and actual demand in domestic market is 70 -75 percent whereas in export market, it is 20-25 percent.”

In India, demand for denim apparel such as jeans, shirts, tops, short trousers and jackets, etc., is growing fast in all apparel segments, driven strongly by the urban and semi-urban aspiring youth. In addition, demand which was earlier fuelled by shopping malls is now reaching unprecedented growth as a result of the new trend of online consumerism. This is leading to the increasing share of denim apparels in the fashion segment of retail markets. It can be gauged by the present-day consumption of, on an average, two to three pair of jeans by the urban youth, and which is aspiring to reach not less than six pairs in the near future. Once this happens, the demand will grow 100

percent over the next five-year period, considering that e-tailing itself is growing at 20-25 percent per annum in India due to the young demographic.

Rajan Gupta, National Sales Manager-Denim Fabric Division, KG Denim, agrees to a 15 percent growth pattern per annum which he too has monitored in the last 2-3 years. He says, “Worldwide denim demand has come up from all over the sources not only from ready made garments (RMG) sector but also from home-furnishing and other mix and match products as denim is the most fashionable product in the industry.”

Ashish Bhatnagar, VP Marketing, Malwa Denim, has seen a positive trend in the last 5 years. “There has been huge expansion in the Indian denim fabric sector with almost doubling in capacity from 700Mn in 2010 to approximately 1.2 billion meters currently. This has created a huge demand-supply gap

>



“Currently denim is holding 13 percent share in men’s apparel and 1 percent share in women’s apparel, the growth and demand of denim is rapidly increasing in man and woman segment, the domestic market plays a significant role looking at the growth chart in all verticals.”

S N Modani,
Managing Director, Sangam Group



“There has been huge expansion in Indian denim fabric sector with almost doubling in capacity from 700 million in 2010 to approximately 1.2 billion meters currently.”

Ashish Bhatnagar,
VP Marketing, Malwa Denim



resulting in increased competition and price pressure in the low priced segment. For mid to premium category, the mills which have consistent and elevated products, in line with fashion demand, are still doing well.”

S K Gupta, Group CEO, Raymond UCO identifies that, “there has been a steady growth rate but capacity build-up during the last 2-3 years has been much higher leading to demand-supply mismatch.”

If we consider the growth rate in China and other countries with Indian denim fabrics growth statistics, it reflects that China is suffering from industrial slowdown and tapering out in textile production. Research shows that China

will become a marginal player in the future of textile and global denim trade, while India, Vietnam and Bangladesh are all set to emerge stronger. Bangladesh is more active in denim products, for which it has achieved the export mark of \$2 billion, and has set an ambitious target of exporting denim products worth \$7 billion by the year 2021.

Other countries, in particular, Vietnam, Turkey and Brazil, will also benefit from the falling share of China in the future, and pose serious competition. Vietnam is expected to experience major gains for expanding its exports into the US once the Trans-Pacific Partnership (TPP) trade agreement is operational from early 2018.

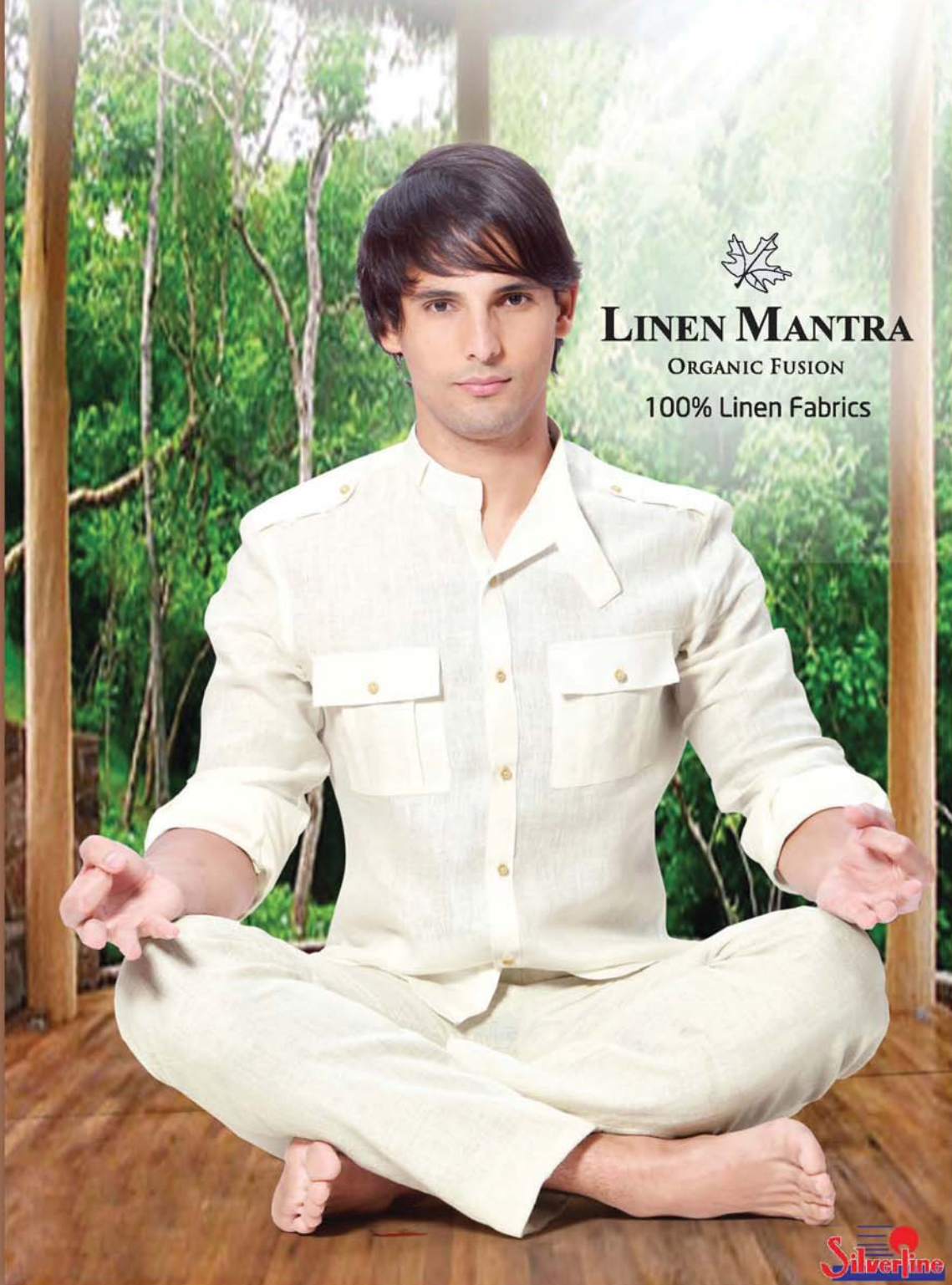
IMPORTANCE OF DOMESTIC MARKET FOR THE INDIAN DENIM FABRIC MANUFACTURERS

On an average, a consumer in India’s urban/semi urban areas consumes two to three pairs of jeans – which is much below than the six to seven pairs on average for the US consumer. Once the rural and semi-urban youth – with improved education, fashion awareness via TV, media and growing internet/online penetration – also joins in the craze for jeans, the average

consumption in India will soon touch four to five pairs of jeans each.

S N Modani, Managing Director, Sangam Group says, “In the domestic retail market denim, consumption is ever growing due to market vibrancy, young population and more affinity to denim. Currently, denim is holding 13 percent share in men’s apparel and one

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percent share in women's apparel. As the growth and demand of denim is rapidly increasing in men's and women's segment, the domestic market will need a complete overhaul."

SK Gupta, Group CEO, Raymond UCO highlights on the fact that a significant 80 percent production is consumed by the domestic market.

Ashish Bhatnagar, Malwa Denim defines, "The domestic retail market in India is one of the largest and very important for all denim fabric manufacturers. However, the unorganized retail segment is pretty huge here which has been growing consistently but lately has been underperforming because of bad fund flows and huge gap between demand and supply. Barring 15-20 percent of the mills in India, rest all are primarily dependent on the domestic market."

Srigopal Jhawar, President and Business Head-Denim Division,

Mafatlal Industries Limited, says, "The Indian retail market is expanding at the rate of 15-18 percent in the last 2-3 years and is expected to grow at the same levels in next 2-3 years. This is very important for denim fabric manufacturers as this is the first step towards manufacturing high value, quality products and this gives entry to the international markets."

There is optimism in the domestic denim market and it is growing significantly in clocking twice GDP growth. Vijay Shrinivas, Chief - Sales & Marketing, Arvind Limited, says, "The domestic market is where we get an understanding the trends and fashion. Hence, it is a very important market in terms of product development."

The Indian market, therefore, has the scope and potential to grow at a fast pace, considering the large young population and GDP growing at average 6.5 to 7 per annum.



Rajan Gupta,
National Sales Manager-Denim
Fabric Division, KG Denim
Limited

The denim fabric industry has expanded its wings to cater to the following three broad categories:

- a) Domestic RMG i.e. Brand sector- It covers a major share and have good consumption of bottom weight qualities in flat finish, knits and doobby. There is activity throughout the year and even more during the festive seasons.
- b) Manufacturer/exporters- Export of denim products takes place for shirt weight qualities. If we look at the bottom weight, India is not as competitive as Bangladesh and China. The quantum is very big and are in consistency for the whole year particularly for American buyers vis a-vis European labels. Major products in demand are tencel and its variants. Finer counts silky denim in denser reed picks with and without slubs/xhatches, etc., are popular.
- c) Home furnishing/upholstery- Under this category denim demand has increased due to its specialty of lower maintenance cost. It has also stood ahead in terms of comfort and its versatility of usage in blue variants for mix and match items.



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COMPARISON BETWEEN INDIAN AND WESTERN MARKET DENIM FABRIC PREFERENCES

Even though the Indian market follows international trends in fashion, it is unique in terms of product requirement. US market is into slubs whereas Indian market is into products with clean look. Indian market is heavily influenced by Bollywood and cricket stars.

Vijay Shrinivas,

Chief - Sales & Marketing, Arvind Limited

Denim varieties consumed in India is almost Lycra/Spandex where as in western markets combination of Lycra and non Lycra is more preferred. Currently in India, knitted dobby, jacquard and all different kinds of structured are consumed.

R C Panwar, JT.

President (Marketing), Century Textiles

The fashion trends come from west as they work one year in advance than India. The Indian mills have become very proactive and aggressive towards innovation and new developments to offer all such fancy varieties as evident in the western market.

Rajan Gupta,

National Sales Manager-Denim Fabric Division, KG Denim

Indian Fashion is little different than international fashion. Indian market adopts fashion from international market but requires slightly higher weights and little dazzle.

Srigopal Jhavar,

President and Business Head- Denim Division,
Mafatlal Industries Limited

The Indian market, especially the unorganized retail, is way too fashionable and trendy as compared to the western markets that are still very sober and conservative. The life cycle of such fashionable products are relatively shorter and trends keep on changing. The western markets are way too conservative, with a product category running across many seasons, sometimes for years too.

Ashish Bhatnagar,

VP Marketing, Malwa Denim

This still can't be generalized, however Indian youth is much more ready to experiment and therefore the varieties of denim that can be sold in India is increasing.

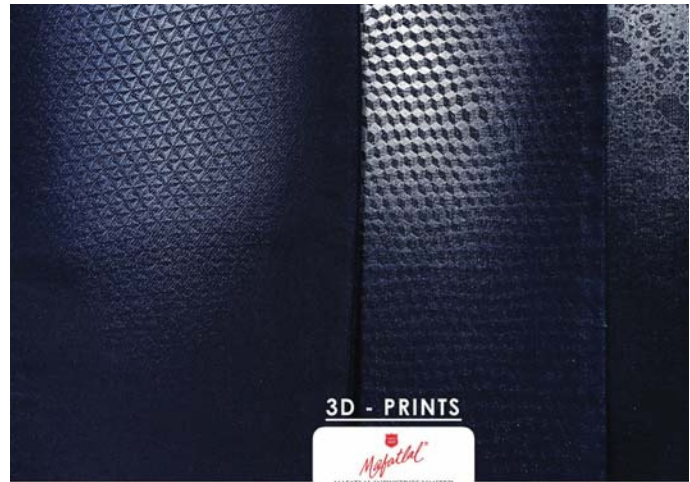
S N Modani,

Managing Director, Sangam Group

Brands are, by and large, the same with styles, sizes, and fits in the Indian market.

S K Gupta,

Group CEO, Raymond UCO



MOST PREFERRED DENIM VARIETIES IN INDIA VS WESTERN MARKETS

Denim is an important piece of the fashion puzzle. It is a well-loved staple for the modern youth. Some of the features of denim fabrics, and the reasons they are loved are as follows:

Color Variety: Unlike in the past when denim was only available in blue, today, the fabric is available in numerous colors. While coloured jeans are a prominent trend that is increasing in popularity, denim trends today are also indicating a strong preference for the traditional hues: deep indigo, gray and black.

Stretch Factor: Denim fabrics with stretch back fibers have proven to be the most popular choice for both men and women chiefly owing to the comfort factor.

Organic Denim: There has been an evident surge in natural fabrics' demand. Natural denim is produced from organic cotton which is free of chemical fertilizers and pesticides as well as insecticides. From spinning, dyeing, and finishing, the whole production process observes ecological standards which help conserve the environment.





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RECENT INNOVATIONS

ORGANIC DENIM

The use of organic cottons is prevalent these days to make organic denim. Besides this, potato starch, natural indigo, etc., are also used to manufacture organic denims.

CORDURA DENIM FABRIC

Another innovation brought in the market is the use of Cordura denim fabric, which has been developed by using LYCRA T400 fiber as well as LYCRA fiber. This fiber offers comfort and feel of cotton denim with long-lasting durability.

DENIM FABRIC BEYOND COTTON

Denim fabric is also manufactured using polyamide, lycra, polypropylene or with polyester and a special bonding with a 100 percent nylon net for a more lively look. This fabric is actually a mix of nylon, cotton and elastane blend yarns.

