

# IMAGES

3

Issue No.

# BUSINESS OF FASHION

March 2016

Volume XVII // No. 3 // ₹ 100

## TOP



## CHALLENGES FACING FASHION RETAILERS IN INDIA TODAY

Khadi: The Fabric of Freedom and Fashion  
Focus: Gujarat Majors  
Budget 2016: Retailer Voices  
+Sportswear International Capsule for India

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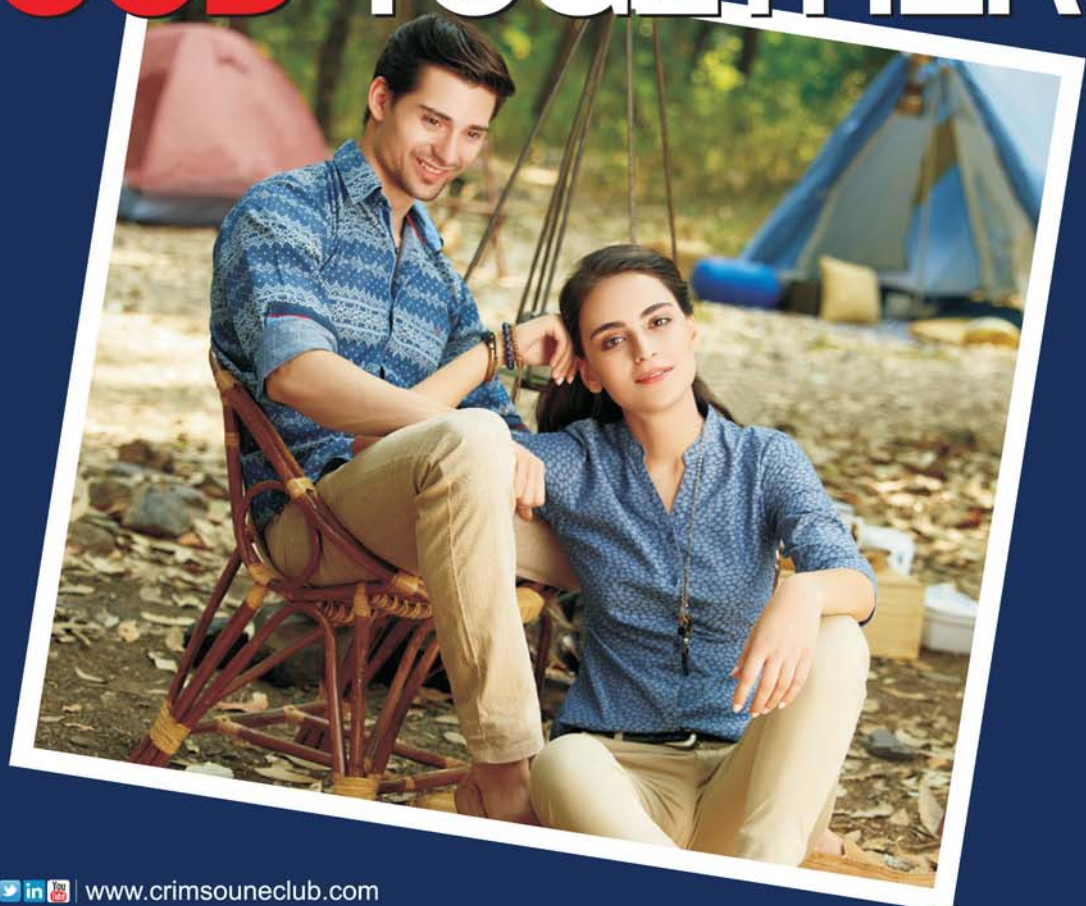




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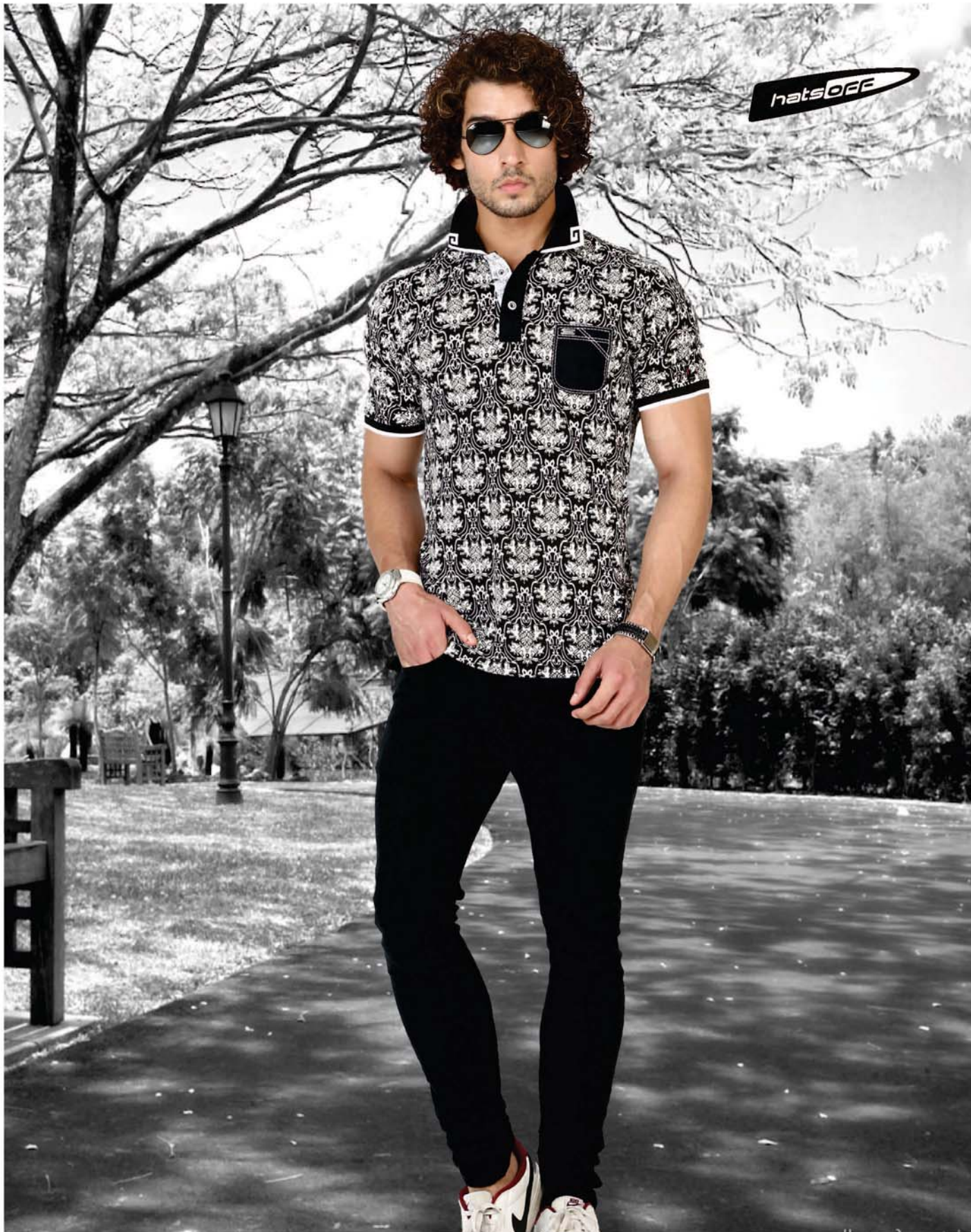
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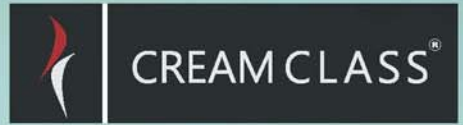


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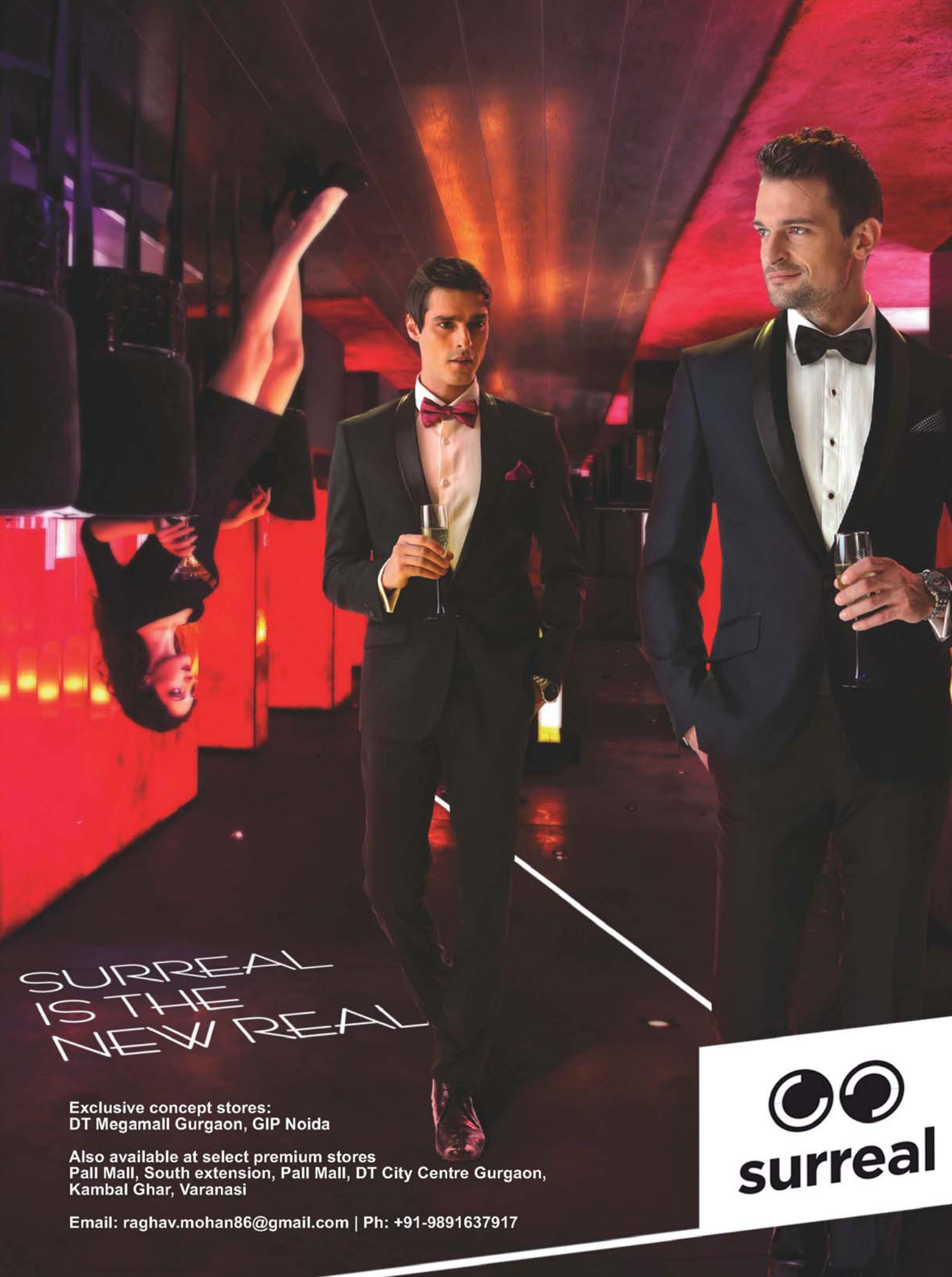
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Dear Readers,

We will be gathering together this month for the 2016 edition of the India Fashion Forum (IFF), India's biggest fashion sourcing, trends, design and retail business event. The mega fashion congregation presented by Exclusively.com will witness international and national brands, business heads, global retail analysts, trend forecast giants and leading designers from the textile and ingredients, fashion creation and fashion retail industries under one roof, to share and outline their strategies to optimise the future of the business.

This year, through the 7-agents of change namely Intuitive Tech, Intelligent Resourcing, Seamless Experience, Brand Alive, Human Connect, Open Thought and Alpha Brandsters, the two-day event will house an incredible mix of iconic global and Indian speakers delivering keynotes and conducting conferences, master-classes, workshops, sourcing exhibitions, globally-aligned design and trend displays to a large inclusive audience across fashion and retail.

We will also be privileged to have with us this year exclusive speakers from three fashion capitals— Billie Whitehouse, Co-Founder of Wearable Experiments, and Innovator Designer and Creator of Fundawear (NEW YORK); Agnès Kubiak, Co-Founder and Creative Director, Style-Vision (PARIS); and Anupreet Bhui, Senior Editor - Street Style and Trend Specialist, WGSN (HONG KONG).

In light of the days of heady deliberations that lie ahead, it is indeed most apt that the cover story of this issue is "The Top 10 Challenges facing Fashion Retailers in India." This helps identify which exactly are the top-issues before the industry. We also wish to thank all the fashion retailers who participated in the study. We hope the study helps in putting perspective and priority on the issues.

The Union Budget presented by Finance Minister Arun Jaitley in Parliament on Feb. 29, 2016, evoked mixed reactions from the fashion industry. We capture the essence of the voices that were heard. Sanjay Vakharia, COO, Spykar, expresses how GST will lead to a rise in economic growth of the country. Read things about H&M that you may not have known. Also read about Tantra's new store in Malaysia and Max's millennial fashion outlet. We take an overview of the background and what's the latest in Khadi, our very own indigenous fabric. And we continue our exploration of Gujarat as a leader of fashion, in which, this time, we look at the textile majors.

The Sportswear International section showcases the best of fashion in 2015 and also looks at some immortal British classics.

This and lots more in the issue. Hope you enjoy going through it.



Amitabh Taneja

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ROCKSTAR JEANS

back gate fold  
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back cover  
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ENDICOTT

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BREAKBOUNCE,  
MACHO,SHERIFF,  
JACK & JONES, VEROMODA

37	ALX NEW YORK
89	ANTIGRAVITY
131	APPLE EYE
175	ASKME
139	ASTRON
141	BEEBAY KIDS
135	BLOOD JEANS
12	BONJOUR
165	CATANZARO
15	CHASE
18	CREAM CLASS CASUALS
22	CROCODILE
35	CRUSOE
11	DEAL
32	DE-MOZA
63	DERMAWEAR
24,25	DESIBELLE
105	DOLLAR
85	DUKE
179	EPSON
42,43	FOCUS
14	HATSOFF
233,234,235	INDIA FASHION FORUM 2016

46,46	INFINITI
129	INFINITY SPARE MALL RANCHI
109	INORBIT
79	INTIMACY
26	IRONY
121	JUSCUBS
59	KIDDER
153	KK FASHION
163	LIBERTY SHOES
77	LINO PERROS
177	LOGIC ERP SOLUTION
91	LUX GLOW
93	LUX ONN
155	MAHAJAN SILK
57	MANISH FASHION
133	MANI SQUARE
38,39	MANYAVAR
65	MARC SOCKS
10	MASHUP
49	MEXICO
137	NOVIO
23	OFFICER
28	ORION MALL

30	OTTO
16	POISON
44,45	PRETR
219	PUMA
71,72,73,74	RAYMOND
248	RECRON
21	RIVERBLUE
53	ROOKIES
195	SAFEXPRESS
115	SOCH
81	SOLEMIO
40,41	SUCCESS
19	SUNNEX
20	SURREAL
111	UFO
9	UJC
83	VALENTION
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**H&M'S SPECIAL SECRETS**

**BUDGET 2016:** RETAILER VOICES

## Contents

# B

36-96

## FASHION BUSINESS

My page

### Benefits of GST to Fashion Retail



*Sanjay Vakharia, COO, Spykar, shares how GST will ease the launch of start-ups and make business relatively easier.*

Pg No. 36



Perspective

### Indian Luxury Market and upcoming market trends

*Eliana Koulas, Director, Luxus Retail Pvt. Ltd. gives insights into the top-end of the Indian fashion market and shares thoughts on the future.*

Pg No. 48



News & Views

### Budget 2016: Not Very Fashionable.. the Industry Voices Consumption Concerns

Pg No. 54



Things to Know

### INSIDE THE H&M STORY

*Ten interesting things consumers do not know about H&M's wonderful initiatives.*

Pg No. 60



## Fashion Business



### COVER STORY

### THE 10 TOP CHALLENGES FACING THE FASHION RETAILERS IN INDIA TODAY

*Images BoF in its annual study identifies which are the top-issues facing fashion retailers today and studies how fashion retailers perceive them.*

Pg No.68



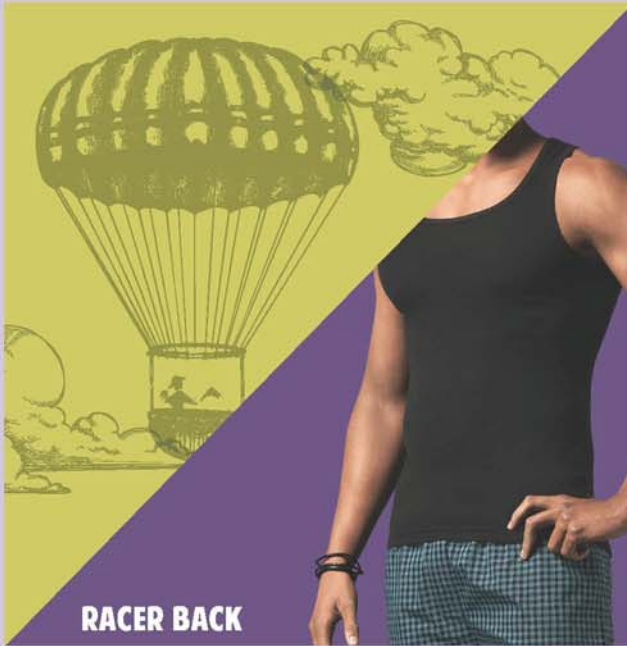
Industry Meets

### Bengal Global Business Summit 2016: Gives Major Fillip to the Textile Industry in the State

*The textile industry in Bengal received special focus and thus a major boost at B.G.B.S. 2016, organized in Kolkata under the the C.M. Ms. Mamata Banerjee's leadership.*

Pg No. 66

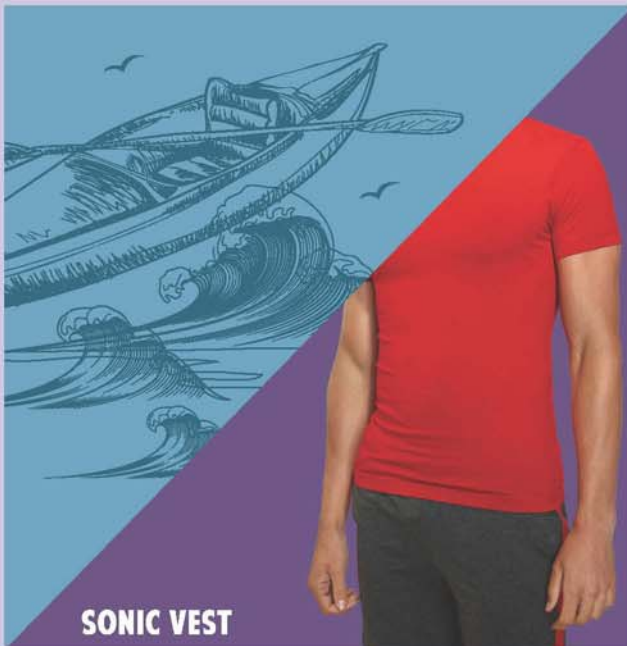
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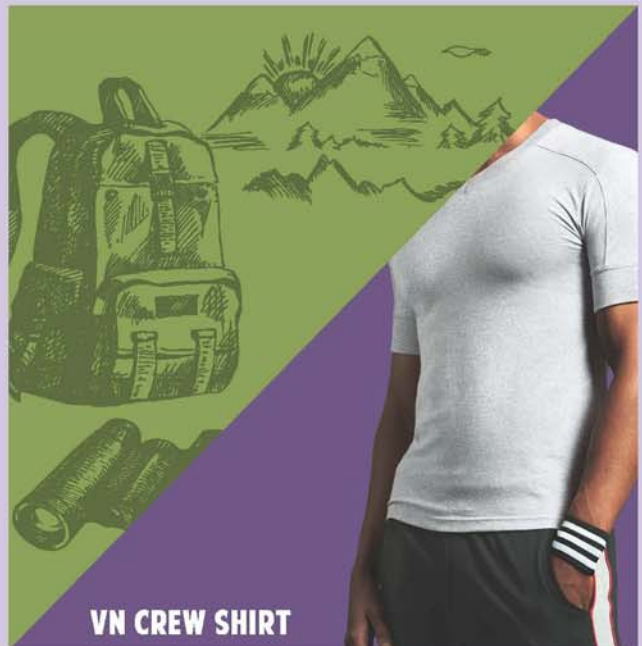
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# BENEFITS OF GST TO THE FASHION RETAIL

In the long term, GST will lead to a rise in economic growth of the country. Most importantly, it will strengthen relations with multinational companies and aid in increasing Foreign Direct Investment (FDI) and Foreign Institutional Investments (FII). Sanjay Vakharia, COO, Spykar, shares that GST will ease the launch of start-ups and make business relatively easier.



Goods and Services Tax (GST) is a comprehensive tax levied on the manufacture, sale and consumption of goods and services at a national level. Under GST, there will be no difference between goods and services. It tries to eliminate indirect taxes and mitigate cascading or double taxation issues and leads to a common national market, with elimination of state boundaries.

The execution of GST in India emerges from the complications of the current tax system of the country. GST targets to minimise the hitches in double taxation: primarily eradicating cascading tax and smoothing the flow and structure to make it more seamless and organised. It will assist in making full input tax credit possible at central and state level. GST would also help to restructure interstate transactions. It will focus on streamlining the taxation methods at different levels across all the states in the country and between the states and central government. One of the merits of this would be condensed administrative costs. A level playing field would be created with a common national market.

It also eases the launch of start-ups and makes business relatively easier. In a long term perspective, this will lead to a rise in the economic growth of the country. Most importantly, it will strengthen relations with multinational companies and aid

in increasing Foreign Direct Investment (FDI) and Foreign Institutional Investments (FII). This will further help in faster decision making, which will further strengthen their relationship with the country.

Looking at the current picture of the Indian retail sector, the introduction of GST will act as a benefit at different stages of the value chain. To begin with, the procurement of raw materials and movement of goods would become less cumbersome, which will further open gates for more suppliers or vendors to merge. Following this, a wider base of distributors would be available as state boundary paperwork will not be a hurdle, resulting in better access and low transportation costs. A favourable environment for a supply chain would reduce transit inventory, further reducing the working capital requirement. Adding to this, simplified taxes and availability of input tax credits can help fetch better margins. GST will also avoid the red tape and documentation on collection and submission of various forms.

## A MAJOR PAIN POINT FOR THE INDUSTRY

Rentals are one of the main costs of retailing industry and they attract service tax at 14.5 percent. Currently, the retailers cannot set off these costs like the other industries. This, they feel is an additional cost of operating in this industry which is unfair to them. Under GST, taxes on services would be available for set off against taxes on goods. Thus, the retailers would be positively impacted.

To conclude, the key benefits of the GST will be the aid where the retailers create supply chain methods based on transportation models rather than taxation models.

## IMPACT ON PRICE SENSITIVE T&A INDUSTRY

To sustain the competitiveness of the Indian T&A industry and help the industry grow and achieve its potential target, it is very important to support this industry by levying a lower rate of GST as currently, fabrics do not attract any tax (both Excise and VAT) and readymade garments attract only VAT.



## ABOUT THE AUTHOR:

### Sanjay Vakharia, COO, Spykar Lifestyles Pvt. Ltd.

Vakharia has been a pillar of strength for Spykar Jeans since its inception in 1992. With a strategic bent, he has been instrumental in creating the brand image for Spykar. With an elaborate experience of over two decades and an extensive insight into global trends across markets like the USA and UK, coupled with sharp business acumen, he gave Spykar the required impetus to transform from a laundry grown to a brand that defines excellence, aspiration and sustainability. Also, his impeccable understanding of the dynamic and ever-changing youth market of the country has always given the brand the edge over its competitors. The journey of Spykar has seen him understand the product, the audience and how to seamlessly integrate both to give the discerning their due without compromising on the value ecosystem of Spykar.



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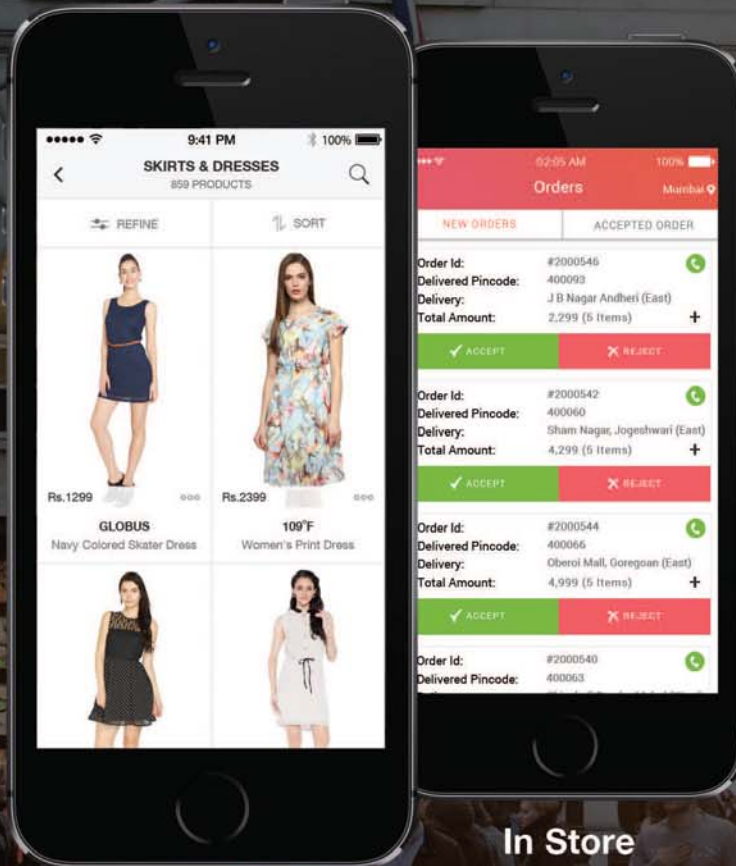
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# INDIAN LUXURY MARKET

## AND UPCOMING MARKET TRENDS

-Eliana Koulas

Until a decade back, shopping was one of the reasons for the ultra high-net-worth Individuals (HNIs) to fly overseas. This led to a revolutionary change with the emergence of luxury retailers in the Indian market. However, the rise in the growth of income at breakneck speed, supported by rising disposable incomes, expansion of modern retailing, emergence of e-commerce, and proliferation of luxury brands into non-metros, has changed the interface and the quantum in the outreach of the brands to their customers. **As luxury brands continue to grow in India, ultra HNIs are likely to increase their spends, by availing themselves of avenues of luxury spending within India, according to Kotak's Top of the Pyramid 2015 report.**

While the emergence of e-commerce has eased the availability of luxury products, the spending habits of these ultra HNIs have changed remarkably as they have a range of products available at just a click of the mouse or from their smartphones, which was not possible few years back. The luxury retailers have encashed on this opportunity and not

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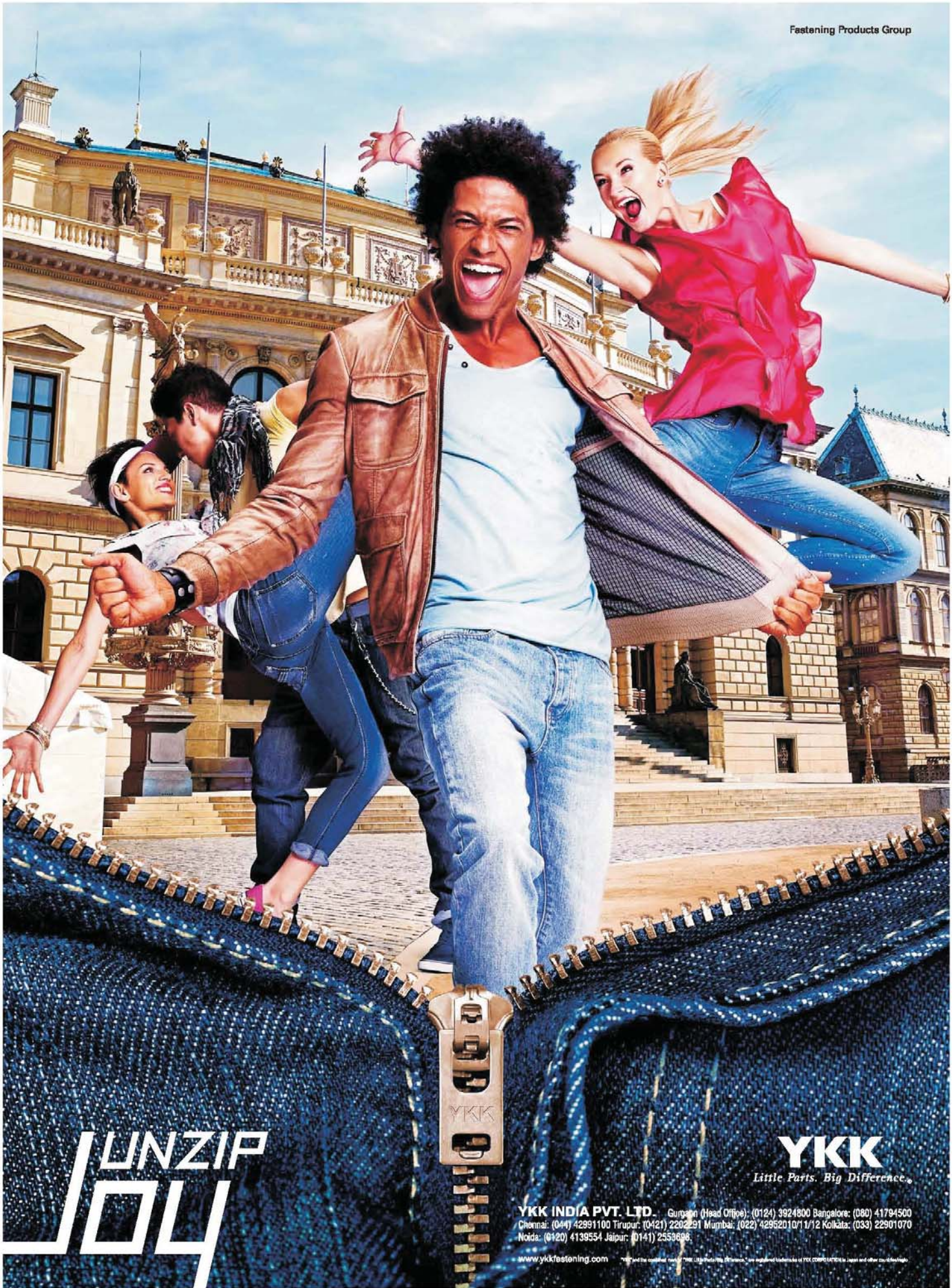
**In 2013, the growth of Indian luxury market was at a healthy rate of 30 percent to reach USD 8.5 billion. It is estimated that this would continue at the same pace till 2016, thus reaching up to USD 14 billion. The driving force of this growth was mainly by the lifestyle sector like gadgets, luxury hotels, fine dining, jewellery, personal care and beverages like wines.**

only made themselves accessible in the retail outlets, but also entered the digitised space in the form of their own websites or social media selling and at the same time, expanding themselves in the horizontal e-marketplace.

As per KPMG-ASSOCHAM India Luxury Summit 2014 and Kotak's Top of the Pyramid 2015 report, the number of the high net - worth Indian households, has seen a 17 percent jump in one year from FY 2014-2015, and their combined net worth was higher by 23 percent which is expected to reach INR 415 trillion by FY 20.

In 2013, the growth of Indian luxury market was at a healthy rate of 30 percent to reach USD 8.5 billion. It is estimated that this would continue at the same pace till 2016, thus reaching up to USD 14 billion. The driving force of this growth was mainly by the lifestyle sector like gadgets, luxury hotels, fine dining, jewellery, personal care and beverages like wines; which led to a steady growth at 30 to 35 percent as the luxury consumers refused to compromise on their 'luxe lifestyle'. Spending on luxury goods has seen an emerging interest. Till 2014, the country enjoyed only a share of 1-2 percent of the global luxury market. Nevertheless, the sale of luxury products in India grew 25 percent in 2014. **The reason behind the balanced growth of the Indian luxury market is due to an ever-increasing base of ultra high-net worth households (HNHs), which is liable to grow at a Compound Annual Growth Rate (CAGR) of 27 percent through 2017-18. The luxury space was once considered to be defined and limited by the preferences of these ultra HNHs, including only the bespoke products and exclusive services.** However, the present scenario has changed with the rising income levels and aspirations which led to a growing segment of potential luxury buyers beyond traditional luxury shoppers. The 'consumption ladder' is ascended by the typical upper middle class aspirers.

According to Euro Monitor International, with the rise of Indian HNIs in the non metro cities by 44 percent, there is a sudden change by rise in the penetration of luxury retailers entering in the second and third tier cities of India, where the consumers have substantial level of wealth at their disposal. India's ultra- rich who increased their expenditure on luxury products like jewellery and apparels which top the spending list are considered as non discretionary. The non- metro regions house nearly half of the state's ultra HNHs; thus offering lucrative growth opportunities to luxury segment players. As per an ASSOCHAM report, around 70 percent of luxury handbag players like



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Judith Leiber are receiving customers from tier-II and tier-III cities without depending on store based expansion. Its local partners are showcasing select products to potential consumers through exhibitions. The rate of luxury consumers preferring to shop in India, in the apparel and accessories segment has increased by over 67 percent. South India has emerged as a primary driver of the country's luxury market. The number of HNHs in these cities is estimated to grow at around 20 percent annually, as against 13.7 percent in metropolitan cities.

However, with the increase in the level of fraudulency, and people enlivening the good old days, there has been an increase in the footfalls in the retail. The luxury market by the Indians is still considered as a niche and premium market and Indian consumers like to touch and feel the products before

making an investment. The uncertainty of the authenticity over the quality and warranty of luxury products available online is still a concern incited.

**The factors which affect the growth of luxury goods players over the forecast period are the increasing infrastructure and operational costs, particularly given the depreciation of the Indian currency. Setting up stores in high streets affects the retailer's profitability due to sky-rocketing rentals. Furthermore, the removal of restrictions, enabling more luxury players to enter India through 100 percent single-brand and 51 percent multi-brand retailing would affect the space on offer in luxury shopping centres.** The presence of luxury brands in India is primarily restricted to malls, high streets and countable luxurious hotels. This would lead the luxury players shifting more into prime shopping streets in

the major cities, during the forecast period as cited by Luxury society- e-division of luxury group. The India partner, who brings in the brands, needs to be patient as it might take a few years for a business to become sustainable.

Despite the consequences of the challenges, multiple luxury retailers have successfully established themselves in India, with their out-of-box marketing strategies and inventive ideas capturing the potential luxury customer. The forecast of the retail space for luxury brands is set to double in the coming three to four years, according to a report by CBRE Group. Developments in the metropolitan cities like Delhi, Mumbai, Chennai and Bengaluru would add an expected 16 million square feet of commercial space, with luxury retailers taking an approximated one to two million square feet.



#### ABOUT THE AUTHOR



##### **Eliana Koulas, Director, Luxus Retail Pvt. Ltd.**

Though born in Greece, Eliana Koulas grew up in Australia and moved to India about a decade back. With an aim to bridge the occasional gaps in the luxury market and to redefine the concept of luxury fashion in India, she set up Luxus Retail in 2012 and brought La Martina, an iconic international luxury polo brand, to the country in 2014. With a total work experience of 18 years in India and Australia, Eliana has garnered thorough and superior skills & knowledge and good finger-on-the-pulse radar of the Indian market as well as its prospects. As the Co-Founder/ Director, Luxus Retail- La Martina, Koulas has made her mark as a dynamic entrepreneur and has many responsibilities under her hat. Prior to settling in India, Eliana was working with Ericsson and SITA Aircraft Services in Australia. An enthusiast with myriad interests, a go-getter by nature, she loves adventure sports and outdoors.

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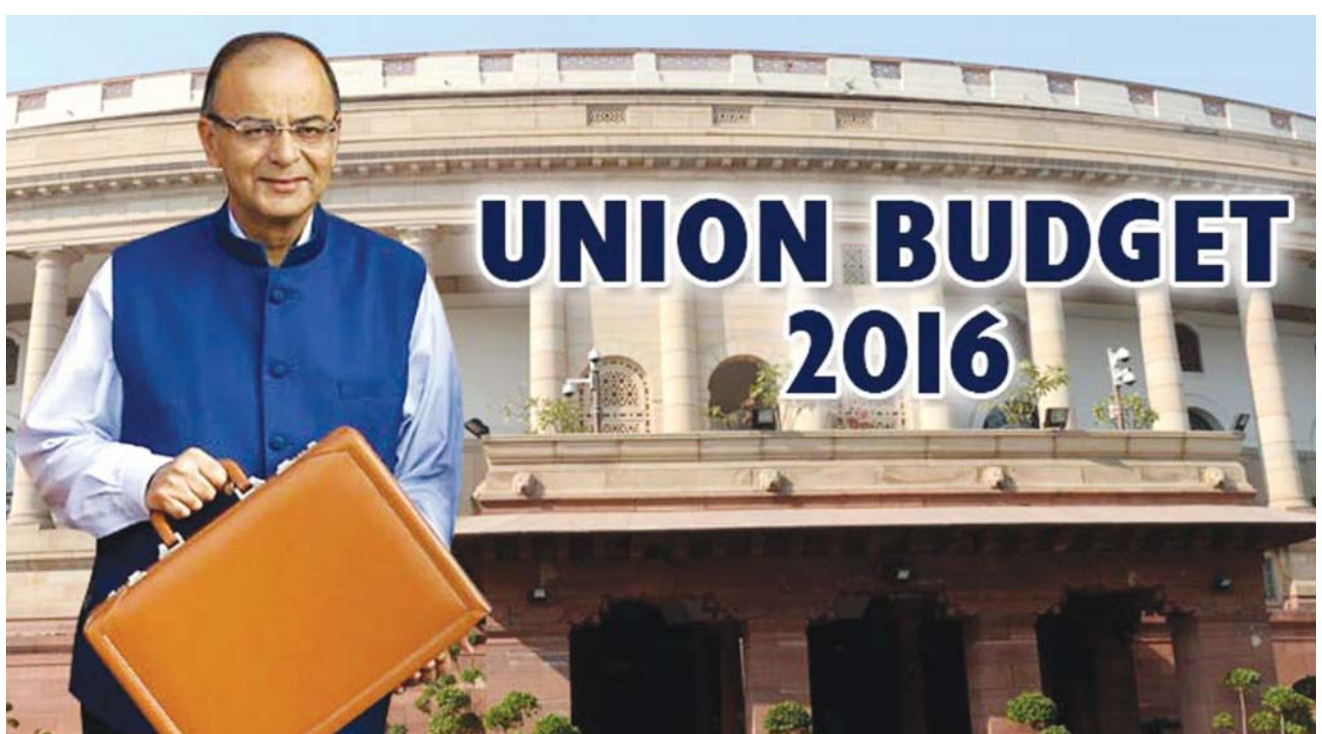
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## BUDGET 2016

# NOT VERY FASHIONABLE ... THE INDUSTRY VOICES CONSUMPTION CONCERNS

-Namita Bhagat & TEAM IMAGES BoF

The union budget presented by Finance Minister Arun Jaitley in Parliament on Feb 29, 2016, shows a clear focus-shift towards agriculture, rural and social sectors. And, undoubtedly, the agriculture sector was both needy and deserving of the significant attention as the largest employer in India. Two successive poor monsoons make its case even stronger. Nearly 70 percent of Indians live in villages; therefore, enhanced focus on rural economy is logical. Priority to social sector is also explicable, given the vast economic diversity of the country.

However, as the budget focuses on the above, it left the urban middle-class (UMC), which is one of the key drivers of the 'great Indian growth story', a bit high and dry. The UMC are not deep-pocketed but are indeed aspirational. Now, they will have to shell out more on products like branded

apparel, jewellery, CDIT, furniture, etc. and on services like beauty & fitness, mobile, restaurant, movies, etc. Already juggling their kitchen budget, they will cut back on consumption. 1 percent tax at source on luxury goods exceeding ₹2 lakh and car purchases exceeding ₹10 lakh is a dampener for luxury space as well. The manufacturers and retailers will tend to pass on the price hike to the consumers. Distressed consumer and lower consumption is every business' nightmare. Besides, the budget proposals to uplift the rural economy will start bearing fruit maybe, only after a few years.

Consumption drives economic growth and it's even better if it comes from all quarters. So, did the Budget 2016 miss the plot? Perhaps, the well-intentional finance minister could have done a bit more to uplift the overall consumer sentiment and business prospects.

The budget has evoked mixed reactions from the industry. The overall non-litigious attitude and support to startups has been appreciated but manufacturers feel a bit let down. The announcement to impose excise duty has been dubbed as "negative move" for the apparel industry. However, proposed cut in basic customs duty on specified textiles (including yarns and fibres) has been hailed by both exporters and importers of these items. Jewellery sector has expressed disappointment over the hike in excise duty. Footwear industry has welcomed reduction in excise duty on rubber sheets and resin rubber sheets for soles and heels. Even the upcoming startups have a reason to cheer as the budget proposes tax exemption on profits, one-day registration of companies and exemption of capital gains tax on startup investments. The budget proposes a 100 percent tax deduction for 3 years over a period of five years for startups approved before FY 2019 under the Startup India scheme.

## HERE'S WHAT THE INDUSTRY LEADERS HAVE TO SAY ON THE BUDGET 2016



– **Kishore Biyani**,  
Group CEO, Future Group

“I look at the budget purely from the lens of consumption. To me, consumption equals to development and from that point of view, this budget is a mixed bag of announcements for me. I believe, the government’s intention was quite positive but it had to walk on a tightrope, juggling between social and economic reforms at the same time. I saw various measures in this budget that would help the consumption and in turn, the development. The announcements also showed government’s focus in strengthening the rural economy. Various measures taken to ensure the security of farmers, doubling their income and providing employment to rural youth will further expand the consumption net and have long-term positive impact. While I see quite a few positives in this budget, I see one announcement that can prove to be a dampener. Making PAN mandatory for any purchases above one lakh rupees is going to have a serious impact on consumption. Without expanding the PAN and Income Tax net, a move like this will enormously hamper the consumption space. I expect its significant impact on retailing as well as on manufacturing. I believe it is a positive change, but we should give more time to our society to adopt these changes. Overall, I see this budget as a mixed bag of multiple things with a common direction. ”



– **Bhaskar Bhat**,  
Managing Director, Titan Company Limited

“We welcome the scheme provided for unaccounted income, as this has been affecting our jewellery business significantly and in the long run, will lead to greater tax collection and transparency. 1 percent excise while not being significant, is difficult to implement on account of the definition norms and the point at and entity to which the excise should be levied. ”

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– **Sanjay Kapoor**,  
Managing Director, Genesis Luxury

“I feel that in a scenario where the consumer sentiment is already low, this could spell lower purchases in India for luxury goods and services. Psychologically, the luxury consumer may feel better about shopping overseas for the same brands which in any case they perceive as cheaper overseas. We have tried to correct this perception over the years, but with such new levies, it just goes against the case of shopping in India. ”



– **Tarang Arora**,  
CEO, Amrapali Jewels

“Once again, it was not an exciting budget at all. No relief to the jewellery sector, we were expecting a relief on import duty on gold, diamonds and coloured stones as these are all raw materials to make jewellery. If the government wants to put excise duty on manufacturing again which was removed after national strike, then it does not give a positive message to this sector. Also removal of MAT was expected in SEZ-Gem and Jewellery zones, which hasn’t happened. If India needs to be competitive jewellery manufacturing hub, then these reliefs are required ”



– **Aasheesh Mediratta,**  
CEO, Fashionandyou.com



– **Arun Ganapathy,**  
CFO, Spykar Lifestyles Pvt. Ltd.



