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Issue No.

May 2016

Volume XVII // No. 5 // ₹ 100



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Issue No.

BUSINESS OF FASHION

May 2016

Volume XVII // No. 5 // ₹ 100

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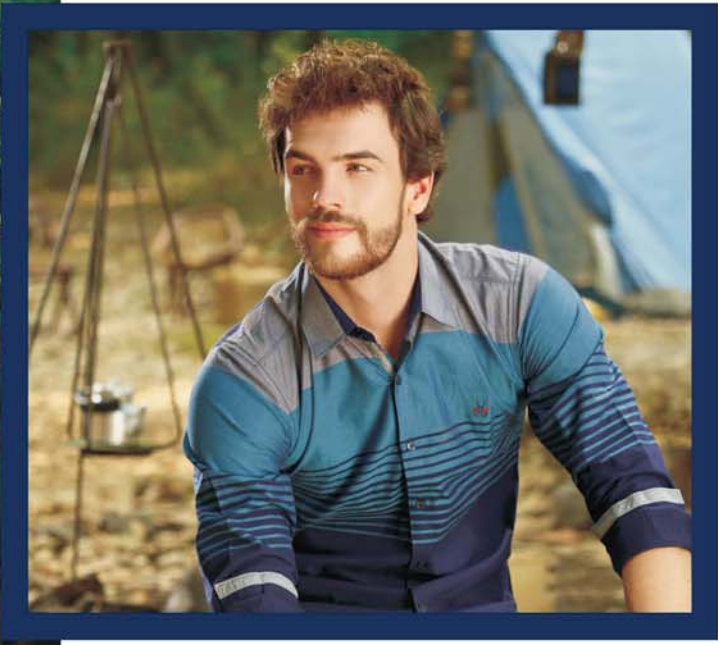
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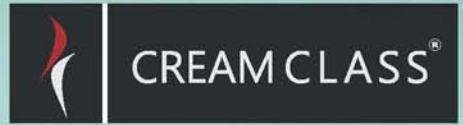
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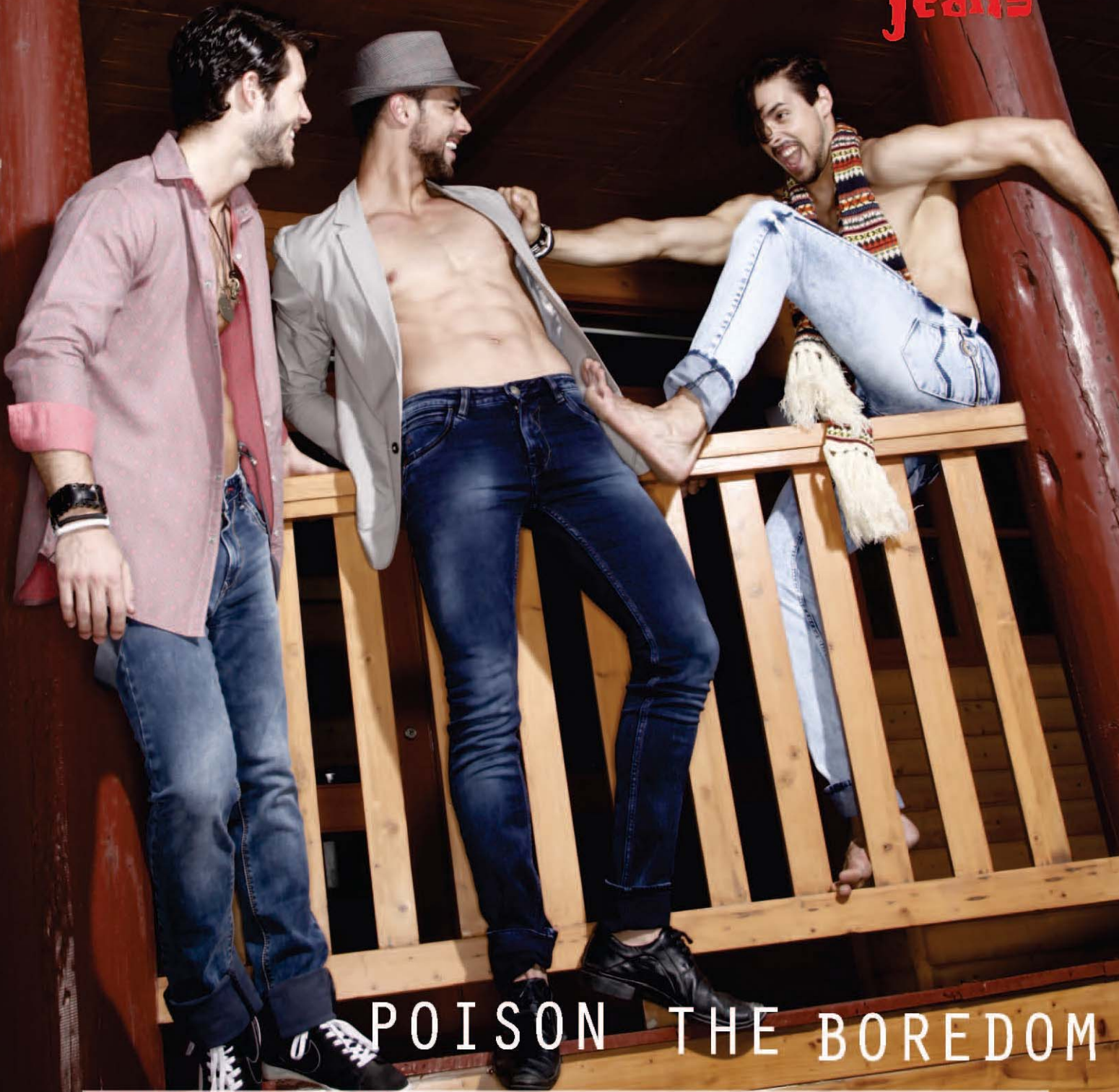
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BRIGADE

Dear friends

The knitwear industry in India is evolving and changing. Knitwear was once considered a sunshine industry due to its stellar role as the leader in exports sector. And while this side has seen its ups and downs, the ever-growing domestic consumption and booming preferences are giving the knitted products a new momentum. The domestic knitwear market is emerging as an extremely lucrative consideration for brands and retailers.

This, the May issue of Images Business of Fashion is dedicated to the study of this very category. As an issue lead, experts from Technopak layout the core facts and stats that outline the size, scale and dimensions of the game. This is followed by expert features on the trends and growth drivers of the Indian knitwear industry. We do a market roundup on the industry with the top brands. Also with the vast evolution that has taken place it was pertinent to study all the key segments individually. These various categories in knitwear are gaining strong individual traction. For one, T-shirts have made a huge impact into the wardrobe of India which once was a country of shirts. The ease of just slipping into a t-shirt, the wider options of pairing a tee with almost anything, and the fashion innovations possible on it, have made it a strong replacement investment. There is also huge interest around active wear and sportswear which is led by the youth. Innerwear ranges are now much more wider. Leggings have turned both Indian and western women's wear

categories on their head. Hybrid categories like loungewear have grown manifold. Winters in India have lost their chill and the winter wear market has had to innovate, but we do invoke some nostalgia as well with a profile of Pringle of Scotland, the first luxury knitwear manufacturer in the world. We also look at other innovations that new-age knitting technology has been spawning. Lots of insights for anyone interested in knitwear.