SILICONE SOFTENING TECHNOLOGY

A new granular softening technology is used to manufacture Denim fabric these days in order to increase its productivity. The specialty of this technique is that it has potentially reduced the use of amount of water, energy, and labor required in the manufacturing process.

There's been a lot of movement in the industry for denim that can be worn as activewear, which makes sense since active wear gave the denim industry a run for its money last year. The competition was for everyday style and comfort, and the industry has seen so many amazing.

>

IMAGES Business of Fashion

LATEST INNOVATIONS IN DENIM FABRICS

Knit-look, super stretch qualities and dobby structures.

S K Gupta,

Group CEO, Raymond UCO

Dobby with heavy structure in knitted denim is in fashion. Printed denim and latest scratching on fabrics and after wash engraving (by laser) are in trend.

Vinod Gupta,

Dy. General Manager, Century Denim (Century Textiles)

Value addition in knit look denim and magic print (denim that has visible print when you wash it down) are a couple of recent innovations that come to my mind.

S K Vijay Shrinivas,

Chief - Sales & Marketing, Arvind Limited

The top recent innovations made in denim fabrics in bottom weights are in bi-stretch, laser printing, printing in special finishes like coating (gel, pigment, foam etc.), tinting in different colours, brushing and peaching, etc. In shirt weights tencel, modal and its variants, tencel/linen and linen/cotton blends are in fashion.

Rajan Gupta,

National Sales Manager-Denim Fabric Division, KG Denim

Faux knits are one product category which has evolved in a big way over the last year. Though this technology concept was innovated by Turkish mills but now India would be having a much wider basket of variations in this category primarily for domestic markets. For international markets sustainability is a big talk of the town these days with organics, BCI, and recycled category product categories having evolved well.

Ashish Bhatnagar,

VP Marketing, Malwa Denim

Recent innovations are in high stretch, soft feel denims for women, bi-stretches for both men & women, printed denims, jacquard denims for both tops and bottoms.

Srigopal Jhavar,

President and Business Head- Denim Division, Mafatlal Industries Limited

The major focus areas of innovation and development are comfort, performance and environment friendliness of different processes. Comfort and fit are very important aspects of denim garments. So, a lot of research has been done to make stretch denims. Elastane fibers are incorporated into the fabric. Spandex is used in weft yarn. Ring and open-end core spun yarns are also used in denim to provide stretch property. To improve performance, synthetic fibers blended with natural fibers are used. Traditionally denim is 3/1 right hand twill fabric. Nowadays 2/1 twill, broken twill, zig-zag twill, reverse twill, Herringbone twill weaves are used in denim fabrics.

S N Modani,

Managing Director, Sangam Group



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“The Indian retail market is expanding at the rate of 15-18 percent in last 2-3 years and is expected to grow at same levels in next 2-3 years. This is very important for denim fabric manufacturers as this is the first step towards manufacturing high value, quality products.”

Srigopal Jhawar,
President and Business Head- Denim
Division, Mafatlal Industries Limited



“Dobby with heavy structure in knitted denim is in fashion. Printed denim and latest scratching on fabrics and after wash engraving (by laser) are in trend.”

Vinod Gupta,
Dy. General Manager, Century Denim
(Century Textiles)

TOP CHALLENGES IN THE INDUSTRY

The denim industry has long reigned as one of the most unshakable sectors of the fashion world. A wardrobe staple throughout the decades, no one really questioned the power of the blue jean basic until the emergence of the athleisure trend graced the catwalks several years ago.

This market shift, along with growing consumer interest in more sustainably, ethically produced clothing, is forcing the denim industry to take stock, innovate and quickly evolve.

Denim is definitely the major fashion trend and helping to break down barriers since jeans are worn by consumers across all of the country's economic strata and in both urban and rural areas. Ashish Bhatnagar, VP Marketing, Malwa Denim lists down two biggest challenges for the Indian denim industry. “Currently specially denims is huge expansion in the pipeline which would further imbalance the demand-supply and secondly the poor money flow combined with poor retail off take in domestic market which effects the entire value chain,” he said.

Another problem which this industry faces is of over-capacities. As S K Gupta, Group CEO, Raymond UCO shares, “Bangladesh and Pakistan are fast becoming vertically integrated, taking advantage of duty free access to EU. We are losing business to Vietnam- joining Trans-Pacific Partnership (TPP). Sudden spurt in cotton prices with no commensurate has also impacted the pricing of fabrics.” He gives an amicable solution to this challenge and adds, “The only way we can win is by offering differentiated products and pushing for Free Trade Agreements (FTAs) with the western world.”

The industry currently requires a greater thrust in denim product

development and innovation and there is a need to develop varied portfolio of denim garments and its accessories. As S N Modani, Managing Director, Sangam Denim currently defines, “We should develop consumer centric denim value chain. There should be industry wide initiative to decode the mind set of Indian consumers and promote denim among the them.”

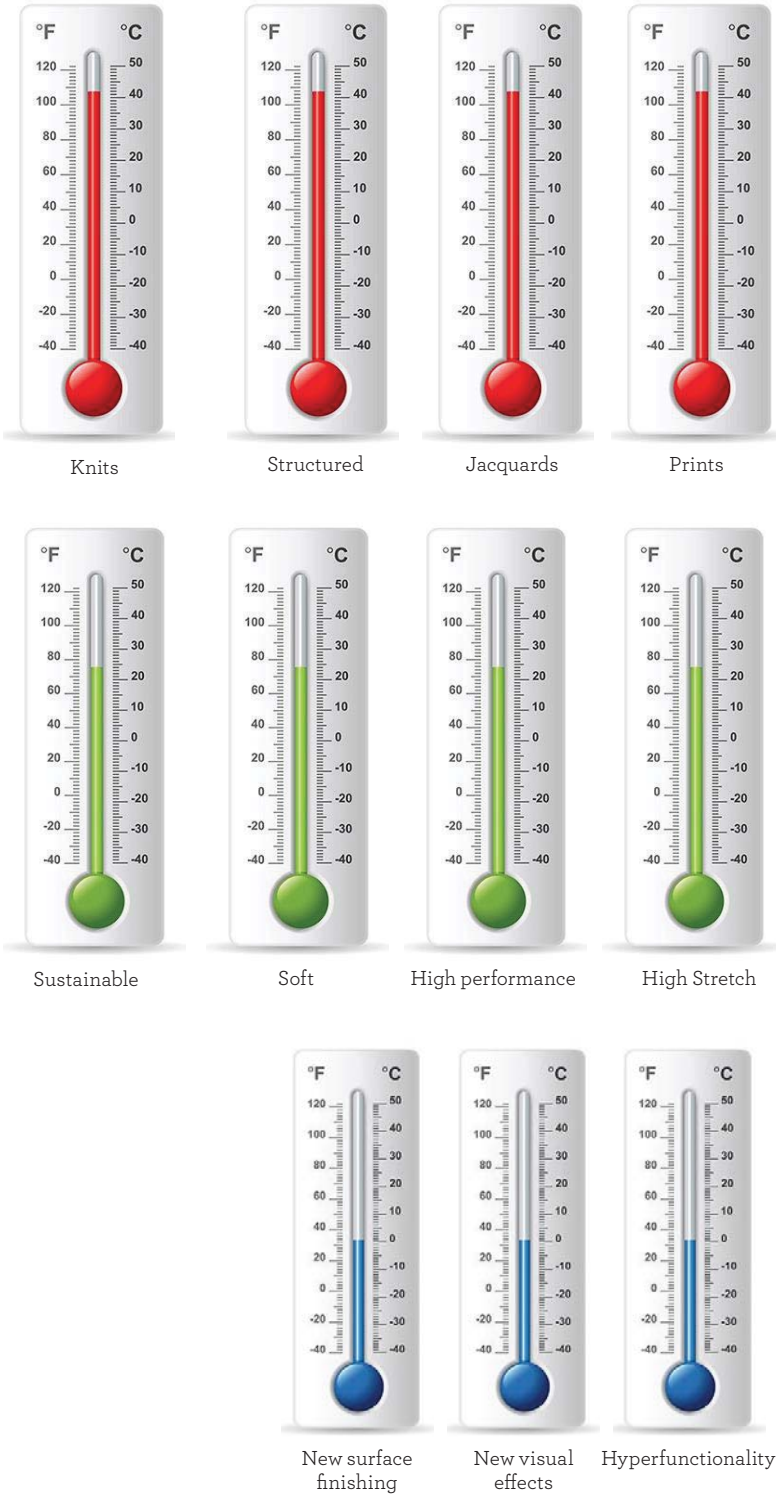
R C Panwar, JT. President (Marketing), Century Textiles debates on supply demand equation as a major challenge which is troubling the industry. He is of the view that we can only overcome this with product innovation. “Make new innovations by using different weaves. New blends in denim like viscose, modal, soya fibres, hemp fibre, milk fibre, sorona fiber and many other man made and natural fibers.”

Vijay Shrinivas, Chief - Sales & Marketing, Arvind Limited points out to the situation where denim mills are continuously adding capacities and proportionate investments are not happening in the garmenting. He says, **“This industry is labour intensive and can create significant employment for our citizens. Perhaps it is time government made an intervention. A vertical capability in India will be a significant competitive advantage and can bring in significant revenue to India. FTA with US and Europe markets will increase our competitiveness.”**

With the growing trend of fast fashion and cotton pricing fluctuations, the industry is also facing issues as Srigopal Jhawar, President and Business Head- Denim Division, Mafatlal Industries Limited points out. “Frequent changing fashion, and unstable cotton prices are major challenges being faced by the industry. Focused product innovation is required. For unstable cotton prices there is no solution as this is due to the demand and supply gaps internationally,” he adds.

DENIM FABRIC TRENDOMETER

Figure: The trendometer illustrates the latest trends in denim fabrics along with new finishes. The upcoming trend reflects to provide more diversified and functional fabrics. Sustainability is the key factor with many Indian denim fabric manufacturers who are keen on using zero hazard chemicals and dying process with less water discharge.



VISION FOR FUTURE

India offers numerous advantages to denim manufacturers. It is among the handful of countries that has a presence across the textile value-chain, from cotton to garments. In addition, it has a huge skilled workforce and offers quality products at competitive costs. To remain competitive globally, most textile companies have adopted global standards of safety and environment compliance.

India is treated globally as one of the “better fabric” manufacturing destinations and are very strong in following the international trends with quicker product developments (though still far away from using the term product innovators). As Ashish Bhatnagar, V P Marketing, Malwa Denim, explains, “In terms of high-end products, many mills in India make top end denim fabrics. For example Malwa makes a Indigo Wool range (patented technology) which ranges from \$15/yard to as high as \$60/yard as well. Other premium products using expensive cotton/fibres like Supima, modal, Tencel, linen are pretty common and available with many good mills in India.”

Despite Indian denim manufacturing industry witnessing rapid growth in the last 4-5 years, technological expertise is still an issue. The Indian denim fabric industry has defiantly yielded results and showcases its capabilities. As S K Gupta, Group CEO, Raymond UCO correctly puts it, “India’s branding needs a makeover.”

With denim coming enormously in vogue with fashion conscious seat of society, this area possesses a high potential and has a great demand, which needs to be exploited with the branded “Made in India-Denim Fabric”.



ARVIND: *A champion of innovation*

About the company:

Arvind Limited is now widely getting recognized as a lifestyle and apparel major, a smooth transformation from its image as a textile giant or a denim king since it was founded in 1931.

The foray into the sector of new-age fabrics has brought global recognition for Arvind's shirting, khaki and knitted fabrics. Its growing presence in the domain of ready-made garments - jeans, shirts and knits - has further placed Arvind on the top as a one-stop solution provider for leading global and domestic apparel brands

Domestic clientele:

They supply to top brands in India like Levis India, VF (Lee & Wrangler), Killer, US Polo Assn, Flying Machine, Future Lifestyle Fashions, Ed Hardy, Spykar, Pepe, etc., to name a few.

International clientele:

In the International market, they cater to most of the large global brands including Gap Inc., Levis, VF Corp, H&M, M&S, C&A, Zara, Jack & Jones, etc.

Production capacities and expansion plans:

Arvind has a production capacity of 100 million meters annually.

Product varieties:

The company notes that the domestic market is now more inclined towards stretch. Hence, along with stretch denim, the company is also concentrating on structures and textures, and value added finishing treatments like coatings and over dyed. Arvind is also manufacturing denim blends which are majorly used



Vijay Shrinivas,
Chief-Sales & Marketing,
Arvind Limited

by women's segment, including linen, tencel and viscose.

Since brands are increasingly becoming more environmental conscious; the company has initiated a lot of sustainable products like Organic, PCW, Natural Indigo Denim and NEO (proprietary piece dyed technology which consumes 22 percent less water compared to a normal dyed process).

New collections for the forthcoming season:

The company is focusing more on trends in the forthcoming season by developing more value added products.

Product expansion plans:

Arvind values design, innovation and sustainability and maintains a strong focus on fashion products.

Market expansion plans:

The company has a strong presence in all the major markets in India. However, it wants to increase its penetration in tier-II markets.

Turnover in the last FY (15-16):

Arvind Group's turnover for FY (15-16) was ₹5,407.26 crores.



CROPTOP AND CONTOURED

CAGR growth over last 3 financial years and future aim:

CAGR has been around 10 percent. The company is aiming to increase their presence in retail and e-commerce market, while maintaining the revenues in the textile manufacturing businesses.

Change in demand for the denim fabrics:

The demand for 3/1 spandex multi count products has gone down whereas structures and knits have seen an upward trend in the domestic market.

Changes in price of denim:

Although prices have been steady over the past 3 years, Arvind concludes that with increase in the commodity prices in general including cotton from the past few months, it is reasonable to expect an upward price movement in the near future.

Impact of stretch denim:

The share of stretch products has increased from 70 percent to 90 percent in the past 5 years in its product portfolio.