– **Rahul Mehta,**  
President, Clothing Manufacturers  
Association of India (CMAI), Mumbai

“ Budget 2016 overall is a good, balanced budget. Renewed focus on rural economy and agricultural sector and a bigger push for infrastructure development are steps in right direction. For start-ups, measures such as ‘one day incorporation’ and thrust on all-round infrastructure development shall definitely be good for the start-up eco-system. The proposed 3 year tax holiday period should be extended to all kind of start-ups. Also, the government should clearly define e-commerce which would resolve a lot of taxation ambiguities. ”

“ Budget 2016 doesn’t augur well for the apparel retailers. Excise duty which was withdrawn in Finance Bill, 2013 has again been imposed on branded readymade garments with MRP of ₹1,000 and above under two options - 2 percent tax without input tax credit and 12.5 percent with Input Tax Credit. The tariff value has also been changed from 30 percent of MRP to 60 percent of MRP. This would be an additional cost on apparel players. Krishi Kalyan cess of 0.5 percent which will be imposed effective June 1, 2016 is an additional impact for us. The non-litigious approach proposed by the finance minister is a welcome move. It will reduce the time spent on tax appeals and litigations. Also, as we are in the discretionary spend sector, no increase in personal income tax slabs or any major tax benefit for the common man is a negative for us as his net cash flow has not improved. ”

“ The imposition of excise duty on branded apparel is all the more surprising when the finance minister rightly emphasized in his speech the importance of job creation and the Make in India thrust. Textile is the highest employer after agriculture, and hence it is indeed ironical that new taxes are being levied on such an industry. As it is, the Industry is going through a rough patch, with the onslaught of online companies with their high discounting, and the somewhat sluggish sentiments of the market. This imposition will worsen the situation. It is also crucial to note that the current period was seeing many exporters, hoping to off set their slow down in global markets, making an entry in the domestic sector. Their efforts would again hit a roadblock. ”



– **Govind Shrikhande,**  
Customer Care Associate & Managing  
Director, Shoppers Stop Ltd

“ Overall, the budget has focused on macro-economic indices and outlines the intent of the government to sustain India’s poster-image of growth against the backdrop of an otherwise dull global economy. The FM has maintained the fiscal deficit at 3.9 percent despite the challenging environment. On the flip side, there has been no modification in Income tax slabs and this could stagnate discretionary spending. Moreover, additional excise duty on certain goods and services including branded apparel above ₹1,000, jewellery etc. and increase in service tax to 15 percent ( via The Krishi Kalyan Cess) is likely to impact consumer spending in the respective categories. Consumer demand which is already muted, could get impacted further. The FM was silent on the much-debated topics pertaining to the retail industry in his Oscar-day speech. We were eagerly hoping to hear about the passage of the stalled GST bill as well as measures toward levelling the playing field for e-tailers and brick & mortar retailers. And some welcome clarity on Multi Brand FDI in Retail. While Leonardo won the long awaited Oscar, the FM did not cheer the retail industry with any of the expected announcements. ”

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–**Harkirat Singh,**  
Managing Director, Woodland

“Union Budget 2016 is indeed a well-thought budget with a clear focus on agro sector, infrastructure and rural development. However, it’s not too positive for the manufacturing & corporate sector. While the last year’s announcement of phased reduction of Corporate Tax, as well as implementation of GST has been a welcome move, the increase of service tax this year from 14.50 to 15 percent will have an adverse effect on the business economics. As a manufacturer, our biggest concern would be an immediate implementation of an excise of 2 percent without ITC (Input Tax Credit) / 12.5 percent with ITC (Input Tax Credit) on readymade garments and will be difficult to administer and will certainly hit our margins. Footwear is marginally benefitted with increase of abatement from 25 percent to 30 percent. The benefit would be insignificant. Rubber sheets for manufacture of footwear soles are however benefitted substantially, as the excise duty has been reduced from 12.50 percent to 6%. 50 percent reduction of custom’s duty on specific fibres is welcome.”



–**Manoj Gupta,**  
Founder, Craftsvilla.com



–**Ajit Lakra,**  
Head Textile, Federation of Industry and  
Commercial Organisation (FICO), Ludhiana



–**I Rahumathullah,**  
MD, Maui Jim India

“While the fine print will emerge eventually, I am happy that infrastructure has got a major emphasis in Budget 2016. Yes, all e-commerce companies will applaud the move to improve digital literacy in rural India, with clear numbers, like ‘of the 16.8 crore rural households, as many as 12 crore households do not have computers and are unlikely to have digitally literate people’. The global financial community will see that despite the urgent need to push growth, India’s budget has not wavered from the consolidation path and has stuck to the 3.5 percent fiscal deficit target, which is a positive sign. What I am really looking forward to is that, the Budget has announced 100 percent electrification of villages by May 1, 2018. This means dignity and access to livelihoods for India’s hinterland.”

“The domestic branded garment manufacturers are not happy with the levy of excise duty on garments with MRP Value more than 1,000. Prices of readymade garments will go up in the range of 2 to 3 percent, depending upon the retail price of the product. We strongly condemn this move of the finance minister, as it will hurt small and medium size industries, which are manufacturing garments for big brands. When the government is in the process of bringing GST, this excise levy for such a short period should have been avoided. The actual burden is not on the brands, but on the MSME vendors of the brands. The MSME industry needs more ease of business at this stage instead of putting them into more complicated excise procedures. Garment manufacturing is a labour intensive industry and can provide maximum employment. The industry deserves to be encouraged in all possible ways.”

“Overall, the budget is progressive and positive as it lays out ground for a stable macroeconomic environment and promises prudent fiscal management. This gives out a positive signal to investors globally and assures of a more stable business environment. Even assuring policy indications like, India will not levy retrospective taxes in future can be very encouraging to the investors, looking to enter the market. The 1 percent levy (to be deducted on source) on purchase of high end luxury goods (exceeding ₹2 lakh in price) has not been liked by the luxury sector, as many believe it will discourage buyers at home and might encourage them to shop for the same products outside India. It might also be detrimental to the plans of brands planning to enter the Indian market.”



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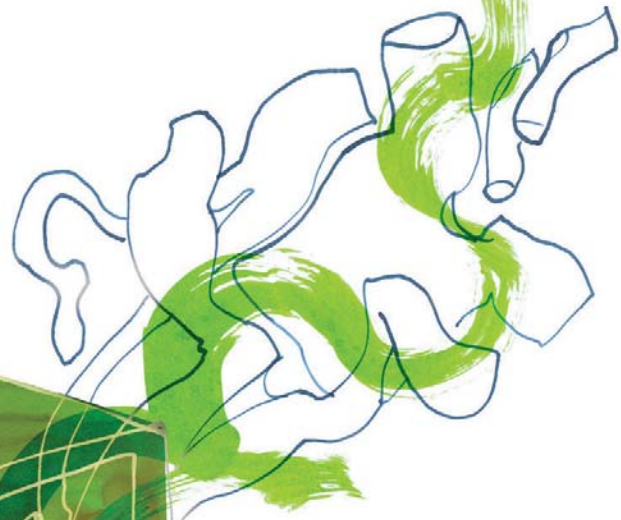
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# INSIDE THE H&M STORY

*Ten interesting things consumers do not know  
about H&M's wonderful initiatives.*

*By Roshna Chandran*



## GARMENT COLLECT BOX

Fashion should not end up in landfill. That's why you can drop any clothes you no longer want or need at H&M to give them a new life. Our goal is to create a closed loop in which these kinds of garments are recycled into new creations. H&M is the first fashion company to have a clothing collecting initiative worldwide. H&M Garment Collecting, which was launched in spring 2013, is offered in all our markets. During 2014, we collected over 7,600 tonnes of clothing or the equivalent of 38 million t-shirts. By May 2015, more than 14,000 tonnes of clothing had been collected in total since launch.



## DESIGNER COLLABORATIONS

H&M is continuously coming up with exciting and surprising new fashion Ideas. High-fashion design doesn't have to be a matter of price. Since 2004, H&M has collaborated with international designers and style icons from Karl Lagerfeld to Versace and so on. The collaborations create buzz by presenting customers with surprising and exciting fashion meetings. H&M collaborated with the legendary Parisian house of Balmain and launched them in stores worldwide on November 5th, 2015.



STYLE ICON COLLABORATIONS



H&M has had capsule collections and specially created campaigns with many style icons like Beyonce, Madonna and David Beckham.

FASHION SHOW AT PARIS FASHION WEEK



Every year during the Paris Fashion week, H&M makes a statement with its season collection - the H&M Studio, which is created by a core design team within H&M led by Ann Sofie Johansson, who creates a limited edition collection full of the hottest looks and statement pieces, every season.

SUSTAINABILITY



Our sustainability work is a very important part of our customer offering, and has been so for many years. Because our sustainability work is an integral part of H&M's operations and genuinely permeates our daily work, it's only natural that it is now also part of H&M's business idea: "Fashion and quality at the best price in a sustainable way".



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H&M Conscious Exclusive is a collection consisting of exclusive dresses in a limited edition, made in more sustainable materials. New materials this year, are recycled sequins and beads made of recycled plastic. More sustainable materials used are organic cotton, recycled polyester, recycled polyamide and TENCEL® or Lyocell, as well as organic leather and organic silk.

THE CONSCIOUS HANDTAG



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## BENGAL GLOBAL BUSINESS SUMMIT 2016

# GIVES MAJOR FILLIP TO THE TEXTILE INDUSTRY IN THE STATE

The textile industry in Bengal received special focus and thus a major boost at the Bengal Global Business Summit, 2016, organized in Kolkata at Milan Mela grounds on the 8th and 9th of January, 2016 under the able leadership of Mamata Banerjee, the Chief Minister of West Bengal.

By Ritusmita Biswas  
(With inputs from Ivy Ghoshal)

While the summit focused on ensuring deliverables for each and every business sectors, it laid special emphasis on the textiles and clothing industry of West Bengal, with two exclusive sessions dedicated solely to textile. While one was the National Consultative Session, that was moderated by Sanjay K Jain, MD, TT Limited, the other was the State Consultative Session moderated by Raj Dugar, MD, Designer Exports. The one point agenda of both these sessions was to discuss ways that would potentially turn Bengal into a hotspot of textile manufacturing in the coming years.

Rajiva Sinha, Principal Secretary, Department of Micro, Small & Medium Enterprises & Textiles (MSMEs and textiles), put forward a proposal on behalf of the state government

to set up 13 textile parks in West Bengal under the TEXPRO Bengal Project, where the industry players keen to come to Bengal will be provided with power, environment compliant infrastructure, single window clearance and land apart from other subsidies on labour, stamp duty, land and capital. The TEXPRO project seeks to establish Bengal as a leading player in competitive and global value added textiles like apparel products, technical textile, knitted fabric, processed power loom and, of course, readymade garments.

The industry segment came forward in big numbers to encourage Bengal in its endeavours to uplift its textile industry. Stress was led on institutionalization of programs and plans so as to not disturb the ongoing plans. In fact, Amit Goyal, Vice Chairman,



EP, Apparel Export Promotion Council (AEPC), who led a delegation to Bengal, was favourably impressed by the enthusiasm of the state government and has promised to bring a bigger delegation in the future.

The 13 textile parks will have a combined space of 22.7 million sq. ft. and till date, expressions of interest of EOIs have been received for more than 50 percent of the space on offer. An offer was made by Rahul Mehta, President, Clothing Manufacturers Association of India (CMAI) and International Apparel Federation (IAF), that he will bring an international delegation to Bengal after the IAF conference in Mumbai later this year.

The participants at the Bengal summit included retail chains like Lifestyle, V Mart, etc., along with textile consultants like Wazir Advisors, Technopak and ILFS. Other than that, a Bangladeshi delegation showed interest and the Federation of Bangladesh Chambers of Commerce and Industry (FBCCI) have submitted an EOI to shift a planned large distribution depot for Bangladesh Garment Companies from Gujarat to Bengal.

Rajiva Sinha assured the industry that the state government would assist them in every possible fashion. He also invited stalwarts to give suggestions on what is likely to make Bengal a prominent player in the industrial market of India. Again, the emphasis was on the development of the

textile and clothing market and in the coming five years, the aim was to increase the share of Bengal in the Indian textile market from 5 percent to 10 percent. The villages of Bengal are renowned for their textile and handloom industries and marketing them in a proper fashion is a new challenge for the state government.

There were encouraging and positive responses from the national leaders who were at the summit. In one voice, all agreed that Bengal is capable of becoming a textile hub, but the only hurdle is the perceptions of the industry in the state and that should change.

**This summit went miles in changing some misperceptions and bring to fore all that Bengal has to offer in the world of textiles. Rahul Mehta, the president of CMAI, said that West Bengal has many manufacturers but most of them are not major brands. The reason that big brands are steering clear of Bengal is wrong perception that Bengal is synonymous with trouble.**

The summit established Bengal as a part of aspirational India that sought to become the torch bearer in the near future. The big step lies in monitoring what Bengal does and that too efficiently. The industry should have high expectations from Bengal and also demand more and better work from the state. Just as the summit highlighted the challenges and it also accentuated the government intention and capability of overcoming it and converting the challenges into fruitful

endeavours so as to make Bengal a future industrial hub in India and the world.

An allegation made by a section of the people against AEPC was that it is indifferent towards Bengal; which was promptly refuted by Vice Chairman, Amit Goyal. He said that AEPC will provide every possible assistance to Bengal to market its product in the international market. He also assured of efficacious garment fairs in Kolkata so that Brand Bengal gets the exposure and promotion that it deserves.

For TEXPRO, some partner associations were Intimate Apparel Association of India, West Bengal Bleachers & Dyers Association, Bangla Readymade Garments Manufacturers & Traders Welfare Association, West Bengal Hosiery Association, Eastern India Garment Manufacturers & Exporters Federation, Chamber of Textile Trade & Industry, Bengal Hosiery Manufacturer's Association, The Clothing Manufacturers' Association of India, The Cotton Textiles Export Promotion Council, Federation of Hosiery Manufacturers' Association of India (FOHMA), Confederation of Indian Textile Industry (CITI), and the Apparel Export Promotion Council among others.

Startups also got a great flip in the state with the state government promising to nurture and support them in the future. With that in view, the government of West Bengal also launched a state startup policy at the Bengal Global Business Summit.





# THE 10 TOP CHALLENGES FACING FASHION RETAILERS IN INDIA TODAY

FASHION, THE AVANT GARDE OF INDIAN RETAIL, IS ALSO A HIGHLY EVOLVED SECTOR. EVOLUTION BRINGS IN A MULTIPLICITY OF ISSUES AND OPPORTUNITIES. AND IN AN EVER EVOLVING MARKET WHAT WAS TOP ISSUE YESTERDAY MAY NOT BE THE FOREMOST CONCERN AREA TODAY. IMAGES BOF IN ITS ANNUAL STUDY IDENTIFIES WHICH ARE THE TOP-ISSUES FACING FASHION RETAILERS TODAY AND STUDIES HOW FASHION RETAILERS PERCEIVE THEM.

AN IMAGES BUSINESS OF FASHION  
EXCLUSIVE STUDY.

STUDY LEAD: RAJAN VARMA  
RESEARCH & INTERVIEWS:  
ZAINAB S KAZI & ROSY N SHARMA

**A**s we end every financial year, and look back at the year that was with hope for the year that will be, it is time to go back to the drawing boards. A wise man once said that he always takes a restart at life at the beginning of every year.

The fashion retail category continues to lead modern retail in India backed by the ever growing dreams of the Indian fashion consumer. The journey of fashion from “need” to “want” and now to “aspire” is truly on its way. Internet retailing and smart phone penetration are leading the aspiration creation and also impacting sales. After gold retailing, menswear leads fashion and kids wear promises the maximum growth. Indeed, what better time than this than to absorb assimilate and successfully ride the many movements and opportunities that lie before the fashion industry.

To find out which exactly are the top-issues facing fashion retailers today IMAGES Business of Fashion did a snap study. First, we spoke to a few retail leaders to help identify the choice set from which the top 10 ten would be ranked. Having identified the choice set we wrote to over a 100

THE TOP 10 CHALLENGES FACING FASHION RETAILERS IN INDIA TODAY	RANK
HIGH RETAIL RENTALS	1
HOW TO SCALE UP THE BUSINESS	2
CUSTOMERS ENGAGEMENT AND RETAINING LOYALTY	3
LOW FOOTFALL	4
LACK OF QUALITY RETAIL SPACES	5
GOVERNMENT ISSUES: RULES, DUTIES & TAXES STRUCTURE	6*
CREATING AND PROVIDING A GOOD OMNI-CHANNEL OFFERING	6*
OVERCOMING/ RIDING ON THE ONLINE CHALLENGE/ OPPORTUNITY	8
LACK OF TALENT/ PROFESSIONAL MANPOWER	9
HOW TO BEST USE SOCIAL MEDIA FOR MARKETING	10

\* joint rank

In the study conducted last year the Top Issue was “How to Scale Up the Business.” However, this year it has been toppled and “High Retail Rentals” has emerged as the most critical challenge voiced by retailers. Other top gainers this year were “Low Footfalls” which rose from number 7 to number 4, and “Government Issues: Duties, Rules & Tax Structure.” Clearly it has been an year of intense concerns on margins. On the other side issues that have gone down the rankings include “Calendar planning: Unclear EOSS Periods” (4th ranking went down to 12th ) and “Competing in a Saturated Market” (6th ranking went down to 14th). Is it that the retailer has accepted both, as factors that are now part of the game?

ISSUES THAT HAVE GAINED IMPORTANCE	RANKING IN 2016	RANKING IN 2015	
High Retail Rentals	1	3	↑
Low Footfall	4	7	
Government Issues: Duties & Taxes Structure	6	11	↑
ISSUES THAT HAVE LOST SOME IMPORTANCE	RANKING IN 2015	RANKING IN 2016	
Calendar Planning: Unclear EOSS Periods	4	12	↓
Competing in a Saturated Market	6	14	↓
Poor Consumption and Sluggish Economy	7	11	↓



fashion retail leaders to participate in the study. Over 40 retailers responded. We wish to thank all that participated in the study.

“How to Scale Up the Business” however emerges as the top issue and “Customer Engagement & Retaining Loyalty” emerges at No.3, if we combine the rankings for both FY 15 and FY 16. These two are very aptly summed up in the words of Mohit Dhanjal, Director - Retail, Raymond Ltd., “the biggest challenge for any fashion retailer is staying relevant to the target group. With the ever expanding array of brands and exposure that consumers have today, it is important that the brands reinvent themselves continuously to stay relevant to the TG. This should not be restricted to only product but also extend to other touch points such as channels of communication, the retail store identity, the customer experience offered at point of sale, etc. With the growing consumption of digital media brands are increasingly going beyond traditional marketing channels and embracing digital especially social marketing into their DNA.”

At this the coming of the omni-channel era there are increasing number of functional areas and multiple customer touch points; each competing for time, effort, resources, focus and innovation; success in fashion retailing today is indeed a huge multi-tasking ask. Add on several other dis-synergies, environmental and statutory problems and fashion retail is a jigsaw with a multiplicity of issues to be tackled. Multiplicity demands prioritisation. We hope the study helps in tackling them perhaps better by prioritising them.

>

ISSUE NO.  
**1**
**HIGH RETAIL RENTALS**


***“This is clearly a demand- supply issue. Few quality malls are making a killing and creating artificial inflation in rent which is unviable for retailers. The question is between sales and bottom-line, any business needs both.”***

**– Rajiv Nair**  
 CEO, Celio Future Fashion Pvt. Ltd.



***“High retail rentals are a push back in finding locations for fashion retailers. Also, higher preference is given to international retailers over domestic retailers.”***

**– Kunal Mehta**  
 VP - Marketing & Business,  
 Being Human Clothing



**H**igh retail rentals are creating havoc for retail brands. The market is taking a hit due to this and eventually when shoppers are not comfortable with driving to far off locations for their favourite brands, the rescue is online shopping! High rentals are a huge deterrent for brand expansion and especially for niche categories. Manu Indrayan, Co-Founder and CEO, 612 League says, “This is the biggest challenge in kids wear category as rentals are not commensurate with store productivity.” Neha Shah, Senior Manager – Marketing, Pepe Jeans aptly puts down the perils of high rentals saying, “Lack of quality retail real estate supply coupled with prohibitive legislation has acted as an impediment to the spread of organised retail in India. Compounding the problem of limited investment-grade supply of retail space are high and lack of professional mall management, all of which make for a challenging operating environment for global retailers.” Shitanshu Jhunjhunwalla, Directory, Turtle Ltd., adds, “One of the major challenges being faced in the current market scenario is the rentals being disproportionately higher to the sales ratio in most cities – most malls are struggling due to lack of growth in footfalls which in turn hampers sales and brands struggle with high rentals which keep on escalating.”

Sandeep Jain, Executive Director, Monte Carlo says, “If we compare the rental values vs. sale, we would find that they are in huge disproportionate order.” Mincing no words, Rajiv Nair, CEO, Celio Future Fashion Pvt. Ltd., shares, “This is clearly a demand-supply issue. Few quality malls are making a killing and creating artificial inflation in rent which is unviable for retailers. The question is between sales and bottom-line, any business needs both.” Kunal Mehta, Vice President - Marketing and Business Development, Being Human Clothing makes an interesting observation, “High retail rentals are a push back in finding locations for fashion retailers. Also, higher preference is given to international retailers over domestic retailers.”

Aptly concluding on this, Jennifer Kapasi, Head of Operations, Triumph International shares, “Inflated rentals in metros and premium locations impact retail profitability and thus indirectly impacts the consumer platforms.”

**Challenges with high rentals**

- Impact profitability massively
- Hinders expansions/investments
- Compromise on location
- Compromise on store layout/people because of cost





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A man with long dark hair and a full beard is shown from the chest up. He is wearing a light pink, long-sleeved button-down shirt and dark blue jeans with a black belt. He is looking down and to the right with a thoughtful expression, his hands are clasped in front of him. He is wearing a gold watch on his left wrist and a small tattoo is visible on his right hand. The background is a wall with a pattern of large, stylized, golden-brown floral or leaf-like shapes on a light blue background.

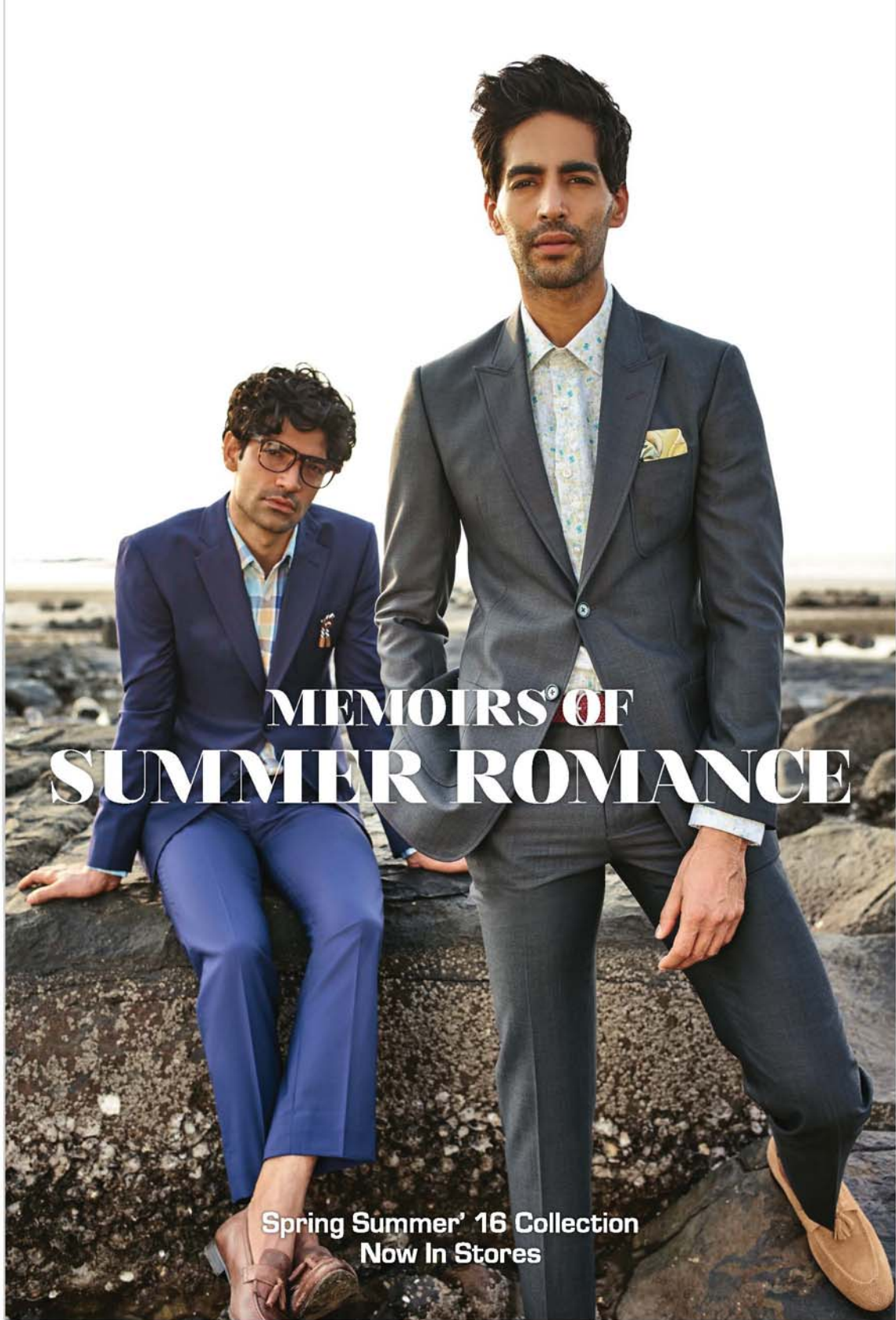
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Spring Summer' 16 Collection  
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The charming notes of muted shades, dreamy patterns and tasteful textures to ring in a Spring Summer affair.



SINCE 1925

ISSUE NO.

2

HOW TO SCALE-UP THE BUSINESS



***“Branded apparel business involves a huge width – design, sourcing, manufacturing, retailing, marketing and other related activities need to be scaled up simultaneously.”***

– Manu Indrayan

Co-Founder & CEO, 612 League

No business can afford to remain stagnant. It is a given that be it any industry or category, scaling up is essential. When we talk of apparel, the onslaught of brands in this category is mind blowing. From regional brands to national and international; there are umpteen players in the market. For any brand to survive, it becomes imperative for them to scale up their operation and offering. This remains one of the top issues faced by apparel retailers – that of – how to scale up the business. Shares Indrayan of 612 League, “Since branded apparel business involves a huge width – design, sourcing, manufacturing, retailing, marketing and other related activities need to be scaled up simultaneously.” Ranjiv Ramchandani, Director, Tantra accentuates the point of adhering to core values while scaling up the business. He says, “For a second stage growth brand like ours, it is all about how to scale up our values, without losing the core essence. This means finding the right partner to ally with for the net growth parabola.”

Exploring new markets is an excellent way to scale up business, specially so in the case of growing competition. Highlighting this is Vineet Gautam, Country Manager, Bestseller India, “With new brands coming



to India, we are continuously exploring new markets to achieve constant growth rate for our brands.” Reiterating this is Jain of Monte Carlo who too feels growth would come from new markets though not at the cost of ignoring the existing markets. Though, the issue of steep rentals does pose a hindrance in scaling up. Elaborating on this, Mohit Dhanjal, Director - Retail, Raymond Ltd., shares, “Steep rentals are a big deterrent to store expansion plans. The rising cost of rentals, especially on high streets in big cities, poses a major challenge.” Where the cost of rentals is high, there are issues with regards to the quality of the space available as well. Franchising which has been one of the most preferred way to scale up business, too is being hit by the same besides the other issue being that of finding the right franchising partners. Nair of Celio, shares, “Lack of quality real estate and poor state of high streets limit the ability to grow. Models like franchise operations are seriously under question due to the quality of franchisees available in the market.”

This does pose a challenge for retailers considering having a grip on all functions simultaneously is a challenge. According to Kapasi of Triumph, it is important to keep in mind that while capturing new markets is an excellent way to grow, there is more potential for profit in developing existing markets through increased penetration.





***“In today’s market scenario, the competition is from new brands which are emerging and from the international brands which are entering. Also, online companies are setting up very high competition to the retail companies.”***

– Farah Malik Bhanji  
MD & CEO, Metro Shoes

She adds, “I think the ways to scale up the business is by educating the market and consumers.”

Aptly concluding on the issue of scaling up, Farah Malik Bhanji, Managing Director and CEO, Metro Shoes Ltd., shares, “In today’s market scenario, the competition is from new brands which are emerging and also the international brands which are entering. Also, online companies are setting up very high competition to the retail companies. Coming up with the latest offerings as per the customer’s preference and providing

exceptional service is the key to scale up the business.”

**Challenges while scaling up the business**

- Quality of rental space
- Rental rates
- Finding right partners (vendors)
- Finding right franchisee partners
- Online competition
- Competition from new brands
- Keep pace with ever evolving customer preferences/changing trends



**CUSTOMERS ENGAGEMENT AND RETAINING LOYALTY**

There is no dearth of brands in the market and hence a customer is free to choose and discard the brand that appeals or does not appeal to him respectively. This makes it imperative for the brand to have

niche customer loyalty initiatives in place which again is a challenge considering there is only this much you can do. Elaborating on this, Aiman Khorakiwala, Director, Akbarally’s Men shares, “Customers have abundant shopping choices these days and stores across offer varying amounts of customer loyalty benefits. So much so that it is no longer novel, neither engaging for a customer. Exiting a customer is a challenge.” Adding to this, Mehta of Being Human Clothing shares, “With the noise in the marketplace and hundreds of retailers competing against one another, the customer has plenty of options and is hard to retain. Also, customer prefer international retailers over domestic solely because of a bigger brand name.” Besides loyalty programs, the store ambience also does play an important role to influence a customer. Explaining this, Nair of Celio says, “Competition is fierce and keeping your good customer and retaining new customers is a constant battle. Product and service will be the key differentiators. Store presentation also has a big role to play. Stores have to be seductive.”



*Lisa Haydon*



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***“It costs up to 5 times more to acquire a new customer than to retain an existing one and a 5 percent reduction in the customer defection rate can increase profit by approximately 25 percent. Thus customer retention and building customer loyalty is getting vital.”***

– Vineet Gautam  
Country Manager, Bestseller India

ISSUE  
NO.  
4

LOW FOOTFALLS



***“Low footfalls at the store is a huge challenge. Retailers are spending increasing amount to re-merchandise the stores, offer promotions to incentivise consumers to come, train staff to engage consumers in new ways and improving the overall shopping experience of consumers.”***

– Neha Shah  
Senior Manager - Marketing, Pepe Jeans

Kapasi of Triumph shares, “Customer engagement and retaining loyalty also depends upon the reach of the brand. We suggest, the brands should broaden its touchpoints across market and sales channel to reach out to its target audience. Given the e-commerce revolution, it has become even more critical to look at engagement beyond point-of-sale.” At Triumph International, according to Kapasi, the brand believes in offering high value and consumer-driven loyalty programs and engage with customer on real interest basis, instead of spam emailers and dumping data and information.

Accentuating the importance on having a customer loyalty program in place, Gautam of Bestseller India explains, “It costs up to five times more to acquire a new customer than to retain an existing customer and a 5 percent reduction in the customer defection rate can increase profit by approximately 25 percent. Thus customer retention and building customer loyalty is getting vital.” At Bestseller, the patrons are offered an

“A- lister” loyalty program which offers sale preview, promotional vouchers and special updates of the collection.”

Aptly concluding on the importance of this challenge, Dhanjal of Raymond shares, “We need to be more responsive to the shopper needs and requirement. To achieve this goal, we need to have an indepth understanding of the shopper. CRM is an integral part of how one can bring the shopping experience alive through personalised communication as well as product offering.”

#### **Challenges with building customer loyalty**

- Retaining a customer in face of competition-
- Understanding and catering to the changing needs of the customer
- Retaining old customers and at the same time building a new customer base
- Having a seductive store ambiance to increase footfalls



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Market conditions which are being overshadowed by sluggish economy and of course, the onslaught of discounting taking place online has led to lower and slower footfalls at retail stores. Kapasi of Triumph puts this fantastically when she says, “Year on year, there have been extensive EOSS periods, leading to

considerable decrease in footfall in the stores after the sale. Modern trade issue such as VM shopping, is also one of the reasons for low footfalls. Customers are also turned in to the sale periods, and look forward to shopping only in those months.” On why low footfalls are detrimental for retailers, Shah of Pepe Jeans rightly

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***“Getting customers into the store is the main challenge. Conversions is the easy part. Choosing the best marketing tool and accurately predicting which is most effective for footfalls is also a task.”***

— **Aiman, Khorakiwala**  
Director, Akbarallys Men

points out, “Low footfalls at the store is a huge challenge. Retailers are spending increasing amount to re-merchandise the stores, offer promotions to incentivise consumers to come, train staff to engage consumers in new ways, and generally improve the overall shopping experience of consumers.”

Khorakiwala of Akbarally’s Men candidly shares that getting customers to the store is the difficult part but once the customer is at the store, converting him is not a challenge at all. She explains, “Getting customers into the store is the main challenge. Conversions is the easy part. Choosing the best marketing tool and accurately predicting which is most effective for footfalls is also a task.”

Flagging this as a very deep challenge (that of low footfalls), Jhunjhunwalla of Turtle shares, “At least for our stores, we have been witnessing a steady decline in footfalls in like-for-like stores and this can be attributed either to market expansion and availability of more brands and malls in each city. This is not a healthy sign at all.”



Radu Bercan / Shutterstock.com

The solution to this according to Dhanjal of Raymond is to making shopping memorable experience for the shoppers and not restricting it to just a transactional deal. He shares, “As retailers we need to create memorable moments for customers that will help define the shopping experiences. The key to success if transitioning the relationship from just being transactional, to much more experiential.”

#### Challenges with low footfalls

- Retaining customer interest
- Bringing her to the store and not restricting her visit to just the EOSS period
- Constantly evolving marketing techniques

ISSUE NO.

5

LACK OF QUALITY RETAIL SPACES



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Location. Location. Location. These three words defined all the challenges put together for retail in earlier days before issues of manpower and e-commerce came to be realised. But having said that, the challenge of finding quality retail space cannot and should not be undermined. There is a dearth for the same in the market and retailers are constantly fighting a tough battle to overcome this challenge. Indrayan of 612 League aptly says, “In India, there are very few high quality properties due to poor infrastructure and as a result, the better ones enjoy very high rentals.” Kapasi of Triumph adds, “There are various reasons behind lack of quality retail spaces such as lack of infrastructure in tier-II and -III cities, space restrictions in metros, lack of space for organized retail etc.” Reiterating Indrayan’s point, Dhanjal



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***“To find good quality retail space is still a challenge in the country. The government has to concentrate on developing the infrastructure to let organised retail flourish.”***

– Sandeep Jain  
Executive Director, Monte Carlo



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of Raymond elaborates, “The lack of quality retail spaces in India at affordable rates is a serious challenge. With the proliferation of international labels in the Indian market space, the demand for quality retail space has gone up considerably.”

Elaborating further on this and highlighting how the same can be overcome, Gautam of Bestseller India says, “With new brands coming in, the struggle for good retail spaces is getting real. Government initiatives to promote infrastructure by PPP model and encouraging banks to fund infrastructure projects as low lending rates, ensure capital availability and developments of more number of smart cities should be able to tackle this issue.”

Highlighting the pressing need for government intervention, Nair of Celio minces no words when he shares, “Government effort in clearing projects and facilitating realty players to build malls has been poor. The cost economics of malls is poor even for developers. Thus there is virtually a shortage of quality malls coming up since 2008.” Jain of Monte Carlo adds, “The government has to concentrate on developing the infrastructure to let organised retail to flourish.”

**Challenges with lack of quality space**

- High rentals
- Hitting the business expansion plan
- Poor infrastructure development



**GOVERNMENT ISSUES: RULES, DUTIES & TAXES STRUCTURE**



Taxation and different rules for different states hampers retail operation and expansion like no other. Aply explaining perils and stress of the same is Kapasi of Triumph, “Triumph International India has its presence across India and thus differences in government issues and taxes across states results in complex business structures and complicated finance reconciliations etc. With the proposed excise duty, it will impact business even more.” On how taxes on brands ultimately effect the end consumer, Mehta of Being Human Clothing shares, “High taxes levied by the government are a drawback in the costing aspect for the brand.” Dhanjal of Raymond aptly puts this, “The proposed levy of 2 per cent excise duty on branded

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***“There is a need for uniform taxation to speed up business and to reduce administrative paperwork. Also, recognition of retail as an industry for easier access to capital and finance. The import duties can be reduced and the clearance time decreased for goods that do not compete with local domestic products.”***

– Jaydeep Shetty  
CEO, Mineral Fashions

ready-made garments and articles of textiles of retail sale price of ₹1,000 or more will result in hurting the textile and apparel retail in the country. Given the backdrop of an impending GST, this additional levy can hurt the industry.”

Jaydeep Shetty, CEO, Mineral Fashions elaborates on the need for GST and other issues, “Regulations on timing and also no of days operational for stores must be 365 days. Uniform taxation is needed to speed up business and logistics and reduce administrative paperwork. Hence GST needed; Recognition of retail as an industry and hence easier access to capital and finance; import duties can be reduced and the clearance time decreased for goods that do not compete with local domestic products.” Adding further to the issue, is Jhunjunwalla of Turtle who talks about the issues he faces in West Bengal and shares that “the paperwork process for statutory compliances is very cumbersome and tedious and not business friendly in West Bengal for each goods return you pickup you need to go to the tax department and generate a physical waybill - which



delays the process and puts stress in our product to cash cycle - simplification of current structures and paperwork is dearly required.” Drawing attention specifically to the footwear industry, Farah Malik Bhanji, Managing Director and CEO, Metro Shoes Ltd shares, “Excise duty on footwear is very high at 24 per cent on the cost and VAT rate ranges from 12.5 percent to 15 percent across various states.”

As a solution, according to Jain of Monte Carlo, “The industry has to be in one voice to update the government on their issues. Today, this problem is not in our control.”

#### **Challenges with duties and tax structure**

- Delay in GST
- No uniformity in taxes across the country
- Heavy taxes
- Cumbersome paperwork
- Different rules for timings

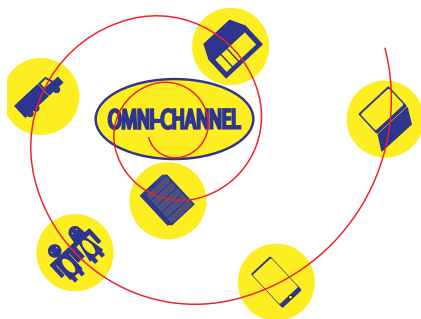
ISSUE  
NO.  
**6**

### CREATING AND PROVIDING A GOOD OMNI-CHANNEL OFFERING

With smart phones and tablets being easily accessible to everyone, retail in India is literally on everyone’s fingertip. This makes it imperative for retailers to create and provide a good omni-channel offering. Indrayan of 612 League aptly puts this saying, “The way consumers connect with a brand is changing rapidly. It is very important for a brand to have an omni-channel presence so that consumers are able to connect in the manner that they feel convenient.” For retailers belonging to yesteryears, it does become difficult to adopt to the changing market trend of having an omni channel presence. Khorakiwala of Akbarally’s Men shares, “A balancing art between brick and mortar business and online business is a task for those people who are accustomed to only physical retail. The business model is completely different.”



Shah of Pepe Jeans accentuates that online and offline are not in competition with each other. She explains, “e-commerce and brick and mortar stores are not competing ideas. Consumers today buy from varied channels, for instance – an EBO, department store or online. Our objective is to ensure that our consumers have a ‘wow’ experience every time they shop with our brand – be it through stores or via e-commerce. We must have an omni-channel approach.” Adding further to this, Dhanjal of Raymond shares, “As



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***“As retailers, we need to be accessible, irrespective of the format, for customers to shop as per their convenience. Therefore, the battle is not between online or offline, but of how one can best integrate these two worlds and offer a seamless shopping experience to customers wherever and whenever they want to experience our brands.”***

– Mohit Dhanjal  
Director - Retail, Raymond Ltd.

retailers, we need to be accessible, irrespective of the format – online and brick and mortar, for customers to shop as per their convenience. Therefore, the battle is not between online or offline, but of how one can best integrate these two worlds so that we may offer a seamless shopping experience to customers wherever and whenever they want to experience our brands.”

According to Nair of Celio this issue is going to be a key to compete in future. He explains, “The online and offline divide will not exist as offline players will have to embrace e-commerce and omni channel. We all need to get prepared.” Though as Mehta of Being Human Clothing shares, “Omni-channel is the ideal way to go, however, the ideal trick has not been established yet and the industry is still on its way to find the most effective omni-channel offering.” However, the river has also started flowing uphill with e-commerce retailers like Yepme, opening brick and mortar store for better sales and in order to engage more customers.

#### Challenges with omni-channel retail

- Understanding of the concept
- Creating a truly omni channel presence

ISSUE  
NO.