Also, as promised, in this issue we present a report on the grand India Fashion Forum Exhibition arena which provided a great platform for many major fashion brands, retailers, tech and retail support companies to showcase and grow. The presenters of IFF-Exclusively.com also share their thoughts. IFF 2016 also hosted the annual NIFT alumni meet where the memories, hopes and suggestions flowed freely.

Please don't miss the exclusive interview of fashion legend Venkatesh Rajgopal, CMD, Indian Terrain; and the dynamic Vinay Chatlani, MD and CEO of Soch. There was also lots happening in the retail industry at the beginning of a new financial year. News of the brand launches, store launches, expansions, etc. We bring all the buzz to you.

We hope you enjoy reading the issue.



Amitabh Taneja

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LETTERS TO THE EDITOR

The India Fashion Forum (IFF) has over a period of time become a platform to learn and share knowledge about the industry. I look forward to this event every year and each issue that you write about the event in is worth an archive.

- Ranjit Dutta, Entrepreneur, Ludhiana

The thoughts and ideas of industry stalwarts who shared their views during conferences and workshops in the events were enlightening. I recommend, the issue is a must read to all.

- Bhanu Bhasin, Entrepreneur, Delhi

The columns [slug] in this magazine are amazing. Although it is a b-2-b magazine, yet it is so very easy to understand. The opinions and ideas shared by the industry leaders in Images BoF can be immediately put to action.

- Rahul Khanna, Business Consultant, Agra

Like love knows no boundaries, similarly Images BoF imparts immense knowledge to its readers. The magazine charts new territories with every passing issue. I truly appreciate the content which is very well researched.

- Neha Khan, Shop Owner, Jhajjar

I always enjoy reading the comprehensive editorial coverage in Images BoF, be it any content. The articles and features are always informative and newsworthy for the industry.

- Shikha Nayyar, Retailer, Dehradun

The editorial content in Images BoF never disappoints. It always deals with fresh subjects relevant to the industry. I look forward to each issue for the meaty content. It helps me get a perspective on the fashion industry.

- Sanjeev Sharma, Wholesaler, Kolkata

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FASHION BUSINESS

DEBUT

Cole Han & Heatwave: ASLL is putting its Best Foot Forward

Arvind Sports Lifestyle announces the May 2016 launch of iconic international footwear brands Cole Haan and Heatwave in India.

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STORES

H&M on an Expansion Spree

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Puma opens its 'Forever Faster store' in South Delhi, with its latest performance and sports-style range.

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Myntra's goes Offline

Online fashion portal Myntra in talks to manage local retail chain of Forever 21.

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Triumph's New Logo

Lingerie brand Triumph unveiled its new logo and new brand identity

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EXCLUSIVE

Indian Handloom Brand:

India Handloom Brand (IHB), an initiative of the Ministry of Textiles, Govt. of India, is on a mission to revamp the Indian handloom industry and turn it into a thriving sector.

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FASHION LEADER

AMERICAN FASHION INDIAN SOUL

Venkatesh Rajgopal, CMD, Indian Terrain Fashions Ltd., talks to Images BoF, on his journey as an entrepreneur from the time he shelved a prestigious Civil Services career to blaze an entrepreneurial path.

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INTERNATIONAL

Hidesign firms up its position in US market

Vikas Kapur, CEO, Hidesign America, speaks on his plans and expansions in the US market.

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BEING HUMAN, SPREADS ITS WINGS IN INDIA & OVERSEAS

Being Human Clothing is spreading its wings to countries abroad and its plans to add 30 more stores in India by FY '17.

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Q&A

SOCH MAKES A BIG PUSH TOWARDS BEING A FAST FASHION BRAND

Vinay Chatlani, MD & CEO, Soch, talks on the women's wear market, and on the growth and future prospects of his brand.

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DYNAMIC STRETCH

Images BoF explores Tommy Hilfiger's new and innovative "Denim Stretch" collection.

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109 F launches its new collection by Nishka Lulla

109°F, with fashion designer Nishka Lulla, unveil their new collection, inspired by floral and tribal arts.

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IFF EXHIBITION

The grand India Fashion Forum Exhibition arena provided a prestigious platform for many major fashion brands, retailers, tech and retail support companies to showcase and expand footprints. A report

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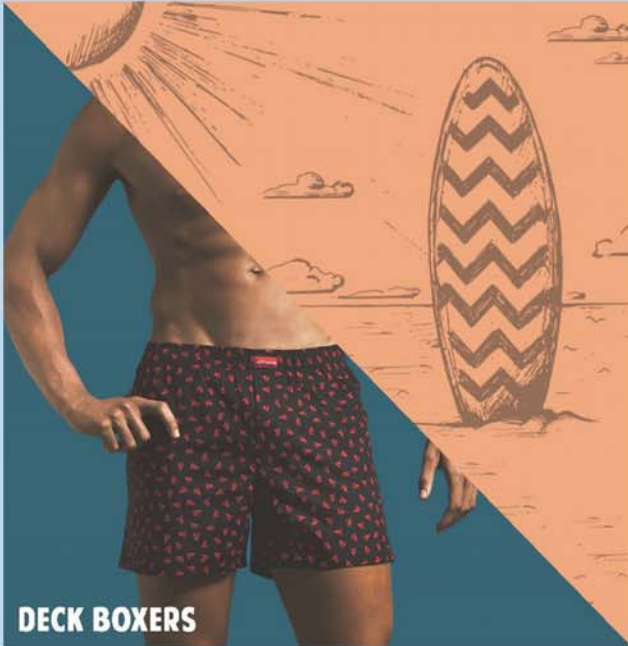
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NIFT- ALUMNI MEET

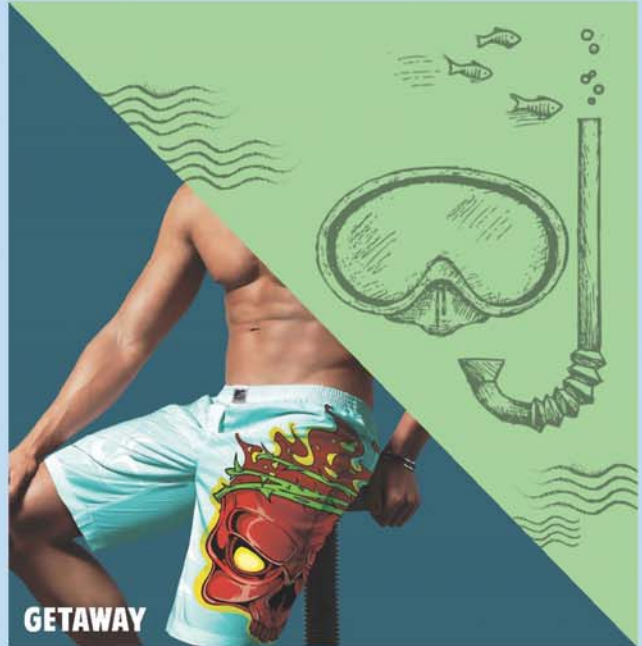
IFF 2016 hosted the NIFT alumni meet, where the faculty members, students and former students interacted enthusiastically.