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CENTURY DENIM: *A trusted name for quality*

About the company:

Century Textiles & Industries Limited, Mumbai was incorporated in the year 1897. Till 1951, the company had only one industrial unit. But after that, the company made rapid progress in various fields. In 1997, Century Denim, a vertically integrated plant equipped with sophisticated and high-tech machinery was set up. Located at Satrati village in Madhya Pradesh, about 100 km from Indore and 510 km from Mumbai, the ultra-modern plant is comparable with the best in the world and boasts of an optimum mix of high-tech machinery, high-calibre personnel and an environment-friendly work culture. Among other cutting edge machinery, the plant is equipped with BARCO hardware and functionalities, biological effluent treatment system and reuse plant with zero discharge.

Domestic clientele:

Fabric manufactured by the brand is used by almost all the popular denim brands of the country. Arvind Brands, Madura Garments, Sin, Sunnex, Mexico, Pantaloons, Mynta, etc., are a few of its domestic clients.

International clientele:

K-Mart Australia, Bonton USA, Max Dubai, Dickies, Target, Next, etc.

Product varieties:

The company manufactures an extensive range of denim fabrics (both bottoms and shirtings) in 4.00 to 15.75 ounce.

Production capacities and expansion plans:

Presently, in full capacity, the production volume is 17 million meters per annum. As of now, there are no future plans for expansion.

New collections for the forthcoming season:

The company has created knitted denim-3/1 weave with tighter construction and has developed new products by using different fibers.

Product expansion plans:

Century Denim has always been a frontrunner in product expansion from time to time, and with changing trends.

Market expansion plans:

The company is always in the look out for opportunities to explore different markets.

Turnover in the last FY (15-16) :

Current turnover is over ₹250 crores.

CAGR growth over last 3 financial years and future aim:

The company, with its strong

fundamentals in manufacturing denim, has always been vying to strengthen its product profile so as to target top brands in the fashion circuit. Century Denim has been growing at a CAGR of 5 to 8 percent annually.

Changes in demand for denim fabrics:

The prediction and change in denim fabric is towards print laser printing.

Changes in prices of denim:

The company is of the opinion that the price movement is specific to a particular product category.

The impact of stretch denim:

Stretch denim fabric constitutes 80 to 85 percent of the company's product portfolio.



R C Panwar,
Joint President-Marketing,
Century Textiles



Vinod Gupta,
Deputy General Manager,
Century Textiles



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K G DENIM: *Raising the bar for innovation*



Rajan Gupta,
National Sales Manager-Denim
Fabric Division, K G Denim Ltd.

About the company:

K G Denim started almost two decades ago and has had a successful journey. The company has commanded a strong positioning right from its inception, both in bottom and shirt weight qualities, covering all segments when there were only a handful of denim players in the industry. The company has lately diversified majorly into shirt and top end bottom denim fabric products which are cost effective and value for money. It has reduced its involvement in mass scale domestic market and is focusing its strength to offer quality oriented products for a niche market.

Domestic clientele:

K G Denim supplies to all major brands including, Levis, Lee, Wrangler, Killer,

Mufti, Pepe, Numero Uno, Cantabil, etc.

International clientele:

Target, Belk, Norstrum, JC Penny, A&F, Tommy Hilfiger, Marks & Spencer, C&A, Next, Debenhams, Esprit, etc.

Production capacities and expansion plans:

K G Denim's present annual capacity is 30 million meters (26 lakh meters/month) and has plans to add up one more dyeing range of about 10 million meters in the years to come. It also plans to add specialised machinery in laser printing machines for pigment khadi/discharge printings, foam coating machines for yarn dyeing and indigo dyeing along with shirting machines.

Product varieties:

The company has its present product varieties in bottom weight denim fabric with flat finish, knits, structured dobby with special finishes like tinting, and coatings under different colour variants. It also has a shirt denim fabric portfolio where it has Tencel and its blends, stretch, dobby in fine counts and silky with/without slubs/xhatch, etc.

New collections for the forthcoming season:

The company is concentrating on bi-stretch, laser prints in bottom weights like Tencel and its blends with linen/cotton, cotton/Tencel/stretch, extra stretch products meant for jeggings, etc.

Product expansion plans: The company has plans to shell out ranges of distinctive products with unique usage, keeping in mind the Indian climatic conditions.

Changes in demand for denim fabrics:

K G Denim has registered an increasing growth in Tencel qualities in the recent past. Infact, the company claims to be the first one to introduce Tencel products in India which were met with very good response.

Changes in prices of denim:

The company is of the view that there have been fluctuations in raw material prices due to change in government policies from time to time. But this has not majorly affected the pricing of the finished product.

The impact of stretch denim:

K G Denim has been offering a basket of stretch products since a long time. With consistent focus towards quality in terms of shrinkage/skewness and other parameters which mark stability in stretch products even after undergoing aggressive washes.





Product Range : • Slub denim • Stretch denim - Lycra • Multi Count Denim • Over-Dyed denim
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MAFATLAL DENIM: *Fashion trendsetter in denims*



About the company:

The denim division of the Arvind Mafatlal Group was started as a joint venture in 1996 with Burlington Mills Inc., USA, as Mafatlal Burlington Industries Limited. Subsequently, the Arvind Mafatlal Group bought Burlington's equity in the JV and the company's name was changed to Mafatlal Denim Limited. In May 2013, Mafatlal Denim Limited (MDL) was amalgamated with Mafatlal Industries Limited. Mafatlal, as a company, has been into textiles since 1905 and is a well known brand in textiles all over the world. Apart from denim, the company is into school uniforms, printed and yarn dyed shirting, linens, whites and home textiles.

Domestic clientele:

MDL sells to VF-India, Killer, Mufti, Pepe, Reliance Trends, Myntra, Indian Terrian, USPA, I-Zod, Elle, Kraus, Stori Fashions & Madura Brands in the domestic market. Other than this, they are also big suppliers to Pantaloons and the Future Group.

International clientele

The company is a nominated vendor to VF and H&M. Besides, they also

sell to brands like Ostin, Jack & Jones, Joules, Boden, C&A, LIDL, Orsay, Next, George, Diesel, Kaporal, JC Penny, Sainsbury, UCB, Celio, Primark, Tommy Hilfinger, etc.

Production capacity and expansion plans:

Currently the company holds a capacity of 30 million meters annually and plans to expand it to 50 million meters annually by 2018.

Product varieties:

The company has a strong hold in high-end fashion denim fabric varieties for both men and women. MDL is increasing their product line in light weight denim for tops. The company claims to hold a top position in knit looks and printed denim in India.

New collections for the forthcoming season:

The company works on two broad seasons and is currently working for the Autumn/Winter 2017-18 collection.

Plans for exploring new markets in India and abroad:

The company has recently started their



Srigopal Jhwar,
President & Business Head-
Denim Division, Mafatlal
Industries Ltd.

offices in Bangladesh and Vietnam and is aggressively working in the USA, UK and Latin America.

Turnover in the last FY (15-16) and its aim for the next 2-3 years:

The company's denim business was approximately around ₹400 crores in last fiscal year and it is aiming to achieve ₹500 crores in the current fiscal.

CAGR growth over last 3 financial years and future aim:

MDL is growing at a CAGR of 10 percent over the last 3 years. Their target is to grow at 20 percent in the next 3 years. The company is focused in providing high quality denim to all its buyers.

Changes in demand for denim fabrics:

As per the company's spokesperson, knit look denim, print denim and light weight shirting are in demand.

Changes in price of denim:

Price revisions in denim industry are correlated with cotton price movements and cotton prices have been very volatile.

Impact of stretch denim:

MDL has a portfolio of approx 80 percent in stretch denim fabric. The company view that both men and women wear require stretch denims and now the trend is power stretches and bi-stretches.





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MALWA GROUP:

Spinning a success story beyond fabrics

About the company:

Malwa Group forayed in cotton denims in the year 1997. Since then, there has been no looking back and Malwa's presence in denims has grown from strength to strength. In sync with the emerging trends in denim, Malwa's in-house design team works closely with leading international design consultants to come out with an array of breathtaking designs and finishes, a year ahead for every season.



Ashish Bhatnagar,
Vice President-Marketing, Malwa Denim

In the year 2006, the fabric capacity was forward integrated into garment manufacturing. It then grew into a fully vertically integrated company from cotton to final jeans, within the same premises.

Domestic clientele:

The company works with most of the reputed denim brands in the domestic market, like Levis, Killer, Integrity, Lawman, Pepe, US Polo Assn., Mufti, Being Human, Pantaloon, Future Group and many more.

International clientele:

International clients include Ralph Lauren, Zara, Jack & Jones, H&M, etc.

Production capacities and expansion plans:

The company has a production capacity of 20 million yards per annum, currently. Malwa also has garment manufacturing facilities in India and Jordan with capacities of

2MPPA and 3 MPPA respectively. As of now, the company has no plans of expansion.

Product varieties:

The company has a huge product mix catering to various segments and markets. Ranging from 6 to 14 oz, the product range includes basic denims in open end to ring/multi-count products, cotton stretches and various blends using modal, linen, T-400, dual core and many others. Sustainable products using recycled yarns, organic and BCI cotton are also a key part of its product mix.

New collections for the forthcoming season:

The new collection features many high performance and soft fabrics together with a huge collection in faux knit indigo fabrics which is in vogue.



Product expansion plans:

Currently, the company is consolidating its current capacities and expanding in terms of markets and customers. Expansion in terms of products has always been on the cards with the company depending on fashion trends and market feedback.

Turnover in the last FY (15-16) and its aim for the next 2-3 years:

Malwa has closed a turnover of ₹500 crores last year and aspires to grow every year as per industry standards.

Changes in prices of denim:

Malwa has seen that the price band in the denim fabric category has been quite stable, although it should have been moving upwards now due to the increase in raw material prices.

The impact of stretch denim:

The company has a major 90 percent product mix in stretch denim fabrics.



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RAYMOND UCO DENIM: *Lords of ring denim*

About the company:

Raymond's denim story began in 1996. Focusing on quality, innovation and the creation of exclusive products and designs, the company has now successfully embossed its name amongst the top producers of speciality ring denim in India.

In August 2006, the company entered into a 50:50 joint venture with European denim major UCO NV to form a global denim powerhouse - Raymond UCO Denim Pvt. Ltd., engaged in the business of manufacturing and marketing of denim fabrics.

Raymond UCO Denim is a formidable combination of product innovation and design and possesses strong manufacturing expertise, especially in dyeing and finishing. The company is considered as one of the first choice of most denim brands throughout the world.

Raymond UCO Denim has been operating primarily in the premium segment with facilities in India and Romania.



S K Gupta,
Group CEO, Raymond UCO Denim

Domestic clientele:

The company is supplying fabric to all the major denim brands in India.

International clientele:

It also caters to the most popular brands in the international market.

Production capacity and expansion plans:

Raymond UCO Denim has a present capacity of producing 44 million meters per annum. And the company plans to enhance this by 20 million in the next 2-3 years, depending on market situation.

Product varieties:

Hi-fashion cotton ring denims.

New collections for the forthcoming season:

Raymond UCO Denim has always strived to give differentiated products for various global markets.

Export and market expansion plans:

Today the company exports 50 percent of its production and continues exploring new markets.

Turnover in the last FY (15-16) and aim for the next 2-3 years:

The current turnover is around ₹900 cores. Raymond UCO Denim plans to cross ₹1000 cores in this year.

CAGR growth over last 3 financial years:

The company is registering a CAGR growth of 7 percent in value terms due to capacity constraints.

Changes in demand for denim fabrics:

There has been no major change which is seen. However, the company predicts that there would be fierce price competition in the market.

Changes in price of denim:

The company has witnessed a major price decline in the last 3-4 months due to over-capacity at home and fabric manufacturing build-up in Bangladesh.

Impact of stretch denim:

Raymond UCO Denim has a significant portion of production dedicated to stretch denim.





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S N Modani,
Managing Director,
Sangam Group

SANGAM DENIM: *Moving ahead with strong fundamentals*

About the company:

The company forayed into denim fabric production in 2007 with a capacity of producing 8 million meters annually and graduated into a branded denim manufacturer by 2012. From 2012 to 2014, the Sangam Group undertook massive developments to increase the production capacity to 32 million meters per annum. The company has already planned to increase the production capacity to 40 million meters by the current fiscal year and is likely to add one more line into its existing 5 lines by increasing another 8 million meter capacity in the coming year. Ever since its inception, the denim segment has continued to offer high growth and a key segment of expansion for the company.

Domestic clientele:

Indigo Nation, Raymond, Future Group, Pantaloon, Killer, etc.

International clientele:

Mavi Turkey, L C Waikiki Turkey, Tesco & Primark (through garmenters).

Production capacities and expansion plans:

The company's present production capacity of denim fabric is 40 million meters per annum. The company plans to double the existing capacity through internal accruals and external finance.

Product varieties:

Sangam's denim fabrics come in 5 oz to 15 oz and in varied qualities like open end slub, ring slub, silkies, mix count, multi count, stretch and poly weft.

New collections for the forthcoming season:

The company is introducing exotic fiber blends of excel, Tencel, modal and linen. Sangam Denim is further developing a range of shirting collection in plains, designs and introducing comfort coating peach finish fabrics.

Product expansion plans:

Sangam Denims plans to increase their capacity to make wider width fabric in medium and lighter weight category.

Market expansion plans:

The company has plans to increase the distributor base for the domestic market and cover more brands. It also is vying to have brand associations and approvals to be part of supply chain for global brands.

Turnover in the last FY (15-16):

Turnover in FY 15-16 was ₹1,504 crores.

CAGR growth over last 5 financial years and future aim:

The company's CAGR growth over the last 5 years has been 3.2 percent

in yarns and 13.9 percent in fabric segment. Sangam Denims continues to witness challenges particularly from the Chinese slowdown and its aggressive dumping. However, the company predicts the outlook for 2016-17 where the situation looks promising due to recent uptick in realizations. With additional capacities going on stream in the current fiscal, the company expects robust performance.