8

OVERCOMING/RIDING ON THE ONLINE CHALLENGE/OPPORTUNITY



***“Online sales or online marketing depends upon too much discounting resulting in unprofitable business and also decreases the brand value. It also does not have the supply chain infrastructure.”***

– Jennifer Kapasi  
Head - Operations, Triumph  
International India



E-commerce has taken India by storm. From houses to condoms, everything can be purchased online. Fashion is no exception. Dedicated designer portals to those only dealing with handicrafts, the universe for fashion retailing is huge! Though, this does pose a challenge for the industry as well. Aptly explaining this, Kapasi of Triumph International says, “Online sales or online marketing depends upon too much discounting resulting in unprofitable business and also decreases the brand value. It also does not have the supply chain infrastructure.” On the issue of pricing, Khorakiwala of Akbarally’s Men does not seem too happy with the discounts and offers. She shares, “There are perennial

sales on online marketplaces with all the brands. That is tough to compete with for a price sensitive customer.” Reiterating the same is Mehta of Being Human Clothing, “While online retail has expanded its reach to the deepest corners of the world making retailers accessible in a couple of clicks, the huge discounts offered to the customer has changed their mindset. The customer of today is numbed by the regular in-store discounts offered and is constantly looking for more.”

The platform is definitely a blessing for some brands that are targeted to customers who are looking at brands that are easy on the pocket and also for customers

>

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### INDIA FASHION FORUM

Show Dates: 15 - 16 March 2016

Venue: Renaissance Hotel

Mumbai, India

Contact:

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Santosh Menezes: +91 9820371767, santoshmenezes@imagesgroup.in



Mar 18  
2016

### EAST INDIA RETAIL SUMMIT

Show Dates: 18 March 2016

Venue: ITC Sonar

Kolkata, India

Contact:

Piyali Roy Oberoi: +91 9831171388, piyalioberoi@imagesgroup.in

Rohan Narayan: +91 9830961388, rohannarayan@imagesgroup.in



May 11 - 12  
2016

### INDIA SHOPPING CENTRE FORUM

Show Dates: 11 - 12 May 2016

Venue: Renaissance Hotel

Mumbai, India

Contact:

Anjali Sondhi: +91 9810204297, anjalisondhi@imagesgroup.in

Waseem Ahmad: +91 9833628852, waseemahmad@imagesgroup.in



Sept 21 - 22  
2016

### INDIA RETAIL FORUM

Show Dates: 21 - 22 September 2016

Venue: Renaissance Hotel

Mumbai, India

Contact:

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who do not have access to some brands. Accentuating this, Ramchandani of Tantra shares, “Online is the new el dorado for budget brands like ours, due to low overheads, and access to the remote regions of India.” The same also applies to high end and premium brands. Shares Gautam of Bestseller India, “On the online front, we strive to identify our brands as value oriented rather than being compelled by market’s demand of discounted prices. Thus we acknowledge online platform as an operational leverage to reach our customer, increase sales and communicate value.”

Drawing an apt conclusion on the online trend, Shah of Pepe Jeans shares, “The reality of digital arrived sooner than expected, reshaping consumer behavior and expectations. Online retailers know an amazing amount about the consumer, how they shop, where they went on their portal, shopping cart traffic, closed sales and how they left their online store. Brick and mortar stores are now trying to offer the consumers the same shopping experience and convenience that she is accustomed to online.”

**Challenges due to online retail**

- Pricing - Pricing - Pricing



**LACK OF TALENT/PROFESSIONAL MANPOWER**



Retail is all about ‘people’. As important are customers for any brand, so are the employees and teams. Organised retail is relatively new in India hence we shouldn’t really be surprised and/or disheartened to see lack of skilled manpower though this is one of the most pressing challenge for the industry. Indrayan of 612 League hits the nail right on the target when he shares, “There are hardly any good institutes in the country providing retail or fashion studies; as such, most of the skills are to be developed on the job.” Khorakiwala of Akbarally’s Men adds, “Getting a person with the right skill at the right price and at the right time is always a challenge.” Making a valid point on the other reason why there is not enough manpower in the industry, Jhunjhunwalla of Turtle says, “With the influx of foreign brands in India, the talent pool has become divided across - it is difficult to find professionals with a global competitive outlook and I think home-grown brands like us have to really invest in our team to build global businesses. We need better training schools







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***“Brand building is not a job for the ordinary. It combines vision and execution. The truly talented can be counted on one’s finger tips.”***

– **Ranjiv Ramchandani**  
Director, Tantra

ISSUE  
NO.

10

HOW TO BEST USE SOCIAL MEDIA FOR MARKETING



***“This area is still widely nascent and there is a lot of scope for learning and utilising the full potential of social media marketing. Especially for a country like ours, where over 65 percent of the internet population is connected through mobile devices. We have miles to cover in this area compared to other mature markets like the US or Europe.”***

– **Shitanshu Jhunjhunwalla**  
Director, Turtle Ltd.

and finishing schools to take care of this.” The influx of brands has also made it difficult for a retailer to retain his manpower as poaching is rampant in the industry. Dhanjal of Raymond shares, “Retaining talent is a challenge in the industry. In addition to providing the right training, it is imperative to devise a career progression plan along with a lucrative reward and recognition programme that can keep the employee motivated.” Besides this, another way to ensure a steady supply of manpower is to have some concrete government intervention. Highlighting this, Mehta of Being Human Clothing shares, “The government needs to seek a solution for

nurturing and training manpower for the retail sector in specific as it is difficult to find talent in the respective field.” On the functions that are hardest hit, Nair of Celio shares, “Key talent in the field of planning, supply chain and product remain to be scarce in the market and what is available is not at par with global standards. Thus again, high demand and poor talent pool increases cost of talent artificially.”

**Challenges with lack of trained manpower**

- Team building
- Retaining manpower
- Constant pressure on HR
- Business expansion leadership
- In-house training escalating cost

Things may seem easy on the social media front but the digital team knows how difficult it is to keep the budget in mind and also ensure good mileage through ads or otherwise. Aply explaining this, Shah of Pepe Jeans shares, “Social media tools are evolving so quickly that it is almost impossible to keep up. Marketers are still trying to identify the ways in which social media can be used to best engage with the consumer.” It is important to note that social media is not a medium to drive in footfalls but it is to spread the brand far and wide and keep it on top of your customers mind. Hence, it is imperative that the tool is not put to use to gauge footfalls and walk-ins as expected by brands. Jhunjhunwalla of Turtle, “This area is still widely nascent and there is a lot of scope for learning and utilising the full potential of social media marketing. Especially for a country like ours, where over 65 percent of the internet

population is connected through mobile devices. We have miles to cover in this area compared to other mature markets like the US or Europe.” Ramchandani of Tantra adds, “Too many practitioners. So who is the best? The challenge is to spend wisely for maximum visibility.”

On the efficiency of the medium, Gautam of Bestseller India aptly concludes, “Social media is a great platform to connect with our customers outside the obvious arena of fashion marketing. It allows our brands to better comprehend consumer preference and explore innovative touch points for our target group.”

**Challenges with social media marketing**

- No means to gauge its effectiveness
- Ever evolving and changing dynamics
- Too many experts to share the do’s and don’ts



# BARE YOUR DENIMS





OTHER TOP ISSUES	RANK
Poor Consumption and Sluggish Economy	11
Calendar Planning: Unclear EOSS Periods	12
Wide Variety in Consumer Preferences Across India	13
Creating Standout Stores	14*
Competing in a Saturated Market	14*
Sourcing Challenges	16
Predicting Trends and Designing Standout Products	17*
Accuracy in Size and Measurements in India	17*

\* joint rank

ISSUE NO.

11

POOR CONSUMPTION AND SLUGGISH ECONOMY

This is one challenge that is universal. The economy across the globe is in not positive to speak with least and the eventual fallout is poor consumption. Fashion is not a necessity hence if two ends are not being met well, fashion takes a back seat most certainly. Shares Shah of Pepe Jeans, "Like every other industry, retail is up against a fragile economy, with slow growth forecast." Commenting on the dynamics being witnessed in India, Jhununwalla of Turtle shares, "Although

there is a lot of optimism with the new government in power - we have failed to see this optimism trickle down to the store level where consumer basket sizes are not growing and people are postponing their unnecessary purchases." Reiterating this is Nair of Celio, "Indian economy despite a majority government does not show signs of stability and high growth. But yes, lot of our issues are also linked to global sentiments."

Sharing a solution to this issue, Dhanjal of Raymond shares, "Business models needs to be more nimble and adaptive to changes in the economy. We live in a

VUCA world (Volatile, Uncertain, Complex and Ambiguous). The ability to adapt to these continuous changes is critical for long terms sustainability."

But then on second thoughts, if fashion is not a necessity, basic clothing is and hence if priced right, clothing largely would remain unaffected by the economy. Aply putting this is Ramchandani of Tantra, "Consumption is a cyclic habit. After all, we are talking about roti, kapda and makaan."

ISSUE NO.

12

CALENDAR PLANNING: UNCLEAR EOSS PERIODS

One are the days when the end of season sale was a much awaited phenomena for the shoppers. Today, a lot many brands indulge in over extended sale period and some of them run almost throughout the year. This is a challenge being faced by fashion retailers. Shares Jhunjunwalla of Turtle, "Large formats and brands are pre-poning the sales calendar

every season - earlier the winter EOSS used to commence from January 15 onwards till mid-Feb. This season, we witnessed the sales starting from December 25 across brands. This really shorten the fresh season selling window and becomes difficult to compete profitably in the marketplace." Dhanjal of Raymond elaborating on this, syas, "The current 8-12 months lead time for traditional fashion retailers will come under severe stress as our ability to forecast 6 months will be limited. Given the prolonged EOSS periods, some retailers experience a

sales dip post EOSS. Expecting customers to wait for long periods to get discounts can also affect the brands in the long run."

Bringing in an interesting point of how even malls are bringing in their own EOSS causing all the more stir, Bhanji of Metro Shoes shares, "With more number of brands in the market, the EOSS periods are getting vague and highly unplanned. Malls are also coming up with their EOSS periods which also adds to the list."

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ISSUE  
NO.  
**13**
**WIDE VARIETY IN CONSUMER PREFERENCES ACROSS INDIA**

India is a land of diversity. This makes it difficult for any retailer to cater to the ever evolving and changing preferences of consumers across India. Migration due to work also has an impact where places like Delhi, Mumbai and Bengaluru have a mix of people from different regions across the country but who still prefer to stick to their core fashion preference based on the region of their origin. Indrayan of 612 League elaborates, “India is a diverse country. It is difficult to satisfy preferences across geographic and religious segments.”

Gautam of Bestseller India shares, “India is a challenging market with distinct customer preferences. The range planning and retail allocation is a continuous effort to achieve the apt blend of customisation and standardisation of the collection to ensure relevance to our customers from different regions.”

 ISSUE  
NO.  
**14**
**CREATING STANDOUT STORES**


The store has to be inviting for customers to walk into it. In the brick and mortar space, apart from the customer service, the store layout is probably the only differentiator for brands, especially the MBOs. For individual brands, the store is an extension of the brand and the layout has to extend the thought of the brand through its ambiance. But again, keeping in mind the high cost of real estate and also that of manpower, investment in store has taken a hit. Kapasi of Triumph shares, “Seeing the increase in rental values and hike in commercial property

rates, creating standout stores is feasible only for premium and luxury segments.” Bhanji of Metro Shoes adds, “With lack of quality retail space, it is difficult to create standout stores. Also, the competition leads to more similarity.” On what makes their store a hit with their patrons, Gautam of Bestseller India shares, “We continuously work towards new concept stores to improve the shopping experience for our customers. Apart from clothes, the visual merchandising of our stores are incessantly adapted to changing customer preferences to offer exciting shopping experiences.”

 ISSUE  
NO.  
**14**
**COMPETING IN A SATURATED MARKET**


With increasing competition, markets have indeed reached a saturation point. This is a critical challenge being faced by fashion retailers. Aply elaborating on the related consequences of this, Shah of Pepe Jeans shares, “A variety of factors, including high competition, lower market need and dampened consumer sentiments, contribute to saturated conditions. The big drawback of operating in a saturated market is that it limits your profitability and growth potential.” If brands in India learn to keep themselves updated and at par with the changing market dynamics, Ramchandani of Tantra sees competition as no challenge though. He shares, “Established all-India brands are always going to stay in the reckoning, provided they learn the art of managing the change.” Besides keeping yourself abreast with the changing trends, how do brands survive in a saturated market. Jain of Monte Carlo is of the opinion that building patrons is an important step. He shares, “Customer loyalty is a major factor for a retailer today. One has to find new and innovative ways for customer retention.” To survive the challenge from brands, team Bestseller India according to Gautam, “We consistently strive to offer value to our customers. Brand imagery and products are the prime drivers for our brands.”

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ISSUE  
NO.  
**16**
**SOURCING CHALLENGES**


More choice leads to delay in decision and confusion as well. Sourcing challenge also includes joining hands with the right partner with a hawk's eye on quality and price. The other issue is related to timely supplies close to the season as well. Highlighting the intricacies of sourcing, Mehta of Being Human Clothing says, "Sourcing plays a key role in a vertically integrated organisation. The process of sourcing is lengthy and cumbersome which increases the response time of the brand in general." Gautam of Bestseller India adds, "To ensure trend relevance, we are buying closer to the season. But this implies less production lead time. Also, the buying focus is towards increasing width and decreasing depth of collection to ensure better inventory turnover and more options to the end consumer. But this poses the challenge of meeting the minimum order quantity." According to Bhanji of Metro Shoes, less investment and high taxes in the manufacturing sector has created sourcing challenges.

Sharing a solution to this, Dhanjal of Raymond shares, "Designing an integrated supply chain that is responsive and can adapt to changing market scenario is crucial. Technology can be an enabler in overcoming these challenges."

 ISSUE  
NO.  
**17**
**PREDICTING TRENDS AND DESIGNING STANDOUT**

Fashion like a rumour spreads without wings. Internet and television have given fashion wannabees access to what happens globally. This makes it difficult for brands to keep at par with ever evolving expectations of the customers. Kapasi of Triumph says, "There is a dearth of in-depth market research studies on consumer trends in India which would help us to make market predictions. Hence, we have to rely on learning from our customer research which we design and implement periodically. Our product development is also based on global insights. Indrayan of 612 League shares, "Fashion trends and awareness to trends is changing at a rapid pace. It is difficult for a brand to understand these and design their products forecasting one year in advance."

 ISSUE  
NO.  
**17**
**ACCURACY IN SIZE AND MEASUREMENTS IN INDIA**


Gautam of Bestseller India shares, "To promote the online business which we see as a great contributing channel, standardisation of sizes and measurements is paramount, which will aid in confident shopping by the customers." It is mostly true for the brand who are available on shopping sites. Shopping for clothes online can get you great style at bargain prices, however it comes with the worry that because one is buying a clothing item unseen, it just won't fit and one wasted the money. But to make sure that it does not happen or to deal with return or exchanges with a little planning on sizes and measurements.

✕



# FASHION RETAIL



## BRAND WATCH

ADIDAS, REEBOK, CORLOUIS

## RETAIL EXCELLENCE

WESTSIDE



FASHION RETAIL

STORE LAUNCH

**TANTRA OPENS DOORS IN KUALA LUMPUR**

Pg No. 100

**MAX LAUNCHES MILLENNIAL FASHION OUTLET**

Celebrating 10 years of presence in the Indian market, Dubai based Landmark Group's fashion retail brand, Max launches its new Millennial Fashion outlet in Bengaluru.

Pg No. 102

STORES SUCCESS

Pg No. 104

RETAIL EXCELLENCE

**WESTSIDE: WHERE FASHION COMES ALIVE!**

Westside, the trendy departmental store from the house of Tata, is a one-stop shop for compelling yet aspirational fashion. The chain currently has 88 stores pan India. A look.

Pg No. 106



BRAND WATCH

**ADIDAS: ON A FAST TRACK**

Global multi-sportswear and apparel giant Adidas' India run is expected to meet more success having got government nod to open fully owned stores in India.

Pg No. 112

**REEBOK: REVAMPED & REBOOTED**

Iconic sportswear brand, Reebok began repositioning as a premium fitness brand in India in 2013 and launched its new retail stores. Two years on, Images BoF takes a look.

Pg No. 116

RETAILER WATCH

**GLOBUS: FUN FUSION CLOTHING FOR THE YOUNG**

Launched in 1999, Globus is a leading retail clothing store chain in India. A study of whats latest at Globus.

Pg No.122

HONOURS

**DUKE BAGS "MAKE IN INDIA" AWARD**

Duke efforts to become an active partner in the 'Make in India' campaign of the central government win accolades.

Pg No. 130



NEW BRAND

**HARRYZ: THE IMPECCABLE WHITE SHIRT**

A white shirt is not just essential, but also a status symbol which has been defining fashion norms for years now. We look at how Harryz exudes relevance and class in its range of white shirts.

Pg No. 124

BRAND WATCH

**CORLOUIS: HIGH FASHION JACKETS & BLAZERS**

Tridev Fashions has been manufacturing high quality fashionable jackets and blazers for over 25 years under the brand name 'Corlouis'. Rohit Bhakoo, Director, speaks about the company's expansion plans.

Pg No. 126

IFF CURTAIN RAISER

**THE FASHION CONFERENCE OF THE YEAR**

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Pg No.132

COLLECTIONS

**TWILLS SHIRTS: ECOLOGICALLY SPIRITED**

The men's lifestyle brand, Twills has introduced an innovative concept 'Eco-Spirit' to preserve the environment.

Pg No. 128



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# TANTRA

## OPENS DOORS IN KUALA LUMPUR

**BRAND:** Tantra

**PROMOTER:** Urbane Style Loft (M) Sdn Bhd

**LOCATION:** 101 Putrajaya Mall,  
Kuala Lumpur

**SIZE OF THE STORE:** 220 sq.ft.

**COLLECTION:** The store showcases a complete representation of the entire Tantra portfolio, including all four categories - men, women, kids and infants.

**STORE THEME:** With plenty of high octane graphics, the store displays a youth-oriented appeal.

**STORE INTERIOR:** A neutral backdrop, having a combination of white and yellow, accentuate the ambient lighting of the store. The antique wood floor and custom made-to-order angular shelves also help facilitate the visual display of the products in the store.

**STORE DESIGNER:** The store has been designed by the Tantra Design team and the store layout was executed by KL-based Vista Design.



**Ranjiv Ramchandani,** Director, Tantra, in a candid interview with Images BoF, shares his plans for the global expansion of the brand and what are the challenges he is facing to achieve the goal.

**What were the major opportunities you saw that made you decide on opening a store in Malaysia?**

**RR:** Malaysia is an important country for us. It is the gateway to the Far East. The country has a huge youth population and its tropical climate is favourable for t-shirts market. Moreover, not too many Asian players are there in the organised t-shirts space.

**What all problems you had to face before launching your store abroad?**

**RR:** Firstly, identifying and deciding on the retail space took quite some time. In the end, we opted for a successful mall, which was located in a good catchment area, for long-term prospects.

**What is the significance of a brand like Tantra opening a stand-alone store abroad ?**

**RR:** We, through our range of Tantra t-shirts, aim to showcase Indian creativity to the world. Tantra is a stand-alone Indian brand without big financial fund. It is growing in unconventional spaces purely owing to its organic



ability to connect with quality partners across India and abroad. Without that emotional connect, no brand can survive in a long-term.

**How have the customers in Kuala Lumpur responded to your store so far?**

**RR:** The Tantra store in Kuala Lumpur's Putrajaya 101 Mall caters to an interesting clientele. It has a mix of indigenous Malays, Indian-origin Malays and Chinese Malays. The mall is a tourist hub and is also frequented by people residing in nearby software parks.

**How are foreign markets different from India and what should Indian brands do before entering them?**

**RR:** For a brand like ours offering a host of t-shirt labels, it is all about figuring out what the customer wants (in terms of t-shirt designs) and tailoring the needs to the market. Essentially, the youth are the same everywhere. For any brand entering any foreign market, the questions remain the same, "what value can I add there in terms of content or price?".

**Do you plan to open any more stores in other foreign countries?**

**RR:** Yes, we are open to business anywhere! We look at this as an important milestone for our future growth abroad.

**What are your future plans for Tantra?**

**RR:** Our only focus is growth. Here... There... Everywhere...!



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# MAX LAUNCHES MILLENNIAL FASHION OUTLET

Max, a fashion brand by Landmark Group catering to mostly youth, launched its new Millennial Fashion outlet in IT hub, Bengaluru. The fashion brand offers a wide range of modern and fusion apparel, footwear and accessories along with kidswear and ethnic wear garments. The new tech savvy Millennial outlet claims to take the shopping experience to an all new high.

By Roshna Chandran

Popular Dubai based Landmark Group fashion brand, Max has launched its new Millennial Fashion outlet in Bengaluru. Celebrating 10 years of presence in the Indian market, the Millennial Fashion outlet is operating as a new identity targeting the 18 to 30 year old with a product range of modern and fusion apparel, footwear and accessories. The store will be stocked with imported limited edition collections and is planning on expanding to 6 metros across the country.

According to Vasanth Kumar, Executive Director, Max Fashion India, almost one-third of the sales at Max stores come from the youth segment who were of 30 years and below, even though the store also had a wide range of kidswear and ethnic wear. Kumar pointed out that the new outlets targeting the millennials will be present as an additional catchment along with the regular max stores. Millennial Fashion outlets are also positioned at specific curated shopping malls. The new stores will be operating within a space of 6,000 sq.ft. in area. "We are also planning on adding the endless isle where a consumer can browse through all the catalogues and look out for latest styles. Here, customers can place orders and have the products delivered to their homes," explained Kumar.

“We can also get desired sizes from the central warehouse. The new collections are also previewed here. We plan to make this the most happening place for a millennial,” he added.

Kumar also expects the customers who walk into the store to be savvy online shoppers. A Millennial Fashion outlet requires around ₹2 crores of investment, due to the new kind of digital innovations along side new branding and identity of the store that is equipped with international fixtures. The store stocks products with multi layer displays that give customers a thorough view of all the products. Kumar ensures that the new outlets will be stocked with fresh collections for the season along with visual display system that showcases the new looks of the season at the store and through social media channels.

“We also leverage on our properties which are the Max model hunt and fashion shows to launch the new collections. The collections at Millennial Fashion outlets are priced between ₹300 - ₹1,000. Generally, the kidswear range pulls the prices down. Here, we have only youth range, so the products will be priced a little higher than the rest,” elaborates Kumar. According to Kumar, a typical Max store breaks even after the first year or middle of second year, making it a very profitable format.

Growing at 33 percent in the past few years, Kumar stresses that this is due to the brand's ability to match the store profile to the product profile, which also helps the store to break even sooner. He explains, “Walk-ins are never an issue for us, it is a conversion. We are planning on opening one store every two weeks. We are focusing on 50 cities. The Easy Buy concept will be put forward in tier-II cities. We will be driving the store with the new looks.”

In a country where value fashion stands as a very straightforward market and the biggest market in apparel, Max store collections are promoted through powerful audio and visual promotional activities at public spaces such as movie theatres, social media, radio as well as print. The brand does carry forward at least four commercials in a year. Kumar finds the new Millennial outlets have the right kind of product ranges that a millennial would pick up, “We provide everything for our consumers and are operating through malls that apply strategy and segmenting while curating their mall space. The Millennial Fashion outlet has a wider range of footwear and accessories which are imported because we find the millennials pick up more footwear and accessories and goes with their buying habits,” concludes Kumar.

×





# SUCCESS

**BRAND:** Success Men's wear

**COMPANY:** Agwani Fashion Pvt. Ltd.

**PROMOTER:** Rajnish Sethia

**LOCATION:** Bhubaneswar (Janpath)

**SIZE:** 2,000 sq. ft. approx.

**COLLECTIONS:** Success, a brand launched in Kolkata city in the year 1996 by Rajnish Sethia, assembles a man's complete trousseau, presenting them with a fusion between the global fashion trends and the ever-evolving taste of the market. The core product basket of Success includes suits, blazers, waistcoats and trousers. Apart from these, the brand also offers casual jackets,

shirts, t-shirts and accessories for men. The price range of suits vary between ₹3,995 to ₹15,995, blazers cost between ₹2,995 to ₹9,995, shirts start from ₹895 and go upto ₹2,495, trousers cost between ₹895 to ₹2,495, prices for t-shirts range from ₹395 to ₹1,495 and denims starts from ₹1,095 and goes upto ₹2,495.

**STORE THEME:** Janpath is considered as the heart of Bhubaneswar and is the major shopping area of the city, housing all the hi-street brands that the city can offer. The reason behind opening a store in Bhubaneswar is increase in demand and also because it receives highest footfall of fashion conscious shoppers from across the state throughout the year. Soft colour palettes, white spot lights of the newly opened Success store exhibit a very calm, easy going and comfortable experience. The ambience has been designed to suit the needs of the customers with better display of the products and clarity in finding different categories of men's clothing.

**STORE INTERIORS:** The store interior is simple, bright and fuss-free with light fixtures to draw shoppers' attention to the merchandise on display. Having a large space of 2,000 sq. ft., the designers gave special attention to hassle-free placement of various categories, easy accessibility and visibility of the products. Designed by the director of the company, Rajnish Sethia himself, the new Success store has an appealing look, making customers feel comfortable so that he can shop at ease. Wall finishing and fixtures are in brown and white. The store is well-lit, making the environment inviting. The flooring has been kept stark white matching the walls and the furniture, shelves are of teak wood colour with a light melamine finish for a classy look. Keeping in mind the size of the store, the main concern while choosing the lighting was energy conservation. Hence, Sethia opted for the latest LED lighting systems which consume less energy but are high on luminescence.







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# WESTSIDE

## WHERE FASHION COMES ALIVE!

Westside, a trendy departmental store from the house of Tata, is a one-stop shop for compelling yet aspirational fashion. A widely accessible, lifestyle shopping experience is the key element in highlighting the brands at Westside. The chain currently has 88 stores pan India.

Established in 1998 as a part of the Tata Group, Trent Ltd. operates Westside, one of India's largest and fastest growing chains of retail stores. Westside is a trendy departmental store, offering a one-stop shop for compelling yet aspirational fashion. The store stocks a broad range of products ranging from apparel, footwear, accessories to cosmetics and perfumes to home accessories and gifts amongst others. Exclusive brands are the essence of its customer proposition, especially under its own Westside banner. The chain offers predominantly an exclusive range of own branded fashion apparel alongside partner brands. **Each Westside store presents international shopping ambience, superior merchandise at affordable prices and excellent service. Elegant and well-designed interiors, prime locations and coffee shops within, add to shoppers' delight, making them a most sought-after fashion destination!**

### MARKET PRESENCE

The chain currently has 88 stores measuring 8,000- 34,000 sq.ft. across 53 cities like Ahmedabad, Allahabad, Aurangabad, Bengaluru, Bareilly, Bhopal, Bilaspur, Chandigarh, Chennai, Coimbatore, Dehradun, Delhi-NCR, Goa, Guwahati, Hyderabad, Indore, Jabalpur, Jaipur, Jalandhar, Jammu, Kanpur, Kochi, Kolkata, Kurnool, Lucknow, Ludhiana, Mangalore, Mumbai, Mysore, Nagpur, Nashik, Pune, Raipur, Rajkot, Sangli, Siliguri, Surat, Trichy, Thrissur, Udaipur, Vadodara, Varanasi, Vijayawada, Vizag, etc.



### BUSINESS DYNAMICS

The Westside store has several departments to meet the varied shopping needs of customers. While an exclusive range of own branded fashion apparel continues to be the mainstay of the chain, the Westside model involves active control all across the value chain including branding, sourcing, logistics, distribution, pricing, display and promotion of almost 90 percent of the product range retailed. It believes, this model is more robust than department store models that mostly retail third party brands including from a 'return on capital employed' perspective. Product sourcing capabilities and a global vendor base are key ingredients to Westside, delivering a desired merchandise range at the right price and time to customers. The company makes substantial investments in technology and upgradation of the supply chain network, which it believes is vital to the success of a retail organisation. This has enabled the company to significantly enhance the efficiency of its warehouse operations in recent years. Higher levels of efficiency were witnessed despite growing volumes in terms of both intake from vendors and dispatches to stores.



### BRANDS ARRAY

Westside products are known for style and class amongst fashion conscious consumers. In recent years, the chain has launched and refreshed a number of brands, available exclusively at Westside stores. These brands have been evolved to target key customer segments based on their needs, purchasing power and appetite for fashion. Customer response to the refreshed offerings has been encouraging and the intent is to continue investing on growing the exclusive brand portfolio. Some of the key brands in women's wear segment are Bombay Paisley, Gia,

L.O.V and Zuba. While, Bombay Paisley offers chic, western and contemporary ethnic wear for the experimental and vibrant youth, Gia offers a fashionable casual collection for the curvy women. L.O.V is a smart, casual, feminine offering for the 25-plus women and Zuba offers silk and handloom blends with handcrafted embroidery. Other noteworthy brands include Wardrobe, a trendy 9-to-9 fashion for women and Nuon, a young casual fashion brand.



In men's wear, Westside has Ascot, a modern classic lifestyle brand for the discerning man, E.T.A, understated casual wear for contemporary men, and West Sport offers functional and stylish casual mens apparel.

In FY'15, the chain launched four new brands, exclusively available at Westside stores. It brought in Wunder Love, the chain's in-house lingerie brand and Sassy Soda, Westside's collection of trendy clothing designed for the curvier youth. StudioWest is an exclusive beauty zone at Westside, which has several leading beauty brands together with an exciting new range of Studio West cosmetics. Oak & Keel, a new fashion clothing line for the beefed up men too was launched.

Apart from this, Gourmet West and Lakeland are two relatively new areas Westside has ventured into, in the recent years. Gourmet West, its gourmet section, is currently operating from nine key Westside stores in Mumbai, Bengaluru, Hyderabad, Chandigarh, Surat, Ahmedabad and Baroda. With encouraging response seen in these stores, the company will continue to invest in the food segment.



In FY'14, the chain had introduced innovative kitchenware through an exclusive tie up with Lakeland - a British company famous for its creative kitchenware across the world. Currently there are three Lakeland stores across Pune and Bengaluru.

#### OPERATIONAL GAMUT

Westside aspires to deliver a uniform experience to all its customers irrespective of whichever store they walk into. During FY '15, the parent Trent continued to focus on a number of internal improvements in Westside. Apart from the launch and refreshing exclusive brands portfolio, other key initiatives included, improved presentation in stores, focus on select newer

categories and providing a better shopping experience to the customers by improving the look and feel of select existing stores. In order to increase walk-ins and improve the customers' shopping experience, it pursued the modernisation of some older stores and optimisation space allocation based on the category mix which have a better sales potential with a renewed effort to improve service. Aided by the strategies pursued and reasonably favourable market conditions, the format registered a healthy 11 percent like-for-like growth in revenues over the period. Operating efficiency has witnessed an improving trend in the recent years. The measures undertaken to reduce shrinkage



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level at stores, warehouse and distribution centres have yielded positive results. The chain would continue to emphasise on robust deployment of its operating model coupled with review rigour.

### TECHNOLOGY INTEGRATION

Westside's parent Trent Ltd. acknowledges that in the years to come, online fashion retail play will get much bigger in India. With an aim to address this fast emerging market, and especially to enable the convenience of its customers seeking to shop it online, the company is working to launch Westside online as part of the Tata Group market place initiative. It believes this approach would provide the company adequate visibility and control in respect to various customer experience elements including pricing, omnichannel integration and range of offering.

### CUSTOMER ENGAGEMENT

The chain runs its own rewards program Clubwest, that has been designed exclusively for Westside regulars. The program has a base of over 2.5 million members and contributes to over 70 percent of the Westside sales. The loyalty program offers special privileges for classic and gold members, who earn reward points every time they shop, that can be redeemed during



future purchases at Westside stores. It also extends exclusive offers, discounts, gifts and privileges from time to time across a range of lifestyle products and services besides privileges at stores. Clubwest cards are now accepted across all landmark stores. Moreover, the customers can also buy gift cards and e-gift cards for others.

Of late, Westside has increased its focus on using social media as an important customer listening and learning mechanism. A number of campaigns are carried out on Facebook and Twitter. The objective of these campaigns is to improve customer engagement and move beyond just fan generation. During FY '15, power targeting was used to run customised campaigns for Clubwest members. This helped the chain in improving contribution from Clubwest members. The innovative usage of targeted communication methods helped it connect with its customers better, understand and act on their inputs. The average bill size

registered an encouraging growth of 10 percent in FY 2015.

### MARKETING/PROMOTIONS

Westside's marketing and communication strategy is focused on building its exclusive brands within the store, engaging with its strong loyalty base and connecting with customers on digital mediums. The company has undertaken significant investments in visual merchandizing to develop a signature visual representation for each of its key brands within the store. Westside also engages in focused communication with Clubwest, to drive awareness and consideration for its brands, with the focus of communications being its weekly product launches and consistent newness in store.

### THE WAY FORWARD

The Indian market is being targeted by retailers from across the globe. In consequence, the share of organised retail is growing and is expected to accelerate further in the coming years, especially with respect to fashion apparel. Westside too is increasing its reach and expanding into newer cities. The chain continues to monitor opportunities in tier-II and III markets and establishing presence in those markets as appropriate. Simultaneously, strategic properties in tier-I cities which fit into its overall growth plan are also being pursued. A team of in-house property experts supported by a well-defined set of processes for analysing the potential market and catchment help Westside identify strategic locations for new stores and make it profitable in a relatively short span of time.



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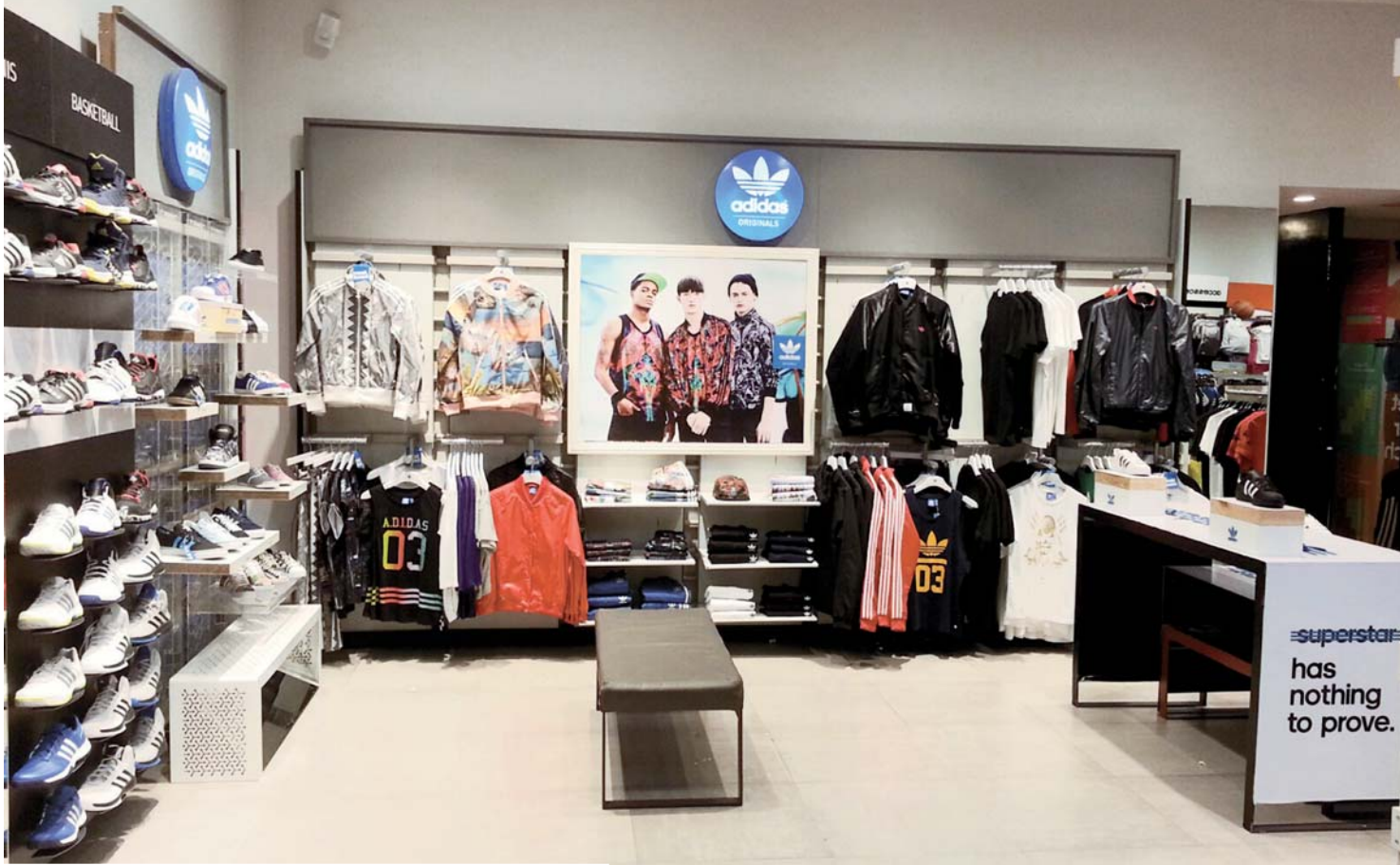
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# ADIDAS ON A FAST TRACK

Global multi-sportswear and apparel giant Adidas' India run has been quite a success so far. Having got government nod to open fully owned stores in India, the brand plans to continue with franchise partners and open company- owned stores as well.

Founded in 1948, Germany-based Adidas Group (AG) is one of the global leaders within the sporting goods industry, offering a broad array of products around three core brands – Adidas, Reebok, and TaylorMade-Adidas Golf. Adidas came to India in 1996, and has emerged as a dominant player in the country's affordable premium sportswear and apparel market. Significantly, Adidas and Reebok had merged their operations in India in 2011, as both continued to grow their respective market share and retail presence. With evolving retail scenario, Adidas has evolved and innovated to preserve its leadership and deliver on its brand promise. States Damyant Singh, Senior Marketing Director, Adidas India, **"At Adidas, our stores are not just a point of sale; it's a destination to deliver our brand experience, that is rooted in sports."**





*“At Adidas, our stores are not just a point of sale; it’s a destination to deliver our brand experience that is rooted in sports.”*

– Damyant Singh

Senior Marketing Director, Adidas India



### MARKET PRESENCE

Adidas has brick stores for two of its sub brands, Sports Performance and Originals. They are also retailed on its official web store, [www.shop.adidas.co.in](http://www.shop.adidas.co.in), along with other online marketplaces. Adidas Neo is currently retailed “online-only” in India. As per Singh, “Today our retail footprint consists of 407 Sports Performance stores and 12 Originals outlets in the country. In addition to this, we have rolled out an omnichannel model, giving consumers access to our products, by connecting all touch-points - online, mobile and retail.”

### BUSINESS DYNAMICS

India makes up for nearly five percent of Adidas’ global business. The brand has 42 to 45 percent share of the country’s sports market. Over 70 percent of its products sold in India are locally made (under contract manufacturing). Currently, all the existing stores of Adidas are franchisee-run. In

September ’15, the brand opened its largest outlet in India in Bengaluru, spanning across 5,000 sq.ft. over two floors, and is mulling over opening bigger stores in cities like Delhi, Mumbai, Bengaluru, Hyderabad, Kolkata and Pune. The brand is looking to double its business by 2020, in terms of revenue as well as profitability.

### PRODUCT RANGE

The brand offers products such as footwear, apparel and accessories for men, women and kids. While sportswear remains its stronghold, the brand is also focusing on the sports lifestyle segment. **The India offering includes three sub-brands—Adidas Sport Performance, Adidas Originals and Adidas Neo. Founded by Adi Dassler, the brand brings passion for great products to athletes in all sports with main focus on five key categories - football, basketball, running, training and outdoor.** Represented by the iconic trefoil, which was established

at the 1972 Munich Olympics, Originals is a sports inspired streetwear brand. It retails exclusively and as SIS at Sports Performance outlets. The recent addition to Adidas India portfolio, Neo is the ideal mix of sporty and casual with an eye for fashion and a focus on fun. The label caters to youngsters in particular.

### LEVERAGING TECHNOLOGY

Adidas has always been at the forefront of design and product technology innovations. Recently, the brand unveiled its newest technology (a prototype), Futurecraft 3D, a 3D-printed running-shoe midsole that can be customised to an individual’s needs. All that customers have to do is walk into an Adidas store, run on a treadmill and they instantly get a 3-D printed running shoe - which is a flexible, fully breathable carbon copy of the customer’s footprint matching the exact pressure points and contours. Another recent introduction





is a soccer cleat recycling program, in which any piece of Adidas sportswear can be broken down and remodeled into a 3D-shapeable material that allows customers to reimagine and personalize products. The Adidas Group constantly upgrades its store operations too. In India, it is aggressively rolling out its omni-channel model to integrate both Adidas and Reebok stores with shopper-friendly technology and tap into the e-commerce boom. Many of its stores in north have already been integrated with the 'endless aisle' technology, which equips the stores with iPads where shoppers can browse and order for items that are not in stock at the brick stores.



### CUSTOMER ENGAGEMENT

Recognizing that today's customer wants to connect with the brand across multiple channels like retail, social media and e-commerce, Adidas extensively utilizes social media to engage with its targeted group. Singh gives an example on how the brand delivered a great retail consumer experience with the launch of the Yeezy Boost 350, a shoe designed by American rapper Kanye West. **"Timed with the global launch, the launch in India was announced through top fashion bloggers and online media and with our consumer database across Delhi, Mumbai and Bengaluru. The consumers were registered for a raffle for a chance to buy the shoes. The build-up enabled us to create more desirability for product, and it was sold out in less than four minutes across the country."**

During 2015 Cricket World Cup also, Adidas had created a world-first direct connection between a billion cricket fans and their team, letting fans send their support by capturing their photos touching the ground where they play cricket, and post them using #SacredGround. The campaign trended on Twitter and gained 131 million social impressions besides millions of hits on Facebook and Instagram.

### MARKETING/PROMOTIONS

The brand implements a 360-degree marketing strategy using a mix of ATL and BTL media, with special focus on digital media to reach out to its consumers across

the country. Adidas India's current list of brand ambassadors includes Bollywood actor Ranveer Singh for Adidas Originals, while Cricketer Virat Kohli and Tennis sensation Sania Mirza endorse Adidas Sports. In-store promotions, sponsorship tie-ups and events are also a part of the brand's communication program. A few months back, it launched Adidas Uprising in India starting with Bengaluru. Adidas Uprising is a unique campaign inviting athletes and sports enthusiasts to take to the sport they are or have been passionate about, and experience the breadth and depth of the Adidas brand in a sports performance-led environment. In November, the brand announced the third edition of the FC Bayern Youth Cup India to be held in mid-January, 2016. It is an under-16, seven-a-side inter-school football tournament that will see top school teams from New Delhi, Mumbai and Bengaluru compete for a chance to participate at the FC Bayern Youth Cup World Finals in Munich in May 2016.

### MOVING AHEAD

Addidas group India will have presence of approximately 800 stores (including Adidas brand outlets) by 2016. Having got the government nod to open fully owned stores in India, it plans to continue with franchise partners and open company-owned stores as well.