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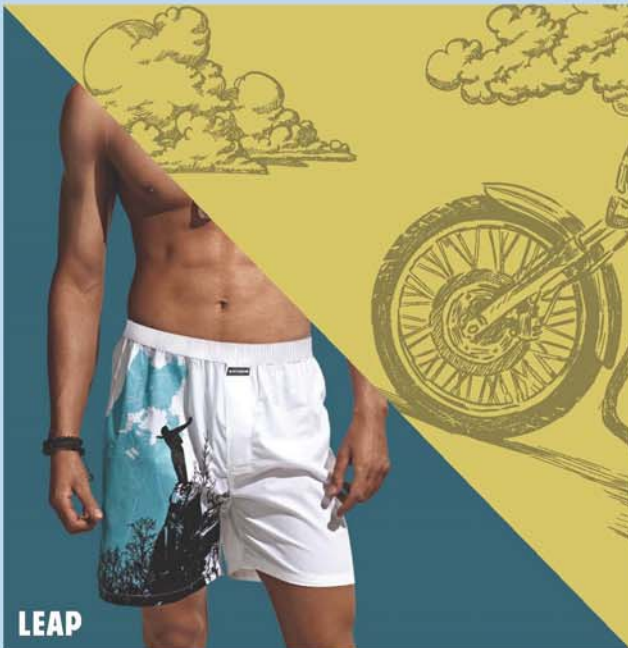
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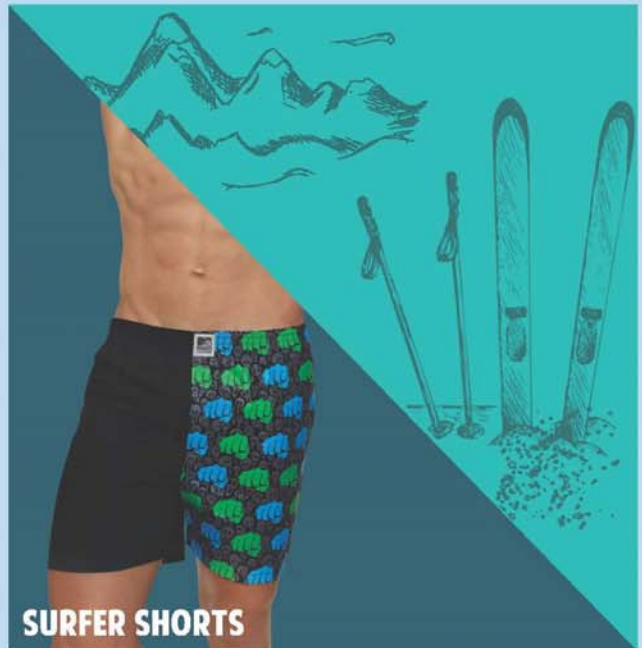
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Men's footwear collection Cole Haan store

PUTTING THE BEST *Foot Forward*

Arvind Sports Lifestyle has announced its tie-up with iconic international footwear brands Cole Haan and Heatwave in India. While Cole Haan is positioned between luxury and premium, Heatwave will feature an affordable range for the style conscious women.

Arvind Sports Lifestyle Ltd., a subsidiary of Arvind Limited, India's lifestyle brands and apparel major with a strong retail footprint, has announced its strategic tie-up and launch plans with two globally well recognised footwear brands - Cole Haan and Heatwave. Both the brands will be launched in India by May 2016.

Cole Haan is an iconic American lifestyle accessories brand and retailer of premium men's, women's and children's footwear and handbags, leather accessories, outerwear and eyewear. Cole Haan stands for its commitment to craftsmanship, timeless style and design innovation. Heatwave is a Singapore based premium women's footwear brand. The brand is dedicated to quality, superior comfort and strong design elements. It has over 50 stores in Singapore, Malaysia, Vietnam, Cambodia, Myanmar, Saudi Arabia and Qatar.



A Heatwave store in Singapore



— Rajiv Mehta
CEO, Arvind Sports Lifestyle Ltd.

“Cole Haan and Heatwave are at the forefront of the footwear industry globally and this tie up will help us establish the lifestyle positioning.”

Market Overview

Footwear is increasingly becoming a part of one's lifestyle and emerging as an important fashion accessory. This lifestyle segment is expected to appeal people who are ingenious, resourceful and want to make a difference. “With increasing disposable income, the love to splurge on premium lifestyle products has turned into a compulsive cosmopolitan culture. Cole Haan and Heatwave are at the forefront of the footwear industry globally and this tie up will help us establish our lifestyle positioning. We're excited to help drive the expansion of these brands into India, thus resulting in the growth of our footwear business,” said Rajiv Mehta, CEO, Arvind Sports Lifestyle Ltd.

Its Position

According to Mehta, the positioning that Cole Haan would enjoy in India would be a sweet spot between luxury and premium, allowing consumers to choose their price points comfortably. “We saw

a real gap in the price points starting at ₹7,000 right up to ₹20,000 and that's what we aim to bridge with Cole Haan. Heatwave will allow the woman of today to stay in vogue with the best in fashion footwear at affordable pricing,” he shared.

The Cole Haan collection will range between ₹7,000 and ₹24,000 while Heatwave footwear will be priced at an affordable range between ₹2,000 to ₹4,500.

The Strategy

As a part of its business strategy, the brands will have stores across major Indian metros. The first Cole Haan store will be launched in Delhi by mid-May followed by stores in Bengaluru, Mumbai and Pune, while Heatwave will open its first few stores in Bengaluru, NCR and Mumbai. The brands will be present only offline currently and will soon reveal e-commerce plans.