Change in demand for the denim fabrics:

The company witnessed a significant shift from rigid to stretch over all segments of denim.

Changes in price of denim:

In the last 3 years, the Industry has witnessed overcapacity of around 15 percent to 20 percent, which in-turn has resulted in stiff competition. The companies which are working on value for money products and maintaining customer oriented strategy will survive in the market.

The company views that prices are more or less constant. However, with increase in raw material prices, a likely upward correction is expected.

Impact of stretch denim:

Stretch denim now contributes to almost 50 percent of Sangam Denim's overall sales. Infact, for the domestic market, stretch is more popular and has pushed demand in the men's segment as well.





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Pinkesh Shah,
Managing Director,
Kapil Rayon (India) Pvt. Ltd.

Established in 2000, Kapil Rayon (India) Private Limited specializes in shirting fabrics which it markets under the brand name Fab-Berry.

The company, initially started with an annual production of 1 million meters of fabric, gradually undertook radical changes in the sales network to constantly expand its business. In an exclusive interview, Pinkesh Shah, Managing Director, Kapil Rayon (India) Private Limited, talks about the company's vision and how they have evolved in their creation.

By Gurbir Singh Gulati



KAPIL RAYON

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EXCERPTS OF THE INTERVIEW

Tell us about your journey and you brand's product portfolio and its latest collection.

Initially, there were many hurdles but as time passed, we achieved steep increase in sales adhering to ethics and devotion. In terms of our product portfolio, we produce fabrics for garment manufacturers, exporters and for stores. We produce 100 percent cotton, blended, tencel, modal viscose and linen fabrics. In our products, we have qualities like checks, stripes, chambray, dobby weaves, solids, poplin, satin and twills. Presently, our design team is working on summer concepts and designs. Our fabrics are produced on latest European weaving machines supported by cutting edge auxiliary machines.

What about product category expansion plans?

Our future plans are to increase our weaving strength along with fabric processing or can say, to make composite.

Tell us about your present capacities and how are you trying to increase this in the next 2-3 years.

Presently, we have capacity of 10 million meters per year and we are expecting growth of 25 to 30 percent in 2016-2017. By 2017, we expect that our weaving capacity is going to increase by 5 million meters annually.

Tell us about your ratio/share of sales in retail stores and readymade garment manufacturers.

We supply 60 percent to readymade garment manufacturers. About 40 percent of our fabric sales comes from retail stores.

Which brands are you supplying to in the domestic markets?

We supply to almost all leading brands like Oxemberg, Classic Polo, Vitamins, Otto, Turtle, Pan America and many more upcoming and established brands.

Have you noted any change in the buying behaviour of fabric manufacturers in terms of quantity/quality/time period/designs and variety?

Day by day, there is an increasing demand for good fabrics which has to be with new designs concepts and colours. We are one of the preferred names which stand for quality and our market share is increasing.

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WHAT IS YOUR WASH?

What is it about washes that attract shoppers to a pair of denim jeans or a denim top-wear? But still, we are yet to see marketing initiatives by any brand led by the wash they offer. Do brands pay as much attention to highlight the washes they offer as much as they do to the fits or new collections? We speak with a few leading brands to find out about their views on the dynamics of washes in denims.

By Zainab S Kazi

The dynamics of washes

Siddarth Kumar, Director, Resil Chemicals & Ng Technologies, aptly sets the context for the story stating, “To understand denim washing, we not only need to understand what look the brand is going for but also whether the brand would want to impart any functionality to the product. On the styling front, what we have noticed is that styles incorporate some traditional washes like mid washes, marble wash, whiskering, etc., that remain evergreen across brands. A rising trend is to add functionality to denim, adding comfort and ease of use to the wearer (e.g. Wrangler’s Silvershield range of jeans and Levi’s Commuter series). A trend that was promising but still has not lived up to its promise is

laser finishing, primarily because of the high cost of investment and low production output in comparison to conventional methods.”

Sameer Patel, Chairman, Deal Global Fashion Pvt. Ltd. further adds, “Stone wash, acid wash, sandblasting, etc., are a few of the denim washes that gave rise to the concept of denim wash in early 80s and will always remain in talks when it comes to trends in denim wash.”

Spykar has been one of the early brands in India to be exclusively devoted to denim jeans. To hear it from them on the dynamics of washes, we asked Siddhartha Wilson, Production Head – Denims, at Spykar

to share his views. He pointed out, “Enzyme wash, stone wash, bleach wash in combination with the used look continue to serve the purpose of authentic denim. Parallel to these, the fashion look washes like rag wash, resin 3d, frayed and weathered, discharge and color spray washes in combination with used look are being made.”

In a short span of time, Being Human Clothing has spread itself across the country with its EBOs. It was interesting to have Saurabh Singh, Design Head (Men’s Wear) for Being Human Clothing share his views on the topic of washes. “Raw/rinse wash continues the heritage authentic vibe for both denim and top wear. Authentic



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Saurabh Singh
Design Head (Men's Wear), Being Human Clothing



Sameer Patel
Chairman, Deal Global Fashion Pvt. Ltd.



Neha Shah
Senior Marketing Manager, Pepe Jeans

Evergreen Iconic Washes

- Stone Wash • Acid Wash
- Rinse Wash • Mid Wash • Light Wash
- Sand Blasting • Enzyme Wash

vintage look washes right from full bleached to mid and dark tones with and without ripped-and-repair are the best bet for any denim wear brand," he said. Talking about the trend being witnessed at Being Human, he shares, "Majority of our focus is on authentic vintage look apart from which we also experiment with new wash techniques which are introduced each season."

Kamakshi Kaul, Head of Design - Women's Wear at MAX, shares her take, "Dark rinse is the most commonly accepted wash as well as most versatile. In top-wear, mild washing is preferred to create a soft feel and seam ripple effect." Talking specifically about MAX, Sandeep Khapra, Head of Design - Men's Wear at MAX shares, "MAX has a sufficient offering in rinse and mid wash in both regular and slim fits but MAX, being a fashion inclined retailer, offers a lot of trendy washes and does not overly rely on these classic washes."

According to Neha Shah, Senior Marketing Manager, Pepe Jeans, the

classic wash remains an evergreen choice for both top and bottom wear. Mid-saturated (or medium) denim and dark jeans are good all year round. Talking about Pepe Jeans, she shares, "At Pepe Jeans we also have a special line consisting of vintage wash denims called Heritage Collection. The washing processes help create the vintage look as the color levels can be changed and tints added to give different color levels. A majority of the denims from this collection have also undergone finishing processes to give the 'worn in vintage look'. The vintage look is achieved by adding PP Spray (a kind of bleach), hand scraping, whiskering and grinding."

Changing dynamics seen in the last 3 years

Key Highlights:

- Blue, black or grey colors enjoy evergreen status.
- Laser technique is witnessing an upsurge
- Ripped denims shall be the focus for the future
- Stretch in denim fabrics has gained unparalleled momentum
- Authentic vintage washes shall always have a loyal fan base
- Towel wash shall witness a decline



Drawing an insight on the changing dynamics witnessed in the last 3 years, Khapra points out, "For the last few years, stretch in denim fabric has gained a lot of ground because of the slim fit trend. And stretch in the denim fabric has to a large extent guided the choice of washes also. Also knit denim has become quite a popular choice for jeans and joggers. It is quite a delicate fabric to take the beating that a regular denim fabric can bear in mechanical washes. Mechanical washes have made way for more use of chemical washes such as bleach wash, acid wash and laser treatments, because these are more suitable for stretch fabrics which are prone to damaging on rigorous mechanical processes."

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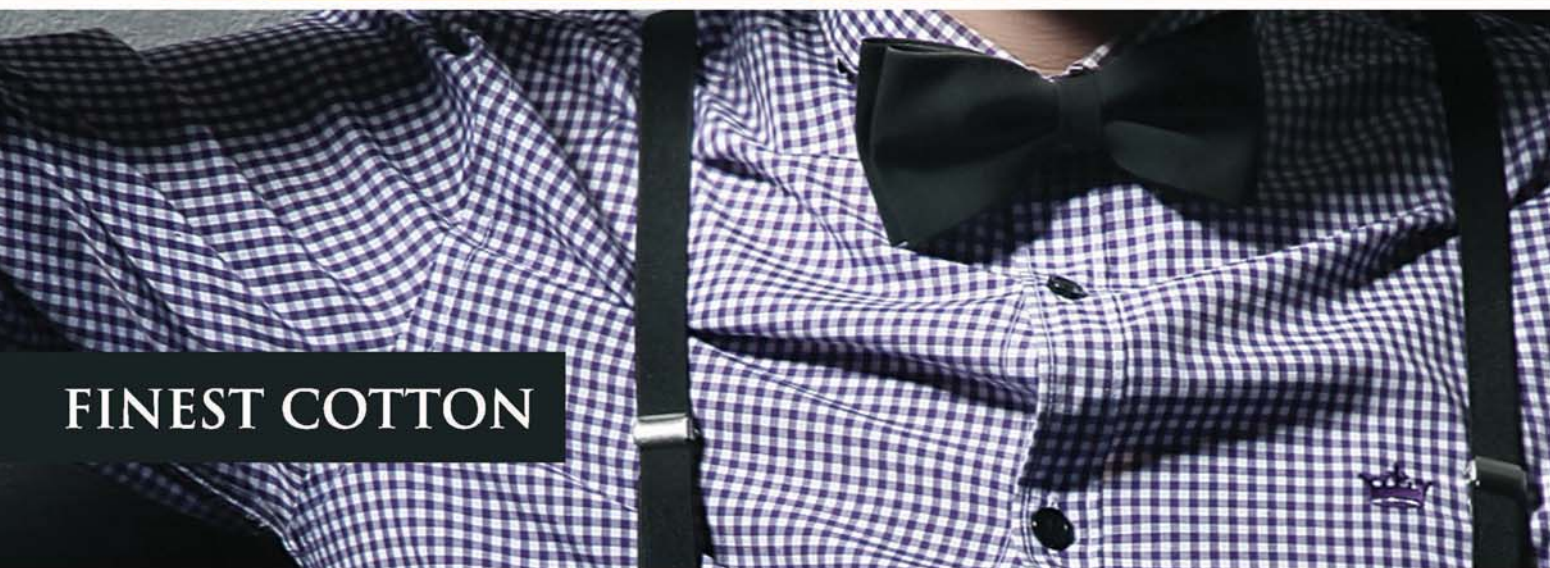
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**Kamakshi Kaul**

Head of Design - Women's Wear, MAX

He further adds, "The effects which were previously created by whiskering, sandblasting started to be achieved through the laser technique." According to him, laser technique also gained popularity because of less use of water for denim processing. He adds, "With the trend of ripped denims gaining ground and set to become mainstream, non stretch fabric might find favors with designers."

**Sandeep Khapra,**

Head of Design - Men's Wear, MAX

According to Saurabh Singh, in the last three years, the stand out wash direction was the resurgence of heavy ripped and repaired denim in mid and light tones. The washes that have almost ceased to work are washes with heavy tinting and fabrics with red or green casts; this is so because the casts become very prominent after wash. He adds, "Another wash that did well in the last three years was the towel wash/ fancy acid wash which has now reached its saturation point and will start to decline in consumer preferences."

Taking us through the basics of classic washes with their functionality and acceptance in the market, Sandeep Khapra, Head of Design - Men's Wear at MAX shares:

- Rinse wash, mid wash and light wash have been the evergreen washes for denim and always form the core range.
- Other fancy washes or treatments on offer in the market are based on trends.
- The basic purpose of washing a denim is to make the garment wearable as it takes the residual dye out from the jeans and helps stop the color running.
- Also the wash gives a softer hand feel compared to a raw jean but still maintains a clean appearance.
- Rinse wash gives a dark blue color and has a slightly rough touch
- Mid wash gives a mid-blue color and softer touch
- Light wash gives a light blue color and softest touch of the three.
- Classic denim players have always offered a large width of offering in rinse and mid wash. Mid wash is generally the most accepted wash. This gives an aged effect but not too faded. And denims in this wash are the most versatile and can be teamed with most colors in shirts and t-shirts.



Talking about Being Human, he shares, "At Being Human Clothing, we have experimented with many wash techniques like rip and repair, acid washes, authentic vintage washes and even base fabric colours. Apart from classic indigo tones we have extensively worked on black and grey tones. The authentic vintage look has done very well for us for both men's wear and women's wear."

Siddhartha Wilson shares, "In denim washing, nothing has been discontinued in absolute terms. The treatments continue to be in use in some form or the other. What we have observed since the past few seasons is that resin 3D to give a creased effect, rag wash to get the high low washed effect and laser discharged motifs are doing extremely well."

Khapra shares the trend seen at MAX. He said, "Distressed denims with mild nicks and damage has worked well for men's denim. Light blue acid washes on both woven and knit denims have been well accepted and have shown encouraging sales figures."

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Siddharth Kumar
Director, Resil Chemicals &
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Siddhartha Wilson
Production Head - Denims,
Spykar

Contrary to what we have read above, according to the spokesperson from Jack & Jones, demand for denims with whiskering and sand blasting has gone down as the trend is catching up towards clean denims with rinse wash or mild enzyme wash. He adds, "Abrasion with acid washes continue to be the favorite amongst the college going youth whereas denims with clean rinse wash is gaining popularity as a work wear option. Men have started showing preference towards cleaner denims especially grey cast with just a good wash, whereas in the women's denim category, there is a growing interest in ripped denims, especially knee slash denims."

Kamakshi Kaul adds, "The milder washes are most accepted and the dark rinse wash has seen a very good response from our customers."

At Jack & Jones it is the rinse wash and mild enzyme wash that have been a staple for denim top wear. Especially, for bottoms, distress has been in trend for achieving the worn out look. It is usually complemented by acid wash or enzyme wash.