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# REEBOK REVAMPED & REBOOTED

Iconic sportswear brand, Reebok began repositioning as a premium fitness brand in India in 2013 and launched its new retail stores. Two years on, the brand seems to be in the pink of health with 150 fit hub concept stores along with several other formats.

The global sportswear brand, Reebok entered India in 1995. Known as the pioneer in distribution in the country's footwear industry, Reebok was merged with Adidas India in 2011, a development in line with the Adidas-Reebok merger at a global level in 2005. From 2013 onwards, Reebok started repositioning as a fitness brand, moving away from its past positioning as a sportswear brand. It came up with a new store format 'Reebok Fitness Hub' (RFH), a premium store offering fitness and training merchandise, besides advice, guidance and information on community based fitness events. For this, upgradation of existing stores was initiated. Subsequently, another format 'Reebok Fitness Studio' (RFS) was rolled out. It's a 'store and studio' format situated within the RFH, and its first door opened in Mumbai in 2014. The company has also altered its product offerings; it completely exited from selling sports gear, and brought in products catering to fitness.

Says Dhruv Bogra, Senior Retail Director, Adidas India Group, "While Reebok has always been an iconic and ardently loved brand, the new focus on fitness has been receiving a great response from Reebok loyalists as well as new customers. Fitness enthusiasts have started identifying with the renewed brand approach, and we are emerging as the brand of choice for their varied fitness gear requirements."

## MARKET PRESENCE

As of now, Reebok has a pan India presence with 150 'Fit Hub' concept stores across 70 cities, as well as several other formats present.

## BUSINESS DYNAMICS

The RFH concept is based on a global initiative by the brand to inspire people to move, train, get fit and have fun doing it. The



*“We aim to be India’s most desirable premium fitness brand, and have consistently created and executed many initiatives in this direction. We are reaching out to more and more people and inspiring them to adopt fitness as an integral part of their lives.”*

– Dhruv Bogra,

Senior Retail Director, Adidas India Group

format aims to guide customers on their fitness journey and provide a flexible and appealing retail space, that helps people discover the right exercise apparel, footwear and equipment to meet their fitness goals. Like a gym, the environment in the RFH is raw, creative and innovative, immersing customers into fitness entirely. Each store is divided into three key zones: the interactive storefront, a story floor and fitting studio with cross-fit-inspired displays. The RFH store design takes inspiration from CrossFit boxes and the gym environment including fixtures that replicate gym equipment, audio tracks specially selected for workouts, genuine gym flooring construction and functioning plyometric jump boxes as seating, providing customers a one-of-a-kind retail fitness experience. Adding a brand new element to the existing Fit Hub store, the RFS caters to the fitness needs of Indian consumers. Leading the way for other global Reebok markets, India was the first country to launch the RFS.

#### PRODUCTS & SERVICES

RFH stocks best in the line of fitness products for various forms of workouts. As Bogra describes, “We have dedicated collections for yoga, dance fitness, aerobics and running. **Reebok is the only brand to have official CrossFit merchandise.** Consumers can also get fitness tips from trained instructors who visit the stores at select intervals. The Fitness Studio enables customers to engage in exciting fitness activities such as dance, aerobics and yoga. The studio collection offers products for both men and women across each of these categories, providing consumers a holistic and seamless fitness experience. The brand’s merchandise is also sold online through its official web store ([www.shop4reebok.com](http://www.shop4reebok.com)) and other key shopping portals.

#### LEVERAGING TECHNOLOGY

Reebok constantly strives to bring in products that are innovative, equipped





**Reebok is the only brand to have a dedicated range of shoes and apparel for globally popular workout form – CrossFit. It recently launched CrossFit Nano 5.0 training shoes which have been engineered specifically for the CrossFit athletes and developed in association with the CrossFit community.**

with top-of-the-line technology and design elements, and are of superior quality. In 2015, it launched two exciting products in India, ZPump and CrossFit Nano 5.0. ZPump Fusion running shoes, one of Reebok's most technologically advanced products, are equipped with its flagship pump technology. **This shoe uniquely conforms and adapts to any foot, and boasts a new and proprietary air-filled cage that surrounds and molds to any foot providing a locked-in custom fit. Unlike a traditional running shoes which is often made up of over 40 individual parts, the ZPump is made up of just three key parts and all the three parts work together to deliver improved fit and control.**

Reebok is the only brand to have a dedicated range of shoes and apparel for globally popular workout form – CrossFit. It recently launched CrossFit Nano 5.0 training shoes which have been engineered specifically for the CrossFit athletes and developed in association with the CrossFit community. The product uses Kevlar material featuring the innovative 360° BulletCage built for added protection, durability and also features newly engineered anatomical heel counter and foot bed with an R55 platform for additional high rebound and cushioning. It offers traction working alongside a full rubber sole with MetaSplit flex groove and heightened RopePro+.

#### CUSTOMER ENGAGEMENT

Founded on the concept of togetherness, the Fit Hub stores entail greater interaction with customers, helping them embark on their fitness journey and finding the right products which enable them to accomplish

their fitness goals. The stores have clearly demarcated merchandise sections for different fitness activities like training, running, aerobics, dance and yoga, that facilitate an easy shopping experience. RFH's strong focus towards catering to women's fitness needs has led to the category contributing significantly to its overall business in selected stores.

#### MARKETING/PROMOTIONS

In India, Reebok is endorsed by celebs like John Abraham, M S Dhoni and Nargis Fakhri. While some of the marketing campaigns are globally conceptualised and driven, many are conceived by Reebok India team that are suited to the local needs and sensibilities. The brand's notable marketing initiatives during 2015 include, ZPump Fusion launch, one of the brand's largest product-driven campaigns to introduce revolutionary new shoes; MSD4India launch during the ICC World Cup with an aim to inspire Indians towards fitness and healthy lifestyle; 'Be More Human' embodies the brand's mission to change how people perceive and experience fitness; and 'Reebok 100' with Reebok saw the famous novelist Chetan Bhagat take up a 100 day fitness challenge to undergo a physical transformation with the help of Reebok experts and trainers.

#### MOVING AHEAD

"We aim to be India's most desirable premium fitness brand, and have consistently created and executed many initiatives in this direction. Through our unique and exciting fitness initiatives and top-quality products equipped with superior technology, we are reaching out to more and more people across India and inspiring them to adopt fitness as an integral part of their lives," Bogra stated. Continuing its retail expansion under new format stores, Reebok India is targeting to convert all existing outlets to Fit Hub store format by mid 2017.





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# GLOBUS

## FUN FUSION CLOTHING FOR THE YOUNG

Commenced in 1999, Globus is a retail clothing store chain in India, providing a vast range of casual, occasional, traditional and premium clothing for men and women. It also offers an impressive range of jewellery and fashion accessories for the discerning youth.

Owned by the Rajan Raheja Group, the Brand Globus opened its first location, a 35,000 sq.ft. store, in Indore in June 1999, followed by two locations in Chennai. The flagship store in Mumbai was opened in November 2001 and by May 2008, the chain had expanded to 24 stores. The founder, Rajan Raheja had a vision to create one of the most admired fashion retailer brands of India, and Globus, today, is a fashion hub for the young and the trendy Indian men and women, girls and boys with 35 stores across 27 cities in India.

The Globus clothing is a fusion of western and ethnic, giving the brand an edge over its competitors. Employing state-of-the-art international technology, a highly skilled team of professionals and commitment to quality, the brand is known for its unique ethno-western outfits. The Globus western silhouettes styled with ethnic prints and motifs are highly appreciated by the younger generation.

### MARKET PRESENCE

Globus primarily caters to 18-35 year old fashion enthusiasts. The brand has 35 operational stores today, spread across 27 cities all over India. It also retails its trendy collection of apparel, and accessories through its online web store.

## BUSINESS DYNAMICS

Affordability escorted with craftsmanship is indeed an epitome of fashion creation and at Globus, it is a brand USP. Globus employs superior quality technology and is committed to deliver the best to its customers.

Globus has introduced an omnichannel app and a website, which gives the customers the freedom to shop wherever and in any way they like to do their shopping and not just be restricted to making purchases from physical stores alone. These platforms are accessible from anywhere and to everyone. They allow pickup from any store or delivery at the store and same can be returned at any store. Empowering customers with such technology brings the brand closer to meeting the client's requirements. These tools also allow the customers to get their entire purchase history and view their reward points at a single place.

## PRODUCT RANGE / OPERATIONAL GAMUT

Globus offers an impressive collection of apparels and accessories for the modern youth. Be it t-shirts for men, ladies tops, denim jeans or ladies jeans, you name it and Globus stores have it all. Globus' product portfolio includes - ethnic couture, semi formals, fusion wear, western wear and formal wear for the women. While for men, it has an amazing collection of casuals as well as formal western wear in latest international styles. The brand also offers a vast range of accessories comprising trendy bags and stylish jewellery, which are hot favourites amongst the younger generation.

The 'F-21' brand of Globus comprises fashion forward street and club wear ranges for the youth. The 'Poetry' and the 'Signerio' labels are sophisticated and elegant premium wear. Apart from these, the brand also features colourful tees, singlets and racer backs, a wardrobe must-haves throughout the year.

The brand stores are designed in such a way that the entire range caters to their every mood and taste of customers remarkably.

The designs embedded with intricate details and workmanship vie for attention.

The superior quality tailoring further adds to the outfit's beauty.

## TECHNOLOGY INTEGRATION

Globus is constantly making efforts to enhance its product portfolio by incorporating the latest technological developments and innovations. The brand seeks to revamp the 'Globus



Frends' app and the company website to bring in omnichannel experience. Along with this, the brand has also introduced various customer oriented practices like, personalised beauty tips, social sharing, social connections and virtual trial of clothes. Globus aims to interact with its customers by creating fashion forums and groups for such discussions through any accessible media including physical stores, online stores, market place stores, mobile store or via social media platforms.

## CUSTOMER ENGAGEMENT

To secure customer loyalty and attract potential customers, exceptional interaction with them is a must. Globus has introduced various customer-oriented practices like virtual trial, personal beauty tips and social sharing to stay in touch with its consumers. Post virtual trial, the customers can share the photos of the desired trials with their friends to get their feedback; this helps in easier decision-making. The tips given out by Globus come from the industry experts.

## MARKETING/PROMOTIONS

For brand communications and customer interaction, Globus employs a mix of both online and contemporary media. In 2008, Kareena Kapoor was the brand ambassador for Globus.

Various promotional activities on social media have been lately introduced to increase customer flow online. Besides online activities, various in-store events and outdoor promotions too are organised for promoting the brand.

Globus combines state-of-the-art international information technology, the highest quality of human resources and sustained financial commitment to realise its long term vision. Globus targets to be the "Most Admired Fashion Retailer in India."



# HARRYZ

## THE IMPECCABLE WHITE SHIRT

The classic white shirt is a familiar and omnipresent entity in any man's wardrobe. A white shirt is not just essential, but also a status symbol which has been defining fashion norms for years now. Harryz exudes relevance and class in its range of white shirts which include different collars, cuffs, cuts and textures.

By Rosy Ngaihte Sharma

In today's time, professionals require the highest standard of shirts for their daily work-wear. Whether you are a lawyer, doctor, academician, architect, hospitality professional, banker, designer or any other professional person, your attire needs to re-affirm and boost your passion and dedication.

Harryz offer a spectrum of products for professionals to suit their formal and work-wear needs. Whether it is a crisp white shirt with a stiff fused collar and firm yoke for an executive meeting or one that feels soft as feather for an evening gathering, you will find your perfect white shirt within their entire range of 'white shirts' collection. With strong definition and detailed perfectly-locked single-needle stitching, Harryz white shirts have a highly defined look and feel for all occasions.





“Power dressing is of utmost importance when it comes to getting noticed, appreciated and working your way to the top. At Harryz, we strive to offer only the most exquisite white shirts in the market as we believe our customers want to settle for nothing but the best,” A K Nijhawan, Managing Partner, Harryz.

#### THE BEGINNING

Harryz is a new line of white shirts launched by the enterprising mother-son duo. The brand aims at the niche ‘white shirts’ market within the gigantic men’s apparel clothing market in the country. It strives to provide with the finest, most exquisite and reliable quality of white

shirts which are meant to be worn by connoisseurs for the class that they define and by professionals for their durable character. According to the brand, at Harryz, quality and price are prime aspects taken into consideration for the design and manufacturing of white shirts.

#### THE QUALITY

Harryz white shirts are few of the most exclusive post-cured wrinkle-free white shirts available in the country and use the world’s finest Supima and Egyptian cotton as base materials. The white shirts can be used by professionals and executives as their preferred choice of work-wear owing to their dependable materials, design and manufacturing.

“Our cotton is soft as silk, partly imparted by the high count used in the different weaving patterns of all our shirts. With high-grade yarn-dyed cotton being used, whether you prefer to wear a Herringbone stitch, solid Oxford or a dobby stitch, you will find your need is taken care of under our various range. The white shirt collection is truly made for those who demand excellence and nothing short of it,” he explained.

#### PRODUCT OFFERING

Harryz white shirts are available in three categories -- classic, premium and signature styles, with differences in their weaving patterns, weave counts, origin of cotton and other details used to make the shirts.

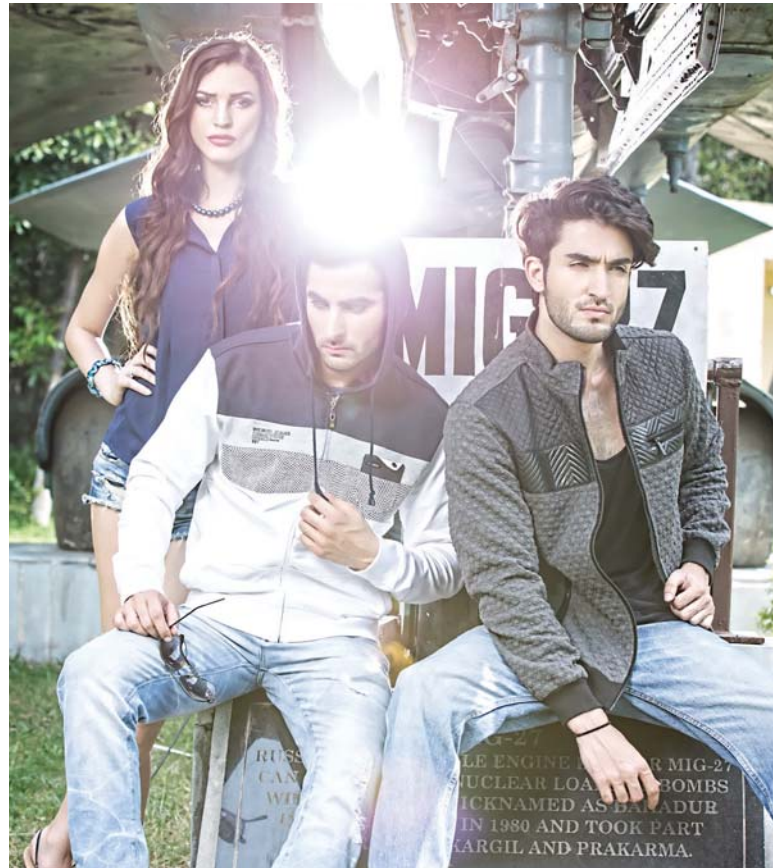
Although the brand’s principal focus lies on maintaining the finest spectrum of white shirts for its customers, it also manufactures leather goods including office bags, travel bags, wallets and invaluable accessories like cuff-links.

#### RETAIL PRESENCE

Harryz white shirts can be purchased online at the weblink [www.Harryz.in](http://www.Harryz.in), or at its flagship outlet at Ansal Plaza, Andrews Ganj, New Delhi.



Categories	Patterns	Fibre	Counts	Price range
Classic 1	Herringbone Weave	100% Supima Cotton	100/2 X CM 50; 155x106”	₹2,999
Classic 2	Solid Oxford (Plain)	100% Supima Cotton	80/2 X 80/2	₹3,499
Premium 1	Dobby Weave	100% Supima Cotton	80/2 X 80/2; 134x96”	₹3,999
Premium 2	Dobby Weave	100% Supima Cotton	100/2 X 100/2; 130x120”	₹4,499
Signature	Herringbone Weave	100% Egyptian Cotton	100/2 X 100/2; 150x110”	₹4,999



# CORLOUIS

## High Fashion Jackets & Blazers

Tridev Fashions has been manufacturing high quality fashionable jackets and blazers for over 25 years under the brand name 'Corlouis'. The product mix also includes sweat shirts and basic garments. The collection combines current fashion trends with detailed finishing and elegant styles. Rohit Bhakoo, Director, Tridev Fashions speaks about the company's expansion plans to Images BoF.

**T**ell us about your brand core. How did the brand idea and the name evolve?

Corlouis was started in 1998 with jackets as a product category. We already had a vast experience spanning across 25 years in the knitwear industry. In the last four years, we have added coats and blazers to our product portfolio. Recently, we have also added sweat shirts.

**Corlouis targets the premium dealers in areas like Delhi, Uttar Pradesh, Punjab etc. We target youth who are always looking out for something new and respect what is exclusive.**

**Tell us about your complete product range and MRPs Which are your core lines?**

Our portfolio encompasses both casual and designer trends. We make jackets, blazers and sweatshirts. Our fashion category starts from a price range of ₹2,000 and go up to ₹2,300. The jackets range anywhere around ₹4,000. Blazers range from ₹4,300 to ₹4,400. We also make basic products but they carry a touch of fashion which is different from what you see in the market.



**What are your manufacturing capacities in terms of number of pieces per category per year? How many plants do you operate and where are they located?**

We make 30,000 pieces of jackets and 10,000 pieces of sweatshirts. By next year, we plan to increase our manufacturing capacities. We already have two factories in Ludhiana and are planning to grow once we increase our production.

**The fashion aspect in the business is getting more complex and difficult to deliver every year. How do you cope with the challenge? How do global trends influence your designs and styles? How do you forecast your trends?**

We always strive to make something exclusive. We believe in staying ahead in fashion as we face the challenge to create one. **We travel extensively to source the best raw materials to give an edge to our products. We work with advance thinking in choosing the designs which will work. It calls for a lot of hard work and planning to create products like jackets**

**or blazers where in certain pieces we even mix-match with five different fabrics. There are only basic forecasts available for creating a fashion winter-wear product.**

**What are the top key trends you are betting on in Autumn/Winter 2015?**

In blazers, we have given a lot of contrast shades in fabrics, accessories and threads uses. Subtle fashion effects are working in blazers, as it gives both the casual and the formal look.

**Light weight winterwear are more in demand. How is your brand looking at this?**

Gone are the days when the customer used to buy heavy winter wear products to combat the weather. Today the customer wears layering of winter garments to show he is fashionable. We are aware of this and make jackets and blazers which are fashionable and lightweight.

**Tell us about any exclusive product launch or new development which you have planned for your brand.**

There is still a lot of scope in the winter wear category which we are addressing. In the years to come we will consolidate and strengthen our existing product portfolio.

*There is still a lot of scope in the winter wear category which we are addressing. In the years to come, we will consolidate and strengthen our existing product portfolio.*

**Tell us about your retail presence. How many EBOs, MBOs and LFS are you currently present in?**

We have presence in Delhi, Uttar Pradesh, Punjab and the Northeast. We are supplying to approx 300 MBOs. We are dealing with big MBOs like Bindals, Paul Garments, etc.

**What are your expansion plans? What are your plans to explore new markets in India?**

We will strengthen our positioning in the existing market, increase our infrastructure and look forward to opening our own store in the near future. We are also planning to get into Gujarat and the South Indian markets.

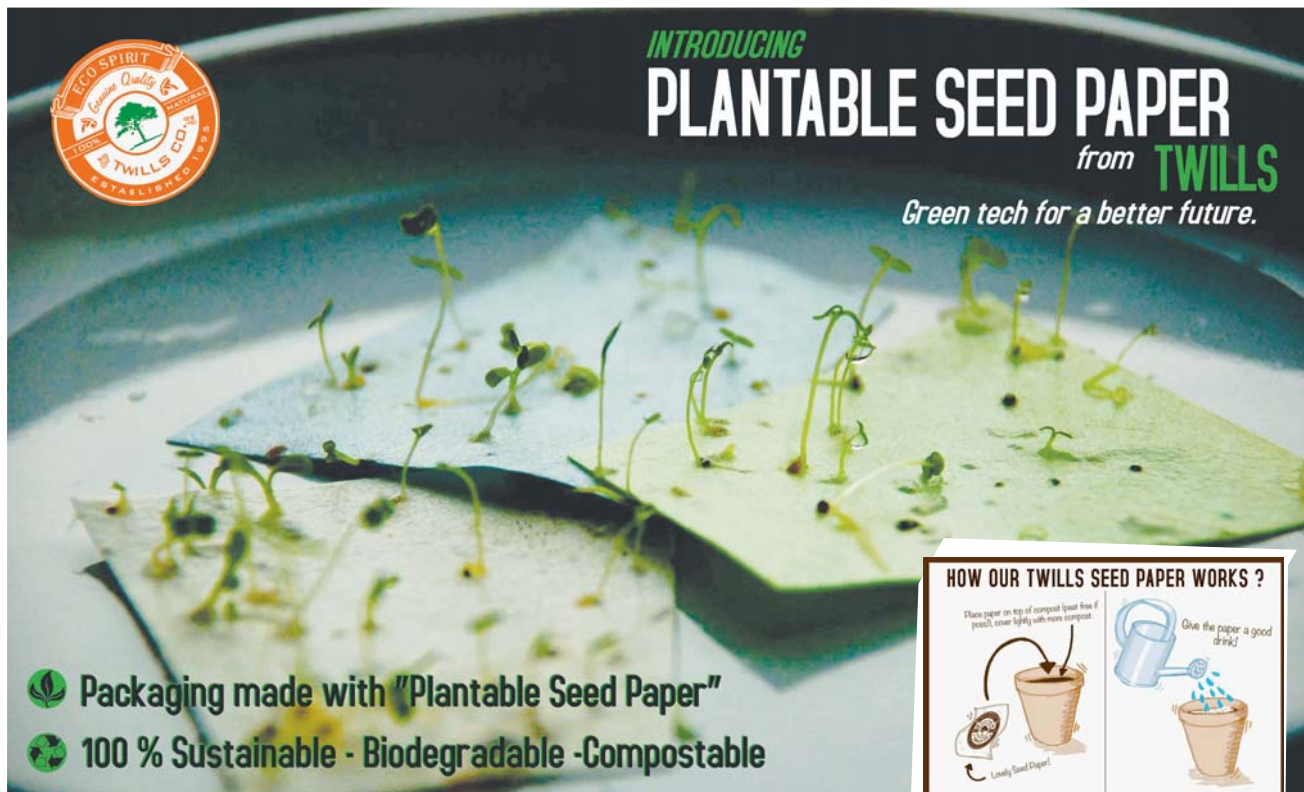
**Very few brands have opted to sell online. Tell us what has been your success story.**

We will start our visibility on leading online stores soon. It is a very strong channel and we will soon like to sell through Amazon, Jabong, Snapdeal, Flipkart, etc.

**What is your current turnover? How much are you aiming for in the next 2-3 years?**

We have added new products which has pushed our growth, which can be seen evaluated around 15-20 percent.





# TWILLS SHIRTS

ECOLOGICALLY SPIRITED

The men's lifestyle brand, Twills has introduced an innovative concept 'Eco-Spirit' to preserve the environment. They will also produce BCI cotton shirts to support the causes.

By Rosy Ngaihte Sharma

In its constant endeavour to preserve the environment, the lifestyle fashion brand, Twills, has launched 'Eco-Spirit' shirts. The innovative concept is a phenomenal initiative from the brand, where the use of plastic material has been totally avoided. All the material used under this concept like collar bands, price tickets, hand tags, etc. are 100 percent bio-degradable and compostable. Above all, each garment in this concept has a hand tag that has seeds which can be planted.

"In our near future, we are planning to use BCI (Better Initiative Cotton) cotton for producing these garments. In this way, we can contribute and diversify from other premium brands in India," Chaitanya V K, Senior Merchandiser, Twills, said.

BCI is a non-profit organisation that exists to make global cotton production better for the people who produce it, better for the environment it grows in and better for the

sector's future. BCI connects people and organisation from across the cotton sector from field to store, it promotes measurable and continuing improvements for the environment, farming communities and economies of cotton producing areas. "We want to be the most conventional brand and aim to implement environment friendly products into the market," he shared.

The brand offers top-class quality products at honest prices, thereby making Twills merchandise a great value for money product. All the garmenting is done in-house through an integrated R&D centre. The brand offers a wide range to choose from including cotton, linen and denims.

Twills products are available on 90 exclusive outlets, more than 2,000 multi-brand stores and at large format stores including Reliance Trends, Central and Brand Factory.







artist impression

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## DUKE BAGS “MAKE IN INDIA” AWARD

The award boosted the morale and acted as a catalyst for Duke to strive hard to achieve even higher levels of productivity and innovation and to become an active partner in the ‘Make in India’ campaign of the central government.

The renowned lifestyle brand, Duke, has received the “Make in India - National Productivity & Innovation Award” for the year 2014-15 under Textiles & Garments Sector. The award was presented by Kalraj Mishra, Union Minister for Micro, Small & Medium Enterprises in ‘NPI Award presenting ceremony’ on February 22, 2016 at Scope Complex, CGO, Lodhi Road, New Delhi in the presence of IAS K K Jalan, Secretary - MSME; IAS S N Tripathi, Development Commission - MSME; and Sidharth Sharma, Deputy Director General, NPC & Overall Incharge of Awards.

A total of 51 awards were given in 6 sectors of MSME and Duke bagged the first award in textile category. ‘Make in India’ is an international marketing campaign slogan coined by the Prime Minister of India, Narendra Modi, to attract businesses from around the world to invest and manufacture in the country. The campaign

has been concentrated to fulfill the purpose of job creation, enforcement to secondary and tertiary sector, boosting national economy, converting India to a self-reliant country and to give the Indian economy a global recognition.

On receiving the award, Komal Kumar Jain, Chairman, Duke Fashions (I) Ltd., shared, “I express my sincere gratitude and appreciation for the invaluable contribution and cooperation of our channel partners, colleagues and employees who have been our consistent source of inspiration in helping us achieve our business results and deliver best-in-class and qualitative products to local and global markets.”

He added, “A large part of the credit for this growth in the business goes to those people who have been very pro-active on the business of Duke. Our products are cost competitive and affordable to common people. We planned for an even larger growth in the innovation and production ahead. With the support of the Duke team, we are

confident of achieving this. Duke is a value for money brand and our mission is to make available the international designs and styles at highly reasonable prices. We see it as our duty to provide our customers the inspiration they need to look and feel confident.”

Minister Kalraj Mishra also expressed, “we have to aim at improving not only the productivity and quality of our industrial goods but also of our entrepreneurial talent through innovations. Only then, we can translate our strength of human capital dividends into an effective mode of socio-economic development for all round productivity.” He expressed hope that through the improved productivity and innovation demonstrated by the award winners, the scheme will motivate others to follow the path of excellence and to make India the global manufacturing hub. He believes that it is important to reiterate that productivity and innovation is the main pillar of success for any economic venture in the globalised world.





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- Intuitive Tech
- Intelligent Resourcing
- Seamless Experience
- Brand Alive
- Human Connect
- Open Thought
- Alpha Brandsters

The 2016 edition of the India Fashion Forum (IFF), India's biggest fashion sourcing, trends, design and retail business event, will kick start on from March 15 and 16, 2016 at the Renaissance Hotel, Powai (Mumbai).

The IFF mega congregation presented by Exclusively.com will witness international and national brands, business heads, global retail analysts, trend forecast giants and leading designers from the textile and ingredients, fashion creation and fashion retail industries under one roof to share and outline their strategies to optimise the future of the business.

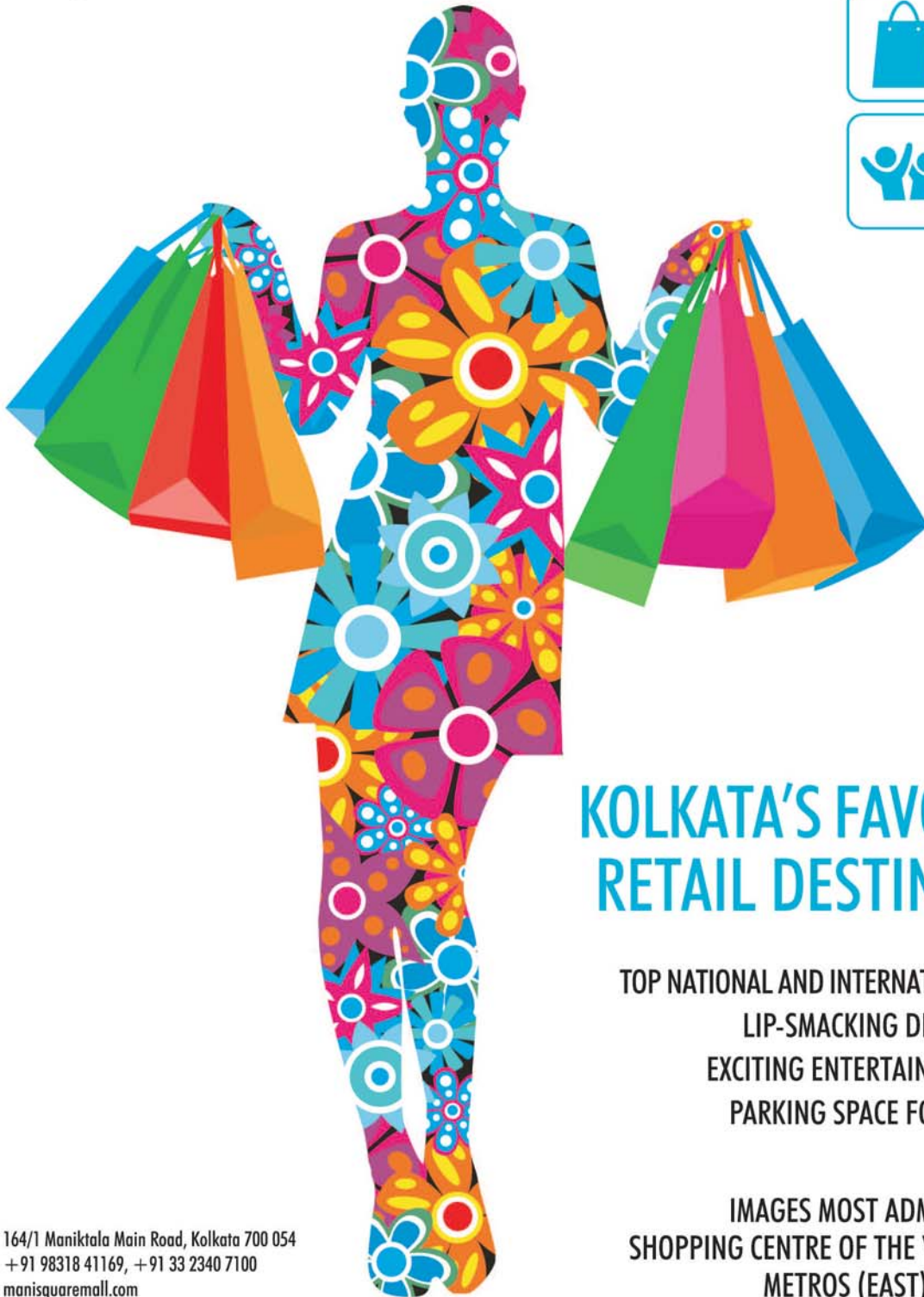
This year, the theme of the IFF 2016 is 'Fashioning the Fastest Changing Consumer Market of the World' through 7-agents of change namely Intuitive Tech, Intelligent Resourcing, Seamless Experience, Brand Alive, Human Connect, Open Thought and Alpha Brandsters.

The two-day event will house an incredible mix of iconic global and Indian speakers delivering keynotes and conducting conferences, master-classes, workshops, sourcing exhibitions, globally-aligned design and trend displays to a large inclusive audience across fashion and retail.

This year, among the many highlights of this massive, multi-layered event, will be exclusive Knowledge Series talks delivered by Billie Whitehouse, Co-Founder of Wearable Experiments, and Innovator Designer and Creator of Fundawear; Agnès Kubiak, Co-Founder and Creative Director, Style-Vision, Paris; and Anupreet Bhui, Senior Editor - Street Style and Trend Specialist from Hong Kong, WGSN.



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DAY 1 – March 15, 2016 (TUESDAY)

## FASHION RETAIL - CONFERENCE AGENDA

### Open Thought

10:30 - 11:00

#### **CONFERENCE: PROFITABILITY IN FASHION - WHAT MAKES FASHION RETAIL THE MOST EXCITING AND PROFITABLE BUSINESS TO BE IN**

- What makes Fashion the most exciting of retail businesses to be in – Case Studies of brands like GAP, Abercrombie & Fitch who have survived many decades, and garnered a cult following
- Where are the profits in Fashion:
  - Case Studies with break-ups on cost of different processes like: Sourcing/ Merchandising/ Employee Cost at stores and back-end/ Store Design cost/ Real Estate cost of stores in malls and high streets/ Marketing and Branding cost
  - Understand the secret of brands like Zara, H&M, Uniqlo achieving trading densities and returns per square feet of retail area, far ahead in multiples of other retailers. And how can fashion retailers in India steadily replicate these benchmark processes to get there
- **Research Presentation: Debashish Mukherjee**, Head, Consumer and Retail, A.T. Kearney

### Open Thought

11:00 - 12:30

#### **CONFERENCE: INAUGURAL AND KEYNOTE ADDRESSES: FASHIONING THE FASTEST CHANGING CONSUMER MARKET OF THE WORLD**

*Debating and discussing the OPPORTUNITIES and CHALLENGES*

Fashioning an emerging superpower brings in its wake a huge thrust of opportunity. India will soon be a \$3 trillion economy – it took 20 years to reach the one trillion dollar GDP, while the next trillion was added in just six to seven years. This kind of growth signals a phenomenal opportunity for the fashion industry to think all-out in terms of riding this huge potential, given the fact that no other industry reflects the increase in lifestyle aspirations and consumption with growing affluence, than the Fashion and Lifestyle industry. The accessibility of fashion itself is growing with fashion retail not only booming in the six-seven metros, but a big number of revenues and profitability coming in from Tier II and Tier III towns for a number of major retailers. Further promise of 100 Smart Cities bringing great infrastructure with planned growth, will further open the affluent and young working people to settle in these cities driving spending and consumption on fashion, home and lifestyle. Online retail has been the game-changer by penetrating the entire geographic reach of the country and the growth rates are amongst the fastest growing in the world. We also have the world's biggest young demographic, 65% of population being 35 or under, and half of our 1.25 billion people under 25 years of age – these are the consumers for today

and tomorrow who are enough to drive fashion consumption for the next 10 years, willing to spend and in the know of latest trends. Various mediums like television, cinema, print and magazines, digital media, lifestyle shows and fashion events are acting as Social influencers further catalyzing the aspirational value in consumers to demand the best styles and latest trends. All this opportunity is not without its share of Challenges though. They do remain in the form of expensive retail real estate denting profitability margins, logistics for bringing fast fashion into the stores and ensuring seamless last mile delivery still not as robust, the integration of technology and its understanding in production, design, inventory management, creating digital interfaces being still quite low by people both at strategic decision making and operational level; the understanding by retailers of a true Omnichannel model to get ready for the future is still not there, and building a fashion product by understanding consumer tastes and trends is still lagging.

Visionary leaders of our industry come together to share insights on how to take India's surge ahead as a fashion superpower and to make it into a key fashion market of the world, build robust business models for the future, and drive consumption and profitability in one of the most promising and lucrative markets of the world.

- **Session Chair: BS Nagesh**, Founder, TRRAIN
- **Chairman's Welcome Remarks and Introduction to IFF'16:**  
**Kabir Lumba**, Chairman, IFF & MD, Lifestyle International
- **Rakesh Biyani**, Joint MD, Future Retail
- **Govind Shrikhande**, CCA and MD, Shoppers Stop
- **Sudhir Tripathi**, Director General, NIFT
- **Ritu Beri**, Fashion Designer \*

### Open Thought

12:30 - 13:45



#### **CONFERENCE: CEO THINKPAD: THE DYNAMICS OF EVER-CHANGING FASHION BUSINESS AND HOW CEOs ARE COPING TO GET READY FOR THE NEXT DECADE**

Few industries require their leaders to stay as nimble and on their toes as the fashion retail business. The dynamics of the fashion industry undergo a sea change dramatically and need leaders to think from an entirely new perspective every couple of years. The very nature of the fast-moving trend of fashion, requires retailers and brands to jump on trends right away, coupled with the additional dynamics that are adding to the challenges. Shoppers increasingly want brands to speak to them with the same level of relevance, whether they are on an online website, or an app, or browsing in a store.

*To succeed amid the shifting tides, fashion leaders need to build up competence in many new areas like:*

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**JEANS & CASUALS**

- **Digitisation:** young fashion customers increasingly going digital to get information on trends, exchange experiences, compare prices, shop online 24x7
- **Channel convergence:** digital channels no longer only serve to provide pre-purchase information; they have become standalone transaction platforms. Independent of channel and device, fashion consumers expect a seamless shopping experience.
- **Deluge of data:** more and more customer data is coming through all kinds of new touch points – from user accounts to social networks. But how to use that intelligently?
- **Growing Urbanisation** and different expectations of Metros vs Tier 1, Tier 2, Tier 3 consumers
- **Global-local** brand management
- **New shopping experience:** giving a new meaning to stores - reevaluate store locations and sizes, optimize store density, design stores for a lower investment and operational cost, and potentially renegotiate leases

Hear from the biggest CEOs on how they are building brands and businesses of the future, building fashion tribes and communities, gaining trust, and growing loyalty from the digital savvy consumer.

- **Moderator: Neelesh Hundekari**, Partner, A.T. Kearney
- **Abhishek Ganguly**, MD, Puma India
- **Bhavik Jhaveri**, Founder & CEO, Pretr
- **Dilip Kapur**, Founder & President, Hidesign
- **Ganesh Subramanian**, Founder & CEO, Stylumia & Ex-COO, Myntra.com
- **Kenny Si Yeol Shin**, Director & CEO, SHOP CJ Network
- **Natasha Shah**, Founder & MD, The Nature's Co.
- **Sharad Mehra**, CEO, Pearl Academy

13:45 – 14:30

### Luncheon Meet

### Open Thought

14:30 - 15:00

#### **CONFERENCE: THE NEXT 5 YEARS OF EVOLUTION FOR THE FASHION AND LIFESTYLE BUSINESS**

- The Growth categories
- Categories with the highest profitability
- New fashion retail concepts
- The next billion dollar fashion and tech ideas
- **Research Presentation: Abheek Singhi**, Senior Partner & Director, The Boston Consulting Group (BCG)

### Open Thought

15:00 - 16:00



#### **CONFERENCE: THE NEXT 5 YEARS OF EVOLUTION FOR THE FASHION AND LIFESTYLE BUSINESS**

- The Growth categories

- Categories with the highest profitability
- New fashion retail concepts
- The next billion dollar fashion and tech ideas

#### • **Lead Presentation and Moderator: SAP Leader**

- **Manav Sethi**, Group Marketing Head and Head, Digital Products & Strategy, Askme.com
- **Rajesh Jain**, Managing Director & CEO, Lacoste
- **Rishab Soni**, MD, SSIPL Group
- **Sachin Oswal**, Omnichannel Head, Shoppers Stop
- **Sandeep Kulhalli**, Vice President – Retail & Marketing, Tanishq, Titan
- **Sandeep Mukim**, CEO, Proline
- **Vikram Idnani**, Head IT, Trent

### Intelligent Resourcing

14:30 - 16:00

#### **KNOWLEDGE SERIES: WGSN: UNDERSTANDING FASHION & TREND FORECASTING**

##### *THE VISION – FUTURE FASHION TRENDS FOR SPRING SUMMER 2017*

THE VISION brings together the opportunity to understand 4 key influential fashion trends derived from in-depth research and analysis. Each future trend unfolds into its related mood, color, design influences, materials, silhouettes and key fashion must have products for both men's and women's categories.

Fashion & trend forecasting is the prediction of mood, behavior and buying habits of the consumer at particular time of season. It is no longer a question of finding your markets or consumers by age, geography or income, but looking into how and what they buy, based on their culture, mood, beliefs, occasion & geographic locations, it is also dependent on fashion cycle and plays a major role in introductory phase of recurring fashion cycles.

- **International expert: Anupreet Bhui**, Senior Editor - Street Style & Trend Specialist from Hong Kong, WGSN

#### **About WGSN:**

WGSN is the world's leading trend authority serving fashion and the creative industries providing trend insight and inspiration to 7,000 of the world's most influential brands and retailers.

### Brand Alive

16:00 - 16:07

#### **CONFERENCE: SPECIAL PRESENTATION: CREATING YOUR BRAND STORY**

Flipkart ads have introduced a new form of advertising called - Commerce Advertising. The platform delivers a holistic view about customer's journey post ad interactions and highlights effectiveness of the advertising campaigns. Flipkart being the pioneer in this form promises a universal solution to brands that is based on superior data and buying intent of 50 million+ customers.

Brand Story Ads, the native offering can help brands weave stories to communicate their offerings to the customers- in a



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simple and interactive story format, using content images and product guides .

The magnitude of consumer traffic and intelligent data insights on online shopping behavior gives Flipkart the edge to provide data-driven advertising- to Marketers.

## Intuitive Tech

16:10 - 17:10

### CONFERENCE: 'BIG DATA' - DECODING THE FASHION LANDSCAPE

*Slice and Dice: Making Confident Decisions Around BigData*



While retailers & brands are adept at using data from POS, CRM & web analytics, the benefits of applying big data analytics to the way they do business in today's high-velocity competitive environment still eludes them. Big data has tremendous potential for improving merchandising, supply chain, e-commerce, store operations and pricing decisions. This session will give you a first-hand look at how retail analytics can be used to not only have an edge over the competition, but also create new benchmarks for others to catch up with.

- Experience the power of real-time market intelligence
- Upgrade your competitor benchmarking strategy through automation
- De-jargonize optimal pricing
- Compare catalogues across marketplaces to spot opportunities
- Decipher competitor strategies through brand visibility, discount analysis and catalogue movements
- Monetize real-time up-sell and cross-sell opportunities provided by your in-store shopper
- **Lead Presentation and Moderator: Sanjeev Sularia**, CEO and Co-founder, IntelligenceNODE
- **Anil Shankar**, CCA & VP - Solutions & Technology, Shoppers Stop
- **Bhai Ajinder Singh**, MD, M&B Footwear (Lee Cooper, iD, Provogue)
- **Gaurav Nabh**, Marketing Director, Koovs.com
- **Hrishikesh Pore**, VP-Omni Channel, Metro Shoes
- **Manoj Krishnan**, CIO, Landmark Group
- **Rohiet Singh**, COO, Tommy Hilfiger india
- **Uma Talreja**, Chief Digital Officer, Raymond
- **Vishal Kapil**, Director - IT, adidas Group India

## Intuitive Tech

17:10 - 17:20

### THE NEXT-GENERATION OF DESIGN AND 3-D TECHNOLOGY

3D virtual prototyping is set to revolutionize the product development process. Being the best at translating ideas into products is what makes a brand relevant to consumers and being able to do this quicker than any other company is what will shape the consumers' perception of a brand. Companies that use 3D technology not only can save their time and money, but are in the line with fashion trends. See the best of creative technology in this 3D software tool that allows designers to be creative, iterative, realistic and precise and to see a real translation of their

ideas in considerably less time.