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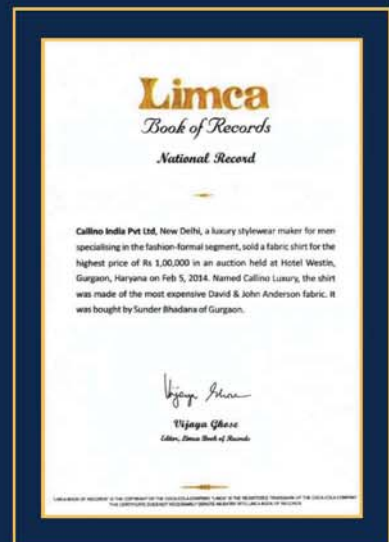
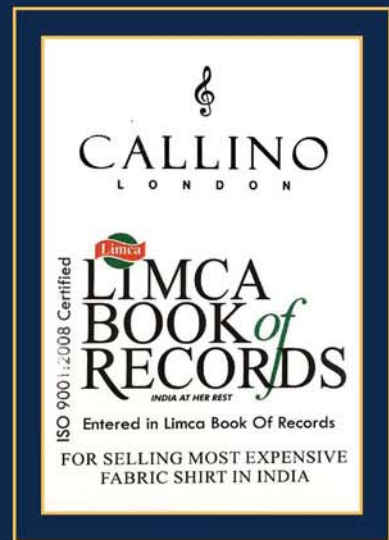
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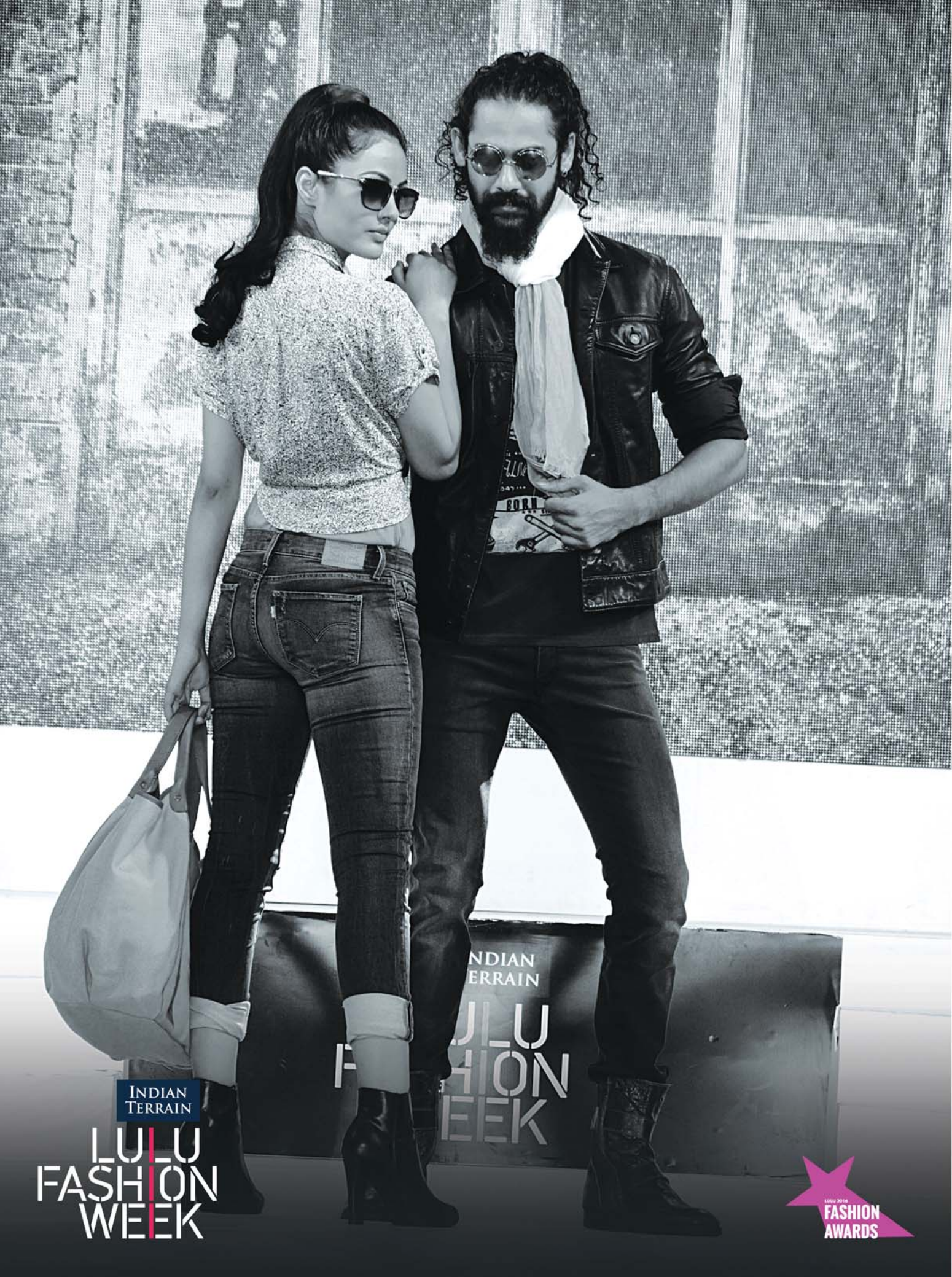
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H&M ON AN EXPANSION SPREE:

LAUNCHES ITS 4,000TH STORE IN NOIDA

Swedish fashion retail giant H&M is on a roll with a 'never-ending' expansion plan, taking the number of stores to 4,000 with the latest one opening in Noida. The store, touted as the biggest H&M outlet in India, was inaugurated by Bollywood Diva Parineeti Chopra, thus helping the brand in attracting a huge crowd and publicity on its opening day.

By Tanya Krishna, Team BoF



Following its Bengaluru launch, Swedish fashion retail giant H&M opened its 4,000th store at the DLF Mall of India in Noida. H&M roped in Bollywood diva Parineeti Chopra and lined up dance performances along with DJ spin-offs, in order to attract millennial crowd toward its fifth store in the country. Over 500 fashion lovers queued up early in the morning to get a glimpse of the diva and be the first to shop the latest collections at H&M. The brand also offered exciting giveaways to those in the queue.

The store is spread over four-levels of prime retail space and covers an area of 37,000 sq.ft. Interestingly, the outlet is located just next to that of GAP's, which is one of the biggest competitors of H&M.



Janne Einola with Parineeti Chopra at store opening



Janne Einola, Joint Country Manager, H&M

This outlet is the company's full-concept flagship store, carrying a complete range of clothing and accessories for women, men, teenagers and children. The flagship store features separate sections for lingerie, H&M Sport, H&M Mama (for expecting mothers) and a plus size collection called H&M+. "This is truly a landmark moment for H&M, to have the 4,000th store launch in India, the biggest flagship that the country has seen yet, at a fantastic location. We are determined to bring a unique fashion experience with every store opening and are confident that our customers will enjoy shopping at the DLF Mall outlet," said Janne Einola, Joint Country Manager, H&M.



"The collection of the store is at par with global collections, reflecting along the ethos of the brand - being fashionable and delivering quality products in a sustainable way," Einola further added.

He also indicated that the brand which is famous for its winter jackets in India, will be foraying into tier - II and - III cities in the days to come. The global e-store of H&M will be launching in seven new markets this year as the brand sees e-commerce as a natural part which goes along with the brick-and-mortar store. The opening of an online store in India is also in the pipeline.

Furthermore, Einola also added that, "H&M will be soon opening its first outlet in Punjab in the North Country Mall, Mohali. It is also looking to open two stores in Mumbai at High Street Phoenix and Phoenix Marketcity."