Washes – men and women

Where jeans have predominantly been more of a men's wear clothing in the past, things have changed since last two decades with each brand having a strong women's wear range as well. Saurabh Singh points out that, "For women, wash choices are limited, as women's jeans category is more complicated with different fits for different body types. Also the need for stretch and flexibility in the fabrics used limits the kind of washes that can be done on these fabrics."

On the washes that are doing well in men's wear, Neha Shah points out, "White jeans were last a 'thing' in the mid-2000s, they've been consigned to obscurity in the years since; however for 2016, though, they're back with a bang. Fuller jean silhouettes featuring heavy distressed washes, ripped details and whiskering effects are some of the key elements that are preferred by men this season." In the women's wear range, Shah elaborates on the range that is being made available this season, "Jeans for women from Pepe's latest collection consists of acid wash denims, light wash denims with a worn in look, as well as clean dark indigo jeans that are perfect to pair with work wear." As for men, she shares, "The Pepe Men's Heritage Collection consists of jeans that is reworked and repaired and



crafted for a lived-in and loved look. Classic stone wash and natural worn-in effects remain the key treatments."

To conclude...

Going by the above, there are handful of washes that are doing well for each brand and not much innovation has taken place off late. What perhaps needs to be highlighted is that along with washes, the way the denim is processed needs some attention. Sharing a concluding remark, Kumar says, "One trend we see is the growing awareness of consumers in the US and EU who are aware of how denim processing consumes significant water and hence brands are launching environmentally conscious lines that adopt washes that consume less water (e.g. H&M Conscious collection and Levis Water<Less). However we do not see this trend emerging in Asian and Middle Eastern countries."





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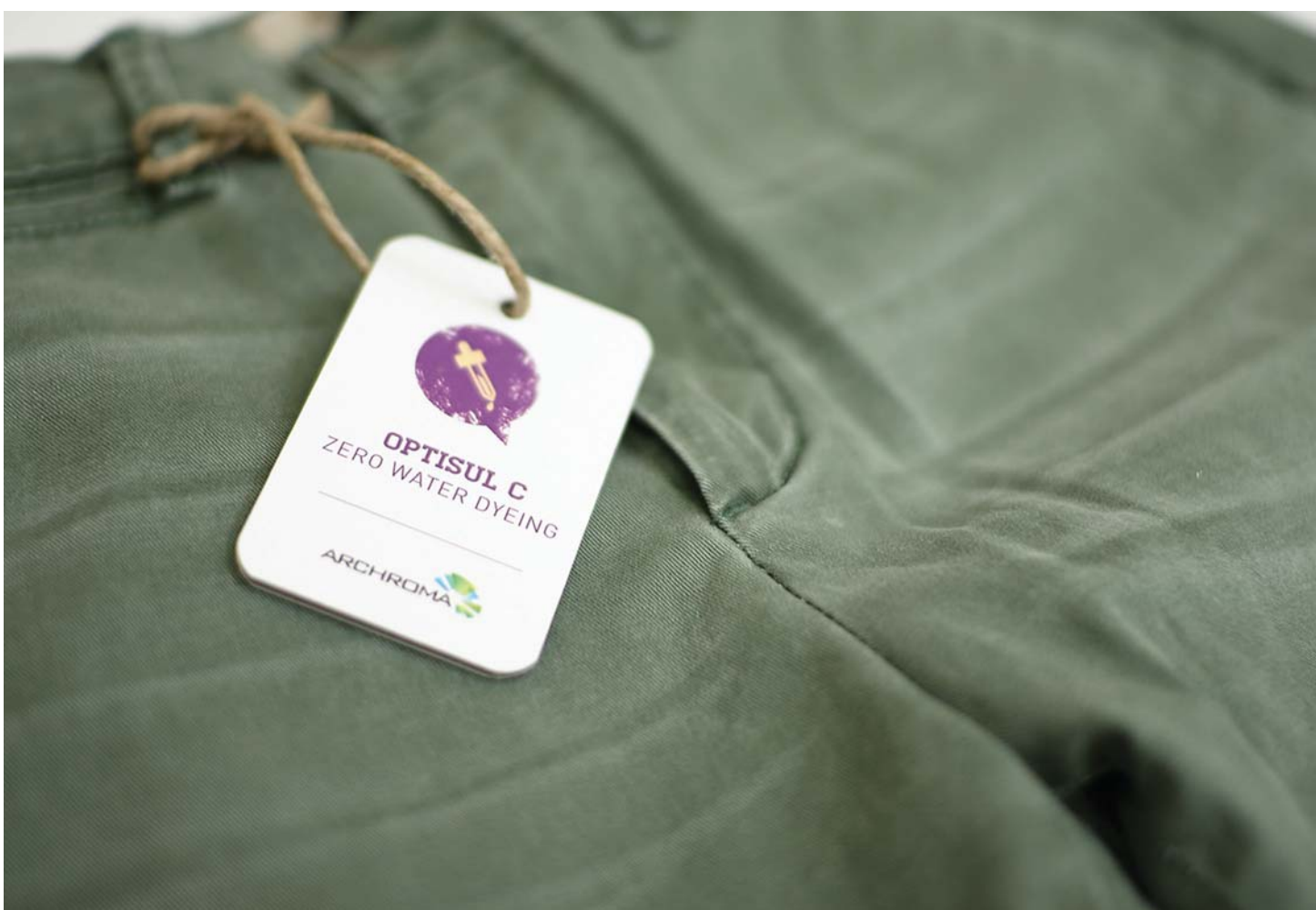
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With increased concern about sustainable products, brands are compelled to aim for more environmentally responsible processes. Archroma makes a positive contribution to this aspiration by helping brands and manufacturers achieve these aims.

The market is changing and today, more than ever, consumers and brands demand assurance that textile articles, babywear, fashion apparel and home textiles are safe for the consumer to wear and that the environment is not harmed during their manufacture. As a result, apparel brands and retailers are working with their supply chain partners to find more environmentally advanced solutions. In response to consumer concerns, they're actively evaluating the environmental impacts of textile treatment, dyeing and finishing processes - because it is no longer sufficient to merely comply with relevant regulations. This is where a company such as Archroma, a Switzerland-based global color and specialty chemicals company, is usually called to assist.

"Through our intense research and development efforts and application of innovative chemistries, we have made numerous advancements that are making textile manufacturing more earth-friendly. We are working closely with the brands and their manufacturers themselves, to help enable the textile value chain to achieve these aims," explains Anjani Prasad, Head



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-Anjani Prasad,
Head of Textile Sales (India),
Archroma

of Textile Sales, India at Archroma. Archroma is applying its expertise to create more sustainable fabrics and fashion, and create new formulas that can benefit the whole life of garments, coverings and fabrics.

For instance, the company introduced ‘Advanced Denim’ a few years ago, a technology that may very well be the first real innovation in the area of denim since the rivet was invented a hundred years ago. ‘Advanced Denim’ is a dyeing technology for eco-advanced innovative colors and effects. It mimics indigo and, in addition, it allows the designer to achieve a myriad of other exciting effects which were previously not possible with traditional indigo dyed denim. In comparison to traditionally indigo dyed denim fabric, ‘Advanced Denim’ technology can save up to 92 percent in water, 87 percent in cotton waste and 30 percent in energy.

Archroma also recently launched the ‘EarthColors’ a range of dyes which are manufactured from renewable waste biomass feedstocks, such as almond husks. This range of dyestuffs cover an exciting gamut of rich earthy colors and can be fully traceable by the consumer at the point of purchase in order to deliver assurance to the consumer. “We presented our ‘EarthColors’ at various exhibitions and conferences in the past year, and they are creating quite a sensation among our audiences,” says Prasad.

Inkpresso®, a pioneering system that Archroma believes will mark a turnaround in the textile digital printing market, is an innovation introduced recently at ITMA Milano 2015. By allowing the inks to be mixed on site and on demand by the printing company, Inkpresso® brings together benefits that were unattainable so far in inkjet printing—production flexibility, no shelf-life problems, a larger colour spectrum and the possibility of an individual colouristic fingerprint. And, as a major component of usual ready-mixed inks is water, Inkpresso® allows lower transport costs and environmental impact.

Last but not the least, Archroma just launched a ‘Color Atlas’ library last month with over 4,300 readily available new shades. Prasad himself is quite amazed by what his company’s colour management team has created. “Color Atlas by Archroma® combines a physical and digital library, as well as colour-on-the-go, an app that allows you to capture an image using your smart phone, and identify the closest Color Atlas shades with the possibility to purchase a color sample instantly,” he said.

Archroma is present in India with approximately 180 employees in its offices and laboratories in Thane.



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DENIMS GO FOR A **JOG WITH JEGGINGS**

Things have suddenly changed and with the advent of denim jeggings, women have found a new friend. We take a look at the changing market dynamics for denim bottoms in India.

By Zainab S Kazi

The market for women's bottom wear in India went through a mammoth change with the launch of knitted leggings. The comfort and the colors it offered led to women changing their wardrobe overnight, discarding or putting to rest their cotton chudidars and salwars. A pair of black, white, beige and red legging is all that was required now to team up with different kurtis. As the market for knit leggings grew further and further, brands got innovative and this led to the launch of denim jeggings. From the stitch to the fit, jeggings resemble denim jeans and they are already taking the market by storm.

Understanding the jeggings acceptance

Where denim wear brands have gone ahead and in some form or the other rechristened jeggings as joggers or a part of the athleisure category or for that matter any other term that they deem fit, the unorganized market is flooded with jeggings in different colors. This article has brands sharing in their take.



Aptly putting things in perspective to explain the rise in the category of denim jeggings, Amit Singh, Design Head, Spykar shares, “Fashion world is ever evolving just as cultures change and human beings do. The cultural shift triggered by the millennial generation spearheading the era of self awareness is what drives the active leisure trend. We are busier than ever, and are hungrier to achieve both professional and personal fitness goals. The athleisure trend definitely has taken up the market by storm with the rising interest in fitness. Few athletic apparel brands started churning out yoga-inspired athletic apparel, but the athleisure boom was brought in by international celebrities sporting and flaunting the trend on social platforms. The appeal of being able to wear the comfort of workout clothes to work, casual or social occasion is irresistible.”

Pointing out the merging of athleisure and denim bottom wear, he adds, “The denim industry though unshakable in its appeal has understandably woken up to this realisation, to include new

lines into their staple collections to meet these needs. Denim is evolving into a high tech apparel that is at par in terms of stretch ability, breathability and multi functionality, now. It has embraced athleisure.”

Elaborating on the athleisure connect, Sandeep Khapra, Head of Design – Men’s Wear at MAX shares, “There has been a strong trend of athleisure, which makes sportswear an all-day fashion. The sneaker culture and relaxed modes of dressing have shaped men’s fashion in recent seasons. It reduces men’s reliance on tailoring to show their style. Even though this trend is dominated by knit fabrics, the denim industry has smartly adapted this trend, and made it to work for them. Knit denim and jogger silhouette in denim has been lapped up by the customer. The trend of joggers is here to stay for a while, and denim joggers will continue to be a key piece of this look for a few seasons to come it might evolve to a slouchy silhouette soon.”

Kamakshi Kaul, Head of Design Women’s Wear at MAX adds, “Max has been doing jeggings for the past 2 years and it has been very well received by our customers. They love their lightweight

high-stretch pair which gives them maximum comfort and mobility.”

In line with the market dynamics, Spykar shall soon enter the segment with their niche collection. Elaborating on this, Amit Singh shares, “Spykar has always been the brand in sync with the latest trends in fashion and our line reflects that. Currently athleisure concept does reflect in certain segments of the range. Apart from this, we are launching an athleisure denim centric line, in the near future.” He further reveals, “We would be launching a new line of denim wear for the athleisure loving women, which features extremely light weight specialized denim fabrics in knit, Tencel and satin that are extremely supple and comfortable and equally stylish. They provide support and flexibility for easy movement and can be worn for a heavy work out on the yoga mat or on the dance floor on a night out. This athleisure bottom wear fit is called Athlena and comes with complimentary athleisure topwear in denim, knits and woven available at our exclusive Spykar stores.”

Neha Shah, senior marketing manager – Pepe Jeans adds, “The ingenious idea behind the jeggings is quite simply leggings that look like skinny jeans - a



fashion essential that provides the comfort of the legging and chic design of jeans." Shah points out that her brand has been introducing jeggings in stylish washes each season though this season, the brand went one step further.

Shah adds on the new launch, "Pepe Jeans introduced Powerflex, a unique fabric with a dual-core technology - Lycra and polyester yarns are spun together to create a higher elastic fabrication with a minimum 60 per cent stretch. Powerflex denim is thermo-fixed to increase the stretch for better comfort and the denim is crafted from unique fabrics that use the latest weaving technology. It consists of an impressive recovery so that it stays in perfect shape, wearers are treated to the ultimate comfort through this versatile and special elasticity." The range is available for both men and women.

Deal Jeans, according to Sameer Patel, Chairman, Global Fashion Pvt. Ltd. was the pioneer to launch the concept in India. He shares, "Denim jeggings had been introduced in our AW'10 collection, in fact Deal Jeans introduced jeggings in Indian market. Customers have responded well to this category as jeggings can style even a higher age group of women in multiple ways for its quality of softness and sleek look which fortunately extended our TG to 42+ age. Our joggings are lower in price as compared to denims as the production cost is relatively lower for having no accessories and basic washes."

Jack & Jones too has something to offer here. The spokesperson from the brand shares, "Jack & Jones has an innovative product, jog denims with ribbed bottoms and hem with draw cord details." Saurabh Singh, Design Head - Men's Wear at Being Human Clothing shares, "We were one of the first in India to launch denim jogggers for both men and women. The demand has only risen in the denim jogggers over the last few seasons."