- **Jean-Marc PEDEBOY**, VP, Roman CAD, France

## Open Thought

17:20 - 18:30

### CONFERENCE: FASHION AND LIFESTYLE CEOs

#### CONCLAVE: THE BIG OPPORTUNITY IN FASHION, SHOES, ACCESSORIES, BEAUTY AND LIFESTYLE - WINSOME GLOBAL APPEAL, FAST RUNWAY AHEAD FOR THE INDIAN MARKET



The LIFESTYLE industry is undergoing profound changes which makes it a crucial time for us to get together and explore the opportunities with the Indian consumer getting more mature and giving more and more importance to the looking good, and feeling good segment in their fashion, beauty and lifestyle collection, and for us retailers to discover opportunities and growing importance of multichannel retailing. We get together with the leading CEOs as we explore the ever-changing lifestyle retail landscape and discuss ways to successfully grow our business.

- Global lifestyle retail situation and outlook in main markets
- Focus on India's strength in manufacturing - seizing the 'Make in India' opportunity and leveraging Design capabilities to counter other low-cost producing countries
- Brand expansion strategy - 'all under one roof'
- What's next in leveraging the Online retail channel and turning it into an experiential zone on the digital screen
- Where are we in building Omnichannel model for this segment
- Trends - how to understand Trends in apparel, accessories, shoes, beauty products. Where does the market intelligence come from and how do we understand the consumer's mind
- Buying Heads of Retailers - How do they know what to buy for the current season, how do they decide on which collection to stock at their stores
- **Moderator: Vikas Bagga**, VP, Li Ning
- **Adarsh Gupta**, Promoter and Director, Hello 10
- **Gopalakrishnan Sankar**, CEO - Reliance Footprint & CEO - Reliance Living
- **Inder Dev Singh Musafir**, Director, M & B Footwear (Lee Cooper, iD, Provogue)
- **Jean-Marc PEDEBOY**, VP, Roman CAD, France
- **Mohini Binopal**, Co-Founder and Head Retail, Ruosh
- **Rafique Malik**, CMD, Metro Shoes
- **Sonita Unadkat**, Founder and Managing Director, Urban Shore London
- **Swarndeeep Singh**, MD, LOGIC ERP Solutions

18:30 hrs onwards



### India Brand Show '16 ( Fashion Show )

- Brands on the Ramp

(by invitation only)

20:00 hrs onwards



### India Shoes and Accessories Awards 2016


(by invitation only)

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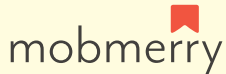
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## DAY 2 – March 16, 2016 (WEDNESDAY)

### Alpha Brandsters

10:30 - 11:45

**CONFERENCE: THE NEXT 'UNICORNS': WORKING WITH FASHION INNOVATORS AND ENTREPRENEURS AND CREATING COMPANIES OF THE FUTURE**



We bring together inspiring thinkers and doers, with their promising ideas and concepts, to share insights on how they have built their success in the market on new products, technology, digital landscape and retail formats. We discuss future trends and what kind of disruption remains for online brands, the sharing economy, wearable technology, and the online/offline retail experience. How are fashion and technology brands creating long-term value for customers and shareholders?

- **Lead Presentation and Moderator: Krishna Prasad**, CEO and Co-founder, MobMerry
- **Abhishek Passi**, COO, Exclusively
- **Abhishek Verma**, Senior VP, Myntra Fashion Brands (Myntra Fashion Incubator)
- **Akshay Narvekar**, Founder, Bombay Shirt Company
- **Avinash Banga**, Co-Founding team and Chief of Strategic Alliances, KAARYAH
- **Sanjay Shroff**, Founder, Styletag
- **Shivanandan Pare**, Head - Ecommerce, Trendin.com / Madura Fashion & Lifestyle
- **Vipin Kapoor**, Chairman, Kapsons Group
- **Vishakha Singh**, Founder, RedPolka.com

### Human Connect

10:30 - 12:00

**KNOWLEDGE SERIES: STYLE-VISION: GLOBAL INTELLIGENCE, LOCAL THINKING: HOW TO TRANSLATE TRENDS INTO SUCCESSFUL PRODUCTS FOR THE INDIA MARKET**

Everybody knows that creating a new product means being close and careful to consumers' expectations. We have to understand how consumers relate to social evolutions and how anticipating their reactions. In effect, influenced by social changes, consumers reveal new expectations and this in turn, creates new opportunities for business applications. But nowadays, individuals do not show the same attitudes towards the evolutions of the economy, culture, technology and society. In effect, as consumers are becoming more mature, versatile and demanding, they no longer enter into simplified categories based on age, gender, revenues and even lifestyle preferences. In this context, traditional demographic segmentation models no longer work on most markets to analyse how consumers react to

changes and forecast their future expectations.

Afterwards, time is coming to translate the global latest consumers' insights into fashion and design trends to refresh Indian fashion brands DNA and re-connect with the new generation of consumers.

This is the big jump into the creative world of fashion!

- **International expert: Agnès Kubiak**, Co-founder & Creative director, style-vision, Paris

### Intelligent Resourcing

12:00 - 13:30

**CONFERENCE: BUYING AND MARKETING HEADS CONCLAVE: BUYING AND SOURCING FROM A RETAILER'S PERSPECTIVE - WHAT'S NEXT AND HOW TO MAKE IT READY FOR THE OMNICHANNEL CLIMATE AND RAPIDLY CHANGING CONSUMER TRENDS**



The product range and assortment are at the heart of the ethos and success of a retail store. As retail evolves in a highly competitive Omnichannel climate with a more empowered consumer, in this new retail climate, good marketing and a strong product range are the foundation of success – it's becoming all the more important for Buying Heads to understand consumer trends, be in touch with the consumer-centric Omnichannel perspective, for the Buying and Marketing heads to collaborate together and instill the positioning in a manner which builds the appeal of a differentiated and carefully curated collection. We bring the Buying Heads and Marketing Heads together to explore the two-way collaboration to understand how they work in tandem to create the store collection and the positioning through marketing and digital campaigns:

- Consumer Trends – how and where they get this intelligence from, what are the trend forecasting techniques and sources they rely on
- Changing Consumer Tastes in Fashion, their Expectations from the assortment they get at the store
- Buying behavior of consumers, the impact of Marketing and Digital initiatives on the consumer and how it translates into store walk-ins and purchases
- How the Marketing Head and Buying Head work in collaboration to position the store collection and design the campaign
- The philosophy at premium stores like Lifestyle, Shoppers Stop in curating the Store Collection – what gets into the store and what the Buying Head looks into while selecting the suppliers and the product assortment
- How is the approach for the brick-and-mortar store and the online retail site for selecting the collection and its positioning – do the Buying and Marketing Head follow the identical



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Elegance*

**NEW DELHI**

City Square Mall, Shop No. FF-01, Raja Garden, Rajouri Garden  
V3S Mall, Shop No. FF-100, 1st Floor, Laxmi Nagar

**PUNJAB**

Pavillion Mall, Shop No. -202, 2nd Floor, Fountain Chowk, Ludhiana  
Trillium Mall, Shop No.10, 2nd Floor, Amritsar

**HARYANA**

Parsavnath City Mall, Shop No. LGF-42, Faridabad  
DT Mega Mall, Shop No. MMS-117, 1st Floor, Gurgaon  
Ansal Plaza Mall, Shop No. UG-03, Palam Vihar, Gurgaon

**UTTAR PRADESH**

Ansal Plaza Mall  
Shop No-59, Ground  
Floor, Greater Noida

**CHATTISGARH**

City Mall  
36 Shop No-28, 1st Floor,  
mangla Chowk, Bilaspur

**RAJASTHAN**

Shop.No-301/302,  
Rajapark, Jaipur

**ALSO AVAILABLE HERE**



approach for store and site, or it differs for the store and for the e-retail site

- **Conclave Moderator: Atul Bajaj**, Executive Director - Product & Sourcing, Puma India
- **Conclave Moderator: Dheeraj Chawla**, VP & Head - Menswear, Lifestyle International
- **Anindya Ray**, VP-Sourcing, Arvind Brands
- **Bhavik Jhaveri**, Founder, Pretr
- **Geetika Srivastava**, Chief-Lifestyle Merchandising, Aditya Birla Fashion Retail - Pantaloons
- **Kapil Bhatia**, Askmebazaar.com
- **Neeraj Raheja**, Head Ecommerce, Raymond
- **Pooja Maheshwari Salwan**, Category Head-Fashion Accessories, Reliance Retail
- **Rashmi Shukla**, Chief Buying and Merchandising Officer, Aditya Birla Online Fashion
- **Siddhart Rana**, Head - Business Development & Merchandising, Exclusively
- **Srinivas Rao**, Vice President - Marketing, Lifestyle International

## Open Thought

12:00 - 13:30

**STORE DESIGN CONCLAVE: 'SMART STORES' FOR SMART SHOPPERS - THE STORE OF THE FUTURE THAT IS NEEDED TODAY, AND VERY MUCH POSSIBLE TO BUILD TODAY**  
*Trends In Retail Fashion Environment – to maximize the capabilities of Digital and Omnichannel retail*



Retail is changing like never before, and so are the stores. Thanks to new technologies, it is easier than ever for retailers to tailor every customers' experience. From digital hangars, lighting and mood solutions, fitting room apps; everything is possible to make the shopping experience engaging and surreal for the demanding shopper who expects nothing less than cutting-edge technology and best-in-class ambience at his service. The physical store has the potential to be the most powerful and effective form of media available to a brand because it offers an experience, which if crafted properly, cannot be replicated online. So what can you do to maximize this effect - learn more at this engaging discussion.

### **Moderators:**

- **Huzefa Merchant**, MD, INSYNC Retail
- **Prasad Menon**, Associate Partner, Better Future (India) - Worked in retail across Europe, Brazil and India. Involved with retail brands like: Nokia Vertu, Liz Claiborne, Mexx Europe, Hamleys India, Future Bazaar.com etc.

### **Conclave Panel:**

- **Alisha Malik**, Director, Metro Shoes
- **Animesh Ikshit**, Head - Projects & VM, Benetton

- **Arden D'Souza**, CCA & Head - Visual Merchandiser, Shoppers Stop
- **Ashima Vora**, Head - Brand Marketing & Operations, HRX Brand by Hrithik Roshan
- **Ekta Saran**, Head - Entertainment and Leisure Store Retailing, Landmark-Trent - Westside
- **Faiz Thakur**, Head - VM, Globus
- **Harish Kumar**, MD, Neeru's
- **Nagendra Pratap Singh**, Head - Visual Merchandising, Raymond
- **Shambhav Chauhan**, Executive Director, Jade Blue

13:30 - 14:30

## Luncheon Meet

### Seamless Experience

15:15 - 16:15

**OMNICHANNEL CONCLAVE: THE FUTURE IS OMNICHANNEL: REVOLUTIONISING THE RETAIL EXPERIENCE THROUGH SMART PAYMENT SYSTEM**



- What is important for retailers and Fashion Brands in 2016?
- Challenges and opportunities for Retailers & Brands in the

## Open Thought

14:30 - 15:15

**IFF EXCLUSIVE: MARQUEE INTERNATIONAL SPEAKER'S KEYNOTE: THE FUTURE OF WEARABLE TECHNOLOGY**  
*A pioneering spirit and an icon of next-generation fashion innovation*

### BILLIE WHITEHOUSE

Co-Founder of Wearable Experiments Innovator Designer and creator of FUNDAWEAR

### **ABOUT BILLIE**

- Billie Whitehouse, an innovator designer, fashion educator, stylist and creative director, is the designer and creator of FUNDAWEAR, which was the catalyst to Billie founding the fashion tech company We:eX [Wearable Experiments].
- Wearable Experiments (We:eX) is a socially driven wearable technology company with a mission to bring together fashion and technology with a functional design aesthetic, and use creative problem solving to help consumers live well and have a better quality of life.



Omni-channel environment

- The importance of incorporating payments and security into Omni-channel Strategy
- Compliance and fraud mitigation across multiple payment channel
- Investing in a modern payments environment that supports innovation at the same time as offering high security and reliability

**Lead Presentation and Moderator: Dewang Neralla**, Director, atom Technologies

- **Rahul Kale**, Director, Iraya
- **Saurabh Jhingan**, Co-Founder & COO, Latin Quarters
- **Rajesh Saboo**, VP IT, Wadia Group (Bombay Dyeing)
- **Sandeep Mistry**, IT Head, Aditya Birla Fashion & Retail (Pantaloons)
- **Pooran Jaiswal**, CTO, Globus Stores

## Open Thought

15:15 - 16:30

### **CONFERENCE: FASHION – AN EXCELLENT INVESTMENT OPPORTUNITY**

Fashion is the biggest sector within organized retail with over 30% share and is growing at ~ 15% CAGR. The entry of global leading retailers and introduction of fast fashion is further

fueling the aspirations of consumers and adding to the growth of category.

The idea of session is to discuss and deliberate upon various investment opportunities in Indian fashion retail, in the light of investors' and investee's perspectives.

How do investors' view this sector and how do they evaluate and select the right brands to bet upon?

What are the key constraints / challenges that come their way while investing in the sector?

What is the inclination of Indian fashion brands (investee companies) towards PE funding?

How do they manage investors' expectations and their involvement/interference in their decision making?

The session thus seeks to focus on how investor and investee can build upon a "healthy partnership" which goes beyond a financial deal and stay together for potential long term returns in a market which is doubling every 5 years.

- **Moderator: Harminder Sahni**, Founder & MD, Wazir Advisors
- **Deep Mishra**, Managing Director, Everstone Capital Advisors
- **Pradeep Hirani**, Chairman & Founder, Kimaya Luxury
- **Shailesh Chaturvedi**, CEO, Tommy Hilfiger India
- **Vivek Gaur**, CEO & Co-Founder, Yepme.com
- **VT Bharadwaj**, Managing Director & Partner, Sequoia Capital

- As director and designer, Billie is invigorating the fashion industry and transforming it into a business focused on improving the quality of consumers' lives.
- Billie was brought up in the design industry, working from the early age of 16 at Australia's leading tertiary design school, Whitehouse Institute of Design, Australia.
- She is an aesthetic specialist with a naturally inquisitive nature towards technology and innovation. As a garment engineer, she strongly believes people should not have to look like the technology that they have grown to love and depend on.

### **CUTTING-EDGE INNOVATION**

- Billie believes that she can give intelligence and purpose to what humans wear. Her designs are sharp, experimental, naturally confident and subtly feminine in appearance integrating the latest technology. Design principals of colour, line, shape, proportion, tone, silhouette and texture are being brought to the wearable technology industry by her.
- Her signature aesthetic of sharp, experimental, naturally confident and subtly feminine designs was clear from her first collection for the Pink Gala Breast Cancer Ball held at the Sydney Opera House in 2008. She was interviewed by Channel 9 for the 12- piece collection, which was a collaboration with Cerrone Jewellery and sponsored by the Australian Wool Innovators.
- Her creations have included everything from Navigate, a GPS-enabled blazer, to The Alert Shirt, a sports jersey that lets fans feel sensations tied to sports games.

- In April 2014, Wearable Experiments released the New York Navigate before the PSFK audience, a GPS jacket that nudges the wearer to direct them left or right. This city-specific jacket gives the wearer the ability to walk around a city unimpeded by a map or app.

### **AWARDS & RECOGNITION**

- Billie has been recognised for her work on FUNDAREAR, with the campaign receiving a Silver Lion at Cannes Lions International Festival of Creativity.
- Business Insider recently named Billie as one of the 30 most important women under 30 in tech.
- In 2014, Billie won the Best Fan Engagement Award for the work on the Alert Shirt with FOX SPORTS. The 'Alert Shirt' is a fan jersey that uses wearable technology to enable fans to feel what the players feel live as it happens during the game.
- Most recently Billie has been doing design workshop and keynotes worldwide, some highlights include The TEI Conference at Stanford University, Cannes Lions 2015, WorldWEDForum Zurich, Wired Retail UK 2015, Financial Times Event Conference New York and WT Conference San Francisco..

Be inspired with Billie's eye-opening talks on tech-design convergence:

- 'Improving the quality of our lives with smart fashion'
- 'When Design and Tech Touch'
- 'Designing Fashion in a Digital Age'

## Open Thought

16:30 - 17:15

### **PREMIUM LOUNGE CONCLAVE: GROWING THE ESSENCE OF PRIVILEGE AND CASUAL LUXURY - CURATING**

#### **LIFESTYLES OF THE AFFLUENT CONSUMER**

*The Blue Ribbon – Taking Luxury to India's Next Pie of Affluent Consumers*

Among bloggers, online magazines, and those-in-the-know, the real trendsetting news is that it's no longer about just the clothing and accessories—it's about a lifestyle. Fashion goes beyond simple clothing to express identity, create wellbeing, embrace creativity and connect global communities. The focus is squarely on finding your own style, and expressing it through every facet of your life, including home, clothing, food, travel, and design. Whether it's the specialty shops, brick-and-mortar stores, or online lifestyle retailers, affluence is moulding the customer discovery and retailing is reinventing itself to fit today's consumer aspirations more than the needs. It's curated and it's personal, offering the idea of discovery, of something new, and with a strong focus on fashion. How do the premium and luxury brands, retailers and designers see the focus on growing this segment, and how are they wooing the Indian consumer to upgrade to a premium lifestyle.

- **Amit Maheshwari**, CEO, Exclusively.com
- **Falguni & Shane Peacock**, Fashion Designers
- **Mrinalini Chandra**, Founder, Mrinalini Chandra
- **Payal Singhal**, Fashion Designer
- **Pranav Saboo**, CEO, Ethos
- **Priyanka Modi**, Fashion Designer & Founder, AM:PM
- **Samir Shah**, Head of E-Commerce, TBZ The Original
- **Forest Essentials**

... followed by Wine and Cheese networking evening

## Intelligent Resourcing

17:00 - 18:30

### **SOURCING AND DESIGN CONCLAVE: CREATING THE SOUL OF FASHION**

*Fashion in a New Millennium*

In today's world of fashion, it has become essential for fashion and lifestyle companies to introduce new products every couple of weeks, and brands that can introduce new styles faster and retailers who can get them out first in the market will have an edge. What's the go-to strategy to bring fashion into the market. While each manufacturer and fashion creator wants to build their own niche and differentiated product and designs, how can we as an industry come together to build collective intelligence and design sensibilities which make Indian products world-class in quality, collection and cost-effective in sourcing ingredients from the different supply chains and global vendors.

Here is the chance for everybody connected with the world of fashion to get a nuts-and-bolts view from designers, heads of leading apparel manufacturers, creative heads and sourcing experts who gauge the fashion intelligence and trends in the

market, build the sourcing parameters, create the supply chains, and get into the process of creating fashion products.

- **Conclave Moderator: Manjula Tiwari**, CEO, Future Style Lab
- **Agnès Kubiak**, Co-Founder & Creative Director, style-vision, Paris
- **Anupreet Bhui**, Senior Editor-Street Style & Trend Specialist from Hong Kong, WGSN
- **Jennifer Kapasi**, Head of Operations, Triumph International
- **Karunesh Vohra**, Creative Director - Louis Philippe, Madura Fashion & Lifestyle
- **Kishor Bhatia**, Director-Product, Raymond
- **Nihal Rajan**, VP & Head of Design-MFB, Myntra Designs
- **Prem Sadhwani**, Group Head-Product Development, Madura Fashion & Lifestyle
- **Sudhir Gupta**, GM-Buying, Merchandising and Sourcing, ITC Lifestyle Retailing Business
- **Vinesh Singh**, Head-Product, Finance & SCM, Ruosh

## Open Thought

17:15 - 18:30

### **CONFERENCE: E-MALL TO OMNI-CHANNEL: SETTING THE STAGE FOR COLLABORATION SUCCESS**

Online majors invested hugely in technology, logistics and promotions in building e-retail platforms and e-malls. While partnership with retailers and distributors helped expanding the brands and products offering, there have been challenges in experimenting different alliance models. This conclave will discuss successes so far and strategies for future win-win models. What new alliance models can evolve in the new ecosystem for collaborative networks of retailers and distributors of different regions to come on mega digital platform/s? How joint growth and market expansion strategies bring clarity on discounted and full price sales and create differentiated models for different segments of markets and customers?

- **Avneesh Mishra**, CEO, Ethix Clothing
- **Bhagirath Jalan**, Director, Jalan Group
- **Darpan Kapoor**, Vice Chairman, Kapsons Group
- **Deepak Aswani**, MD, My Kingdom (Cochin)
- **Dharmesh Patel**, Founder, Options Clothing
- **Harish Kumar**, MD, Neeru's
- **Jagdish Purohit**, CEO, Akbarally's Men
- **Kinshu Sinha**, Director, Flipkart.com
- **Niranjana Viswanathan**, Director, RMKV
- **Praduman Raina**, VP- Sales & Business Development, SSIPL Retail
- **Rahul Bhalla**, Co-Founder & CEO, Latin Quarters
- **Rohit Khetan**, VP, Ginesys
- **Sandeep Jalan**, CEO, Sohum Shoppe
- **Sanjay Sahni**, MD, JDs Apparels (Ritu Wears Biglife)
- **Shambhav Chauhan**, Executive Director, Jade Blue
- **Kapil Bhatia**, Fashion Business Head, askmebazaar.com

20:00 ONWARDS

**IMAGES FASHION AWARDS (by invitation only)**





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Speciality Retailers	Academia	Retail Real Estate Developers	Airports, Metro, Railways
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Retail Security Firms	Investors & Funds	Merchandise Manufacturers	Project Planners & Managers

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# FASHION *CREATION*



## **KHADI**

THE FABRIC OF  
FASHION

## **FOCUS**

GUJARAT MAJORS



Expansions

**THE WOOLMARK COMPANY STRENGTHENS ITS RELATIONSHIPS WITH PARTNERS**

Wool is an ultimate natural fibre and premier ingredient in luxury apparel today. A look at The Woolmark Company's latest efforts in India to enhance its popularity.

Pg No. 150

MAKE IN INDIA

**KHADI: THE FABRIC OF FREEDOM AND FASHION**

Symbolically pious to India, Khadi or Khaddar is a handspun and hand woven cloth primarily made out of cotton. Khadi is a perfect green fabric that beguiles both the bourgeoisie and the glitterati alike. We take a detailed overview at what's the latest with Khadi.

Pg No. 156

DESIGN LEGEND

**"COSTUME DESIGNING IS NOT THE SAME AS FASHION DESIGNING..": BHANU ATHAIYA**



Pg No. 166



**FOCUS: GUJARAT**

**GUJARAT: AN INVESTOR-FRIENDLY TEXTILE HUB**

Gujarat, one of the leading industrial states in India, has unique strengths with respect to textile manufacturing. The industry has played a pivotal role in the economic and industrial growth of Gujarat over the last many years and is still moving upwards with tremendous potential.

Pg No. 170

**ARVIND LTD.: ENRICHING LIFESTYLES**

Headquartered in Ahmedabad, Arvind Ltd. is one of the largest integrated textile and apparel players in India. the company is today also widely recognized as a lifestyle and apparel major, which is a smooth transformation from its image as a textile giant or a denim king.

Pg No. 180



**AARVEE: TEXTILE MANUFACTURING EXCELLENCE**

Suketu N. Shah, Chief Executive Officer, Aarvee Denims & Exports Ltd., talks to Images BoF about the brand and shares an insight about their future plans.

Pg No. 182

**NANDAN DENIM: INNOVATIVE FASHION FABRICS**

Nandan Denim Limited is into manufacturing superior quality grey cotton fabrics, khakis, denims and shirting fabrics. Incorporating latest technology. Deepak Chiripal, CEO, Nandan Denim Limited, talks about the brand's journey and future plans with Images BoF.

Pg No. 188

Fashion Creation

**V S TEXTILES: WHERE INNOVATION IS AN ONGOING PROCESS**

Ahmedabad based V S Textiles has over three decades of industrial experience and expertise in textile manufacturing industry. Ashit Agarwal, Director, V S Textiles, shares about the company and its expansion plans with Images BoF.

Pg No. 190

**ZYDEX: SUSTAINABLE SOLUTIONS THROUGH INNOVATION**

Zydex is a young research driven company delivering high performance polymer based solutions for textile processing. Promoted by Dr. Ajay Ranka (Ph.D.- Polymer Science & Engineering, USA), it holds many US, European and Indian patents.

Pg No. 192

**BHAGWATI IRON & STEEL: DEFINING THE NEW AGE DISPLAY FURNITURE**

Pg No. 194



**NEXT SECTION SPORTSWEAR INTERNATIONAL**

Pg no. 197-230



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Left to Right: Arti Gudal, Nachiket Barve, Rajesh Pratap Singh & Raghav Chanana



# THE WOOLMARK COMPANY

## STRENGTHENS ITS RELATIONSHIPS WITH PARTNERS

Wool is an ultimate natural fibre and premier ingredient in luxury apparel today. The credit for its popularity goes to the The Woolmark Company which is the global authority on wool. The Woolmark logo is one of the world's most recognised and respected brands, providing assurance of the highest quality, and representing pioneering excellence and innovation from farm to finished product.

- Gurbir Singh Gulati, Team BoF

**T**he Woolmark Company is a subsidiary of Australian Wool Innovation, a not-for-profit enterprise owned by more than 24,000 wool-growers that invests in research, development and marketing along the worldwide supply chain for Australian wool.

### CONNECT WITH THE INDIAN MARKET

Taking a step forward to connect its partners across manufacturing, merchandising and the fashion industry in India, The Woolmark Company held a retail seminar in the two prominent cities of Punjab – Ludhiana on February 10 and Amritsar on February 11, 2016. The events were attended by Woolmark licensees including companies like Shingora, S M Textile Mills (Ambassador Shawls) and Apollo Shawls. The seminar's panel consisted of senior leadership from top retailers in India including Arvind Brands, Future Brands, Tommy Hilfiger and Shoppers Stop. The seminar was followed by a fashion show by leading fashion designer Nachiket Barve, who displayed an exclusive collection of stylish Australian Merino wool shawls and stoles.

The Woolmark Company and its retail associates acknowledged and celebrated the contribution of the licensees in driving sales growth of shawls and stoles across India. They discussed various benefits and the infinite potential of wool as well as the changing landscape of retailing with the rise of e-commerce in the country. Using the material provided by the licensees, Designer Nachiket Barve put together a utilitarian yet stylish collection. Commenting on the retail seminar, the official spokesperson from S M Textile Mills, said, "We would like to congratulate The Woolmark Company, who we've been associated since 1983. A networking event which brings the key stakeholders of the textile business together is a

>



commendable initiative. Our association with Nachiket Barve has helped us learn various ways in which our base fabric can be used to create fashionable garments.”

Adding to this sentiment, the official spokesperson from Apollo Shawls said, “We are elated to be a part of this event today which not only helps us network and showcase our shawls but also creates

awareness about the ever-growing Indian retail industry. It also gave us an opportunity to collaborate with designer Nachiket and secure knowledge on how to craft shawls for the fashion industry.”

Spurred by the tremendous success and the growing adoption of lightweight, trans-seasonal Merino wool garments across different categories in India, The Woolmark Company is working with various local SMEs in Punjab to drive further penetration.

Arti Gudal, Country Manager, India, The Woolmark Company said, “At The Woolmark Company, we are constantly engaging with manufacturers, retailers and designers through innovative initiatives to drive awareness, build affinity and create excitement in the Indian wool market.” She further explains “These seminars give our licensee partners direct access to leaders in both the retail and fashion industry. Today, with India witnessing a boom in Indian retail space, it is crucial for us to focus on such initiatives.”

Barve added, “Fashioning statement pieces out of the beautiful Merino wool shawls and stoles sourced from the licensees has been a wonderful experience. The Woolmark Company has provided a progressive platform to amalgamate forward thinking innovative design with a treasure trove of quality Merino fabrics from the key stakeholders in the industry. I am excited about this perfect opportunity to showcase indigenous local textiles and skills with a global design sensibility.”

The evening concluded with a special live performance by the famous Bollywood DJ Aqeel who also decided to dress for the occasion by donning an uber-stylish stole by prominent designer Rajesh Pratap Singh.

#### **WOOLMARK: A HALLMARK OF QUALITY AND EXCELLENCE**

The Woolmark logo has adorned wool products for 50 years, showcasing the







### SHAWL STYLES PRESENTED BY DESIGNER NACHIKET BARVE

**S**hawls have been an integral part of the Indian wardrobe for generations.

The 'Shawl Style Project' aims at reinventing the classic shawl from its unstitched avatar to a statement fashion accessory that becomes a fashion "must-have" for a contemporary wardrobe.

The collection traverses the vast spectrum of techniques such as weaving, printing, embroidery that encompasses the shawl industry. He played with many weights of Merino wool fabric, woven in a light gauzy weave or in compact twill weave. Wool has been used in a feather weight translucent form as well as in textured chunky weight.

The range comprises Ombre-dyed fine shawls, geometric Aztec inspired stoles, textured chubby throws as well as exquisitely embroidered or woven floral Kani shawls. The collection incorporates soaring Japanese Cranes, floating Ginkgo leaves and rose leit motif into the show to add a contemporary edge. The most illustrative examples of each genre have been sourced from the partner licensees of The Woolmark Company to fashion this collection.

The collection does not tamper with the dimensions and the unstitched nature

of the shawls. This not only eases the manufacturing process but also lets the wearer use the shawl in a versatile way.

The varied elements that transform the shawl from a two-dimensional piece of fabric to a three-dimensional article of clothing have been played with in an innovative format; be it buttons, zips, hooks or seams. Shawls and stoles have been joined together with beads and cut outs and decorated with embroidery, applique, fringes and tassels so that they can be worn to style an assortment of outfits for various occasions.

For the reinvention of the shawl to be feasible and truly sustainable, it must become a part of the way in which women dress today and fit seamlessly into their lifestyle, whether an actor is rushing to catch a flight, a corporate maven is in a business meeting or even a fashionista attending a wedding. The collection presented the entire spectrum of shawls for these lifestyle aspects.

The design interventions shown are carefully curated, keeping in mind, minimal stitching skills so as to render them feasible to create on a large-scale level too.

extraordinary versatility and innate luxury of wool. Woolmark licensees are permitted to use one of the logos if their product fulfils their specifications.

The Woolmark brand is the world's best-known textile quality fibre brand. The value of the brand is well established and highly regarded across the world in the apparel, interior textiles and home laundry sectors. It represents a long-term commitment to quality spanning 50 years and helping define the history of wool.

As one of the world's most well-known brands, the Woolmark logo has been applied to more than 5 billion products since the creation of the original mark in 1964.

The Woolmark logo is a certification trademark and products that carry it must be tested at independent Authorised Laboratories and approved by The Woolmark Company. The marks provide consumers with guaranteed fibre content and an assurance of quality. At retail, products carrying the logos are clearly distinguished through the use of one of the world's best known logos via tickets and labels.

Consumers can be assured that the products which carry the mark have been rigorously tested and awarded with a mark of independent quality endorsement.

The Woolmark symbol is available for quality compliant products containing 100 percent pure new wool. The Woolmark Blend logo is for products containing 50 percent to 99.9 percent pure new wool. And, for products containing 30 percent to 49.9 percent wool, the Wool Blend logo is used. It also has a number of apparel and interiors sub-brands.



Check for more information at [www.woolmark.com](http://www.woolmark.com)

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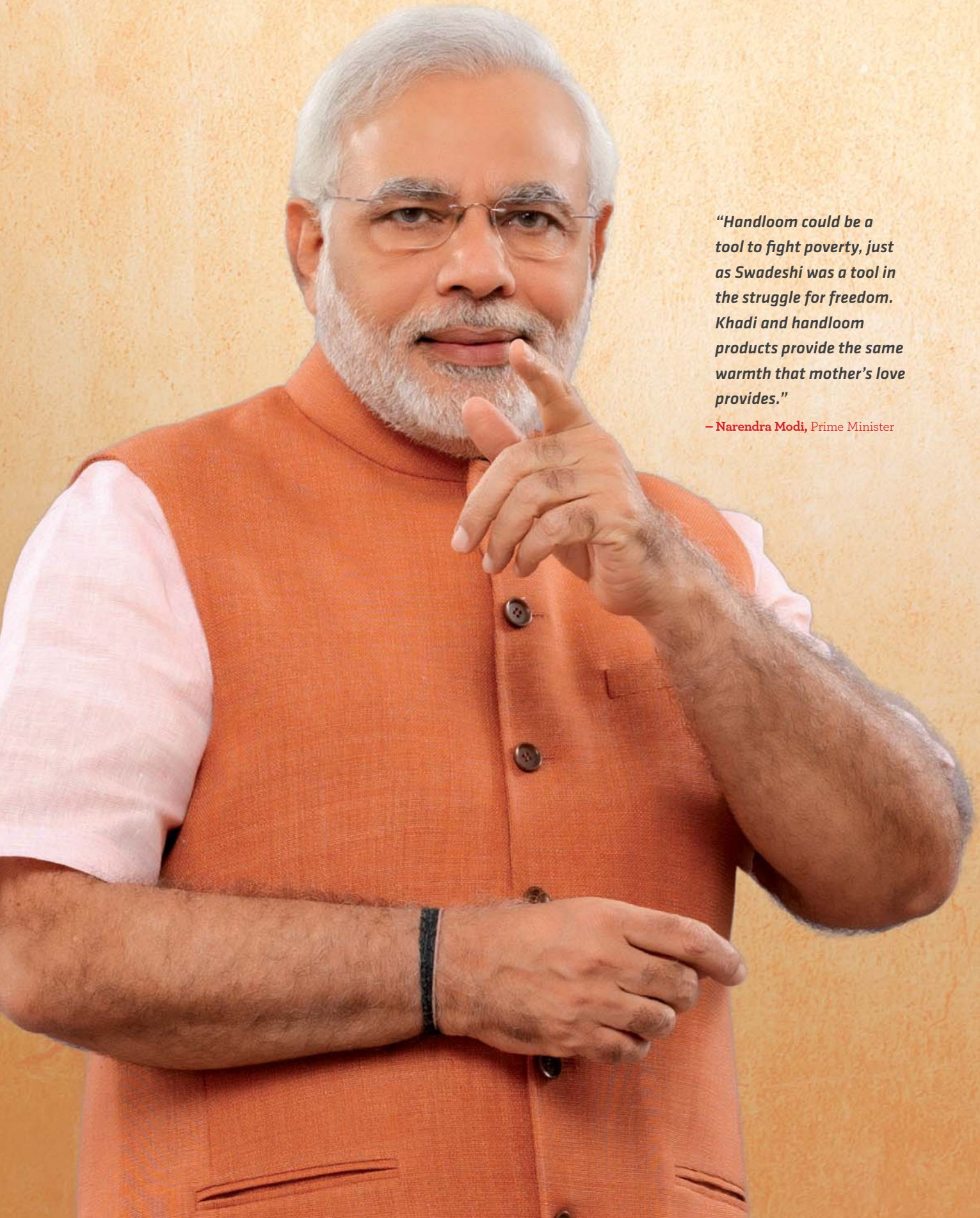
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*“Handloom could be a tool to fight poverty, just as Swadeshi was a tool in the struggle for freedom. Khadi and handloom products provide the same warmth that mother’s love provides.”*

*– Narendra Modi, Prime Minister*

# KHADI

## THE FABRIC OF FREEDOM AND FASHION

*Endemic to India, Bangladesh and Pakistan, khadi or khaddar is a handspun and hand woven cloth primarily made out of cotton. The loom used in weaving khadi inter-laces the threads in such a manner that it makes the fabric highly breathable and soothes the body better than any other fabric. The specialty of the fabric lies in the fact that it stays cool in summer and warm in winter, making it one of the most comfortable fabrics. Woven with natural fibres such as cotton, silk and wool, and spun into yarn on spinning wheel called charkha, Khadi is a perfect green fabric that beguiles both the bourgeoisie and the glitterati alike.*

-By Bharti Sud & Rajan Varma

### JOURNEY OF KHADI

India's rendezvous with textile dates back to the ancient times when the Aryans in the vedic period produced their own cloth. Khadi is among the most ancient fabric known to mankind and finds mention in the texts of various early travellers. In the 6th century, a local variation of khadi cloth was described by Huen Tsang of China and Marco Polo in the 12th century AD, described Khadi Muslin of Bengal to be as fine as a spider's web. It even enjoys mention in the Harappan civilization. During the Maurya period, there was a large spinning and weaving industry. During the Mughal period too, spinning and weaving continued to be an important occupation.

It was Mahatma Gandhi who elevated khadi to its most significant status after he returned from South Africa. In 1915, in his quest to persuade the nation to become self reliant, Gandhi turned

to the charkha and began promoting the spinning of khadi for rural self-employment. Gandhi propagated it not as a fabric but as a way of life. Khadi was meant to become a supplementary industry to agriculture, a crucial element in a self sustained economy.

It was not just a cloth, but a whole movement started by Mahatma Gandhi to throw out the British colonial rulers. By 1921, khadi became a part of the national movement and in fact, became the symbol of the nation's struggle for freedom. Gandhi used khadi as the uniform for the first Non-Cooperation Movement and the Gandhi cap had strong symbolic overtones. Even Pandit Nehru wove a wedding sari for his daughter Indira in salmon pink khadi while he was in jail. In 1926, Gandhi advocated khadi as the

only true 'Swadeshi'. The manufacturing process involved millions, propelling them to be self reliant. As the non-co-operation movement under Gandhi progressed, the popularity of khadi increased and it soon became the symbol of defiance.

In 1923, an All India Khadi Board was constituted with branches in all states, under the supervision of the Indian National Congress for a co-ordinated development of the khadi programme. In 1925, the All India Spinners Association was created, under the chairmanship of Gandhi, for propagation, production and sale of khadi. The techniques of carding, spinning, weaving, dyeing and printing were improved and new varieties of khadi were introduced in the market.





***“Swaraj without Swadeshi is a lifeless corpse and if Swadeshi is the soul of Swaraj, khadi is the essence of Swadeshi.”***

**– Mahatma Gandhi**



industrialization. Industrialists set up huge textile mills to mass produce fine cloth. Khadi's importance diminished as people started turning to mill fabrics.

In January 1953, the All India Khadi and Village Industries Board was set up which took over the activity from the Akhil Bharat Sarva Seva Sangh. In 1957, the Khadi and Village Industries Commission was established to -- “plan, promote, facilitate, organise and assist in the establishment and development of khadi and village industries in the rural areas in coordination with other agencies engaged in rural development wherever necessary.” It took over the work of the All India Khadi and Village Industries Board, and gradually bolstered the prominence curve of khadi, with leaders and politicians opted for khadi to demonstrate their patriotism.

#### **KHADI IN MODERN TIMES**

Khadi, over the decades, has moved from a freedom fighter's identity fabric to a fashion garment. It is no longer worn as a kurta by intellectuals and politicians. The fashion industry has adopted khadi as a natural fibre and it has today become a favourite of the fashion designers.

In 1989, the first high fashion khadi show was presented in Mumbai by the Khadi and Village Industries Commission, where nearly 85 garments were created by

In 1933, 10 million sq. yards of fabric was produced which gave employment to approximately two lakh Indians. Gandhi stressed on cultivation of cotton in every village, without which khadi could never succeed. On 8 August 1942, Quit India Movement was launched in India against the British rule in response to Gandhi's call for swaraj or complete independence through the charkha.

So deep rooted were the sentiments attached to this fabric that it even had religious significance. Back at the day, it was a common practice during marriages in India to present the bride with a khada charkha in their trousseau to encourage spinning of the yarn.

Post independence, in the zeal to stride along our developed seers, India adopted



Devika Bhojwani. In 1990, designer Ritu Kumar presented her first khadi collection at the Crafts Museum. Her 'Tree of Life' show, an audio visual tableau spanning the history of textiles in India, presented eight collections of khadi.

Khadi is now the most preferred choice on the global and Indian fashion ramps. Its unique properties of environment friendly, skin friendly, warm in winters and cool in summers, makes it an attractive option for designers to make stylish clothing. The designers, at times, use high-thread count khadi to make the fabric softer and easier to work with.

Initiatives were taken by premier institutions like NIID, NIFT, IIT- New Delhi and the Textile Committee. In 2001, Vasundhara Raje, the then Union Minister of State for Small Scale Industries, roped in designers like Rohit Bal and Malini Ramani to give khadi a new chic look. Khadi stores soon became a rage and kurtas, kurtis, jackets, dhotis, and sarees made style statements. Designers like Neeru Kumar, Ritu Kumar, Pranavi Kapur and Madhu Jain worked closely with the weavers. While Ritu Kumar vouches by the fabric's ability to dye beautifully and its eco-friendly nature; designer

Agnimitra Paul is all for the fabric's versatility. Rohit Bal felt khadi was India's answer to linen.

Designers, both Indian and foreigners, have added drapes, cuts and style to this hand spun cloth and it has evolved considerably from its modest origins. The versatile fabric is taking innumerable forms - embroidered, embellished, shaded, block printed and pin tucked. The prêt line of khadi tops, kurtas, skirts, suits, sarees, dresses and men's wear are showcased in India's leading fashion boutiques and stores across the country and also abroad. Now, even khadi cocktail gowns have made their debut in international market. The indigenous market is also being captured by khadi jeans and bridal lehengas. Khadi is now being adopted by a more conscious population. A population that understands that by wearing khadi, they are helping the indigenous artisans. Khadi kurtas and jackets worn by Prime Minister Narendra Modi have become a rage among the youngsters. It's popularity also sore among the NRIs settled in US, Canada, UK, etc., who buy them during their visit to the country. Khadi, in the modern times, has got a makeover and a facelift.

Detailing the significance of khadi in today's fashion, Ritu Kumar told IMAGES BoF, "In the fashion history of the world,





**RAJESH PRATAP,**  
Designer

*“Khadi is a hand spun, hand woven fabric which is essentially made in India, so it has a very distinct character and process. For me, it’s pure luxury.”*

“Khadi is a fabric which lends itself to non draped styles, but the rare nature of the production ensures that there are enough choices of styles to work with on this natural fabric,” she said. Reveals Ritu Kumar, “The problem with Khadi is its regular and consistent supply which is controlled by various Khadi centres. There is a lot of publicity and design around the fabric, but the production is hampered by its non organized nature.” “Khadi, if available, our tropical climate will work very well for simple silhouettes which are contemporary enough. It also dyes very well and its highly organic quality makes it a beautiful fabric for any designer to work on,” observes Ritu.

there has been no fabric like khadi. Its intrinsic hand spun nature is its USP, it is very sophisticated and sells for its unique organic and hand-made, handloomed quality and its rustic nature.” She felt that it required a very well developed style sense to understand khadi-- so it was a couture and upper-end fabric, which by its nature, always was aspirational.