Entry in India

H&M had launched its first store in India on October 2, 2015 at Select City Walk in South Delhi amid much pomp and celebrations. The store occupies 25,000 sq. ft. area in the mall.

The Swedish retailer clocked more than ₹1.75 crore in sales on the opening day

of its first store in India - almost double of what its largest rival Zara sold on its inaugural day five years ago at the same location. This translates into an average billing of about ₹27,000 every minute during the 11 hours the store was open. And the impact of the opening was such that the consumers spilled over into other stores, with sales for all brands located around H&M soaring that day.

With such success, H&M, known for fashion and quality at the best price in a sustainable way, is on an expansion spree and has plans to open 50 stores in India to tap into the country's growing demand for global fashion labels.

H&M had, in December 2013, received approval from the Foreign Investment Promotion Board to invest ₹720 crore in India, becoming one of the biggest foreign investors in single brand retailing in the country.

India is H&M's 60th global market and the brand is the first overseas firm to enter the country alone after the Government allowed 100 percent foreign direct investment in single-brand retail.

Currently, the Swedish retail giant operates 3,900 stores across 59 countries, generating \$22 billion in revenue. H&M is looking for stores above 25,000 sq.ft. and its expansion strategy is to always open at the best business locations in a city or shopping centre.





PUMA

BRAND: Puma

PROMOTER: Puma Sports India Pvt. Ltd.

LOCATION: G 4, South Extension Part - 1, New Delhi

SIZE OF THE STORE: 4,800 sq.ft.



COLLECTION: The store offers the widest range of Puma's latest performance and sports-style products ranging from lifestyle to football, cricket, golf, running gear and gym wear. Puma selected a special range of products in collaboration with international designers—Alexander McQueen and Chris Stamp, which are made accessible at the store.

STORE THEME: The brand's strong heritage is underlined by a visible footwear wall, a hot spot in the store. To make consumers' experience more enjoyable, the concept offers smooth transition between categories, clearly split by gender.

STORE INTERIOR: The Forever Faster store imbibes Puma's brand ethos, reflected in store design, layout and top-of-the-line product offering. The concept has been designed to showcase and make a statement on the fusion of performance and lifestyle, all united for the passion of sport and to be forever faster. The look and feel is modern, inspirational and sport-focused, highlighting products that resonate, stir emotions, stand out and demand attention.





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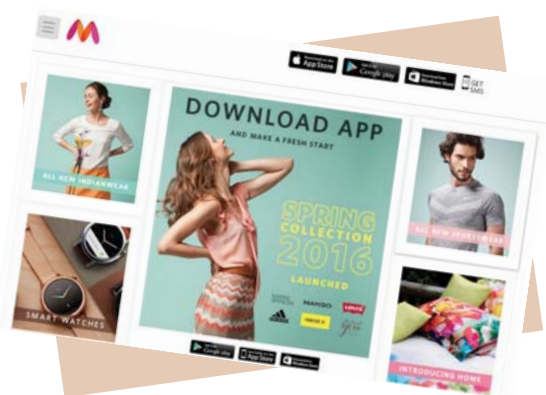
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Myntra goes Offline

To manage Forever 21's retail chain in India



Myntra, one of India's leading online fashion portals, is in talks to manage the local retail chain of Forever 21 in India. Myntra already sells Forever 21's products online in India under an exclusive tie-up. The deal to take over the 10 brick-and-mortar stores – currently managed by a joint venture of Forever 21 and DLF Brands – will mark Myntra's entry into offline retailing.

The reason

Forever 21 wants to exit the joint venture and instead wants to run a franchise operation in India. Myntra will take over and effectively manage the franchise in India, boosting revenue which has been a paltry ₹250 crores a year as compared to Spanish rival Zara's ₹720 crores per annum.

Past experience

The US fashion brand, Forever 21, is targeted at teens and young adults. The brand entered India in 2011 through a franchise route with Dubai-based Sharaf Retail and after the business failed to scale up for two years, the Dubai-based company was forced to close the lone store in New Delhi in early 2013.

After the companies called off their franchise agreement, Forever 21 formed joint venture with DLF Brands and opened 10 stores in Delhi NCR, Mumbai, Pune, Bengaluru, Thane and Hyderabad.

Myntra's plans

Meanwhile, Flipkart-owned online fashion store Myntra is exploring the possibilities of opening its branded offline stores as well. According to the sources close to the development, Myntra had been toying with the idea of having its own brick-and-mortar stores in the past as well.



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Jennifer Kapasi, Shalindra Fernando and the Femina Miss India contestants unveil the new logo

TRIUMPH'S NEW LOGO EMPHASISES ON FEMININITY AND EMPATHY



Lingerie brand, Triumph has unveiled its new logo by signalling a new brand identity that has evolved with exceptional craftsmanship in making lingerie for women since 1886. As an iconic global lingerie brand, Triumph has upgraded its image to stand out in the competitive intimate apparel market, making the brand more enticing for the consumer.

“In determining our vision for the future, we’ve cast an eye over our past; after all, we’re proud to be ‘the maker of lingerie since 1886’ with a reputation for providing outstanding quality and exceptional craftsmanship. So, along with emphasising femininity and empathy, we’ll be referencing our heritage. Communicating the strength of the brand’s heritage in combination with its progressive personality, our beautiful new logo conjures up everything we stand for and where we want to go,” said Shalindra Fernando, General Manager, Triumph International, India and Sri Lanka.

“Sensual without being overtly sexy, feminine, informal and warm with inner drive and strength, our realigned look is rooted in craft, and multifaceted to reflect our extensive range of products for various occasions. Our new logo is influenced by vernacular German handwriting of the 18th century and our logos from the mid-20th century. The flowing and looped bespoke lettering balances warmth, femininity,

fluidity and strength. We believe that our latest promotional photography truly catches each element of our brand personality as we speak woman to woman, capturing realistic aspirations and moments in her life,” said Jennifer Kapasi, Head of Operations, Triumph International (India).

Market Presence in India

Triumph International is one of the world’s largest intimate apparel companies, established in 1886. It enjoys a presence in over 120 countries with the core brands Triumph® and Sloggi®. Globally, the company serves 40,000 wholesale customers and sells its products in 2,000 brand stores as well as via several company owned online shops.

The brand entered India in 2002 and has a strong presence across all sales channels. The distribution in India spans over 75 cities via direct supply having more than 1,000 sale points. The brand is currently present in more than 1,000 points-of-sale across India including leading large format stores, multi-brand outlets and online shopping portals.

In future, the lingerie brand aims to lead the way with even more innovation, beautiful design and perfectly fitting garments.



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Santosh Gangwar, Minister of State for Ministry of Textiles and Kirron Kher, Member of Parliament, BJP at IHB store



Prime Minister, Narendra Modi and Santosh Gangwar, Minister of State for Ministry of Textiles at IHB launch

‘INDIA HANDLOOM’ BRAND: INVIGORATING TRADITIONAL WEAVES OF INDIA

India Handloom Brand (IHB), an initiative of the Ministry of Textiles, Govt. of India, is on a mission to revamp the Indian handloom industry and turn it into a thriving sector. The brand is looking to establish a significant offline and online presence in India and also eyeing the potential of export markets.