Go Colors from the house of Go Fashion India Pvt. Ltd. is hard to miss with their attractive stores at many malls in India. Now the brand is seen expanding through stand alone stores on high streets as well. The USP of the brand is the complete solution it offers in leg wear for women. The brand recently entered the denim jeggings category and it also has a range of denim leggings. Gautam Saraogi, Deputy Managing Director of the company shares, "The metros have been the key drivers for denims for us. We have four options - first, denim leggings. This is a very unique offering. Though they are leggings, they are designed using denims cut and styled like leggings offering the customer a myriad of options to style her look. These are real indigo denims to give a denim look in a legging. There are hardly any makers of this in the world. Next in line from our portfolio is the bell bottom/flared denims for we believe that retro is going to be back. The third option we have is that of super stretch denim leggings. While denims give you the cool look and are very durable it always was that wee bit uncomfortable and inflexible. The last is the slim fit denims that come with a tight fitting and offers customers the option to cut the bottom for that raw edged look." Prakash Saraogi, Managing Director, Go Fashion India Pvt. Ltd., shared the brand's plan to

enter the regular denim jeans category as well. Citing the reason for the brand not doing so till now, he shares, "Now that we have our own stores which give our customers the facility of trial rooms, we shall gradually expand to include all that comes under the women's legwear category."

Going Ahead

The market for denim jeggings is showing steady growth and the very fact that denim wear brands in India are gearing up to offer a collection of jeggings accentuates this point. It is interesting to take note that the launch of jeggings has converted many non-denim wearing women to try the look and feel of denims which eventually would lead them to having a denim wardrobe as well. So it is indeed a symbiotic relationship. Prakash Saraogi concludes by sharing why he thinks jeggings are here to stay, "Majority of the jeans wear brands concentrate on the slim fits for women. We need to understand that the average Indian women is quite unlike her Western counterpart. There women are more slim and fit. In India, this is not the case. Jeggings cater to women in all shape and size and we as a brand are betting big on this category."



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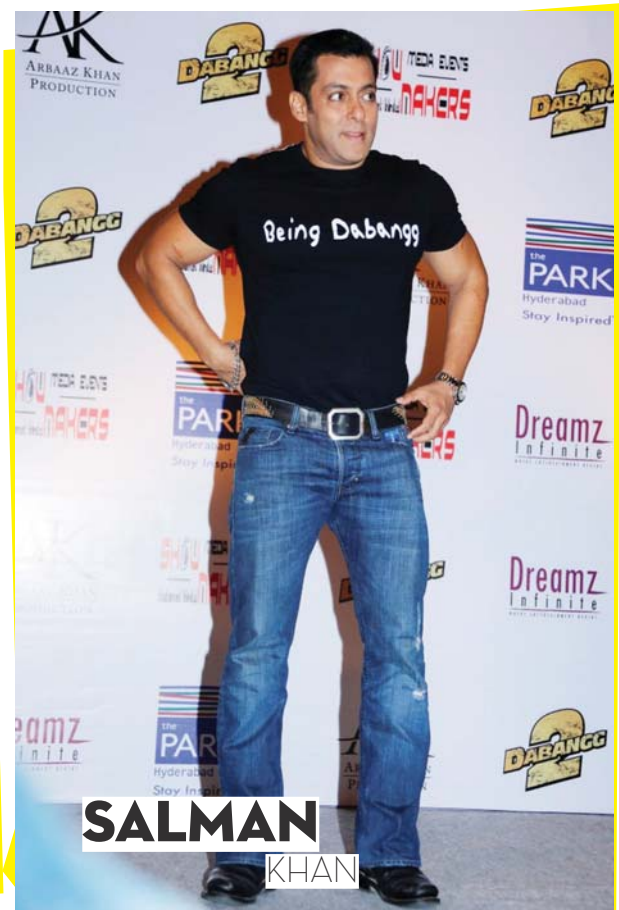
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BREAKING IN #YOURDENIMS

Bollywood's denim lovers share the secret of 'owning' their jeans with Aarti Kapur Singh...

A good pair of jeans will always stretch and mould to fit your body, and the dye will gradually rub-off according to how you move in them. After a few months of solid wear you'll be left with a go-to jean that fits like a second skin and is uniquely your own. But improper care can ruin your denims. Follow some tips on how you can keep your denims in awesome shape.



"Most people don't get the concept of 'well-fitting jeans' right. Denim always needs room to stretch. If they fit "perfectly" in the fitting room, after a week they will be too loose. When you try them on at the store they should be very tight in the waist, seat, and thighs - yes, this could be almost-too-tight-to-walk tight. Trust me, they loosen up considerably, as you wear them, especially in the areas where the pressure is constant."

"The first wash of the jeans is really really important. This is what decides how the creases and fade patterns will form on the jeans. The wearing signs happen much later. So I always wash my first pair after wearing it for at least four to five months at a stretch. This is what makes the 'cuts' as I call the fade marks, so dramatic."



ARJUN
KAPOOR

“Washing jeans, or not washing jeans - may be a critical question for some. But I, for one, have learnt that the longer you wait to wash your brand new denims, the more the dye will rub-off naturally. And this is the secret to that amazing personalised brushed or whiskered effect. Yes, if they get grimy - like in the humid weather of Mumbai, I just steam them a bit. But washing a pair of jeans before at least 6-7 months is sacrilegious for me! I don't do it, and I don't know of a denim lover who does it.”

“I have always been partial to antift jeans. And since I wear them a little lower, I am always getting the hems altered. My basic rule is to not get them altered before they are fully broken in. Sometimes, denims get slightly longer as they stretch and get looser, but they could also become shorter because of that ‘folding’ effect behind at the knee and hips. I think this takes a month or so. I don't recommend any alterations before that.”



VARUN
DHAWAN

“The washing machine is the worst enemy of a pair of new jeans. It scrubs out too much of the dye and the dryer ruins the fit by shrinking the jeans. I always give my jeans the ‘first bath’ by hand. I fill a bathtub with lukewarm water and add a tiny bit of mild liquid detergent and soak for about an hour. I also turn them inside out before soaking. After soaking them, I don't wring my jeans - but hang them for 10 minutes to drain off excess water and then roll them in a towel to soak off some more water. And they are always hung to dry.”



SHILPA
SHETTY KUNDRA

GLOBALLY YOURS

The denim game has reached new heights, as Hollywood glitterati are ditching their regular flares for cropped, ankle-bearing and other innovative trends. Get inspired by the best denim looks worn by the most stylish stars and models from all over the world.

By Aarti Kapur Singh

Love your denims? You are not alone. The likes of Rihanna, Karlie Kloss, are there to give you sartorial company. Here is a list of the best denim dressers on the international circuit.



**KARLIE
KLOSS**

The tall model looks towering when she wears her specially crafted Frame Denims - made especially for Amazons. It features two styles with whopping 40-inch inseams, and Karlie is seen painting the town denim blue quite often. While she dons skinnies also, we think she totally owns the flared pants trend.

Whether flared on a day off, cut up into shorts or super tight to show off her shapely legs, Rosie Huntington-Whiteley loves her denims. Black skinnies are said to be her favourites. Smart! They can be smart or casual, dressed down or enhanced. Not just that, black skinnies are slimming too.



RIHANNA

Ripped, cropped, slashed, skinny - Ms Jenner has tried every denim there could possibly be. The fabric loves her too. Denim gets this flirty feminine touch when Kendall adapts it to shirt dresses or pairs them with pastel t-shirts and minimal makeup.



**ROSIE HUNTINGTON-
WHITELEY**

Rihanna dresses up in denim like no one else does. She has made the fabric her evening wear staple too. She recently donned a light wash denim jacket with embroidered floral patchwork detailing and a shearling collar and lining, a piece that packed the ultimate retro punch. Rihanna has done denim shoes, jewellery and even lingerie. RiRi teamed up with Manolo Blahnik to create Denim Desserts, a collection of stylish new shoes.



**KENDALL
JENNER**

There's something eternally cool about the notion of elegantly weathered fashion, and investing in easy everyday pieces is something that model Gisele Bündchen keeps in mind with respect to her denims. In fact the jeans t-shirt combo is her favourite everyday outfit. We are not surprised, considering she looks so darn good in them.



GISELE BÜNDCHEN

Curvy Kim relies on denims to highlight her figure. Spotted in distressed denim both pre- and post-pregnancy - she tries to achieve the golden mean between dressed up and dressed down by pairing denims with hi-end labels.



KIM KARDASHIAN



ANGELINA JOLIE PITT

Jolie Pitt usually favours a tried-and-true one-note palette for her denim game. This cigarette style has Jolie Pitt able to crisscross the globe in style while being able to simultaneously take her from the kids' school to red-carpet cool. For her global travels, she has mostly been rocking the relaxed flared silhouettes.



KATIE HOLMES

Katie Holmes rocks the urban chic trend and keeps her wardrobe streamlined, simple, and effortless. Her favourite look is peg-leg true blue jeans sported casually with Stan Smiths or paired with stilettos and a blazer for that conquer-the-town look.



BEYONCÉ

Mrs Jay Z might have the most enviable figure, mane, and everything else in the world, but it's her enviable collection of blues that has her hitting the sartorial high notes. From flirty dresses to overalls to grungy jackets and shredded outfits, Beyoncé never ditched denims. She is even spotted wearing them at concerts and gigs.



JENNIFER LOPEZ

When you have an hourglass figure as incredible as Lopez — the only way to flaunt one's physique is in low-rise, hip-hugging jeans with flair. And that's what Mr Lopez favours, other than red-carpet designer wear. She rocks the neighbourhood Bronx look with equal pizzazz.

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- ▶ Innerwear Market Sizing, Trends & Dynamics
- ▶ Emerging Segments
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Photo: Triumph

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321-334 MENSWEAR/TRENDS

Menswear Trends: Fall/ Winter 2016-17

- Urban Warriors
- Soft Tailoring Meets The Streets
- The Skate Crew
- Pinching From The Girls' Closet
- Jackets' Double Layer
- From The Ghetto To The World
- Rockers Today
- The Fresh Take On Workwear



338-361 MENSWEAR/KEY ITEMS

Menswear Key Items: Fall/ Winter 2016-17

- The Bomber Jacket
- The Biker Leather Jacket
- The Turtle Neck
- The Jogger Pants
- The Flight Jacket
- The Popular Fleece Jacket
- The Cargo Pants
- The Embroidered Jeans
- The Extra Long Coat
- The Quarter Zip Windbreaker
- The Hiking Inspired Boot
- The Printed Sleeve
- The Wide Leg Trousers



363-373 MENSWEAR/COLORS & MATERIALS

Menswear Colors & Materials: Fall/ Winter 2016-17

- Double Check
- Yellow Hints
- Orange Is The New Black
- Red Between The Lines
- Teddy Bears
- Shine On
- Cotton Candy