Another designer who has been working regularly with khadi since the last fifteen years is Rajesh Pratap. He emphasized, “Khadi is a hand spun, hand woven fabric which is essentially made in India, so it has a very distinct character and process. For me, it’s pure luxury.” He feels that khadi should be less about trends and





**JATIN KOCHAR**  
Designer

*“With khadi, only a certain kind of look can be created but that look does not work with the young people. Since it is a stiff fabric, it works more for the fifty plus section. But fashion is what the young wear and not what the old wear. Khadi is expensive, colour fades away and it even shrinks. Khadi can never be a Zara product because it is not consistent. It lacks technology and interest. A lot can be done, but we need to create that urge for the consumers to buy.”*



more about luxury and an exclusive product out of India. He shares, “We are focusing more on what we can do with the yarn, weaves and the idea is to improve the quality of the fabric without compromising on its characteristics. We sell khadi in some of the finest stores in the world.”

Pratap also feels that a lot has been done to promote khadi by designers as well as Indian government, but it has not been done in a very qualitative and focused way so far. “Khadi should not be about a bad quality product sold with the help of government subsidy. It’s the emotion and the versatility of a slow process which one needs to focus on,” he told BoF.

Raghvendra Rathore, a noted fashion designer for luxury men’s wear known globally for his iconic Jodhpur style

Bandhgala suits, elaborated on the significance of khadi in today’s fashion and said, “Khadi is a national treasure. It is a part of our culture, a self-sustaining mechanism in small social dwellings and most importantly, a symbol of the freedom struggle. The recent awareness about the idea of luxury has slowly brought fabrics such as brocades and khadi in its consciousness.”

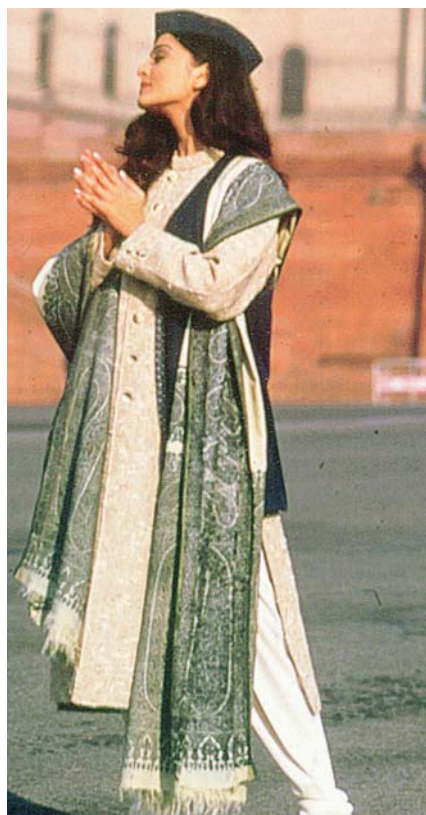
According to him, Khadi as a product needs to be repackaged from a global point of view. He feels khadi is a philosophy that needed to be incorporated in textile design and fashion. He said, “A departure from the existing notion of khadi will liberate it from its present mass market status to a pedigree trend.”

Discussing about the role of Indian designers and brands in supporting

khadi, Rathore said, “An attempt by young designers to incorporate khadi in their work has been an on-going initiative for the past few years, . The brand prides itself in creating classic heritage clothing in the most sensual khadi fabrics for over a decade. Our attempt, season after season, is to consciously incorporate khadi in our new collections.”

**Designer Jatin Kochhar had a different view. He felt that all the hype around khadi is useless because it is not a very versatile fabric.** Keeping today’s fashion in mind, he feels that it is very stiff, very thick and even the authorities were reluctant to innovate. He said, “With khadi, only a certain kind of look can be created but that look does not work





with the young people. Since it is a stiff fabric, it works more for the fifty plus section. But fashion is what the young wear and not what the old wear. Khadi is expensive, colour fades away and it even shrinks. Khadi can never be a Zara product because it is not consistent. It lacks technology and interest. A lot can be done, but we need to create that urge for the consumers to buy."

"Khadi means nothing to me. I also went with lot of ideas to the department. I even suggested Lycra Khadi. Sixty years ago, it was a need. Show me one person today who will be interested in wearing khadi. You have to move with the times," he told BoF.

#### **KHADI DIL KA PRODUCT 'MANN KI BAAT'**

'Gone are the days when khadi products were used either by politicians or by the elderly. After Prime Minister Narendra Modi's appeal to use khadi products in one of the sessions of "Mann ki Baat" on All India Radio, there has been a tremendous increase in the sales of khadi. Khadi has become a fashion trend. "We must promote the use of khadi. Buy at least one khadi product. By doing so you will light the lamp of prosperity in the house of a poor," said PM Narendra



Modi. He further urged, "Buy khadi and handloom during festivals. I am not saying use only khadi but give it some place in your lives." Chief executive officer of the Khadi and Village Industries Commission (KVIC), Arun Kumar Jha said that there was some magic in the appeal of PM as the sales went up substantially. Khadi has now moved from being 'freedom fabric' to 'fashion fabric'

In order to make Khadi more popular, KVIC has completely changed the orientation. Earlier, whatever was produced was being sold. But now, the industry has started making clothes according to the prevailing trends, which makes the products more popular among the youth. KVIC has also introduced a khadi denim collection which includes readymade jeans and t-shirts targeting the youth. Of late, various interventions have also been introduced to improve the quality, process, stiffness and softness in khadi.

Today, khadi has its own designer wear range and fashion trendy collection. Designer khadi has also been launched as part of a youth centric campaign.

KVIC was even in the process of tying up with major textile brands, including Fabindia and Raymond to promote the fabric. It has also roped in actor Amitabh Bachchan as the 'brand ambassador' for khadi.

#### **KVIC INTRODUCES SOLAR CHARKHA TO INCREASE OUTPUT**

Charkha, which was popularized by Mahatma Gandhi is all set to become environment-friendly with a new avatar



- the solar charkha. The Khadi and Village Industries Commission and Gandhigram Urja Vikas Sanstha, an Amravati-based NGO, in collaboration with the Mahatma Gandhi Institute of Rural Industrialisation, Wardha, have developed spinning wheels with more spindles that can run on solar power. Gujarat will be the first state to test the solar-powered wheels. The Khadi Prayog Samiti, Ahmedabad, Udhog Bharti Trust, Gondal, Surat Engineering Vikas Association and Indo-German Tool Room are conducting the tests.

AP Jaiswal, KVIC's deputy director said that the purpose behind developing the solar charkha was to keep khadi spinning environment-friendly as well as easy. The solar power charkha would reduce the effort, provide employment to more men at rural level and increase their earnings.

#### **KHADI UTSAV IN AHMEDABAD**

On the occasion of Mahatma Gandhi's 146th birth anniversary, the Gujarat government held a special Khadi Utsav in Ahmedabad in October, 2015. It created an aggressive marketing drive in order to promote Khadi among the young generations. The main attraction of the utsav was the introduction of a wide range of khadi apparels, both for men and women, in new styles that included Modi kurtas and jackets.

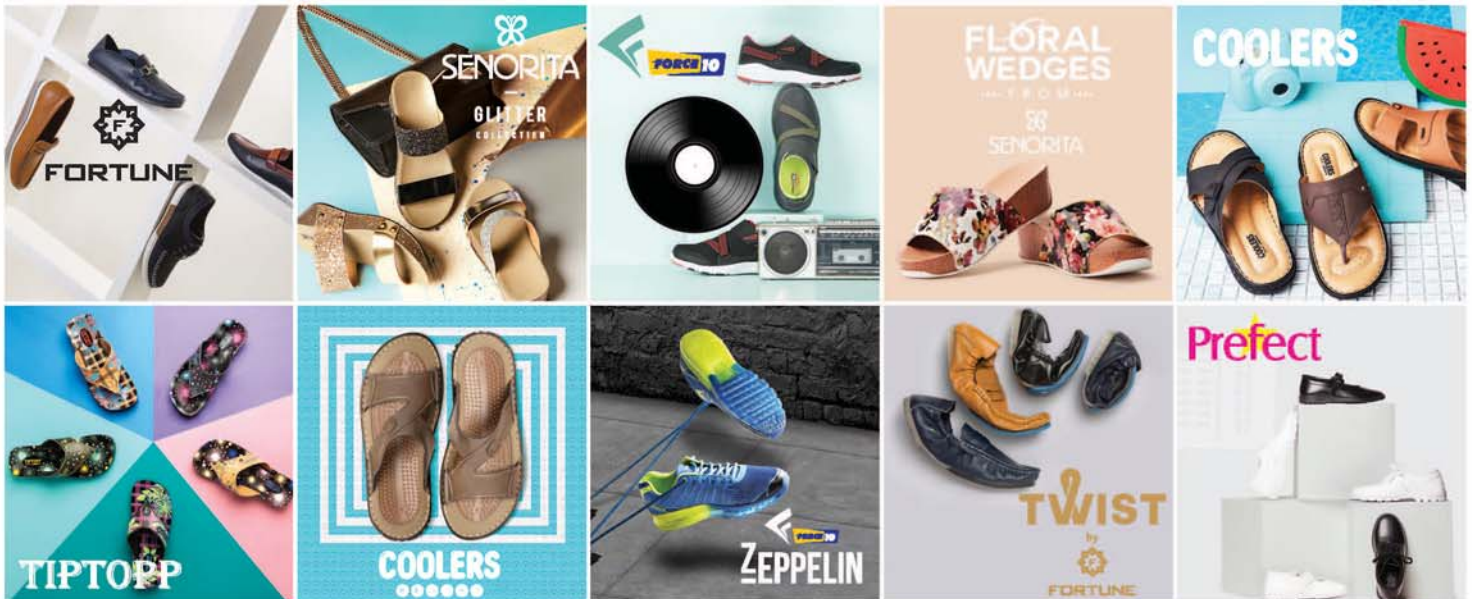
Taking into account the recent developments, it seems that the fabric of ages is here to stay and rule; not only through political attires but through national and international fashion scenes.





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# New Buzz in the Khadi world

“Khadi has the power to provide employment to crores of people. I am happy that, after all these years, it has now become a symbol and a centre of interest of the nation’s youth. And thanks to the efforts of many government organisations towards this field, it is emerging as a potential employment generator.

“Yesterday, on the the occasion of Martyrs Day, I tried to reach out to as many as possible to tell them about khadi. The experiment of associating the spinning wheel with solar energy has been a success. I was told that, in the near future, the proliferating demand of khadi might result in employment opportunities for about 18 lakh Indians.”

*Prime Minister Narendra Modi, in his first ‘Mann Ki Baat’ address in 2016.*



## From Handspun to High Street: Khadi Comes of Age

Following the proliferating popularity of khadi, Peter England, India’s most loved men’s wear brand, launched a dedicated khadi collection, named Move Forward with Khadi, aimed at its young customers. The collection seamlessly blends traditional Indian weaving techniques with Western design sensibilities to present a unique range that conforms to the preferences of the millennials.

Peter England’s khadi initiative is in line with the concepts of origin, texture and predominantly sustainability which the brand intends to champion over a period of time. Peter England interprets this unique collection of stylish and modern suits, shirts and trousers using authentic khadi and khadi inspired fabric.

The brand also introduces a limited edition range of garments, that are made from hand spun and hand woven fibres, under its Elite Sport category. While the collection promises to take the fashion consciousness in India by storm with it’s one of a kind printed khadi shirts, the interpretation of khadi in formal suits, trousers and accessories is not to be missed either.



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"COSTUME DESIGNING IS  
NOT THE SAME AS FASHION  
DESIGNING..."

// BHANU ATHAIYA



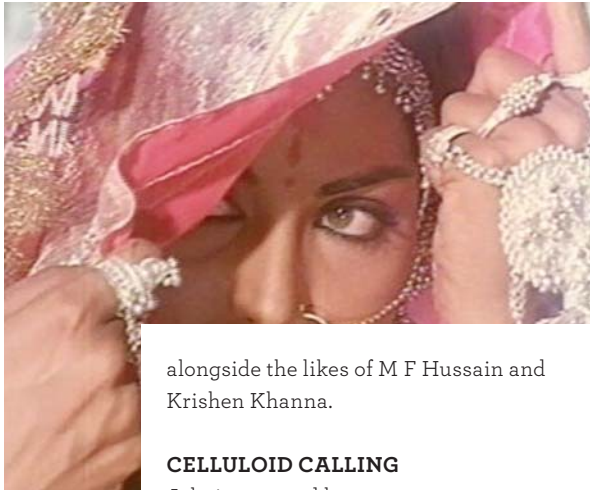
**BHANU ATHAIYA,**  
Costume Designer

In Bhanu Athaiya's 2010 coffee table book, 'The Art of Costume Design', Attenborough commences his foreword saying: 'It took me 17 long years to set up *Gandhi*, my dream film, and just 15 minutes to make up my mind that Bhanu Athaiya was the right person to create the many hundreds of Indian costumes that would be required to bring it to the screen.'

Bhanu Athaiya, India's first Oscar winner and the Hindi film industry's most renowned costume designer whose work spans over five decades, was born Bhanumati Annasaheb Rajopadhye on April 28, 1929 in Kolhapur (in present day Maharashtra). She wanted to be a painter, drawing inspiration from her father, Anna Saheb.

"Even though I was only nine when he passed away, I have fond and vivid memories of cleaning his brushes and palette after he finished work," recalls Athaiya, now 86. It is his influence that influenced and defined her signature style. "We were encouraged to see the bioscope that the travelling artist brought along every Sunday with images of the Raj, miniature paintings around palaces in India and even European women dancing in their ballroom finery. I am sure these images were imprinted somewhere in my subconscious mind," says Athaiya.

Athaiya eventually joined Mumbai's Sir J J School of Art, graduating in fine arts. "I made the journey with my art teacher from Kolhapur, who had convinced my mother to send me," remembers the doyenne, who has even held exhibitions



alongside the likes of M F Hussain and Krishen Khanna.

#### CELLULOID CALLING

Athaiya started her career as an illustrator with the popular magazine *Eve's Weekly*, where she would make fashion illustrations inspired by India's heritage. Her fashion illustrations in each issue, made her quite popular. So when the magazine opened a fashion boutique, Gulshan Ewing, the then editor of *Eve's Weekly*, got Athaiya to design a lot of his creations. "That boutique was visited by everyone, from Kamini Kaushal and Nargis to Ramanand Sagar. It was Kamini Kaushal who gave me my first assignment. I started by designing her personal wardrobe, and soon went on to design her costumes in films like *Shahenshah* and *Chalis Baba Ek Chor*," Athaiya recalls.

Guru Dutt spotted her talent at a painting exhibition and that's how she bagged her first film as full-fledged costume designer, *CID*, starring Dev Anand and Waheeda Rehman. Soon, filmmakers like B R Chopra and Yash Chopra started frequenting the store, and Athaiya found herself at a fork in the road. She could choose to continue fashion design or move to costume design. The lure of a wider scope and more exciting work made the choice for her, and she became a full-time costume designer. Candid enough

to admit that it was a smooth sailing, Athaiya says, "Before I entered the scene, things worked very differently. What one saw in the film industry was that the director and set designer would put their heads together and call in a tailor or go shopping. My stepping in relieved them of this tension. I would listen to the director, make a sketch, meet the actor and finalise the outfit. In that era, the director was king and the actors didn't present any problem at all."

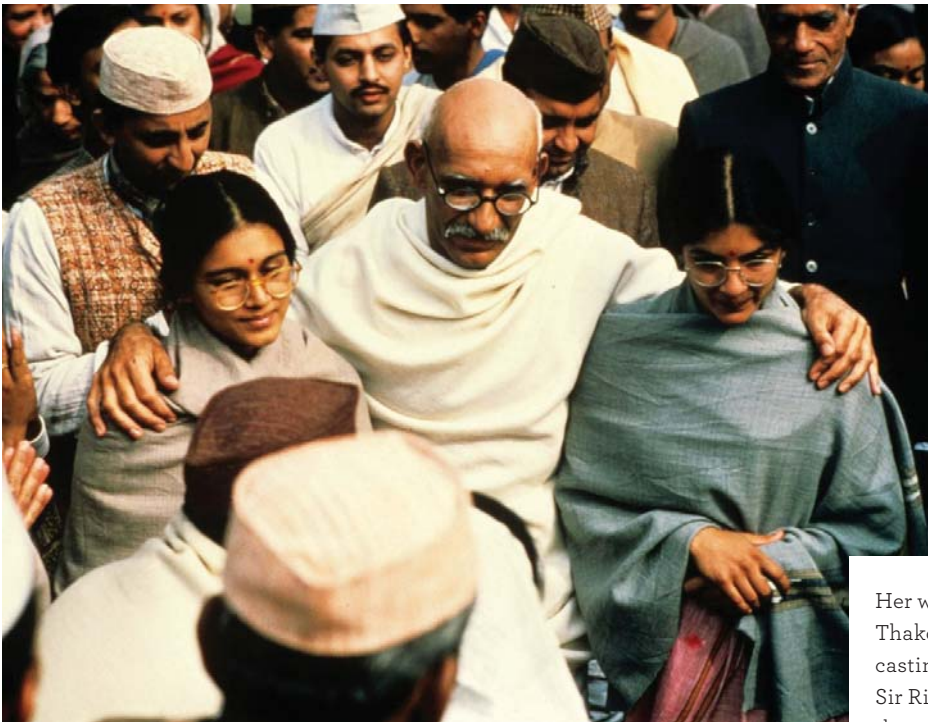
She worked with Guru Dutt in memorable films such as *Chaudhvin Ka Chand*, *Kaagaz Ke Phool*, and *Pyasa*. In the 1960s,

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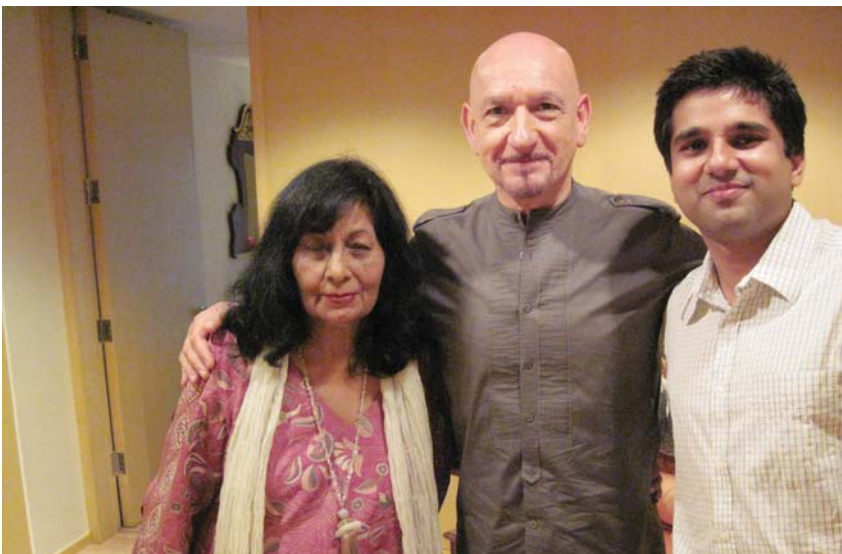
**"We were encouraged to see the bioscope that the travelling artist brought along every Sunday with images of the Raj, miniature paintings around palaces in India and even European women dancing in their ballroom finery. I am sure these images were imprinted somewhere in my subconscious mind."**

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Her work in theatre prompted Dolly Thakore, who was working on the casting of the film, to refer her name to Sir Richard Attenborough for designing the costumes for the magnum opus. “It was my close friends Simi Garewal and Dolly Thakore who literally pushed me to go meet Richard Attenborough when he visited India. If it wasn’t for them, I probably would not have even gone for the auditions,” reminisces Athaiya, adding, “Within 15 minutes, the director told his crew that he had found his designer! As for the Oscar...it was not something that had crossed my mind. I mean, I was in Bombay, LA was so far away. Why dream of such unlikely things? And I had won awards here. But when I returned after winning the award, people here would ask me, “Madam, why did you win the award? Everything in the film looks so normal.” The clothes for *Gandhi* couldn’t have been picked out of a store or off the rack. At the Oscar award ceremony, the other designers who had been nominated -- my competitors told me that they felt like they didn’t even stand a chance, because my canvas was so large.”



she worked in films such as *Sahib Bibi Aur Ghulam*, *Teesri Manzil*, *Guide*, *Janwar*, *Waqt* and *Mere Sanam*.

*Waqt*, directed by Yash Chopra, was a watershed moment for the manner in which clothes worn by the heroine influenced public tastes. Throughout the 1960s and '70s, stars such as Asha Parekh, Vyajanthimala and Mumtaz became style icons due to Athaiya’s creations that they sported on screen.

#### **GANDHI AND AFTER**

Athaiya’s moment of international fame came with the acclaimed 1982 film *Gandhi*, for which she won an Oscar for the Best Costume Design. Recalling the challenges of working in such a major production, Athaiya said in an interview, “We had to capture 50 years of Mahatma’s life in various locations and we could not go wrong because he was an international figure, well known to the world audiences.”

In 2012, she decided to return her Oscar statuette to the Academy of Motion Pictures Arts and Sciences, Los Angeles, for safekeeping. She was afraid that it could meet the same fate as poet Rabindranath Tagore’s Nobel Prize medal.





**“We had to capture 50 years of Mahatma’s life in various locations and we could not go wrong because he was an international figure, well known to the world audiences.”**

Athaiya continued to work in films after her *Gandhi* triumph. She bagged the National Film Award for Best Costume Design in 1991 for *Lekin...* and in 2002 for *Lagaan*. From *Guide* to *Gandhi* to *Lagaan* - if it is a trendsetting film, chances are that the costumes have been done by Bhanu Athaiya. She is one costume designer who has worked steadily from the black and white films through to historicals and period dramas right to the modern age. Despite being diagnosed with a brain tumour, Athaiya was roped in as design consultant for the TV show *Mahabharat* in 2013.

#### CONTRIBUTION TO REVIVAL OF ETHNIC DESIGNS

Athaiya, who has worked in more than 100 films, has had a significant influence on the look of both post-independence Hindi cinema and its actors and actresses. Rather insistent that costume design not be mixed with fashion, Athaiya reiterates, “It’s not the same as fashion design where the clothes have to be beautiful and glossy. Costume design is the art of creating a character and look. That depends on the film and its story. This is why research is important to create the clothes you think characters should wear! Any costume designer needs to remember that they are not creating clothes for the market, but for the character. Stars come and say, ‘Get my dresses designed by so-and-so’. The 1980s brought in a lot of fashion designers into cinema. But

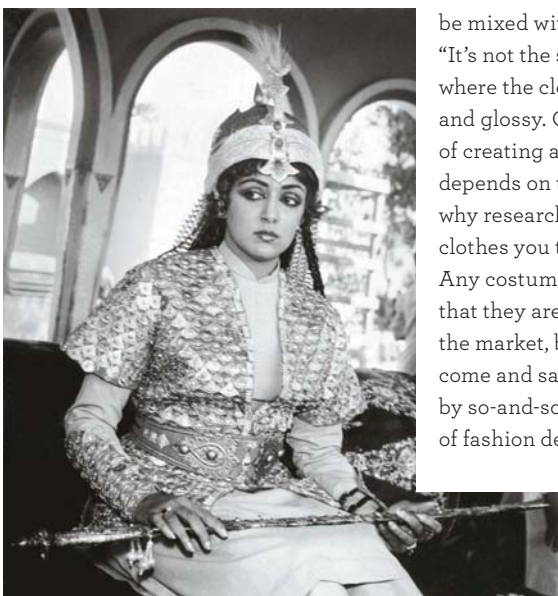
designing for a star and designing for a character - that is a different cup of tea.”

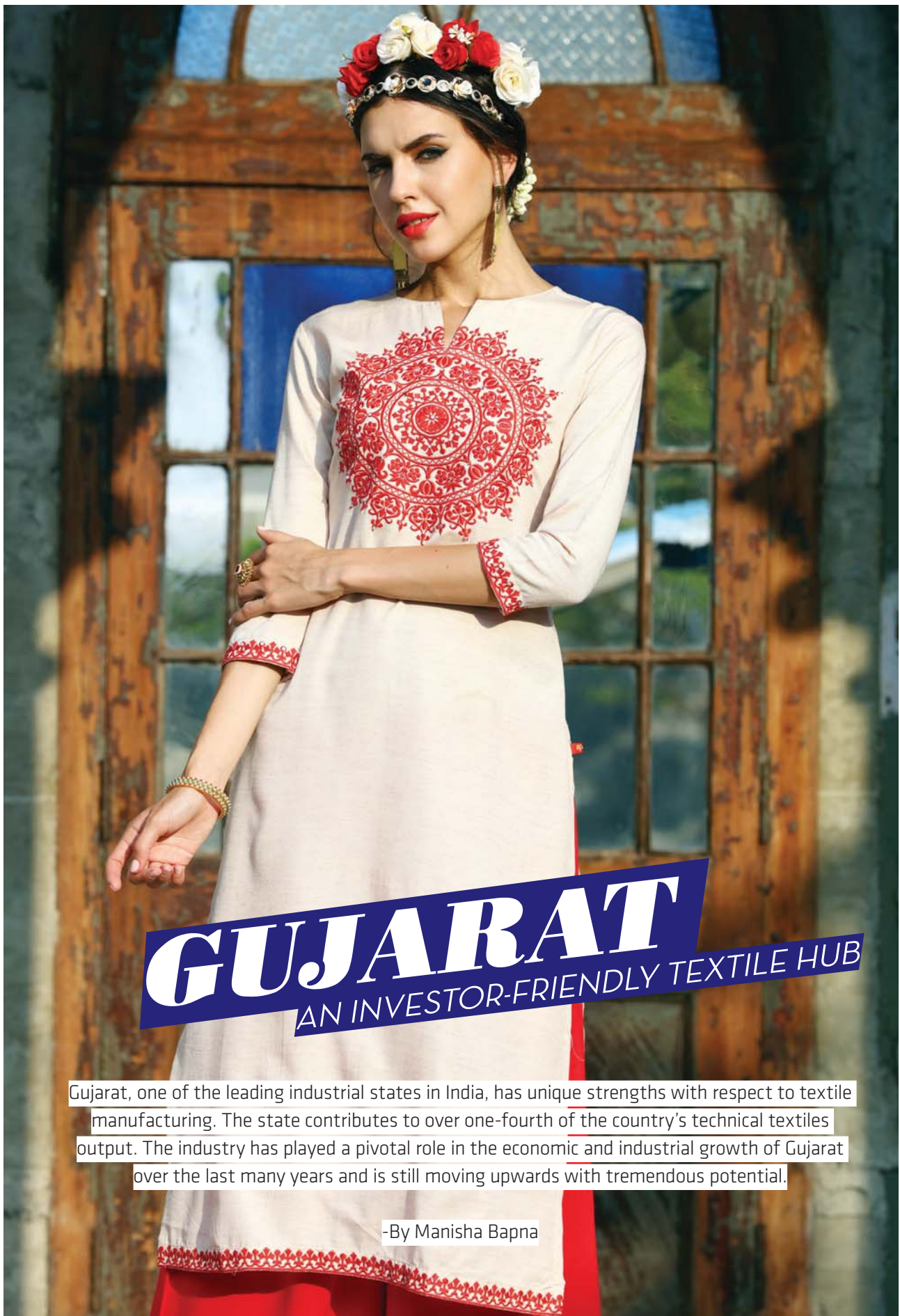
This is a working philosophy that has reflected in all of Bhanu Athaiya’s work. While she picks Meena Kumari’s costumes in *Sahib, Bibi Aur Ghulam* and the elaborate period costumes worn by Vyjayanthimala in *Amrapali* as her favourite work, her attention to detail is visible in films such as *Pyaasa*, *Guide*, *Chaudhvin Ka Chand*, *Mera Saaya*, *Reshma Aur Shera*, *Ghar*, *Abdullah*, *Nikah*, *Razia Sultan* and many others. Her garments have also had a trendsetting appeal. Who can forget Mumtaz’s saree in *Brahmachari* or Sridevi’s image-changing clothes from *Chandni*.

“I still continue to read a lot. That is the only way I can be true to my work. This is what helped me create the British regiment uniforms in *Lagaan* or more recently, my work in the TV *Mahabharat*,” says Athaiya.

The grand old dame credited with the revival of ethnic fashion and craftsmanship through cinema is in the midst of putting together her second coffee-table book that will also be a story of her sartorial adventures in the world of cinema.

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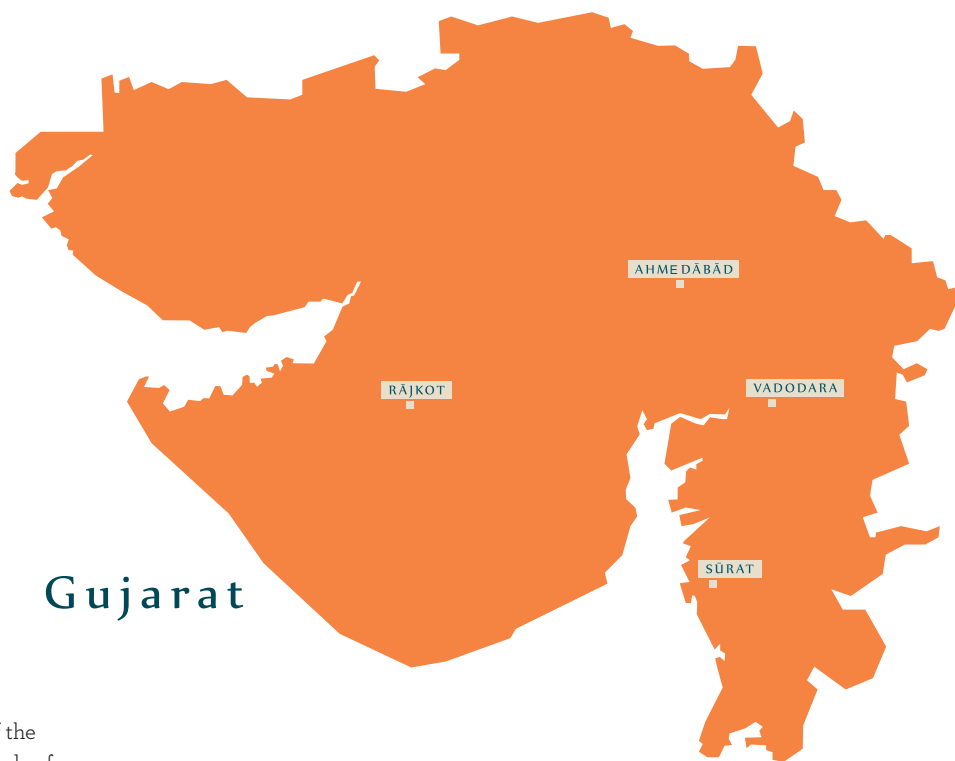


# GUJARAT

AN INVESTOR-FRIENDLY TEXTILE HUB

Gujarat, one of the leading industrial states in India, has unique strengths with respect to textile manufacturing. The state contributes to over one-fourth of the country's technical textiles output. The industry has played a pivotal role in the economic and industrial growth of Gujarat over the last many years and is still moving upwards with tremendous potential.

-By Manisha Bapna



## Gujarat

Once known as the ‘Manchester of the East’, the state employed thousands of people from across the nation, and exported cotton garments across the world. Due to the large number of textile mills in Gujarat, it was popularly known as the textile state of India. The state could enjoy the legacy for decades purely because it managed to defend its old tradition and culture.

Industrial Revolution in Gujarat dates back to Harappan Civilization. Gujarat started trade way back while Kutchhi businessmen settled in Oman and the Greek and Roman art influences of second and third century reinforced the connect between Gujarat and other countries. Gujarat shipped textiles and since 13th century, had been selling cotton textiles to the Middle East and most probably, South-East Asia. Silk Patola, Ikat Fabrics, plainly woven and coarse cotton textiles printed with wooden blocks were exported.

### HISTORY- GUJARAT TEXTILES

The history of Gujarat’s textile industry can be traced back to the 19th century, when the city and the industry were established under the British Raj. The Rajhans (Desai Jain)

Group has made sizeable contribution to Gujarat’s textile industry. Since its inception in 1997, Rajhans (Desai Jain) Group has maintained its reputation.

The organised cotton textile industry contributed significantly to the process of industrialisation of Gujarat, Maharashtra and Tamil Nadu. However, with the decline in productivity and profitability of textile manufacturing, it has also affected economies of these states. Gujarat has the second highest number of sick units and between 1991 to 1997, the closure of the mills had doubled.

### BUSINESS ADVANTAGES V/S CHALLENGES

Gujarat has unique strengths with respect to the textile industry. It is now the largest producer of cotton in India, with a share of over one-third of the total cotton production. It is also the largest manufacturer of man-made and filament fabric and the second largest manufacturer of cotton fabric and has a dominant share in the production

of denim with a one billion metre capacity. The state contributes to over one-fourth of the country’s technical textiles output. The important centres of Gujarat are Vadodara, Bharuch, Surat, Rajkot, Porbandar, Maurvi, Bhavnagar, Viramgam, Sidhpur, Kelot, Kadi, etc.

“Considering the textile industry, Gujarat is a self-sufficient state which fulfils sourcing requirements like cotton, dyes and chemicals, yarn, machinery, labour and other infrastructural requirements,” says Suketu N. Shah, Chief Executive Officer, Aarvee Denims & Exports Limited. Government initiatives like Vibrant Gujarat Global Investors’ Summit have helped a lot in facilitating trade and commerce and have attracted





**Deepak Chiripal**  
CEO, Nandan Denims



**Ashit Agarwal**  
Director, VS Textiles



**Suketu N. Shah,**  
Chief Executive Officer, Aarvee Denims & Exports Ltd.



investments from around the world. **The government of Gujarat intends to invest USD 3.28 billion in textile industry in next 5 years which will also help create 1 million jobs in the sector.**

Where on one side, the state of Gujarat is a high potential state offering various advantages to the manufacturers; on the other side, Gujarat has few drawbacks which affects the business industry. Sourcing capabilities of Gujarat too are far better than other states. There is abundant availability of all the latest raw materials for garment manufacturing. The investments in spinning are increasing leading to better quality yarn that can be sourced from Gujarat itself. “More and more industries and export houses are coming up due to the incentives given by our government,” says Hemant Lala, Director, Pink Choice Fashion Creator.

From textile perspective, Gujarat is one of the best places in the world. Input-output-catalysts, all are available in abundance with enough of competition to facilitate and compliment in case of any temporary failure to cope up with aggressive demand,” says Deepak Chiripal, CEO, Nandan Denim Ltd. “Gujarat is a well established state and is a one stop destination housing all types of industries. A state which is very aggressive in doing business,” says Ashit Agarwal, Director, V.S. Textiles.

“We feel the entrepreneurial spirit is such that there are a plenty of vendors who

can give us quality materials as per our demand,” says Ashutosh Lala, Director, Pastel Creation. “The biggest advantage of being in Gujarat is that it is a problem free state for businessmen with strong sourcing capabilities and no labour related issues. It, in fact, provides a window to source the latest raw materials, which are easily available to the manufacturers,” says Atul Shah, Director, Charchit Apparels. “The textile industry is promoted well by the government with duty drawback policies encouraging exports. Ports which are easily accessible for sea shipment along with an international airport makes international trading easy,” says Vijay Shrinivas, Chief Sales & Marketing Officer – Denim Fabric, Arvind Ltd. But despite these comforts, connectivity poses a problem for businesses in Gujarat. There are issues with availability of manpower especially for women’s wear manufacturers. “We still do not have an association to represent our problems to the government,” says Ranjit M Vala, Partner, MG Sons. Agreeing to poor connectivity issues, Shah adds that “Gujarat is not connected to major airports and the railway stations. Anybody who has to come to Gujarat has to travel through Delhi and there are still very less flights which directly connect Gujarat. This even acts as a problem in logistics and delays delivery schedules.” To attract higher investments and to bridge the existing gaps in the textile value chain, the state government announced the Gujarat Textile Policy, 2012 in September 2012, in order to make the textile industry competitive both in domestic and international markets.





**Atul Shah,**  
Director, Charchit Apparels



**Vijay Shrinivas,**  
Chief Sales & Marketing Officer, Arvind Ltd.



**Ranjit M Vala,**  
Partner, MG Sons

The policy laid down an integrated approach from fibre to fashion, to transform its cotton industry as a leader in manufacturing of yarn, fabric and garment. It stressed development of the 5Fs – Farm, Fibre, Fabric, Fashion (Garment) and Foreign (Export). The policy provides VAT concession to units across the textile value chain from cotton to garment to made-ups in Gujarat for the entire value of the eligible fixed capital investments in plant and machinery. It also offers interest subsidy for units manufacturing technical textiles.

Vala further feels that along with a comfortable environment, the government is always ready to support new ideas and provides full safety for setting up a unit in the state. “The state is really economical in terms of electricity, raw material supply, logistics, etc.,” believes Prakash Singh, Director, William Hazlitt. He further adds that, “The biggest policy which has really helped the business grow is maintaining law and order in the state. Another policy promoted as ‘Made in Gujarat’ helps the small companies to sell in the overseas market by availing rebates from the government. The government also provides loans for buying machinery and other infrastructural facilities. **Above all, Gujarat is a corruption free state, which is an added advantage for the businesses to perform well and grow.**”

However, there is still no focused policy for the textile and garment industry. Though the Technology Upgradation Fund Scheme (TUFS) policy has proved to be beneficial but certification is still a

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***“The biggest policy which has really helped the business grow is maintaining law and order in the state. Another policy promoted as ‘Made in Gujarat’ helps the small companies to sell in the overseas market by availing rebates from the government. The government also provides loans for buying machinery and other infrastructural facilities. Above all, Gujarat is a corruption free state, which is an added advantage for the businesses to perform well and grow.”***

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challenge. “We would rather look at reforms with the labour act which will be good for our business. Nevertheless, we are waiting for the GST,” says Shah. “Though the TUFS works in our favour, but there are no specific policies which can give advantage to the garment manufacturers,” says Ramesh Mehta, Director, Salt Clothing Company.

“Gujarat being a power surplus state, 24 hours uninterrupted power is supplied to the industry which helps in the overall productivity,” says Shah from Aarvee Denims & Exports Limited.

But he feels that one of the biggest challenge textile industry is facing right now is the sky-rocketing land prices and opines that the government should help the startups in acquiring land near the city limits. Naman Khandhar, Director, Span, says, “We don’t see major impact on domestic retailing/ domestic manufacturing due to ‘Vibrant Gujarat’”

#### **LABOUR POLICIES**

Singh from William Hazlitt, feels that labour policy in Gujarat needed a reform as it was very difficult for small scale industries to abide by them. There is an abundant supply of skilled labour for textiles. But one cannot deny the fact that the rising cost of power

and labour, which consequently raises the cost of production, is a major issue faced by the Surat textile market. Most of the labour employed in this industry is unskilled and comes from various states such as Bihar, Odisha, Maharashtra and Uttar Pradesh. Moreover during April-June, the players have to face severe labour crunch as the labourers travel to their hometowns.

Shrinivas of Arvind Ltd., feels that even though the labour costs are increasing, it is still attractive when compared to the labour rates in metro cities. “Further labour reforms will enhance investments and create new garmenting capabilities in India, which will not only provide employment to the young and growing population, but will immensely help boost our competitive capability in the textile sector,” feels Shrinivas.

“Due to the labour policies of the state government, labourers from other states of the country find good employment opportunities in Gujarat. Currently, there is an oversupply situation in the textile market. Government should frame policies that help the local industries to survive in this tough competitive market and encourage them,” says Shah from Aarvee Denims & Exports Limited.



**Anil Mehta**  
Director, Mehta Garments Pvt. Ltd.



**Abhay Shah**  
MD, Aartex Apparels



**Rajesh Lala**  
Director, Pintoo Garments

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***“Gujarat contributes to 25 percent of the total exports of India, so as a state, we are ahead of any other state in the country, but there is still a scope for improvement. We are planning to increase our export at the rate of 30 percent per annum.”***

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“As a retailer, we feel a crunch of trained sales staff and fashion guides to assist our customers in buying the best. We think that with more number of institutes and as the retailing scenario develops, we will have better access to such man power,” says Rajesh Lala, Director, Pintoo Garments. “There is no problem in getting skilled labours but the main challenge is to find helpers. The other issue we see is with the PF norms which have been set by the government to be given to the employee in a unit which has more than 15 labours. The government should make such policies which are friendly to businesses like us,” says Anil Sumermalji Mehta of Mehta Garments Pvt. Ltd.

#### **GUJARAT – THE EXPORT HUB**

Gujarat contributes to 25 percent of the total exports of India, so “as a state, we are ahead of any other state in the country, but there is still a scope for improvement. We are planning to increase our export at the rate of 30 percent per annum,” says Abhay Shah, Managing Director, Aartex apparels. “What has helped Gujarat become an export hub is increase in port capacities, good road, rail and air connectivity,” believes Shah from Aarvee Denims & Exports Limited.

The director said that the state of Gujarat was still unknown to the export category. “There are only few selected players who are trying to do this,” he remarked. Shah also discussed various positive policies enforced by the government for the benefit of the companies. He remarked, “The positive policies enforced by the government give us benefit in our taxation and labour reforms. There is no harassment by the government at all.” When asked about Gujarat as an export hub, Singh said that Gujarat had yet not been able to attract the overseas buyers. “Exports out of Gujarat are primarily happening to Gulf countries. It is growing as compared to other states,” believes Mehta.

But Vala believes that garment export out of Gujarat to various countries across the globe would not be more than one percent. The other regions like Delhi, Mumbai and Bengaluru are far ahead of Gujarat.

#### **AHMEDABAD- EMERGING TOURISM & BUSINESS CENTRE**

**History** - The textile industry of Ahmedabad in Gujarat dates back to the 19th century, when the city and the industry were established under the British Raj. Ranchhodlal's Shahpur Mill set an example of pioneering success in 1855. The Becherdas Mill, Ahmedabad's second, rose only in 1867, six years after Ranchhodlal paved the way. The mill, today remains the

oldest in Ahmedabad and is still controlled (though as a public limited company) by the same family. In 1877, Mansukhbhai Bhagubhai founded the first of a number of mills he was to control. And the story of entrepreneurial ventures continues....