By Namita Bhagat

India’s rich and diverse textile heritage continues to exude its age-old charm even today! The textile tradition varies from region to region and finds connoisseurs in India and abroad who admire the craft and value the skill and labour that go into weaving the magic of Banarasi, Kanjeevaram and Kota Doria sarees; or producing a beautiful piece of Chikan, Phulkari, Kashmiri, Kantha or Zardorzi embroidery. Not just women, many a man cannot resist the elegance of Indian cotton, khadi and silk materials when they want to dress up ‘ethnic’.

Handloom is one of the ancient cottage industries in India. Decentralized and largely unorganized, it provides direct employment to a sizeable rural population besides engaging many indirectly. However, over the last few decades, the industry has been struggling due to the influx of a plethora of modern fabrics and mechanization of textile manufacturing. Hand-woven fabric making is a time-intensive process and poor marketing added to its woes. Save for the government patronage, the handloom industry would have vanished into oblivion.

In recent times, the Government of India has taken several measures to put the sector back on track. The launch of India Handloom Brand (IHB) by Ministry of Textiles is one such step which aims to revamp the handloom industry and turn it into a thriving business for all stake holders.



– Alok Kumar,
Development Commissioner (Handlooms)

“The aim of India Handloom Brand is to promote the production of niche handloom products having high quality with traditional as well as contemporary designs, zero defects and zero effect on environment. The government has been making efforts in popularising indigenous products and this provides an ideal platform to showcase and sell the wide array of products.”



The brand story

IHB was launched by Prime Minister Narendra Modi on the occasion of first National Handloom Day on August 7, 2015. The day commemorates the spirit of “Swadeshi” movement started in 1905 during the national freedom movement to resurrect indigenous products and production practices. Earlier in 2006, the government had introduced the “Handloom Mark” scheme to provide assurance to the consumers on authenticity of handloom products, but it did not cover the aspect of quality assurance. However, the India Handloom Brand stands for originality as well as quality of handloom products.

The Office of Development Commissioner for Handlooms has been entrusted with the responsibility to promote and market the IHB products.

Alok Kumar, Development Commissioner (Handlooms), states, “The aim of India Handloom Brand is to promote the production of niche handloom products having high quality with traditional as well as contemporary designs, zero defects and zero effect on environment.” As per him, IHB will differentiate high quality handloom products in the market and assure the consumers by endorsing quality of handloom products in terms of use of 100 percent natural raw material, safe dyes, high level of colour fastness, GI Compliance, other quality parameters and by ensuring social and environmental compliances in their production.

The registration under IHB is granted to certain specified eligible entities in respect of identified product categories which meet prescribed quality standards. The registration process includes stringent testing of samples in government laboratory. “Since October 2015, out of 700+ samples submitted, only 172 registrations in 42 product categories have been granted,” Kumar informs.

The brand has come up with its own website, www.indiahandloombrand.gov.in, to facilitate the handloom producers to register online with IHB. It contains all the information that the producers, retailers and even consumers will find useful.

Unique proposition

The concept of “India Handloom” is to brand the handloom products, which are exclusively catering to the “quality” need of the socio-environmentally conscious consumers. The brand focus is to preserve the sanctity of the traditional hand-woven textiles as it incorporates a more contemporary look to the styling. The collections are made using textiles from different parts of the country to create

>



– Pramod Nagpal,
Managing Director, Central Cottage
Industries Corporation of India Ltd (CCIC)

“We are happy to be a part of India Handloom Brand products. The IHB logo will be an assurance to customer of quality and indigenouness. It is a great initiative by the government to display the hand-woven strengths and sell the original and high quality products made by natural dyes.”

a distinct identity and promote India’s vibrant culture and heritage. Synonymous with comfort, style and fashion, IHB is looking to develop a niche market space for assorted range of quality handloom products targeted especially at the younger consumers.

Product range

IHB offers a variety of handloom products sourced from some of the exotic locations of India. The product range comprises Saree: Balarampuram Cotton, Banaras Brocade Silk, Banarasi Butidar Silk, Baluchari Silk, Jamdani Cotton, Kota Doria, Tancoi Silk, Chanderi, Kancheepuram Silk, Pochhampally and more; Fabrics: Banaras Tancoi Silk, Banaras Cut-Work, Plain Tussar, Ikat, Pochampalli, etc; Salem Silk Dhoti, Kullu Shawl and Pochampalli Bedspreads, etc.

Partners in mission

The Office of Development Commissioner (Handlooms) has partnered with leading retail stores (government, cooperatives and private outlets) to sell India Handloom Brand products. The partner stores will set aside an exclusive area within their premises for

showcasing and selling IHB branded products only. Some of them include: Central Cottage Industries Emporium (owned by Ministry of Textile); Andhra Pradesh State Handloom Weavers Cooperative Society Ltd. (APCO); Maharashtra State Handloom Corporation Ltd. (MSHC), Assam Apex weavers & Artisans Cooperative Federation Ltd. (ARTFED); J&K State Handloom Development Corporation Ltd. (JKSHDC); Bhutti Weavers Co-op. Society Ltd. (BHUTTICO); Telangana State Handicrafts Development Corporation Ltd. (TSHDC); H.P. State Handloom and Handicrafts Development Cooperative Federation Ltd. (Himbunkar), along with well-known private stores like Biba Apparels (Delhi), RMKV Silks (Chennai), Shantalata Silk (Bengaluru), Kalaniketan (Mumbai) among others. Aside brick-and-mortar stores, IHB has also joined hands with some online players.

Creating offline presence

The first ever IHB store was rolled out in March 2016 at Central Industries Cottage Emporium, Janpath, New Delhi. The brand has already entered into agreements for opening of IHB sales counters at 72 retail stores throughout the country, of which four are now operational at Delhi, Bengaluru, Mumbai and Chennai. Significantly, all current four stores are located within the Cottage Emporia.

On association with IHB, Pramod Nagpal, Managing Director, Central Cottage Industries Corporation of India Ltd. (CCIC), says, “We are happy to be a part of India Handloom Brand products. The IHB logo will be an assurance to customer of quality and indigenouness. It is a great initiative by the government to display the hand-woven strengths and sell the original and high quality products made by natural dyes. As the Govt. is taking a number of initiatives to promote weavers, we are committed to provide original and high quality IHB logo products to our customers”.





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Kumar at IHB added, “The store is an excellent retail platform provided by CCIC, exclusive for India Handloom Brand high quality product. The government has been making efforts in popularising indigenous products and this provides an ideal platform to showcase and sell the wide array of products in the textile segment that our country has been producing.”

With rapid expansion underway, several new IHB outlets within the Cottage and other partner stores are expected to start functioning soon.