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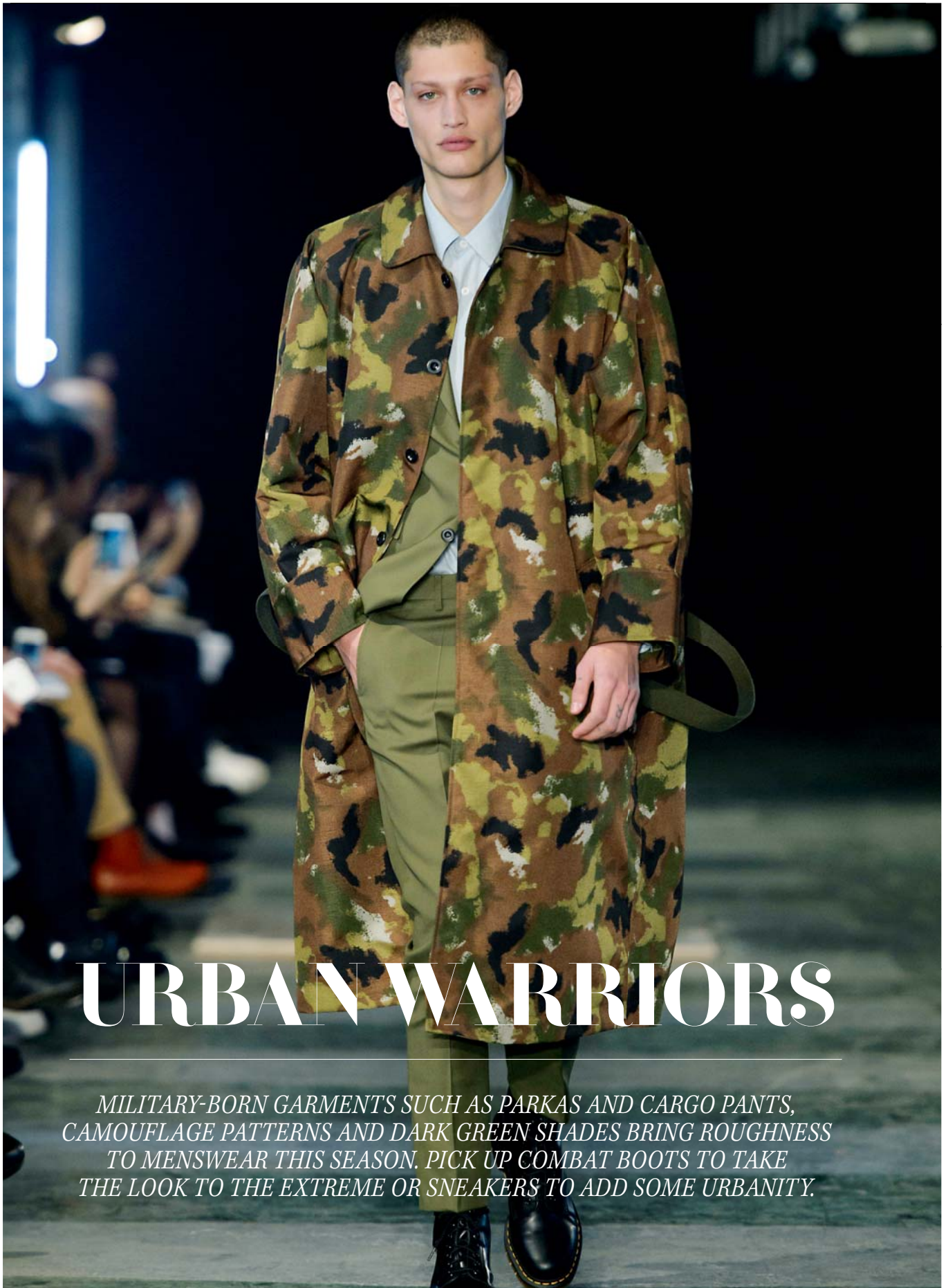
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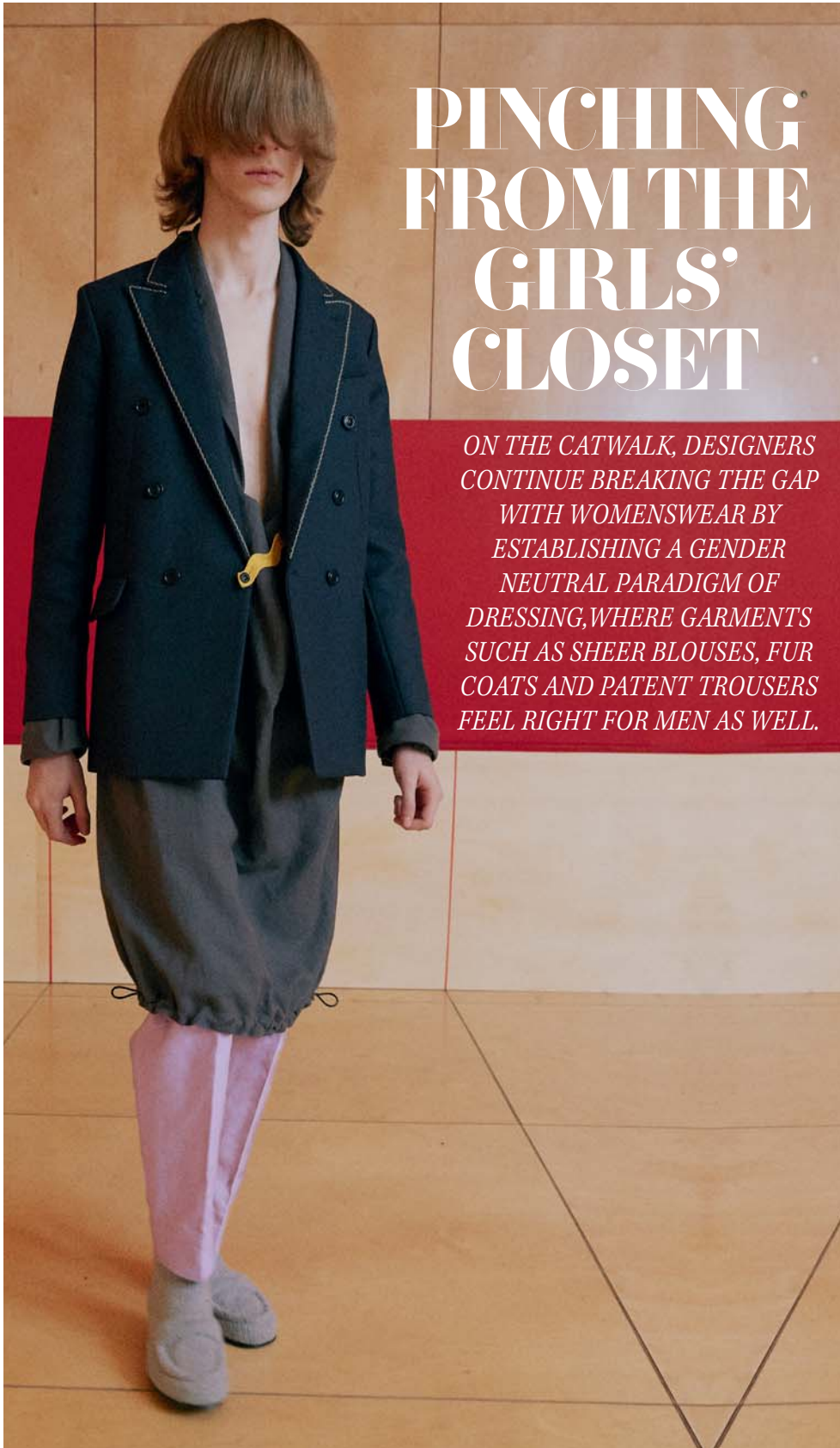
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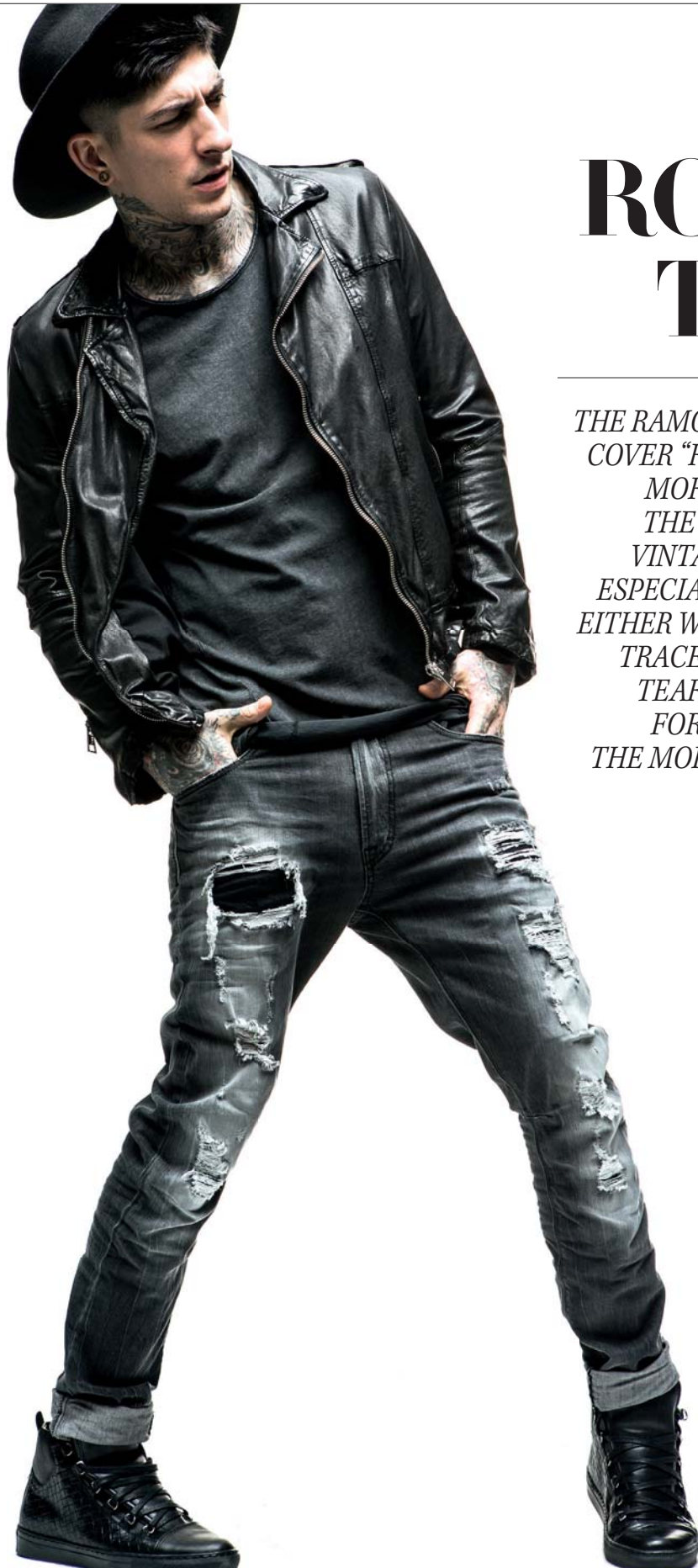
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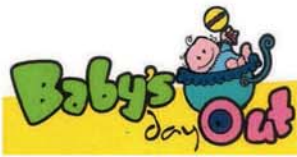


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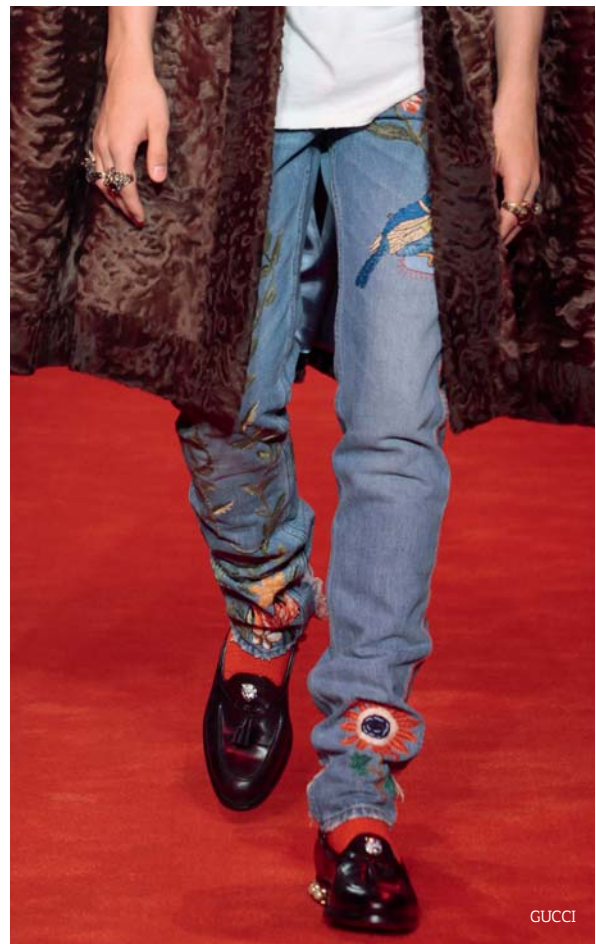
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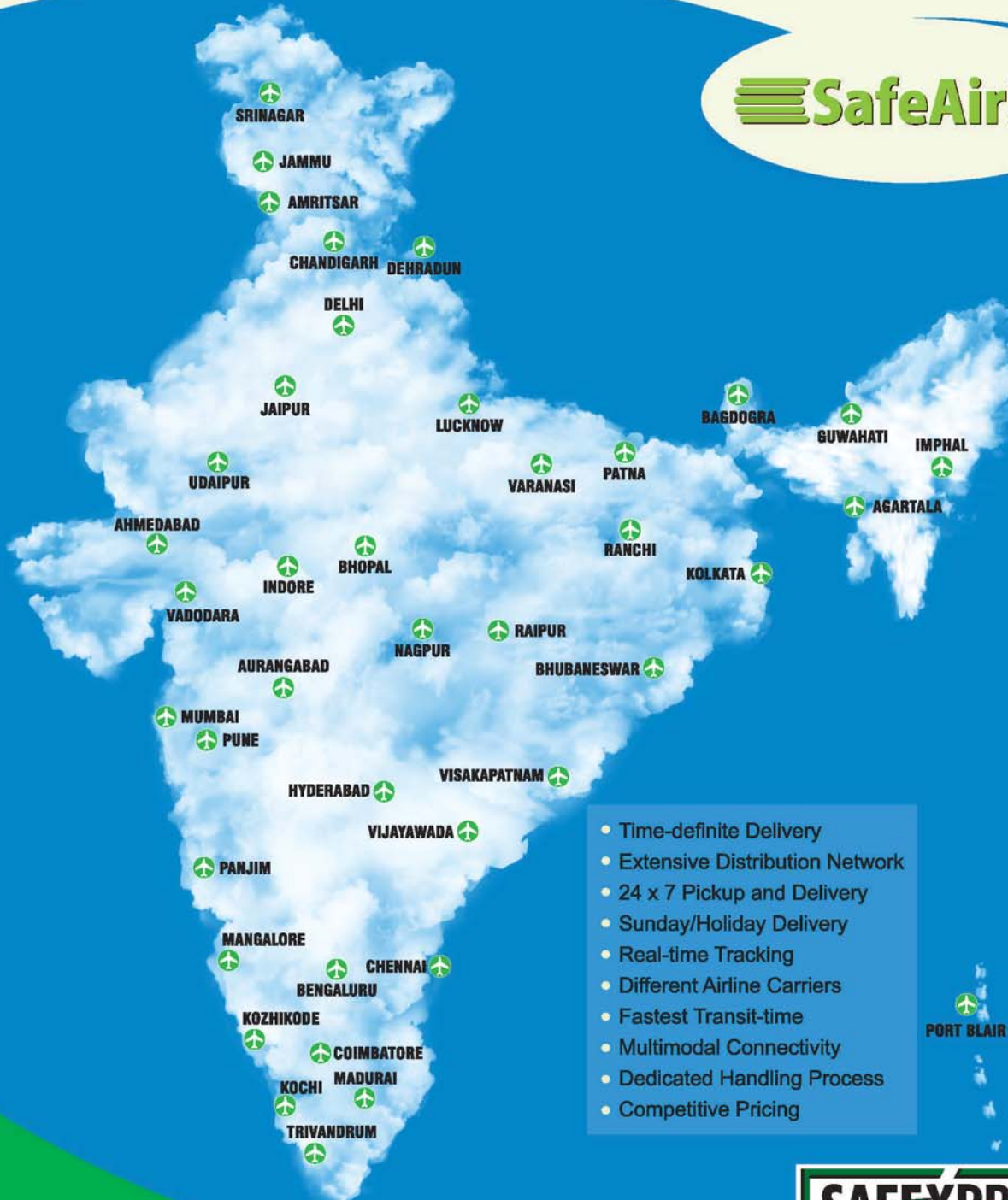
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THE WIDE LEG TROUSERS

THE SILHOUETTE CHANGE IS IN FULL SWING—WIDE LEG PANTS SETTLE DOWN IN MEN'S COLLECTIONS. VOLUMINOUS CONTOURS IN BOTTOMS ARE SMOOTHED OUT BY TUCKING THE TOP INTO THE PANTS.