Perhaps the most important contribution of the early mills to entrepreneurial efforts was the psychological impact of the examples, not only in Ahmedabad, but across the state and country. By 1890, India had 114 cotton mills with nearly 3 million spindles, 22 thousand looms and one lakh workers. The Bombay industry, spearheaded by its Parsi and later Jewish entrepreneurs had set the pace.

Ahmedabad is located in Gujarat on the banks of the Sabarmati River. The city of Ahmedabad which was actually called the ‘Manchester of the East’ due to the large number of textile mills in the city, had fallen into decline. The mills started shutting down and lakhs of people lost their jobs but no remedial action was taken until the situation was completely altered over the last decade under the guidance and leadership of the then Chief Minister Narendra Modi. Understanding the vitality, cotton cultivation and the textile sector have in the development of Gujarat, Modi government undertook a complete transformation of these two sectors. The results were seen in 2001, when Gujarat produced 23 lakh bales of cotton whereas a decade later, the figure stands at 1 crore 23 lakh bales.

Denim, blending and cotton industries are the major industrial units. Ahmedabad is known as the Manchester of denim. “Availability of world’s best denim fabric





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**Naman Khandhar**  
Director, Span



**Prakash Singh**  
Director, William Hazlitt



***Around 65 percent of India's man-made fabric production is done in Surat. The city expects a growth rate of 15-20 percent in manmade fabric demand in the near future.***

at a distance of few kilometers gives us tremendous advantages in serving our customers," says Shah from Aartex Apparels. People from all over the country and abroad are now coming to Ahmedabad to witness various business events and also various festivals like Rann Utsav, Diu Fest, Kite Festival, etc. "We see a huge inflow of customers during these type of events. These customers come to us looking for latest in fashion," says Lala.

Federation of Bangladesh Chambers of Commerce and Industry, Bangladesh Cotton Association, and Bangladesh Garment Manufacturers and Exporters Association has put up a proposal to the Government of Gujarat to set up a textile park in Kadi, near Ahmedabad.

#### **SURAT – BUSINESS CAPITAL**

Each day in Surat, 35,000 to 1 lakh sarees are made, guaranteeing a daily turnover to the tune of 5 crore. There are nearly five lakhs of powerlooms in Surat, which consumes yarn of about four lakhs metric tons in preparing the grey fabrics. About two crore meters of grey textile is manufactured daily in Surat. Today, there are about 450 dyeing and printing units located in and around Surat in various clusters - Pandesara, Sachin, Kadodara and Palsana. There are about 150 wholesale markets in Surat. The city of Surat is now known as 'Silk City'.

The Surat-based textile industry is witnessing an aggravated over supply situation with

demand for textile products has been more or less stagnant since last six months. Inventories at textile units have risen by 20-30 percent. According to industry sources, slowdown coupled with liquidity crisis in the market has led to subdued demand for textile products from the city. Moreover, reduced demand has resulted in buyers keeping less stock with themselves, leading to higher inventory for textile makers in Surat. The main market for Surat's textile products are India and other Asian countries. Around 90 percent of polyester used in India comes from Surat. However, international demand for its products is not very significant. The Middle East is the major export market for Surat's textile products. According to experts, more improvisation in the quality is required to cater to the demands of the international market.

In spite of certain drawbacks, the city occupies a major position in the production of manmade fabrics. Around 65 percent of India's manmade fabric production is done in Surat. The city expects a growth rate of 15-20 percent in manmade fabric demand in the near future. Hence, the future of the Surat textile industry does look bright.

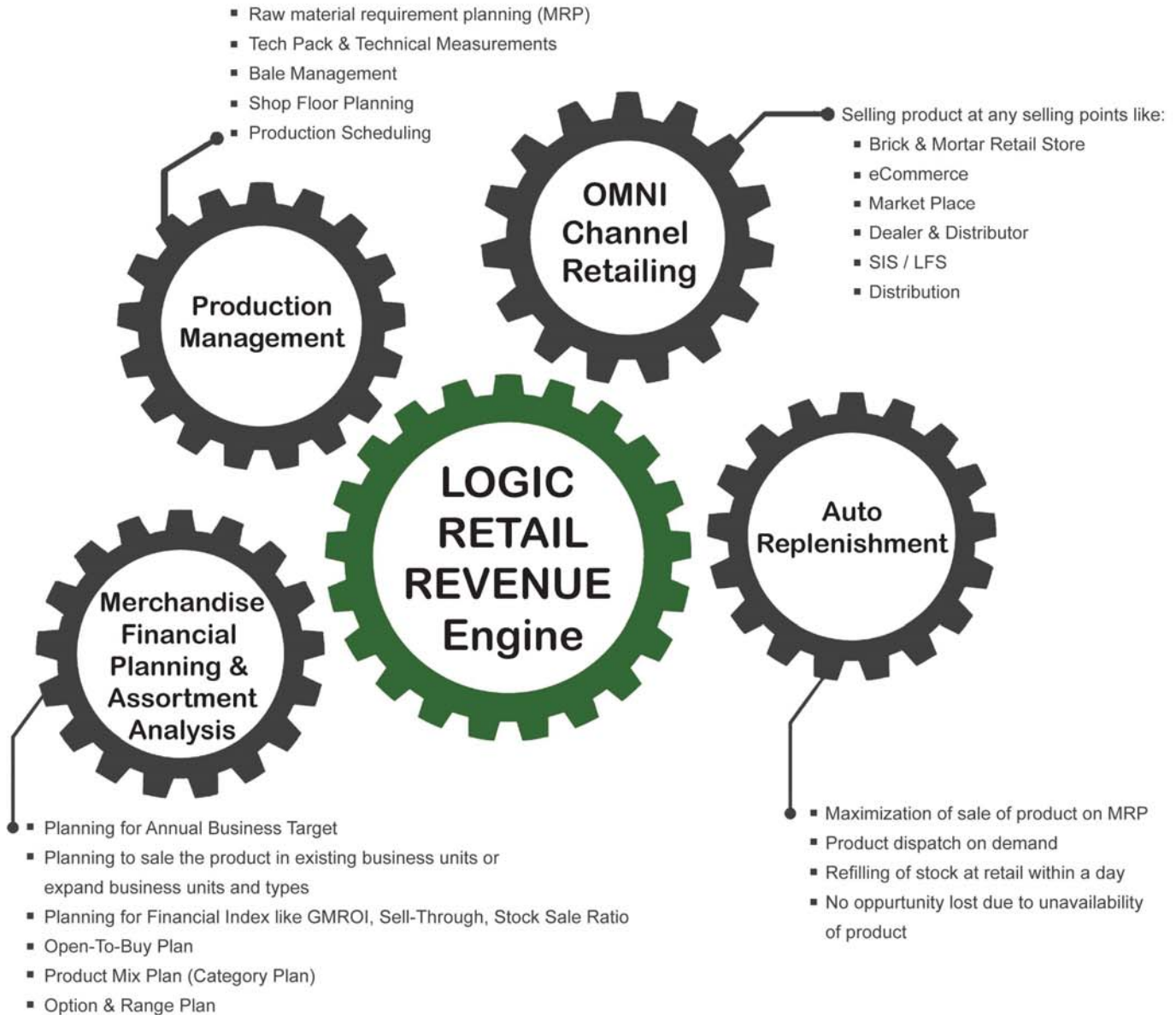
#### **DEVELOPMENT INITIATIVES**

A majority of textile players are shifting their base from Tamil Nadu to Gujarat primarily because the state offers interest subsidies and single window clearance, but it is Gujarat that offers refund on value added tax on spinning mills for new and additional capacity, power





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## FEW FACTS ABOUT GUJARAT'S TEXTILE INDUSTRY

Gujarat is the largest producer of cotton in India because of its climatic and geographical conditions. Black soil mixed with lime and potash, water retentive capacity, 50 cm rainfall, 26°C temperature, etc. are suitable for cotton cultivation. Gujarat is providing with all these factors:

- It is the largest producer (35 percent) and exporter (60 percent) of cotton and is the third largest denim producer in the world.
- It offers India's 12 percent textile exports. Gujarat's six percent of total Industrial production comes from textile industry.
- Gujarat has the largest number of multihead embroidery machines.
- Over 24 percent to 28 percent of fixed investment, production value and employment of Small Scale Industries (SSI) is from textiles sector.
- Technical textiles is a key emerging area with over 860 units in Gujarat (as per government of Gujarat's survey report) and they strive to capture 50 percent of the Indian market. Large fabric process houses are concentrated in Ahmedabad (250) and Surat (450). The state accounts for 12 percent share of the total textile exports of the country.
- Gujarat is a leader in textile sector with home to 1,560 medium and largest textile units and having 18 textile-related product clusters.
- Gujarat's textile market is estimated to be around USD 25 billion by 2017 and it contributes around 10 percent to the national technical textiles output.
- Presence of more than 1,000 technical textiles units across all sub-sectors of technical textiles. The state envisions to attract at least 2,000 new units with an investment worth USD 1,600 million (INR. 10,000 crore) by introducing technical textile mission.
- Three dedicated textile SEZ are being planned in Ahmedabad. Surat Apparel Park, a textile SEZ is already functional.
- Two new Composite Centres for the development of technical textiles to be set up in Ahmedabad and Surat.
- Five percent interest subsidy on bank loans for five years for those who establish new plants for value addition chain like ginning, processing, weaving, knitting and machine carpeting.
- Seven percent interest subsidy on new plant and machinery for five years for cotton spinning, garment manufacturing and technology up-gradation.
- Refund of value added tax (VAT) on expansion of new units in spinning and readymade garments.
- Power tariff concession to cotton spinning and weaving units.
- Financial assistance for skill development centres; for technology acquisition and also for supporting energy and water conservation as well as for environmental compliance.

tariff concession and support for energy and water conservation. Additionally, state government has taken active step in developing Apparel Park, one at Surat and the other at Ahmedabad under active support of Union Ministry of Textile. Besides, Jetpur, a centre of saree printing, has been already earmarked for setting up a Textile Park in near future.

Most of the investment in Gujarat in the recent past is focused mainly on cotton spinning. At least 15 lakh of spindle capacity are in various stages of implementation. Cotton spinning has also made a driving force for investment in cotton-based weaving, mainly in and around Ahmedabad, Rajkot and Saurashtra region. Gujarat-based Sintex Industries today said, it will set up a textile processing plant near Pipavav port at an investment of ₹5,500 crore by 2017-18.

Gujarat has in all 13 textile parks, of which 8 parks have been either completed or ongoing while 5 new parks have been sanctioned. A few textile parks are also in the process of implementation. It is the only Indian state with an integrated state-wide gas grid, state with the highest number of ports and airports, has highest per capita power consumption, continuous water supplies, which makes it lucrative for businesses to invest. Future growth in Gujarat is expected to be mainly in the area of technical textiles and high valued readymade garments mainly for exports.

### INVESTMENT OPPORTUNITIES

**Conventional Textiles**  
Ginning and pressing, cotton and synthetic based spinning, weaving and processing units, cotton knitwear, terry towel / home furnishing, high valued garment manufacturing

### TECHNICAL TEXTILES

Protective textiles, agro textiles, geo textiles, automotive textiles and home textiles.

### INFRASTRUCTURE DEVELOPMENT

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# ARVIND LTD.

## ENRICHING LIFESTYLES

Arvind Ltd., the flagship company of the Lalbhai Group, is one of the largest integrated textile apparel and branded apparel players in India. Launched in 1931, Arvind Limited has been India's largest denim manufacturer and the world's second largest producer and exporter of denim. Headquartered in Ahmedabad, the company is today also widely recognized as a lifestyle and apparel major, which is a smooth transformation from its image as a textile giant or a denim king, since its inception.

**T**he foray into the sector of new-age fabrics has seen Arvind emerge as one of the largest denim manufacturers in the world. It has also brought Arvind, global recognition for manufacturing shirtings, khakis and knitted fabrics. Its growing presence in the domain of readymade garments - jeans, shirts and knits - has further placed Arvind on the top as a one-stop solution provider for the leading global and domestic apparel brands.

The company's most recent and aggressive ventures in the branded apparel, retail and fabric retail businesses, infrastructure and the initiative of growing cotton the organic way have consolidated its presence throughout the apparel value chain.

Arvind Ltd. has an unmatched portfolio of owned and licensed brands and retail formats. Today, the company not only retails its own brands like Flying Machine, Newport, Colt, Ruggers and Excalibur but also licensed international brands like Arrow, Gant, Izod, Elle, Cherokee, US Polo Assn., etc. through its nationwide retail network. The company has a joint venture in India with global majors like Tommy Hilfiger and GAP, and it also runs the value retail chain Megamart and The Arvind Store.

### PRODUCT PORTFOLIO

Internationally, the products which are high on innovation and speciality have gained prominence in the recent years. Arvind Denims believes in three pillars - fashion, performance and sustainability. The company caters to brands who value any or all of these pillars.

Says Vijay Shrinivas, Chief Sales and Marketing Officer, Arvind Limited, "Domestic market is more inclined towards stretch structures and textures are in high demand. Value added products like coatings and over dyed form our product portfolio. Blends are majorly used by women, which include - linen, Tencel® and viscose.

Brands are becoming more environmental conscious which has led to production of sustainable products like - Organic, PCW, Natural Indigo denims and NEO (proprietary piece dyed technology which consumes 22 percent less water when compared to a normal dyed process)."

### MARKET PRESENCE

In denims, Arvind Ltd. is present in all the continents ranging from North America to Australia. In the International market, the



brand caters to large global brands like - GAP Inc, Levi's, VF Corp, H&M, M&S, C&A, TCP, Zara, Jack & Jones, etc.

Says Shrinivas, "We have a sizeable presence in the Indian market, occupying ten percent of the domestic consumption. We supply to top brands in India like Levis India, VF (Lee & Wrangler), Killer, US Polo, Flying Machine, Future Lifestyles, Ed Hardy, Spykar, Pepe Jeans etc., to name a few."

Talking about the company's turnover and CAGR growth rate over the last 3 years, shares Vijay Shrinivas, "Our group's top line has exceeded ₹7,851 crores (1.2 billion \$) with a CAGR of 19 percent over the last 3 years."

#### NEW STYLE/ TRENDS & RECENT INNOVATIONS

The men's segment at Arvind Ltd. has moved towards performance stretches. They have developed surface textures with different casts/shades. While the women's segment is moving towards very high performance stretches with a softer hand feel. The company has leveraged technology and innovation to create value added products like fine coatings and NEO dyeing.

Said Shrinivas, "With an intention to focus on innovation, design and sustainability, we have hired designers and have built design teams that closely work with our clients. We work with innovators in the areas such as fibres and dyes. We have design centres located in India and Bangladesh."

#### DEMAND OVER THE LAST 3 YEARS:

"Globally, the US and European markets have grown at the rate of 2- 3 percent per annum over the last 3 years. Domestic denim market has recorded a growth of 12- 15 percent which has led to addition of 8 new mills along with

***"Arvind is unified by the common vision of enriching lifestyles. We have successfully integrated diverse business processes, services and products. Apart from the scale of our operations, we have developed rigorous standards for design and service. At Arvind, all the business processes and decisions are subject to the pulse of the market. It is in our DNA to welcome change and reinvent ourselves for the challenges within a dynamic society and marketplace."***

capacity expansion of the existing mills. When it comes to production costs, cotton processes have been constant while the fixed costs and power costs have increased to an extent of 15 percent."

#### CONSUMPTION PATTERNS OVER THE NEXT 2-3 YEARS:

While discussing the consumption patterns over the next 2-3 years, Shrinivas feels, "Internationally, since the markets have matured, we believe that there will be a good demand for the products that offer something different to the brands. Fresh ideas will be the trend for the future. The domestic market is becoming more quality and product conscious. Innovation is necessary to sustain in this competitive market."

#### PRODUCT DEVELOPMENT CYCLE:

Product development at Arvind Mills is pre-planned for the global fashion seasons



like Spring Summer (SS) and Autumn Winter (AW). They plan 18 months before the current existing season. Shares Shrinivas, "Currently, we are planning to promote our products for AW'17. The domestic brands also follow the same cycle. Our domestic trade works keeping the festival season in mind. As such, we have to come up with some new development every two months in order to stay ahead of the competition."

#### CAPACITY EXPANSION PLANS:

The company currently has no plans to increase investments in the denims business significantly. Arvind is operating at 100 percent utilization. Said Shrinivas, "We don't have any plans to expand our denim capacity. We are in fact looking for machine upgradation in the future".





# AARVEE

## TEXTILE MANUFACTURING EXCELLENCE

**A**arvee Denims and Exports Ltd. is a leading global player in the textile industry. Their journey was started in 1988 by Arora & VB Group, which has been involved in textile trade for over 50 years. Later, the brand's name was changed to Aarvee Denims & Exports Limited and it became one of the reputed brands for the young. With more than five decades of experience, Aarvee Denims & Exports is the second largest denim manufacturers in India. With their facility located in Ahmedabad, the company is well equipped with modern spinning, dyeing and sizing, weaving, garmenting and finishing machines. Manufacturing denim garments such as jeans, trousers, jackets, shirts, etc. for men, women and kids, the company also produces cotton garments and home textiles. Backed by experienced promoters, the

company is spreading its wings all over the globe at a very fast pace.

***Suketu N. Shah, Chief Executive Officer, Aarvee Denims & Exports Ltd., talks to Images BoF about the brand and shares insights about their future plans.***

### **Tell us in brief about the company.**

Aarvee Denims and Exports Limited was incorporated in 1988 as Amtex India Private Limited with the commercial production capacity of 5,000 meters a day of denim fabric. It was converted to a public limited company in 1992. Promoted by Arora Group and V.B. Group, the name of the company was later changed to Aarvee Denims and Exports Limited in 1994.



**SUKETU SHAH, CEO,**  
AARVEE DENIMS & EXPORTS LTD.

Today, Aarvee Denims - a vertically integrated composite mill is the 2nd largest denim manufacturing company in India with the following production capacities - yarn- 39,000 metric tons per annum, denim fabric- 85 million metres per annum, non-denim fabric - 18 million metres per annum and apparels - 3.5 million pieces per annum. The company is also into green energy generation with installation of 20.5 MW Wind Power.

**Kindly share your market presence in India. And also about international markets. Which brands are you supplying to in the domestic as well as international markets?**

Since domestic sales attribute to about 70 percent of our revenue, we have a strong presence in every major denim market in India. Internationally, Latin America, Indonesia, Bangladesh and The European Union are our major markets. We also retail through e-commerce websites such as Amazon, Myntra, Jabong and so on and tele-markets such as Naaptol and Homeshop TV18. We also supply our products to some of the leading brands like H&M, Flying Machine, Pantaloons and Max.

**What was your turnover for FY15 and what has been your CAGR growth rate over the last 3 years?**

Turn over for the FY 2014-15 was ₹745.51 crores. CAGR growth rate over the last 3 years has been 4.07 percent.



**Tell us about your product portfolio and the blends that you produce.**

Our product portfolio encompasses simple 3/1 twill weave to complex weaves like dobbies. A majority of these are stretch denims - comfort and power stretch.

**What are the latest new style and trends in fabrics that you are producing? What are the recent innovations you have introduced?**

Innovation is in our DNA. We are constantly introducing new products in the market with a variety of innovations in the yarns, weaves, colour shades, coatings and finishes as per the market trends. Jogger jeans and fleeced denim are some of our fashion products that we have introduced in the market.

**How has the demand increased over the last 2-3 years? What is the increase in percentage terms for your supplies?**

Since the past 2-3 years, the demand has

consistently increased by 8-10 percent. Our supplies have also increased at the same rate.

**How do you see the consumption patterns over the next 2-3 years?**

I anticipate the market to continue to grow at 10 percent (YoY) over the next 2-3 years.

**Tell us about your future expansion plans.**

We are planning to increase our capacities by replacing and upgrading the existing machines. Investments in next gen technology would help us in increasing production efficiency and quality and reducing energy and labour costs. Aarvee Denims & Exports Ltd. also plans to develop a pan India network of its exclusive brand outlets.

×

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# NANDAN DENIM

## INNOVATIVE FASHION

Nandan Denim Limited is into manufacturing superior quality grey cotton fabrics, khakis, denims and shirting fabrics. Incorporating latest technology, Nandan Denim supplies high quality denim fabric to some of the major brands around the world. *Deepak Chiripal, CEO, Nandan Denim Limited*, talks about the brand's journey and future plans with Images BoF.

### **Tell us in brief about the company.**

We began manufacturing in 2004 with a meager capacity of 6 MMPA and over a period of time, we have grown into manufacturing 110 MMPA of denims, 10 MMPA of shirtings and 10 MMPA of Khakhis. We supply around 18-20 percent of our produce to the export territories and balance 80 percent is for the domestic market, which makes us one of the largest supplier of denim products in India. We have an overall capacity utilization of around 82-83 percent on average, and it is being improved through various measures.

### **Kindly share your market presence in India and abroad. Which brands are you supplying to in the domestic as well as international markets?**

We are sort of omnipresent across India, which is our focused market. Our products are exported to more than 25 countries across the world. The list of brands include the

“who's who” in the garmenting business. We are not restricting to any specific brand but are open for all.

### **What was your turnover for FY 15 and what has been your CAGR growth rate over the last 3 years?**

Over the period of last 3 fiscals, we have almost doubled our revenues from ₹574 crores in FY 12 to ₹1,096 crores in FY 15. We are in the process of further capturing the market through capacity enhancement and expect to increase the volume while targeting better per meter realization through value addition and product-customer diversity.

### **Tell us about your product portfolio and the blends that you produce?**

The product basket we offer is perhaps one of the largest offered by any denim player in view of the Chiripal eco-system. The product mix ranges from basic rigid denims to cotton stretch, coated, stretched, printed and blended denims to the coloured denims.



DEEPAK CHIRIPAL, CEO,  
NANDAN DENIM LTD.

*We are working on a well chartered path of growth of the company and the expansion program is on the track. Being a modular expansion with a lot of vertical integration through establishment of spinning capacities, we are building cost competence and product flexibility competence that would strengthen our overall positioning.*

**What are the latest new style and trends in fabrics that you are producing?**

Denim is a fashion fabric where new products are developed and launched on 24 x 7 basis. The only constant in product trends is “change”. We set the trend, follow it and change it. With wider popularity of the fabric, sometimes we are forced to go for “regional fashion” and at times we bring back the “legacy fashion”.

**Tell us about your ratio/share of sales in retail stores and readymade garment manufacturers.**

We are fabric manufacturers and our product goes through distribution channel to the garment manufacturers. Mostly, denim products are being sold only through brands – local or international. 100 percent of the products are bought by the garment manufacturers, who are either selling their own brand or are a part of the outsourcing strategy of National/ International brands.

**How has the demand increased over the last 2-3 years?**

The domestic market is growing at CAGR of 15-18 percent for last one decade and we expect to maintain a momentum through additional capacities getting commissioned across the country. We have been outperforming industry growth rate since

inception through capacity addition and product development.

**How do you see the consumption patterns over the next 2-3 years?**

With a per capita consumption of 0.3-0.4 pair of jeans, the industry is still at a nascent stage. With retailing again catching up through online portals, we expect the demand to pull the growth in the industry. We expect the industry to double its manufacturing competence over the period of next 3-4 years to match the demand pull.

**In terms of product development what is the cycle that you follow?**

Normally, either we suggest a product or our end user does it. In case of in-house innovation, conceiving an idea and getting sample product is a two weeks process. Commercial production doesn't require a long period of time in view of huge manufacturing competence.

**Tell us about your future expansion plans.**

We are in the middle of expanding production capacity to 110 MMPA. We are also creating product diversity by introducing yarn dyeing, yarn dyed shirting and khakis. Regular investment is required in our business to keep the technology updated, be cost effective and offer new products to match up with the expectations of the younger generation, apart from meeting up with the international demand and supplies. We expect to commission the capacities by mid-2016.





# V S TEXTILES

## WHERE INNOVATION IS AN ONGOING PROCESS

Ahmedabad based V S Textiles is a multi-faceted organization, providing an array of products for the textile and apparel industries. With over three decades of industrial experience and expertise in textile manufacturing industry, the company manufactures premium quality textile products to serve the changing demands of the market and fulfill the needs of the customers, all over the world. Committed to provide its customers globally competitive product range, V S Textiles has emerged as the most preferred supplier to the domestic and export markets. With a state-of-the-art plant located at Ahmedabad, the company employs latest technology and innovation in all its manufacturing procedures. In a candid interview, *Ashit Agarwal, Director, V S Textiles*, shares about the company and its expansion plans with Images BoF.

### **Tell us in brief about the company.**

We have been in the market since more than 30 years. The company was launched by Mr. Umashankar Agarwal, Chairman, V S Textiles. He was a great visionary who initially started off with cloth trading and then switched over to manufacturing. Today, we manufacture all types of fabrics for shirtings and suitings. We have a capacity to produce two crore meters yearly and the current utilization is 85 to 90 percent. We have a huge domestic stock in the market. Almost 70 percent of our goods are sold in the domestic market and the rest 30 percent goods are sold worldwide.

### **Kindly share your market presence in India. And also about international markets.**

We have a strong and a well established market presence in India due to proper communication and also because of our better quality products than those available in the market, at very competitive prices. In the international market, we are developing new clients by providing them products suitable for their market. We are majorly supplying to the wholesalers, traders and agencies, who distribute the products to the retail and garment brands.



ASHIT AGARWAL, DIRECTOR,  
VS TEXTILES

*“We have a strong and a well established market presence in India due to proper communication and also because of our better quality products than those available in the market, at very competitive prices. In the international market, we are developing new clients by providing them products suitable for their market.”*

**What was your turnover for FY 15 and what has been your CAGR growth rate over the last 3 years?**

Our turnover for FY 2014-15 was ₹55.00 crores and for FY 2015-16, we are expecting a turnover of more than ₹100 crores.

**Tell us about your product portfolio and the blends that you produce.**

We manufacture many types of fabrics for shirting and suiting. We are also into printed fabrics used to make garments. We majorly deal in cotton fabrics but as per the market demand, we keep changing our products now and then.

**What are the latest new styles and trends in fabrics that you are producing?**

The latest fabrics being manufactured at VS Textiles are mostly for the bottom weights like - cotton lycra, twills, corduroys and dobby corduroy lycra.

**Tell us about your ratio/share of sales in retail stores and readymade garment manufacturers.**

We do not sell our products to the retailers. We have a wholesale distribution channel which supplies to the retail stores and to the readymade garment manufacturers.

**How has the demand increased over the last 2-3 years? What is the increase in percentage in terms for your supplies?**

In last three years, the demand has increased to about 40 percent. The demand has shown an increase due to our new inventions and innovations and also due to the better quality which we offer to our customers as compared to the others.

**How do you see the consumption patterns over the next 2-3 years?**

Our both Indian and overseas clients are developing very well. If this continues at the same pace, we are expecting a 120 percent growth in our sales within next three years.

**In terms of product development, what is the cycle that you follow?**

In terms of product development, we do not follow any specific cycle as such. We are always keen to innovate to manufacture newer products and our R&D team is constantly coming out with new products daily.

**Tell us about your future expansion plans.**

We aim to set up a denim manufacturing plant with all facilities for weaving and spinning. We have already made the blue print and are working on it. The total project cost is estimated to be of ₹200 crores.





# ZYDEX

## SUSTAINABLE SOLUTIONS THROUGH INNOVATION

Zydex is a young research driven company delivering high performance polymer based innovations and solutions in all areas of textile processing. Promoted by *Dr. Ajay Ranka (Ph.D. - Polymer Science & Engineering, USA)*, Zydex holds many US, European and Indian patents.

**D**epleting natural non-renewable resources along with toxicity released in the environment makes this world uncertain for the next generation. Influenced by the great need to evaluate and improve the industry's impact on the environment, Zydex industries embarked on a journey to sustainability in 1997. Since then, Zydex has been developing, creating and providing sustainable eco-friendly chemical technologies for the agriculture, textiles, roads and the construction sectors.

With a mission of 'Sustainability through Innovation', Zydex aims to extend limiting resources with extended life cycle to its customers.

With this commitment to meeting the highest environmental and quality standards in the most cost effective way, Zydex provides polymer based solutions for sustainability

in all areas of textile processing, right from preparatory to wet processing to printing. The Zydex Textile products are water-based and free from azo-amines as well as SVHC chemicals, hence possess an added benefit of being eco-friendly in nature. All Zydex products have been certified with eco-passport, GOTS standards, etc. The products also meet the RSL standards of major global retailers up to baby wear. In addition to products, the company also offers tech service to the brands for making the products at lowest possible cost.

Zydex assists brands and retailers and their Industry partners from their first inspiration throughout the entire supply chain to ensure that they meet stringent quality and ecological specifications, reduce costs and shorten lead times. The company has been working with supply chains of AFIRM group of retailers like C&A, H&M, S.Oliver, Levis,





Nike, Puma, Adidas, Gap, etc. to help them meet the RSL and quality standards.

Zydex Industries and its products with the water-based polymer chemistry (replacing toxic solvents) or nanotechnology (usage of less chemicals for textile production, extending life cycles of building & roads, effective burning of furnace oil, etc.) is today playing pioneering roles globally for making this world sustainable.

#### MANUFACTURING FACILITY

With its state-of-the-art plant located in Luna, in the outskirts of Vadodara City, Zydex is committed to high safety standards. The plant, sprawling over an area of 60,000 sq.m. is equipped with the latest material handling equipment to manage the various goods logistics efficiently, effluent treatment system resulting in zero discharge, advanced PLC systems and a highly proficient technical and trained maintenance support team. The company is also coming up with a new 1,00,000 sq.m. grass root plant to cater to the growing demand of the various product ranges at Gavasad, (near Vadodara).

#### INNOVATION

Zydex is committed to continuous innovation not only in products and services but also in manufacturing techniques and business processes in order to deliver environmentally compatible products. The emphasis is on turning concepts to business opportunities: smart, simple and profitable; Bench marking with the best and continuously evolving above and beyond the best; Innovating and developing the best products and practices for all its operating divisions.

Zydex has developed and markets 200+ innovative solutions for textiles, waterproofing and paints, road constructions and agriculture. It produces eco friendly,

water based, speciality polymers for the textiles and offers nanotechnology based waterproofing compounds for the structures. The company also manufactures nanotechnology based road construction materials for moisture resistant, damage proof, long lasting roads (highways/ rural) with globally patented indigenous technologies. Zydex has also developed nanotechnology based paints and bio-degradable, water retaining bio fertilizers to replace chemical fertilizers.

#### RESEARCH

R&D is the backbone of Zydex Industries. The company's innovative approach to research has enabled Zydex to come up with a range of breakthrough technologies. The company is equipped with three R&D labs which provide a strong foundation for innovation. The labs, spanning over an area of 13,000 sq. ft., are well equipped with state-of-the-art facilities. They are continuously working on the anticipated needs of tomorrow with a focus on sustainability.

#### QUALITY

The quality of the products and services is the key factor in the company's success and underpins the fulfilment of its corporate goals. Zydex gives highest priority to quality

assurance both for raw material quality and finished products. All manufacturing processes, products and application methods focus on quality and adhere to environment protection. The world eco concerns are addressed in the manufacturing processes, where ninety percent of the electricity requirement is met through wind energy. Zydex has outlined the unique features of every product with clarity and precision. The products are fully checked for these attributes in the application development facilities before dispatch.

#### TECHNOLOGY ADOPTION

Keeping up with the changing market trends, Zydex has restructured its business model to offer total solutions from design to M-tailing. This helps in minimising wastages, production time, optimise costs and yet create world class value added products with a concept of SAAAF fashion.\* (\*Sustainable, Aspirational, Attitudinal, Affordable & Fresh Fashion.)

Through this model, the company has been able to replace the traditional polluting processes of dye based, discharge printing with pigment screen prints; digital prints with pigment based screen prints; yarn dyeing and jacquard based designs with prints; conventional dyeing with pigment by pad method. This will create a win-win situation for all stakeholders in the fashion value chain. It will improve inventory turns in stores with minimum value loss due to discounting for traditional retailers. It will also foster faster availability of inventory for delivery with minimum returns for merchants/ sellers of e-tailers.





# BHAGWATI IRON & STEEL WORKS

## DEFINING NEW AGE DISPLAY FIXTURES

Bhagwati Iron & Steel Works (BISW) is a renowned manufacturer of in-store furniture in Ahmedabad. The company was established in 1958 and today has made its mark in making distinctive and attractive products for the stores.

**T**he company offers an array of display systems which are used in malls and departmental stores.

They manufacture tiles display units, garment display units, etc. They supply designer furniture items with reliable forwarding service to customers. The products are competitive in terms of quality and cost saving. They also help clients customise products according to their needs.

Over a period of time, the company has captured a huge market in India and worldwide. They have consolidated themselves among the established manufacturers and exporters of Indian traditional furniture.

### LATEST INNOVATION: SLIDING RACKS

The company has recently introduced a first of its kind product, sliding racks, which can be used for multipurpose displays. These racks can be used to display all kinds of accessories and other products.

A sliding rack usually helps a client display more in very less space. It can be custom made according to the client's requirement. With more than 25 years of experience in shop fittings, BISW is working on the automated version of this product.



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DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

# SPORTSWEAR INTERNATIONAL

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**U.K. Icons | The Best OF Fashion in 2015**

55  
16

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DENIM AND FASHION TRENDS – CAPSULE FOR INDIA

# SPORTSWEAR INTERNATIONAL

- 200 **THE VERY BEST OF FASHION 2015**
- 201 THE ITEM/ TURTLENECKS
- 202 THE HYPE OF MENSWEAR
- 204 THE BRAND/ DKNY
- 205 THE DESIGNER/ DEMNA GVASALIA
- 206 THE LOCATION/ TSUTAYA ELECTRICS
- 207 THE BUYER/ DAMIEN PAUL
- 208 THE PERSONALITY/ MADEMOISELLE YULIA
- 209 THE NEWCOMER/ RITA ROW
- 210 THE STORE/ LES BAINS BOUTIQUE
- 211 THE TREND/ UNISEX
- 212 THE FIT/ OVERSIZED SILHOUETTES
- 213 THE LOOK/ SOFT TAILORING
- 214 THE MATERIAL/ WOOL
- 215 THE FOOTWEAR/ FUR SHOES
- 216 THE ACCESSORY/ EYEWEAR
- 217 THE TECHNOLOGY/ 3D PRINTING
- 218 THE COLLABORATION/ BALMAIN X H&M

- 220 **IMMORTAL CLASSICS**
- 221 UK ICONS
- 222 BARBOUR BEDALE WAX JACKET
- 223 BARACUTA G9 HARRINGTON JACKET
- 224 CLARKS ORIGINALS DESERT BOOT
- 225 DR. MARTENS 1460 BOOT
- 226 FRED PERRY POLO SHIRT
- 227 MACKINTOSH TRENCH COAT
- 228 HUNTER WELLIES
- 229 GLOVERALL DUFFLE COAT
- 230 TWEED



Credits for India Capsule

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THE VERY  
BEST OF  
FASHION  
2015





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## THE ITEM / TURTLENECKS

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A part from beautifully designed electronic gadgets, another thing you may have to thank Apple's late co-founder Steve Jobs for is perhaps the big comeback of turtlenecks in 2015. When thinking of him, it's hard to come up with a different image other than the one he used to show in many of Apple's global presentations: sneakers, mid-blue washed jeans and a signature black mock turtleneck by Issey Miyake. The look became the quintessence of the normcore fashion movement some years later in 2013—it supported unpretentious, unisex, average-looking clothing so that nobody stands out of the crowd. This season, seemingly every brand from Gucci to Gant included turtlenecks in their offerings for both sexes. Besides the winning classic, a slim fit jumper, there are other interesting proposals like tees or tops (perfect for layering) and also knit dresses featuring the rolled-down collar. The styling trend is to wear turtleneck tops tossed into pants or skirts, aiming for an “intellectual” look or pair them with loose fit sweatshirts on top for a sporty-elegant twist.

*[Text: Lorenzo Molina/Photo: Marc O'Polo]*



# THE HYPE OF MENSWEAR

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*THE CREATIVE EXPLOSION THAT HAS SHOOK UP MENSWEAR IN 2015 IS HARD TO COMPARE TO ANY OTHER HAPPENING IN RECENT TIMES.*

Text: **Lorenzo Molina** / Photo: **Gucci**

It's been one of the most talked about topics throughout the industry, perennial on everyone's lips in trade shows, runway front rows, brands and retailing: The new hype around menswear. The spark that initiated this way of no return in the gents' collections is doubtlessly the blurring of gender identities when thinking of fashion, which opened a broad field to experimentation toward new silhouettes, garments and material blends previously forbidden to men. This movement has followed an ascending progression within the industry's hierarchy, starting at the very base with cutting-edge young labels and independent designers that broke down social dressing conventions and hence empowered the idea that anyone can dress and look like the other sex. Worth-mentioning names illustrating this path are Hood by Air, 5Preview, Public School and Vêtements. Inside the men's collections of these brands one can find elongated T-shirts imitating dresses, tops with cutouts in unexpected body parts or wide-leg pants that create the optical illusion of a skirt, among others. Of course, not all pieces are necessarily androgynous. But undoubtedly what make these looks appealing and strong is the merger of both feminine- and masculine-related garments. There's no need to prove the success of their approach. It's enough to see how it has slowly pervaded the collections of important high-end names such as Gucci, DKNY or Balenciaga. Alessandro Michele's first men collection for Gucci last February featured pale long-haired men on the catwalk wearing bow-tie silk and lace blouses, mink cuffed coats and tops with ruffles, while bold faced women models wore heavy coats, essential straight long jackets and wide pleated trousers.

For next summer, he's dressed men with waist-belted shirts, loads of vegetal prints, mini crochet shorts and also his signature lace blouses. Other fashion houses haven't stayed still—they hired new creative directors who seem to better cater to millennials' and early adults' preferences in order to stay relevant in today's market. DKNY hired the duo of Dao-Yi Chow and Maxwell Osborne of Public School, while Balenciaga recently welcomed on board Demna Gvasalia of Vêtements (see page 94).

This turn of the tide would have been difficult without the current social and political frame that enabled men's fashion to take more risks. It starts with the gradual weakening of the patriarchal family structures, where the man was holding all power and his one and only dedication could only be working to maintain his family. Since this burden has diminished, men could explore interest in other leisure activities and men's clothes shopping has increased remarkably.

At the same time, the rights achieved in several western countries by previously excluded social groups such as homosexuals have broken down taboos on how men should behave and look like. Now, even heterosexual men understand that taking care of your image is not a sign of weakness and does not damage masculinity, but is actually proof of self-esteem and the willingness to project the best side of yourself to others. The interesting results that are been achieved in terms of design together with the expected growth of male fashion demand in the market turn menswear into a burgeoning category. Keep an eye on it in the seasons to come.

# THE BRAND/ DKNY

Donna Karan founded her diffusion line DKNY in 1989 with the intent of creating more accessible, sportier clothing in tune with the fast-paced spirit of the unique metropolis. So who better to recapture the essence of that spirit than the NYC born and raised duo Dao-Yi Chow and Maxwell Osborne of Public School? This relaunch fittingly coincides with recent '90s revivals such as the Calvin Klein Jeans advertising campaigns starring the likes of Kendall Jenner and Justin Bieber. At NYFW in September the fashion wunderkinder presented their trademark style of modern feminism and tailoring for the women of today.

The officewear essential, a pinstriped blazer, was deconstructed and reworked in various ways: as a strapless bustier dress with a jersey T-shirt top, a slouchy jumpsuit, a double-breasted dress coat and even as an asymmetrically hanging panel wrapped around the torso and the top of a white knife-pleated skirt. Digital prints of New York skyscrapers rejuvenated an otherwise classically styled white shirtdress while the more conservative hemlines were made evening appropriate through the use of sheer mesh fabrics. Each piece was embedded with an element of free flowing movement, echoing the high velocity of the New Yorker lifestyle. But perhaps most importantly, the collection presented a wearable and contemporary interpretation of corporate, everyday clothing. It will be intriguing to see what awaits the fashion world for Public School's sophomore outing next season.

[Text: Carla Seipp/Photo: DKNY]





## THE DESIGNER/DEMNA GVASALIA

**F**ashion history is half written by longstanding design houses/brands and half by newcomers that manage to reinvent dressing standards among

a certain clientele. In the latter category one can classify the French designers collective behind *Vêtements*, which was founded in 2014 and has been one of the most talked-about labels this year. Demna Gvasalia, who studied at the Royal Academy of Fine Arts in Antwerp, is the visible head and spokesperson of *Vêtements*. What he and the label have achieved has little to do with a groundbreaking design and unusual silhouettes. In fact, the collective mainly rescues classic garments such as high-rise jeans or leather trench coats with barely any modifications. *Vêtements'* achievement is rather to make haute couture followers get excited about normcore and vintage looks that, even if loved and worn by the street crowd, were off the radar of high fashion. *Vêtements* infuses such items with flashy updates, still keeping the line very wearable. The summer 2016 women's collection featured suits paired with neon-colored thigh boots, biker-inspired looks in black leather, granny flowery dresses and controversial aprons made out of rose-printed plastic tablecloths. Keeping with the business trend of luxury brands aiming to revive their offerings by bringing young fresh faces aboard (à la Alessandro Michele taking over Gucci's creative direction), Gvasalia has replaced Alexander Wang as creative director at Balenciaga. But we'll have to wait until March 2016 to see his debut collection for the Kering-owned brand. [Text: Lorenzo Molina/Photo: Willy Vanderperre]



## THE LOCATION / TSUTAYA ELECTRICS

In Futakotamagawa, an up-and-coming shopping hotspot in the west of Tokyo, Tsutaya Electrics, run by CCC Culture Convenience Club Co. Ltd, opened its doors in May 2015. As the most hyped store inside Futakotamagawa's Rise shopping center, this ultra-stylish store covers all desires and needs of today's generation of so called "lifestyle designers." On more than 6,600 sq. meters (71,042 sq. feet) the store offers everything from home electronics and kitchen appliances to portable devices, cameras and TVs. It also features relaxing networking areas, wellness services, coffee shops, bikes and more—it is dedicated being a "cultural stronghold for adults" in a one-of-a-kind atmosphere.