Leveraging the online

The brand is also leveraging the online route to reach out to customers far and wide. As of now, it has signed up with nine e-commerce portals, viz. Amazon, Craftsvilla, Flipkart, eBay, Weavesmart, Chasingsuns, GoCoop, Gaatha and Sareez.com. These shopping websites will cater to different regions keeping in mind the country’s vastness and scattered nature of handloom industry. They are creating page/link for IHB-approved products as well as Handloom Mark products. The weaver/cooperative agencies are being trained by the partner websites on uploading their products.

In Kumar’s words, the e-commerce initiative allows weavers/agencies to get better price for their IHB products and immediate payment to level of 92 percent of sale price. Most importantly, they are

able to connect with the world and get recognition. The success of the initiative can be assessed from the fact that one of our partner portals was able to register 24 societies covering over 23,000 weavers whilst other has covered 542 weaver/agencies, hosts 9,000 handloom products and achieved around ₹100 lakh sale in the last three months. With the concept gaining wider acceptance as mark of genuinity, several more e-commerce platforms have expressed interest to sell IHB-approved handloom products.

Benefit to weavers

The weavers – the backbone of Indian handloom industry – are socially and economically marginalized. The government has been focusing on encouraging Indian artisans and empowering them. IHB too envisions creating pride of ownership among the weavers as to getting their products registered with it after complying with specification and testing. The premium branding will enable the weavers to use superior quality raw material and make fine quality products and increase their sales and earnings. The IHB logo on the products will help them earn consumer trust for quality. What’s more, the registered users are given assistance for institutional finance, design development, technical assistance under the National Handloom Development Program, as per prescribed guidelines.

Kumar elaborates how the brand works for benefit of the weavers. “The effort is to link the handloom weavers/producers to the best retail stores directly, wherein

their products will be showcased and sold. As such, the weavers will be able to get better rates, get regular and continuous business throughout the year and also make their products available across India. IHB took the first step in this direction by organizing Buyer– Seller meet in Hyderabad early April this year, where 72 suppliers showcased their products and retail stores like CCIC, RMKV, VASANSI, PSR Textile, Radha Silk, Handloom House, etc. and various e-commerce partners participated. ₹70 lakh worth orders were placed in the meet itself apart from 26 business inquiries.”

The strategy is to promote the sales of handloom products by facilitating supply of quality products to consumers and generate repeat sales resulting in better remuneration to handloom weavers. Moreover, the use of e-commerce will help handloom weavers in remote areas to have access to a larger market and fast disposal of their products yielding them better realisation of their produce.

The way forward

According to Kumar, IHB’s endeavour to create linkages between weavers and retail stores and e-commerce portals has begun to fructify. A large number of handloom weavers from across the country have started showing interest in joining the IHB initiative. The brand is now looking to establish a significant countrywide presence via the offline and online channels and would also like to tap the high growth potential of exports markets.



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AMERICAN FASHION INDIAN SOUL

Venkatesh Rajgopal, Chairman and Managing Director, Indian Terrain Fashions Ltd.,

strongly believes that a person's fashion is a statement of his identity. The man behind the uniqueness that underpins the identity of the brand Indian Terrain, Rajgopal shelved a prestigious Civil Services career to trail his entrepreneurial chimera into reality.

The early years...

Born to a family of Civil Servants, Venkatesh Rajgopal, bowed out after ten years of service as an IPS officer in 1988. "The change was purely motivated by a desire to do something on my own," he says, the sparkle in his eyes apparent.

The very same year, he launched Celebrity Fashions Pvt. Ltd., an apparel export firm. "The starting of a small manufacturing unit, making apparel for export happened at a time in the late 80's when apparel export was a large source of foreign exchange earnings for India. It was relatively easy to seek bank loans for starting a small manufacturing unit which led to the setting-up of Celebrity Fashions in the 1989," he reminisces.

"It's never easy to start an enterprise on your own as I didn't really have a business family background. My training was in the civil services where I served in UP for 10 years, though it may not have taught me much about business and it's methods, being in the police definitely taught me the value of team building, the importance of discipline towards achieving any task and facing any adversity. There were several risks which lay in the early years of starting the company. At the start the company, Celebrity Fashions was so small that a small set-back would have led to its closure so being from the brave and disciplined environment of the police services gave me the courage to face such times and gave me the confidence that with hard work I would be able to acquire the necessary skills to run an organization."

Rajgopal was new to the world of business when he started Celebrity Fashions Pvt. Ltd., yet he and his team put in their best, which resulted in strong and steady growth of the company. Soon they were serving international brands like Diesel, Gap and Timberland, along with a few other European brands. From 1989 to 2000 there was rigorous learning about how to run a company, establish a business, and how to build a team of people around to succeed. The company also acquired the necessary institutional skill-set to manufacture world class apparel for the Indian market.



“I want to provide the best international apparel, styling, class and quality to the Indian customer and I want Indian Terrain to be the number one brand of choice for sportswear in the country. I know that we aren’t there yet, we are perhaps at the No. 3 position and racing towards the No. 1 spot. The off-take of Indian Terrain at LFO’s is really good and we are the top 3 sportswear brands across Lifestyle, Shoppers Stop and Central... Indian Terrain is spreading its wings, which in turn motivates me to fulfill perhaps what the Indian customer expects from us and there will always be an attempt to exceed his expectations.”

-Venkatesh Rajagopal,
Chairman & Managing Director, Indian Terrain Fashions Ltd.

The genesis of the brand ...

The move into fashion with a brand name happened in the year 2000, when Indian Terrain was launched. Indian Terrain was a unique brand, and as per Rajgopal, the name was favored as it reflects the company’s provenance.

With the many years put into Celebrity Fashions, Rajgopal also developed a personal sensibility on western clothing, primarily American sportswear so when he started Indian Terrain, his endeavors concentrated around getting this very quintessential DNA into the Indian market. So while mastering retail operations was a bigger challenge, making the necessary product, curating it to suit the Indian market was the easier task for Rajgopal.

The motivation behind the choice, as Rajgopal states, was to provide the best international apparel, styling, class and quality to the Indian customer. “I wanted Indian Terrain to be the best in the country. I know that we aren’t there yet, we are perhaps at the no. 3 position but we are surging forward. The off-take of the brand at large format outlets is really good and we are among the top 3 sportswear brands across Lifestyle, Shoppers Stop and Central,” he says both enthusiastically

and proudly. This is a clear indication that the brand is widely gaining acceptance amongst the Indian consumers. And there is an emotional connect too, as per Rajgopal. “When an Indian customer comes across a range of international apparel that calls itself Indian Terrain, there is an immediate emotional connect and that has been a massive advantage over the years. Indians are exceptionally proud of who they are where they come from and the moment they see something Indian in an international stage, there is an instant connect,” he quips.

The pursuit of excellence...