WTIT

WOMEN OF TODAY FOR INDIA OF TOMORROW 2016



JULY 29, 2016, JW MARRIOTT HOTEL NEW DELHI AEROCITY

The forum will aim at bringing in the perspective of women leaders on what India needs to achieve to bring in accelerated growth on all levels.

SPEAKERS AT WTIT 2016



Abha Maryada Banerjee
International Speaker
on Human Potential



Bala Deshpande
Sr. MD, NEA



Deepthi Sutaria
Cyber Crime Head
BJP Legal Cell



Ipsita Dasgupta
EVP & Head (Asia Pacific
& Russia/CIS), Glenmark
Pharmaceuticals



Liza Varma
Fashion Director



Neeta Lulla
Fashion Designer



Priyanka Chaturvedi
Spokesperson, Congress



Ritu Beri
Fashion Designer



Sabina Chopra
Co-Founder
Yatra.com



Shaina NC
Fashion Designer



Vaishali Kasture
Partner, Deloitte
India Consulting



Vinita Bali
Former MD
Britannia Industries

SESSIONS AT WTIT 2016

- // Why Women of Today Matter for India of Tomorrow?
- // World View on India.
- // What does "Make In India" need to succeed?
- // India: Investment excitement or Hiccups?
- // Investing in People – Sports infrastructure – What will it take for India to get Gold.
- // Bringing Diversity to the world – Tourism agenda for India.
- // One on One: Dealing with Cyber Crime.
- // What stops Indian Designers from becoming International Brands?
- // Healthcare: What can India learn from global best-practices?

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MIENSWEAR COLORS & MATERIALS

FALL/
WINTER
2016-17



DOUBLE CHECK

A STAPLE WINTER PATTERN, TARTAN IS ON TOP AGAIN ESPECIALLY IN COATS AND JACKETS. BUFFALO CHECKS IN THE LUMBERJACK-INHERENT RED AND BLACK COMBO DEMONSTRATE ITS ALLURE WHEN INTEGRATED IN SLEEK DARK LOOKS.



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HED MAYNER

ORANGE IS THE NEW BLACK

BESIDES YELLOW, PREVIOUSLY SPURNED ORANGE BRINGS BRIGHTNESS AND EXOTICNESS TO WINTER GEAR. TO SUCCESSFULLY INTEGRATE IT, JUST PICK UP A TOP OR ACCESSORY IN THIS SHADE AND SPICE UP YOUR LOOK.



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PEPE JEANS LONDON



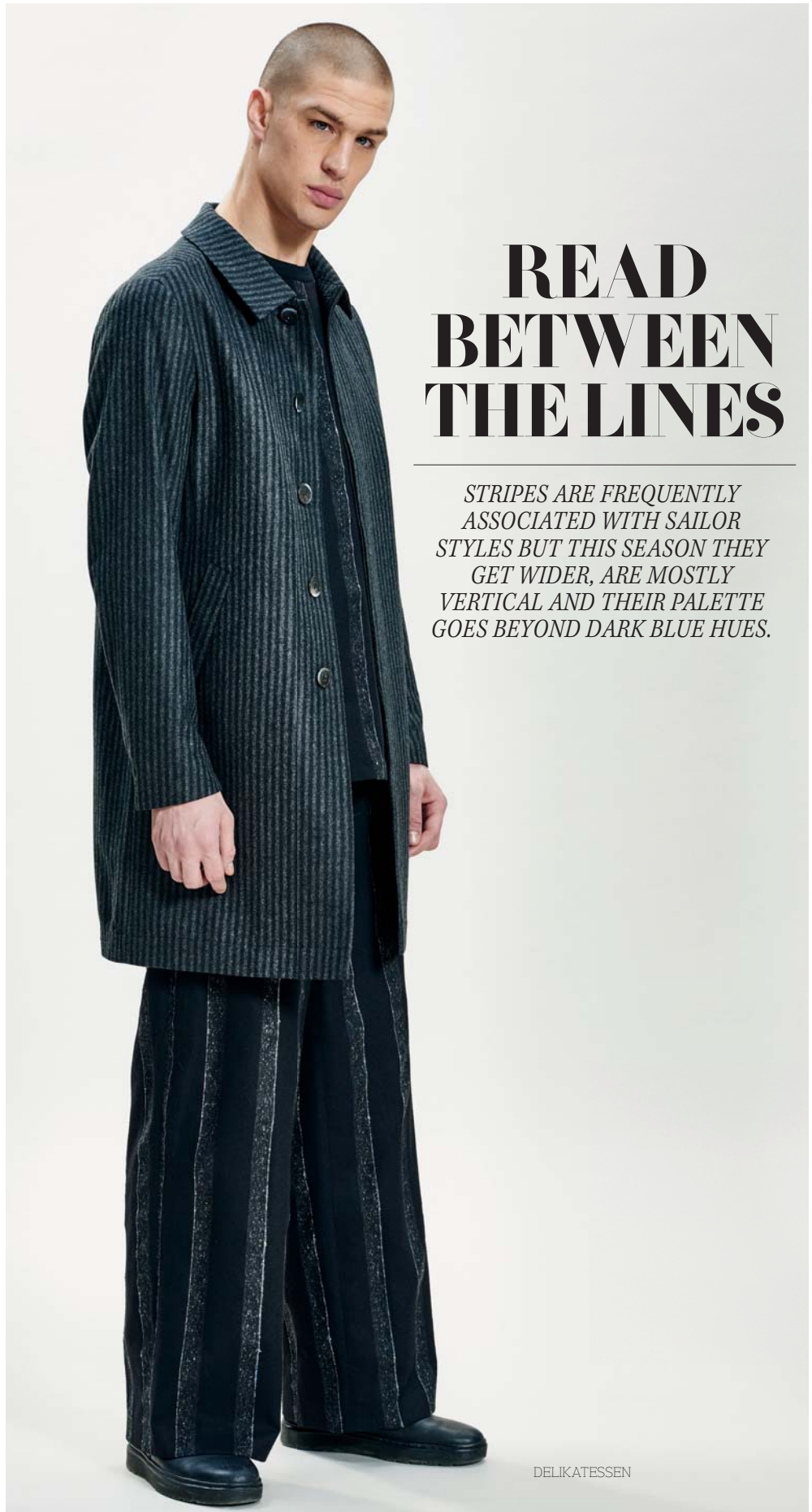
ESPEROS



SCOTCH & SODA



ANTONY MORATO



READ BETWEEN THE LINES

STRIPES ARE FREQUENTLY ASSOCIATED WITH SAILOR STYLES BUT THIS SEASON THEY GET WIDER, ARE MOSTLY VERTICAL AND THEIR PALETTE GOES BEYOND DARK BLUE HUES.

DELIKATESSEN



LOU DALTON



ASTRID ANDERSEN

TEDDY BEARS

FLUFFY MATERIALS WITH A GREAT TOUCH AND FEEL BRING WARMTH AND COZINESS TO MENSWEAR. MIX 'N' MATCH CLOTHES WITH DIFFERENT FABRICS AND TEXTURES TO ACHIEVE GREAT VISUAL RESULTS.



PHILIPP PLEIN (PHOTO: SPG)



JIL SANDER

SHINE ON

DAZZLING, METALLIC FABRICS SHAPE A FUTURISTIC MAN AND GIVE THE EXTRA EDGE TO RATHER PLAIN OUTFITS SUCH AS THE CREW NECK WHITE T-SHIRT MATCHED WITH BLACK JEANS. GLITTERY PIECES ESPECIALLY STAND OUT WHEN PAIRED WITH OTHER DARK GARMENTS.



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BOTTOMS AS A SYMBOL OF
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or mail us at : wbgmda@gmail.com

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MEMBERSHIP FORM

Recognised by the international fashion and retail community through its B2B Magazines, Conferences, Exhibitions, Research Volumes, and Web Portals, the India Fashion Forum is trusted as the catalyst for profitable growth of fashion business through knowledge platform leadership.

A strong portfolio of business publications and research reports have served since 1992 to inform, advise and inspire leaders and decision makers of the fashion industry. Focused media serves the Fashion industry across various operations through its various print and online publications and websites.

The need to connect with businesses, people, knowledge and ideas associated with fashion creation and modern retail is served by IFF Business Exhibitions and networking meets. Conducted alongside these, Knowledge Forums and Conferences featuring global leaders inspire not just debate and discussion, but even influence policy decisions.

Images Fashion Awards (IFA) at IFF recognises outstanding performances in the business of fashion.... And are loved for the style with which these successes are celebrated.

IFF PRIVILEGE MEMBERS' CLUB

IFF offers a host of services to its privilege members - connecting the entire value chain (designing, buying & sourcing to manufacturing, merchandising, branding, marketing & retailing) - serving the entire fashion sector through its various knowledge & innovation platforms round the year.

HOW TO ENROLL?

Choose your category/ies from below:

- Fashion Retailers Fashion Brands, Exporters & Manufacturers Suppliers & Service Providers to Fashion Brands, Retailers, Exporters & Manufacturers

A group operating in more than one category may enroll its different companies in their respective categories. To know the applicable fee and entitlements please visit membership link of www.indiafashionforum.co.in. Service tax will be levied as applicable which at present is 14%. A proforma invoice can be mailed on request.

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Name of the person responsible for IFF communication and coordination	
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Cell:	
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OTHER REQUIREMENTS:

- Please send brand / organization logo along with high resolution pictures of key people, products & services. The pictures can be sent through yousendit or wetransfer. All visuals should be of 300 dpi.
- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

FORM SUBMISSION:

Please mail payment reference details, provide completed form & above details. Submit all to: welcomedesk@indiafashionforum.co.in

IFF CONTACTS FOR MEMBERSHIP:

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IFF ANNUAL MEMBERSHIP FEE EFFECTIVE 1ST APRIL 2015 & DELIVERABLES*

YOUR ACCESS TO THE FUTURE OF FASHION.

Membership Categories	For Fashion Retailers:					For Textile Buyers = Fashion Brands, Exporters & Manufacturers:			For Vendors = Suppliers & Service Providers to Fashion Brands, Retailers, Exporters & Manufacturers:		
Category Code:	A1: Fashion Retailers with less than 5000 sq ft. retail space	A2: Fashion MBOs/ Independent Retailers	A3: Regional Chains – 3 or more stores. A4: Brands with Owned Brand Outlets/ Shop-in-shops)	A5: National Department Stores/ Large Format Fashion Stores A6: Online Retailers	A7: Groups with Multiple Retail Formats + Franchise/ Distribution/ Licensing/ Own Brand operations	B1: Fashion & Lifestyle Brands (without own stores/ SIS)	B2: Exporters, Manufacturers & Buying Houses of Fashion & Lifestyle Products	C1: Fibres, Fabrics & Finishes C2: IT/ Technology/ Logistics	C3: Trims & Embellishments C4: Shopfit/ Retail Design/ VM C5: Consulting/ Research/ Trade Bodies/ Academies/ Support & Services C6: Fashion Franchisees & Distributors		
All Inclusive Annual Fee (Service tax extra)	Rs. 5,000	Rs. 25,000	Rs. 50,000	Rs. 1,00,000	Rs. 1,50,000	Rs. 50,000	Rs. 15,000	Rs. 50,000	Rs. 30,000		
DELIVERABLES											
1	Feature/s, editorial coverage in Images/ IFF magazine/s, IFF e-briefs/ portal (inputs from members)	1 Page	1 Page	2 Pages	4 Pages	6 Pages	2 Pages	1 Page	2 Pages	1 Page	
2	FOC ads/ promo banners in IFF e-briefs/ portal or in classifieds section of Images Business of Fashion magazine (applicable as per category)	FOC up to Rs.5,000	FOC up to Rs.25,000	FOC up to Rs.50,000	FOC up to Rs.1,00,000	FOC up to Rs.1,50,000	FOC up to Rs.50,000	FOC up to Rs.15,000	FOC up to Rs.50,000	FOC up to Rs.30,000	
3	Entry Pass for IFF/ InFashion Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Shows	1 Pass	2 Passes	2 Passes	4 Passes	6 Passes	2 Passes	1 Pass	2 Passes	2 Passes	
4	Special Invite for IFF Power Breakfasts, Networking Lunches, Awards & Gala Dinners	NA	2 Invites	2 Invites	4 Invites	6 Invites	2 Invites	1 Invite	2 Invites	2 Invites	
5	Research Reports & Publications (Print/ Online)	FOC up to Rs.3,000	FOC up to Rs.5,000	FOC up to Rs.10,000	FOC up to Rs.20,000	FOC up to Rs.30,000	FOC up to Rs.10,000	FOC up to Rs.5,000	FOC up to Rs.10,000	FOC up to Rs.5,000	
6	Presence at India Fashion Forum Website	URL link	URL link	URL link	URL link	URL link	URL link	URL link	URL link	URL link	

*Deliverables are subject to submission of inputs/ confirmations/ approvals/ additional charges wherever applicable by specific dates/ deadlines as communicated to members. Deliverables are subject to change without notice.

Additional Benefits:

- Special Packages to join IFF delegations for national & international retail trade shows.
- Access to "MEMBERS ONLY" industry meets & knowledge platforms including IFF & indiaretailing updates, research, analysis & trends
- Announcement to entire IFF data base upon joining the IFF including personal and business profile. Via online & print mediums.
- CEO's picture & profile in 'Who's Who' page on IFF website
- Presence/ mention/ profiling in relevant Research Books/ coffee table books
- Support & connect with potential partners.
- Special Package for Catalogue Show at Infashion & Entry in Trade Show catalogue
- Special Package for Presence in India Business of Fashion Report 2016 Book (Earlier known as Images Year Book) to be released at IFF mega event



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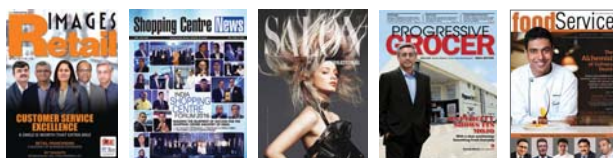
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