When you enter the store on the first floor you might feel as if you are in a botanical garden due the huge amount of plants that seem to be almost obligatory for any Japanese retail shop. After that tropical experience you find, amongst others, a huge selection of books and magazines, a variety of home appliances, a hairdresser and a children's shop. In the basement you can shop at the following six creative areas: Networking, Photo, Movie, Stationery, Music and Sound Rental. In addition, Tsutaya Electrics hosts several renowned tenant shops such as Starbucks, Arflex and Bang & Olufsen, which makes the shopping experience even more diverse and enjoyable. All in all, customers can enjoy a huge variety of products and services while reading the latest books or magazines and having a good cup of coffee. You get lifestyle there, not just products. And you not only see creativity, but the future. [Text: Linda Haberberger/Photo: Tsutaya Electrics/CCC]



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## THE BUYER/ DAMIEN PAUL

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To keep up an exciting though highly commercial assortment seems harder than ever these days, with increased competition and newcomers who pop up regularly. Damien Paul, head of menswear at Matchesfashion.com, looks rather thrilled about the challenge, especially in the gents' department. "What's happening in menswear at the moment is incredibly exciting—we're seeing a real diversity in the kinds of collections that are being shown," he explains. Important for him when picking up products is to believe in them, whether it's a £5,000 Jil Sander shearling coat or a £200 T-shirt and the fact that finish and quality are right. "This is something male customers seem to care about even more than women," he asserts. Paul joined the menswear buying team of the British retailer in 2012, having worked previously for heavyweights such as Harvey Nichols London and Bloomingdale's Dubai. In addition, he also sits on the Newgen Men Committee with the British Fashion Council, which is dedicated to mentor and support emerging British designers. In the light of Matches' financial results, one can say that Paul and the rest of the team are doing well. By the end of this year, turnover is expected to reach £130 million (€181 million)—in 2011, it stood at £35.5 million. As announced in early summer, the platform founders Ruth and Tom Chapman stepped down as joint chief executives after 27 years to become executive chairmen. They have pocketed the shift to online sales that started in 2006, with 85% of overall sales now coming from online. Ulric Jerome, prior chief operating officer, took over the chief executive role. With the next phase of growth in the offing, rumors are circulating that Matches may soon go public. [Text: Lorenzo Molina/Photo: Matchesfashion.com]



## THE PERSONALITY/MADemoisELLE YULIA

In the digital era a new generation of multitalented young women—models, actresses and musicians—have been taking over the red carpets. One of the few internationally famous icons in Japan who gained new fashion fame due to her eclectic style and loyal social media following is the 28-year-old Mademoiselle Yulia (Mademoazeru Yuria). Essentially Tokyo fashion royalty, she shows up at numerous fashion events and street-style galleries around the globe. And all this while DJing only the most exclusive parties such as the Chanel Resort show afterparty in Seoul. As daughter of a trained kimono dresser and her hairstylist father, who is responsible for her signature blue hair, she started gigging her way through the Tokyo club scene at the age of 17, releasing her first pop-electro album *Mademoworld* in 2011, followed by a collaboration with US rapper Will.i.am only a year later. But as one of those kind of polymath girls with an uber cool Japanese look it was only consequent that she also made her way into fashion. She collaborated with H&M Japan, created a collection with Joyrich, works as columnist for Nylon Japan and designs her own jewelry line called Giza. On top of that la Mademoiselle is the muse of Jeremy Scott and has earned the admiration of Stella McCartney for her ongoing campaign “One city, one girl” which she joined for a 2015 collaboration. We have no doubt that in the future Fräulein Yulia as ambassador of Harajuku cool will be seen more often in the western fashion hemisphere. [Text: Linda Haberberger/Photo: Mademoiselle Yulia]



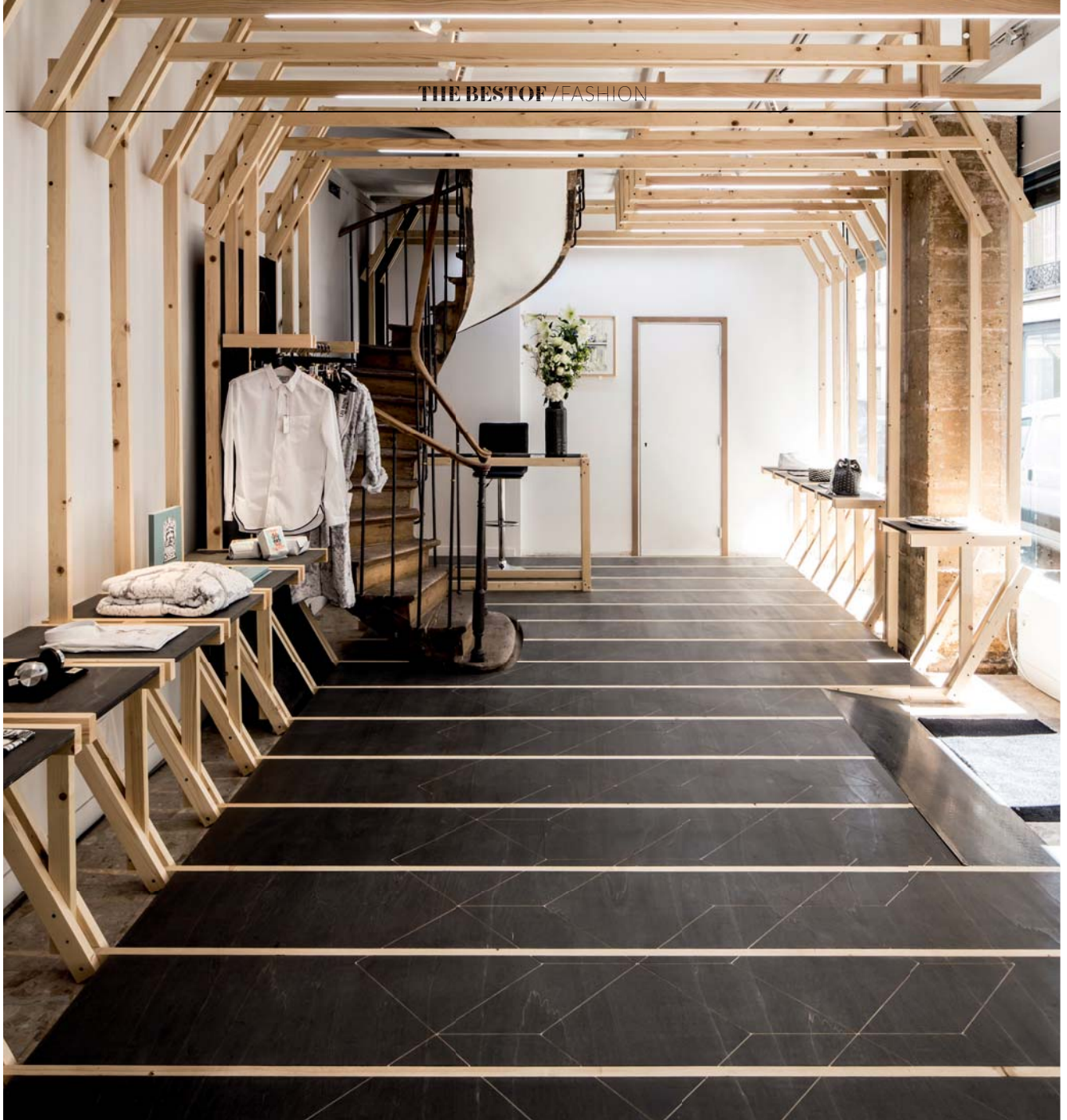
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# THE NEWCOMER/RITA ROW

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**R**ita Row sounds American, but it's Mediterranean, as Xènia Semis and Imma Serra amusingly point out in the label's website. Both associates kicked off the brand in June 2013 in Spain; they design the collections together, but while Serra takes care of pattern construction and production, Semis is more focused on brand image and social media, among others. The label creates women's clothing, footwear and accessories whose design is clearly marked by products that gaze over the past to come up with modern twists, resulting in a highly appealing offering. Every collection draws inspiration from a different theme, hanging on their personal experiences or external sources such as films, art or photography. The current fall/winter range is called "Wow" and it's packed with ribbed knit dresses, knit overalls, knot dresses with vivid flower prints, culottes and cropped jackets with interesting texture games. A masculine element is also present in the form of high-waist pleated pants paired with checked shirts. All garments are produced in local and family workshops in the Catalan cities of Mataró and Olot. The brand is stocked mostly in its home country Spain but also in a few other locations in European cities such as Berlin; Strasbourg, France; Gent, Belgium and Paros, Greece. Retail prices for tops and dresses range from €50 to €160, bottoms are priced between €80-€110 and other special garments up to €200. [Text: Lorenzo Molina/Photo: Alejandro Brito]





## THE STORE/LES BAINS BOUTIQUE

Les Bains, once a bathhouse where Impressionist painters met and then a hedonistic nightclub like no other in Paris, was reopened last April as a luxury hotel. Only two months later, Les Bains boutique, a store and a gallery all-in-one, opened its doors on Rue du Bourg l'Abbé right next to the hotel. The concept has been conceived by Diplomates, a French multidisciplinary studio, who have designed installations for other reference retailers such as Dover Street Market in London. The total eye-catcher of the interior is the light wooden and symmetrical structure that goes across the whole ground floor, providing the reduced space with extra depth in tune with the white walls. A contrast to the modern octagonal wood structure is the decrepit-like spiral staircase with a wrought iron banister. A glass storefront enables natural light to pervade the room. The curated items available in the store are usually the fruit of collabs with artists and creators, ranging from clothes, accessories and jewelry to tech-gadgets, books and art. Les Bains boutique is home of an eclectic mix of luxury products from brands and designers such as Pierre Hardy, Officine Générale, Delphine Delafon (accessories), Thierry Lasry (eyewear) stocked together with street- and sportswear labels such as Geym and La Planche à Roulettes skateboards. [Text: Lorenzo Molina/Photo: Guillaume Grasset]



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## THE TREND/UNISEX

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“It is not about harnessing a ‘trend’ but rather tapping into a mindset and acknowledging and responding a cultural shift that is happening now.”

This statement was made by Selfridges’ creative director Linda Hewson earlier this year, when the department store presented its Agender project, a unisex-clothing pop-up shop without traditional gender divide. It was a reaction to what happened on the runway in January, where androgyny and gender ambiguity were key themes—the utmost expression of the move were represented for many by Gucci’s menswear bow-tie silk blouses. Shortly after Selfridges, upscale online destination The Corner also announced the arrival of a gender-neutral area called “No Gender.” In addition to retailers, contemporary fashion brands are blurring gender identities. Acne Studios’ creative director Jonny Johansson took one of the most interesting approaches when he recruited his 11-year old son Frasse as a model to advertise the current womenswear collection. Photographed by Viviane Sassen, Frasse wears grown-up clothes, heels, futuristic sunglasses and a golden earring as a nose piercing and the result is equally cool and disturbing. Although it remains a mystery whether a gender-neutral way of dressing will settle down successfully in the broad fashion market, the good news about this trend is that brands and retailers support and make it easier for consumers to be themselves and buy whatever they feel like wearing—not what social style conventions dictate. [Text: Lorenzo Molina/Photo: Acne Studios]

# THE FIT/ OVERSIZED SILHOUETTES



Who would have ever thought only a few seasons ago that oversized silhouettes would fight back against skinny and slim fits for prominence?

Now it's obvious that enlarged silhouettes are back. In womenswear, it started already in last year's fall/winter season with oversized coats in a clean Scandi-inspired design becoming a mainstream trend in all price segments. On top of that, the '70s influences have also paved the way for jeans to become looser, with flares and wide-legged options finding their way back to brands' and retailers' assortments. It would take one season for the wave of change to arrive in men's offerings, especially jackets and pants. In tune with the last round of runway shows in New York and Paris, we will experience denim bloomers (Each x Other) and boho dresses (Chloé) come spring.

Out of the denim world, there are light ankle-length coats creating a voluminous silhouette while unzipped (Alexander McQueen) and drop-crotch pants for guys (Vivienne Westwood), among others. In the meantime, the streetwear crowd is thrilled with the comeback of signature baggy pants by labels such as Dickies and JNCO. Even though oversized silhouettes might not become as broad as other fashion trends, the truth is that they bring a lot of freshness to contemporary labels and exude a Scandi-coolness whose fans are now worldwide.

[Text: Lorenzo Molina/Photo: Weekday]



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## THE LOOK/ SOFT TAILORING

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**S**oft tailoring, a result of today's sneaker-and-casualwear culture, offers men of any generation a great chance to be at ease even in a suit. This look of the United Arrows fall/winter 2015 look book slips past the boundaries separating formal and informal to create a fashion realm in which old-school tailoring and streetwear influences coexist in harmony. The formality and stiffness of the single-breasted boxy suit by Errico Formicola is broken by the rest of the outfit: A vintage printed shirt (Gitman Vintage), jacquard socks (Chup) visible thanks to the pants' turn-ups and the basketball-staple turned into cult street sneakers Converse All-Star. The look is wrapped in a black wool alpaca blend coat (Caruso) with a lapel collar, strapped cuffs and a slightly oversized fit. Finally, a white tote bag, a favorite accessory of music festival folks, adds a pinch of hipster vibes. The dandy-inspired look does not lose any of its elegance or sophistication despite the fact that it is easy, cool and comfortable. It seems that officewear is swinging back toward softness in favor of a more laid-back aesthetic. And we just can't get enough. [Text: Linda Haberberger/Photo: United Arrows, United Arrows Styling Edition 16]



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## THE MATERIAL / WOOL

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**S**ometimes out of the mandatory seasonal trends but never completely out of sight, wool is again reclaiming its prominence this fall in the most diverse forms: oversized lapel coats, turtlenecks, ponchos, wide-leg pants and culottes, among others. In contrast to other fibers, eco-friendliness and comfort are two of its coexisting properties. It is a 100% natural, biodegradable material, renewable every year because sheep produce a new fleece. From the consumer point of view, wool garments have the ability to stretch comfortably with the wearer, but are then able to return to their natural shape without wrinkling. The Campaign for Wool, an initiative jointly funded by some of the largest trade wool textile organizations such as The Woolmark Company and supported by fashion retailers and education institutions, has been organizing events across the globe since October 2010 to raise awareness about the fiber. Among these events was the Wool Week Italy in Milan last September, which was kicked off by the annual “On Stage” fashion show as part of trade show Milano Unica.

Ten emerging designers showcased their latest collections in which Merino wool played a crucial role.

*[Text: Lorenzo Molina/Photo: Rich & Royal]*



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## THE FOOTWEAR/FUR SHOES

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**W**hy to give up the comfort and warmth of your slippers when you hit the streets? You've probably dealt with this issue as temperatures drop outside. Don't worry—designers apparently shared your mood when thinking of shoes this season. Probably inspired by Céline's spring/summer 2013 fur-covered sandals and pumps, other fashion houses such as Gucci embraced this material as well but in a less bizarre design approach for fall: black leather loafers with fur lining and heels. Mid-market footwear brands also integrate hairy models in their assortment. French Connection offers Chelsea boots where vamp and quarters are hidden by a thick layer of faux fur. Birkenstock updated its traditional Arizona sandal for cold days by lining it with lamb fur and brand Lika Mimika revamped its summery espadrilles with fur lining and a leather vamp and a contrasting chunky jute rope sole. Despite of their coziness, fur shoes appear to be a bad choice for rainy or snowy days—but what would fashion be without a little dose of madness when dressing? To style these shoes, go minimal. Pairing them with mid-blue light wash jeans and ribbed knitwear will be a winning combo this season. [Text: Lorenzo Molina/Photo: French Connection]



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## THE ACCESSORY/ EYEWEAR

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**Y**ou might find it amusing to say that eyewear is the best fashion accessory—was there ever a time when it hasn't had any relevance in fashion retail to flesh out the offering? Not at all. But the pace of growth that independent labels working on this product niche have achieved of late has given them reason to take a closer look. This is the case of the eyewear label Ace & Tate, which opened last summer a brick-and-mortar shop in its home city Amsterdam, the first one of this online retailer whose main premise is to offer trend-driven quality glasses at a fair price—all models cost €98. This is possible thanks to direct sell to end consumers, which enables it to save the costs of license holders and retailers. Great innovations in terms of bespoke design are also taking place. International eyewear brand Mikita announced in early fall My Very Own (MVO), a collection of sunglasses and prescription glasses where each frame can be tailored to perfectly fit the anatomical features of the wearer. To make it happen, the face is scanned and visualized with a 3D scan. Then in a digital simulation of the selected model, the frame is adjusted to the facial contours. Finally, the frame color, lenses and hinges are chosen to obtain the bespoke pair of glasses. My Very Own will be introduced in brand stores and selected opticians in spring 2016.

*[Text: Lorenzo Molina/Photo: Mykita]*





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## THE TECHNOLOGY/3D PRINTING

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**F**ew technologies appear to be such a game changer in the fashion field such as 3D printing. The basis of any 3D-printed design is a Computer Aided Design (CAD) file—in other words, a PDF with a third dimension. Based on the file, the printer then adds material layer by layer until the final product is done. Without going any deeper on the technical aspects (there are a bunch of different processes for various materials), the most exciting thing about 3D printing is the advantages that this technology brings to up-and-coming designers: the creation of new designs becomes as costly as writing a blog, but at the same time having access to the same quality as the big names in the industry. They can print their design in a batch-size of only one unit instead of having to invest in their first prototype and placing bulk-orders in Asia to be price competitive. Besides, one of the biggest challenges of fashion e-commerce could be solved: overcapacity and logistics—when products are printed on-demand at a local manufacturer. The Post-Couture Collective, a fashion company recently launched by Dutch designer Martijn van Strien, enables consumers to download, customize, produce and self-assemble clothing designs. This way the designs can be shared digitally and manufactured locally. The first collection features six garments taken from the One Off collection by van Strien's own label Mphvs. All the futuristic designs are cut from Spacer fabric, a 3D-knitted material made from recycled PET bottles that is soft, breathable and strong enough for the construction method.

[Text: Lorenzo Molina/Photos: Olya Oleinic, The Post-Couture Collective]



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## THE COLLABORATION/ BALMAIN X H&M

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The images of a possessive crowd bursting into H&M stores all around the world that appeared on the news in November had nothing to do with any mid-season sale of the Swedish retailer. The stampede was directed at H&M's highly desired designer collaboration with the Parisian house of Balmain, which faded away from the racks in a matter of hours. How did this all happen? Well, to attract media attention and consumers' enthusiasm, pocketing model and queen of virtual likes Kendall Jenner and Balmain's own Olivier Rousteing (the house's creative director since 2011) as brand ambassadors is a reliable multiplier. H&M engaged not only them, but many other celebrities ranking high in the social media Olympus such as models Gigi Hadid and Jourdan Dunn. This time, instead of betting on traditional advertising outlets (bus shelters and the like), the company decidedly invested on global-reach digital influencers, dreamy red-carpet events like the one celebrated in New York City (attended by the Backstreet Boys!) and then just waited for the information to spread by itself. The strategy paid off. Our only concern is to determine whether consumers really liked the collection—a women's range dominated by excessively pomp loaded, sequin-embedded dresses, deep neck velvet blazers and lots and lots of gold on details and accessories—or whether the hyper H&M shoppers were only driven by the wish of having something in common with Jenner or Hadid and a piece that pretends to be “real” Balmain. [Text: Lorenzo Molina/Photo: Balmain x H&M]



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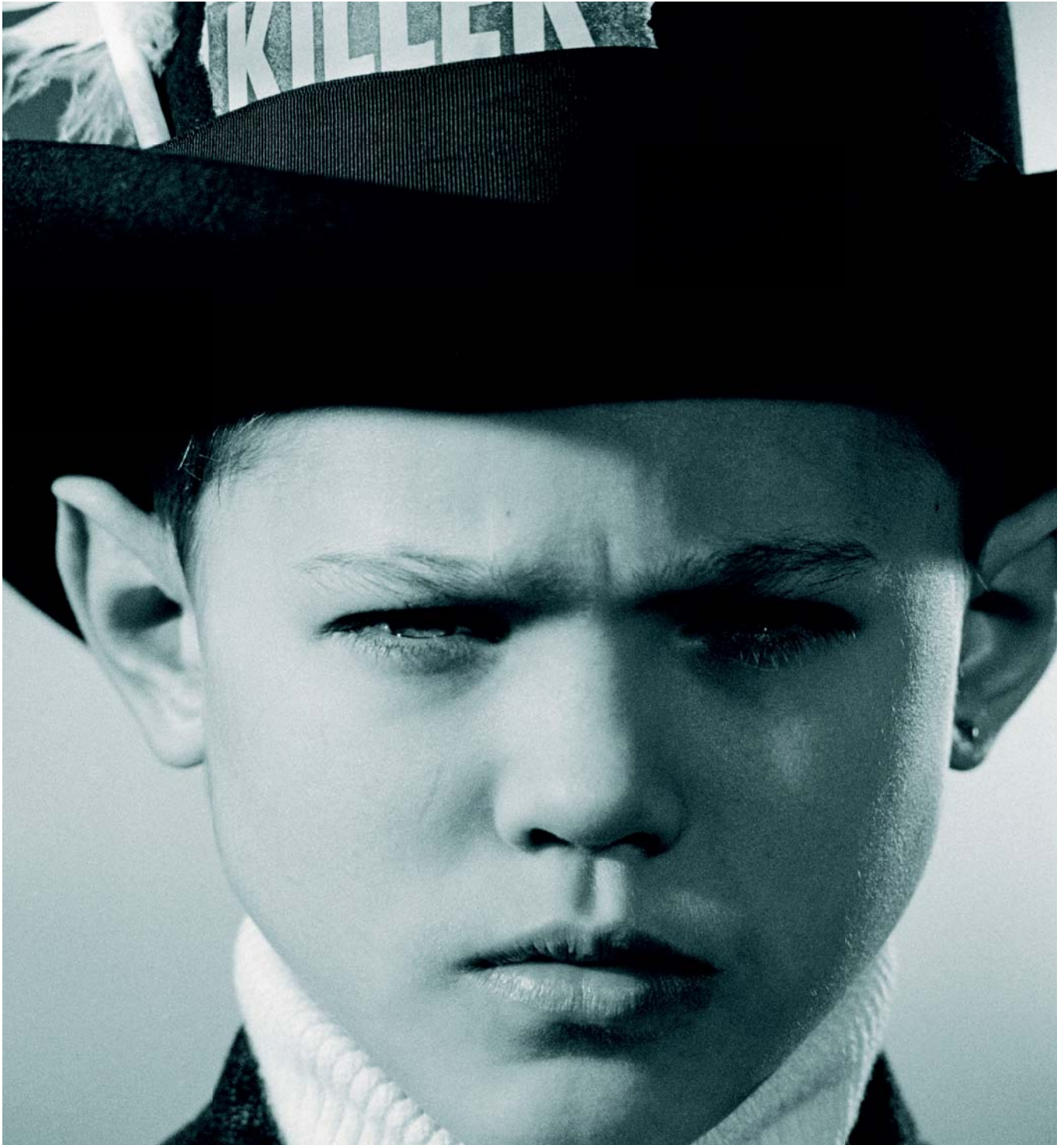
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# IMMORTAL CLASSICS

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In the '80s, the Buffalo movement redefined fashion photography in London. The imagery, such as this “Killer” shot from 1985, still feels contemporary today—just like the British style icons we present on the following pages. [PHOTO **JAMIE MORGAN**]



# UK ICONS

*THESE BRITISH ORIGINALS HAVE BECOME WORLDWIDE STAPLE PIECES  
THANKS TO THEIR TIMELESS DESIGN, RECOGNITION VALUE AND, MOST IMPORTANT: UK SOUL.*

Research **Lorenzo Molina**



NEW BALANCES TARTAN PACK



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## Barbour Bedale Wax Jacket

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In spite of being conceived as an equestrian jacket in 1980—the shorter length was ideal when riding—Barbour’s Bedale is beloved by people settled far away from riding centers. The jacket’s unmistakable features are two bellows pockets, a pull-ring two-way zip and a thick corduroy collar. With ups and downs, the jacket has remained a trend-object since its birth. In the noughties, stars at the Glastonbury Festival such as Alexa Chung, singer Lily Allen and the band Arctic Monkeys elevated its popularity among youngsters. Perhaps that’s the reason why you can spot preloved Bedales in many European fashion flea markets today. For spring/summer 2016, Barbour is launching a menswear line called “Country Prep” that pays homage to the Bedale and reinvents it in summery fabrics such as washed cotton, a waterproof breathable fabric and bold colors. A women’s version of the jacket has existed since 2010; it is a more slim-fitting version called Beadnell. *[Photo: Barbour]*



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## Baracuta G9 Harrington Jacket

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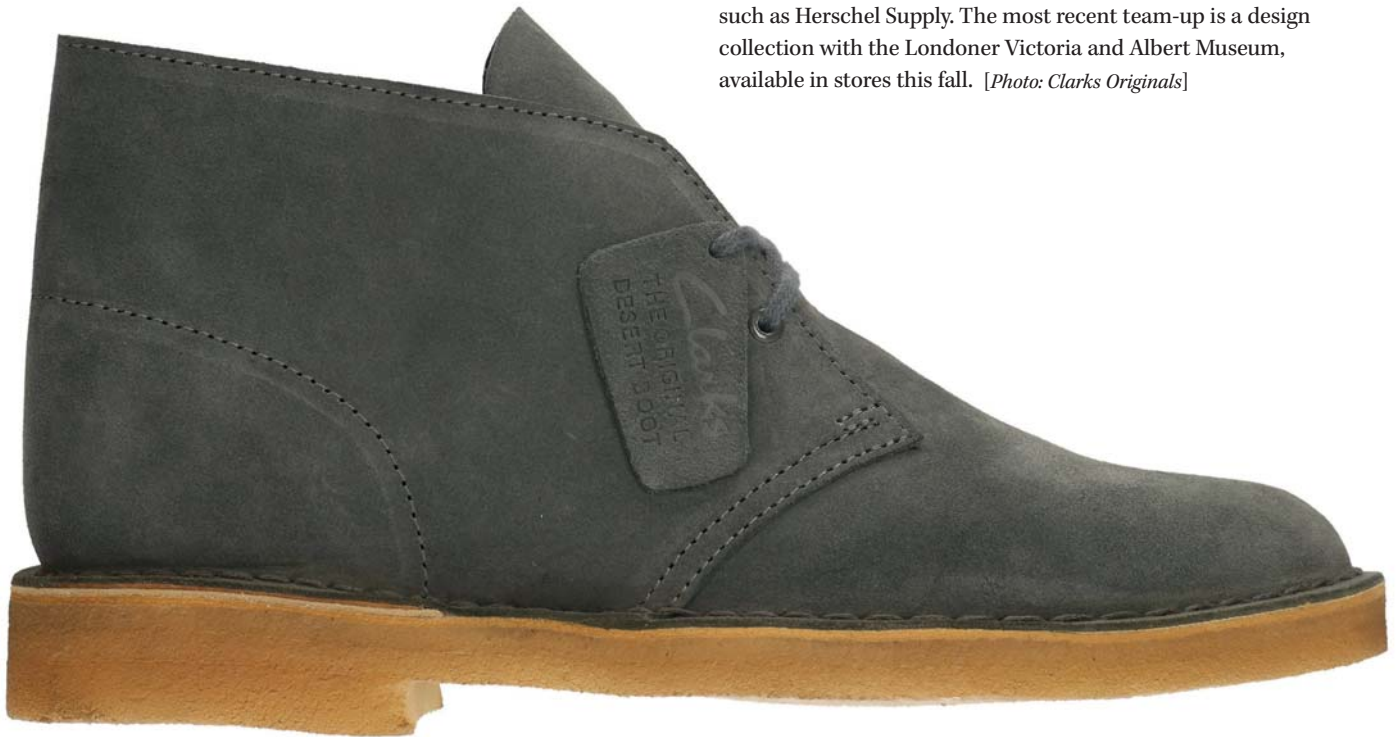
**E**lvis Presley, James Dean, Steve McQueen... The G9 Harrington Jacket has been worn by some of the most beloved celebrities of the second half of the 20th century. Designed by the Miller brothers, this men's classic was afterwards adopted by golfers and also by visually antagonistic youth subcultures such as the mods, punks, skinheads and the Britpop. Even though the jacket's silhouette has remained almost untouched since its birth in 1937, the brand has introduced a wider color palette and several technical improvements along the years. For the current fall/winter range, the G9 comes with a water-repellent fabric (Technowool) and a detachable Thermore gilet to increase protection against low temperatures. *[Photo: Baracuta]*

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# Clarks Originals Desert Boot

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**N**o matter if your jeans are indigo or light blue, raw or washed, because they all look simply amazing with turn-ups and paired with Clarks Desert Boots on your feet. Even though it just celebrated its 65th anniversary, the model hasn't lost any of its original appeal: a soft suede chukka boot with two eyelets and a crepe stitchdown sole. The shoe was conceived by Nathan Clark, a member of the Clarks family who saw similar models worn by other soldiers when he was serving the British army in Burma back in 1944. After discovering that they came from the bazaars of Cairo, Egypt where his colleagues were previously based, he created his own version. Instead of staying still, Clarks has reinterpreted the Desert Boot in capsule collections with well-known labels such as Herschel Supply. The most recent team-up is a design collection with the Londoner Victoria and Albert Museum, available in stores this fall. [Photo: Clarks Originals]







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## Dr. Martens 1460 Boot

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**T**his British icon has its roots (and eponym) in '50s Germany. Suffering from a ski accident, Munich-based Dr. Maertens was dissatisfied with the shoe offer available and thus started developing an air-cushioned sole with his friend Dr. Funk (and the help of imported ingredients such as aircraft tires and leather jackets). An issue of Shoe and Leather News magazine said that they duo was looking for likeminded overseas partners. This caught the eye of Bill Griggs, part of a traditional British shoe-making family in the English Midlands. Griggs contacted Dr. Maertens, bought his sole, anglicized its name and had the first pair of Dr. Martens boots roll off the production line on April 1, 1960. Initially sold mainly as reliable working men's footwear, Dr. Martens boots soon became the choice of the early skinheads, a multicultural, ska-loving group mimicking the dress sense of the British working class. A few years later, Pete Townshend of the The Who wore a pair of black 1460 DM boots on stage, indicating his affiliation with working-class pride in the middle of the flower power era. Since then, Dr. Martens have been embraced by youth culture tribes of all kinds from skins to punks, hardcore, goth, industrial, grunge, Britpop or emo supporters—and the list goes on.

Dr. Martens produces its boots all over the world but still maintains an authentic Made-in-England production in the original Griggs family factory in Wollaston, Northamptonshire. The site produces 68, 000 to 75,000 pairs of shoes per year which makes for about 2% of the company's annual output. [Photo: Dr. Martens]



**B**orn in the tennis court, the Fred Perry Polo Shirt quickly became a streetwear must-have among young British men during the '60s, who would join fashion encyclopedias afterwards for being the seed of the mod subculture. The product silhouette has remained the same since its inception in 1952: a short-sleeve knitted cotton pique polo shirt with ribbed collar and cuffs, a two-button placket and the iconic Fred Perry laurel wreath logo embroidered on the front.

The relevance of this product is undisputed today, especially in tune with the high appeal that sports-inspired apparel enjoys among consumers right now. Interesting design approaches have been achieved through collaborations with artists and designers such as Jamie Reid, Bella Freud and Nigel Cabourn, who left their own imprints on the signature garment. *[Photo: Fred Perry]*



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## Mackintosh Trench Coat

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A flawless look is sometimes hard to achieve; there are though a few garments that were invented to elevate an outfit from ordinary to elegant. The Mackintosh trench coat is such an item. Its origins are also related to the UK's volatile weather conditions: The original Mackintosh was invented in 1823 with a rubberized fabric being the first waterproof one in the world. Even though it used to be a formalwear classic, the trench coat has been progressively embraced by the street crowd, especially thanks to the widespread availability of low-priced versions created by vertically integrated fashion chains. Thus you might pair a Mackintosh with jogger pants and sneakers and you'll be modern as hell. That's only one example of the endless possibilities that this item has and why it is a contemporary clothing essential. *[Photo: Mackintosh]*

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# Hunter Wellies

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**T**he waterproof Hunter Original boots jumped from the military scene in the first half of the 20th century—they were used for flooded war trenches—to the fashion one over the years. Technically, the boot is hand-assembled from natural rubber on a metal last, then put under intense heat and pressure in an autoclave to harden the rubber in a process known as vulcanization. They reached a peak of popularity in 2013 and 2014, as rain boots became a broad footwear trend in womenswear. The hype went down, but nevertheless the wellies continue being a basic for wet days—especially during this year's Glastonbury Festival.

There celebrities such as it girl Alexa Chung and Poppy Delevingne, sister of model of the moment Cara Delevingne, were spotted wearing Hunter boots. *[Photo: Hunter]*



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## Gloverall Duffle Coat

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**L**ike almost all UK-born outerwear products, the duffle coat of Gloverall demonstrates how a simple yet smart outerwear design can become timeless and embraced worldwide. The characteristic cut and features as we know them today—horn toggles, leather fasteners and checked interior fabric—were created in 1954 by Harold and Freda Morris. The coat's background is linked to the military since it was used as a utilitarian uniform during WWII thanks to its heavy wool fabric. This fall/winter season, the '51 collection of Gloverall takes inspiration from the early days of British Grand Prix Racing in the 1950s, when racers such as Sterling Moss and Tony Brooks wore the duffle. *[Photo: Gloverall]*

# Tweed

**W**hat do traditional British country clothing and Coco Chanel have in common? Nothing at first sight, apart from the fact that both succumbed to the charms of the roughly textured wool fabric. Originally a men's-only material, Chanel's iconic tweed bouclé women's jacket—with lining in jersey or a silk crepe—elevated the material to a timeless synonym of feminine elegance. Despite its long run, a men's tweed blazer is also a key piece in contemporary wardrobes. Brands such as Ralph Lauren, Burberry and J.Crew continue betting on it due to its versatility and multiple variations—Harris, Herringbone, Donegal and Houndstooth tweeds are the most common ones. The hype around tweed got a peak in recent times thanks to the proliferation of tweed runs or rides in various European and US cities. This activity describes a group of people who meet to ride their bikes—mostly vintage models—through usually central urban areas while wearing traditional British cycling outfits, where tweed is present on jackets, pants and caps. *[Photo: Asos]*



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Message from the Chairman

# KABIR LUMBA



Dear Friends,

As far as we fashion retailers are concerned, there is a new disruptor on the radar every day. Technology and rapidly transforming consumer behaviour are challenging us to up our game and be at the leading edge of innovation like never before.

At the same time, some of the tenets of successful fashion retailing remain as strong as ever: responsiveness to consumer desires, intelligent imagination, smart sourcing and delivering unforgettable experiences are as compelling as they were a decade ago. However, the big game changer is the speed of everything -- from sourcing to design innovation. In an age when five-year business forecasts make little sense, given the rapid changes, at India Fashion Forum this year, we will be unveiling these seven tenets of powerful fashion creation and retail:

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For 16 years now, IFF has been at the leading edge of fashion retail knowledge, delivering mega platforms that blend some of the finest market insights to future-ready product innovations and ideas. In 2016, we believe these seven Mega Agents of Change, if interpreted and implemented well, can generate an altogether new paradigm of excellence for the business of fashion in India.

But there is no one single organisation or individual who can master all of these seven specialised approaches on their own. And that is why inter-relation is the only way for us -- in the very demanding-but-exciting category of fashion retail - to overpower the simultaneous challenges we face today. Because no one company knows everything, no one organisation can master all of it, and no brand can succeed without partnering with those who are masters of the biggest fashion game-changers today.

Join us at IFF 2016 on March 15th and 16th at The Renaissance Hotel in Mumbai, to feel the 7 Mega Agents of Change for the business of fashion in India, and to see why the future of fashion in India will depend on how intelligently - and rapidly - we optimise collective intelligence.

KABIR LUMBA  
Chairman, India Fashion Forum 2016,  
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CUTTING-EDGE INNOVATION

// Billie believes that she can give intelligence and purpose to what humans wear. Her designs are sharp, experimental, naturally confident and subtly feminine in appearance integrating the latest technology. Design principals of colour, line, shape, proportion, tone, silhouette and texture are being brought to the wearable technology industry by her.

// Billie designed FUNDAWEAR in partnership with Ben Moir and Havas Worldwide, for Durex. FUNDAWEAR is the world's first wearable technology which allows personal touch to be transferred from a smartphone app to a partner anywhere in the world.

// Her creations have included NAVIGATE, a GPS-enabled blazer that nudges the wearer to direct them left or right. In April 2014, Wearable Experiments released the New York NAVIGATE before the PSFK audience. This city-specific jacket gives the wearer the ability to walk around New York City unimpeded by a map or app.

// Another We:eX intelligent fashion product is THE ALERT SHIRT, a sports jersey that lets fans feel sensations tied to sports games.

// Her latest innovation is THE FAN JERSEY. Unveiled at Super Bowl 50 in 2016, and connected through one's phone via Bluetooth, Fan Jersey lets users receive real time haptic vibrations so they can feel the excitement of every highlight in the game. The experience creates a fan to team connection unlike anything ever seen before - putting them front and centre with the game.

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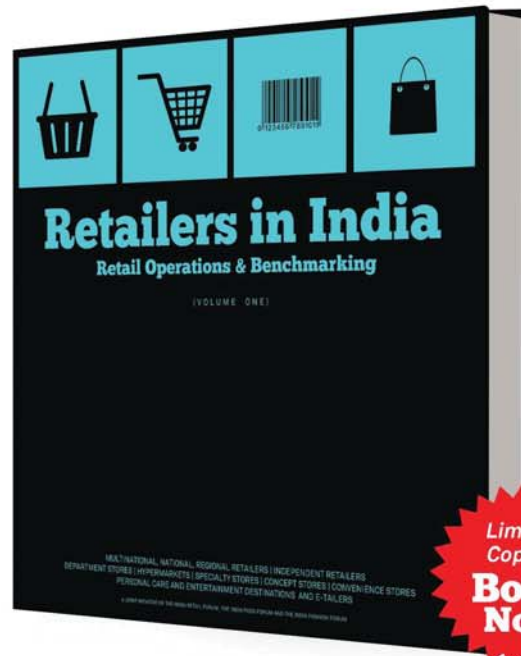
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Category Code:	<b>A1:</b> Fashion Retailers with less than 5000 sq ft. retail space	<b>A2:</b> Fashion MBOs/ Independent Retailers	<b>A3:</b> Regional Chains – 3 or more stores. <b>A4:</b> Brands with Owned Brand Outlets/ Shop-in-shops)	<b>A5:</b> National Department Stores/ Large Format Fashion Stores <b>A6:</b> Online Retailers	<b>A7:</b> Groups with Multiple Retail Formats + Franchise/ Distribution/ Licensing/ Own Brand operations	<b>B1:</b> Fashion & Lifestyle Brands (without own stores/ SIS)	<b>B2:</b> Exporters, Manufacturers & Buying Houses of Fashion & Lifestyle Products	<b>C1:</b> Fibres, Fabrics & Finishes <b>C2:</b> IT/ Technology/ Logistics	<b>C3:</b> Trims & Embellishments <b>C4:</b> Shopfit/ Retail Design/ VM <b>C5:</b> Consulting/ Research/ Trade Bodies/ Academies/ Support & Services <b>C6:</b> Fashion Franchisees & Distributors		
<b>All Inclusive Annual Fee (Service tax extra)</b>	<b>Rs. 5,000</b>	<b>Rs. 25,000</b>	<b>Rs. 50,000</b>	<b>Rs. 1,00,000</b>	<b>Rs. 1,50,000</b>	<b>Rs. 50,000</b>	<b>Rs. 15,000</b>	<b>Rs. 50,000</b>	<b>Rs. 30,000</b>		
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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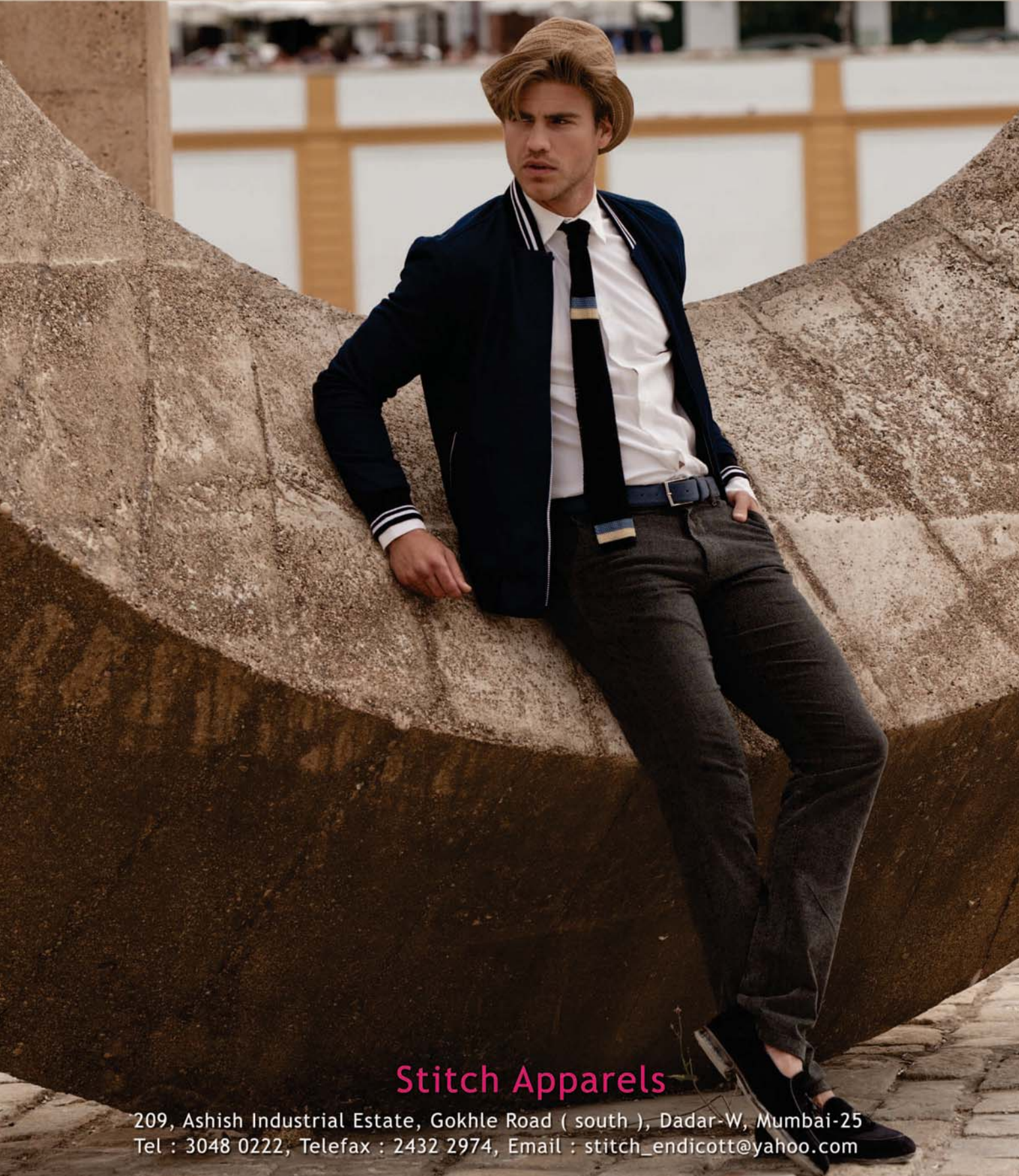
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