Clearly Indian Terrain is one of the leading brands of choice in premium casual wear for men today. Indian Terrain’s growth and longevity is clearly due to the laser like focus on the sportswear definition. It has developed on the interpretation of its clothing and underpinning of a great supply chain which makes world class product. Indian Terrain clearly defines its core colours, silhouettes, fabrics and stitch that will best enhance its acceptance. The brand indeed took time to establish itself in the market, but like fine wine it now has matured and reinforced its position as one of the best.

Fundamental to all of this apart from the product focus that Rajgopal speaks about, has been their success at building a great supply chain to support the growth of the brand. As the dapper MD spoke about the intricate details, it was clear that the hard work in decoding and understanding the DNA of what American sportswear means and what that genre of clothing entails, has been aptly supported by the muscling up the company’s functional prowess. The Indian Terrain retail stores are international, distinctive and really stand out as classy places to shop. “When people hear your name, they conjure up a set of impressions that influence how they think and buy. Those thoughts define your brand,” said

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The hard work in decoding and understanding the DNA of what American sportswear means and what that genre of clothing entails, has been aptly supported by the muscling up the company's functional prowess. The Indian Terrain retail stores are international, distinctive and really stand out as classy places to shop.



Venkatesh (Venky) Rajagopal born in a family of Civil Servants, is a first generation entrepreneur. He did his B A Honors in Economics from Sri Ram College of Commerce, New Delhi and a Post Graduate in Master of Arts from Bangalore University and joined the civil services as an IPS officer in the year 1979. He served for 10 years and resigned in 1988, after which he began his career as an entrepreneur. Entered into the business of garment exports. In the same year he started Celebrity Fashions Pvt. Ltd. and took it public in the year 2005. Celebrity Fashions is one of the premier apparel manufacturing company in India catering to leading global brands.

In the year 2000, Venkatesh Rajgopal launched 'Indian Terrain' to cater to the needs of domestic markets. It was listed in the year 2011. Indian Terrain has today grown to be a truly national brand with its presence firmly established across the entire country. The brand is today one of the three top casual wear brands in the country.

- Venkatesh Rajgopal has been associated with the MMA for the last 4 years. He held office as the President in the year 2012-13.
- He was the Co-Chairman of the CII National MSME council in the year 2010-11.
- He joined the YPO-WPO Chennai Chapter in 2005, and is currently the Chapter Chair of WPO Chennai Chapter.
- He was a member of a social organisation called Round Table for 8 years till 1998.
- He was associated in organizing the international conference of Round Tables in 1996, in Chennai in the capacity as Vice-Chairman of the conference.
- He held office in CII-Tamil Nadu, as Chair of the Taskforce on Nurturing Entrepreneurship, in the year 2011-12.
- He is an avid reader a keen cyclist and golfer and is passionate about music.
- He was the captain of the Kodaikanal Golf Club, in the year 2011-12.

V Rajagopal is associated with the following companies:
 Indian Terrain Fashions Ltd: CMD
 Celebrity Fashions Limited: Chairman
 Celebrity Clothing Limited: Director

Rajgopal taking about gaining salience for the brand. The company did enormous amount of advertising and PR to visually promote Indian Terrain. Among other things, the company exchanged huge equity in Indian Terrain for a barter deal for advertising space with the Times of India. The brand also roped in actor Kunal Kapoor as the brand ambassador and advertised extensively for 2 years, in 2005-06 which really helped in increasing the salience of the brand. Today Randeep Hooda is the new face of the brand. The company truly believes that he personifies the brand's core philosophy 'Real Mature Manly Khakhi'.

In hindsight...

Rajgopal explains how his shift from the civil services and journey into the fashion world has been quite liberating. "You don't really have a path to follow; you are the master of your own destiny you know what you want to do and where you want to go and you have set your path to get there."

But then, establishing a brand's salience embroils a concoction of challenges. "But it is also very exciting at the same time comments," he quips. Brand building is not done in one day and it takes a long time to create a brand's reputation. It generally takes years for a brand to be even visible - from people starting to recognize the product for what it is to asking for the product by the brand name. It takes time to achieve this and during the period it's just another commodity being sold in the market. "At earlier stages you need to have the humility to recognize that you are yet not a brand, there is a lot which goes into making your brand, it's not just about you announcing it. It's about the consistency of your product, the relevance of your product how cool the product is in terms of design and colour," Rajgopal adds.

With a turnover of around ₹500 Crores, the company today retails across the country through more than 700+ Multi Brand Outlets, 130+ doors of Large Format Stores, 100+ Exclusive Brand Outlets as well as being available through online stores.



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HIDESIGN

FIRMS UP IT'S POSITION IN US MARKET



Vikas Kapur,
CEO, Hidesign America

“In year two, we expect to double growth with large increases in sales in the early years as we expand our footprint and bring in additional product categories.”

Images BoF team spoke to Vikas Kapur, CEO, Hidesign America to find out more about this intriguing brand and its planning and expansion in the US market.

By Gurbir Singh Gulati

Hidesign has been crafting original leather goods since 1978. As a brand, it has its own natural character and personality and is predominantly known for its selection of accessories for men and women, which are not only creative but also depicts the passion behind it. Moving ahead in the progress chart, the company had launched Hidesign America in December 2014 to diversify and build the brand outside India. In the US, the brand primarily sells through independent retailers and online channels. It entered this market with men's product range and is now in the process of expanding the women's collection as well. The brand has positioned itself as an exclusive brand, specializing in products that are made of vegetable tanned leathers, and solid brass metal hardware.

EXCERPTS FROM THE INTERVIEW

You have announced your retail expansion plans in US. Kindly share this strategic expansion in setting up business in this country and future road mapping?

Vikas Kapur (VK): Our online store (www.hidesignamerica.com) is just a small fraction of the overall USA business plan. It's a way for us to interact directly with the US customers and educate the customers a little bit more about the brand. The ideal next step would be to make an entry into the department stores and continued growth at high-end independent stores.

We want to educate people and tell them about our expansion and brand story. As part of the strategy, we will be exhibiting at the Travel Goods

Association trade show in Las Vegas, where we will display our product range and use it as a platform to showcase our latest collections.

We want to target the Indian-American community, many of who are aware of the brand but need to be informed that Hidesign is now also available in the US.

What has been the main competitive advantage of Hidesign America against other international competitors in the market today?

VK: It is the quality of the product. It is very hard to find a vegetable tanned top grain leather bag with a great contemporary design at a reasonable price.





What is the market presence that you are targeting in terms of setting up EBOs, MBOs and presence in LFS in US?

VK: Ideally, we would now like to enter into department stores and high-end independent stores in the USA. We have a presence in department stores in the UK, Australia and South Africa but not in the US. These are highly competitive spaces and they are generally looking for very well-established brands. We are not necessarily eyeing any particular region here, although we are planning to target the larger cities in the USA, as the product fits that customer base more. We expect to partner with distributors in at least 3 new markets in 2016.

Which are the town and cities, the brand Hidesign America is planning to target in the next couple of years?

VK: We do believe that our men's product is better suited to large cities on the East Coast of the US with significant corporate cultures such as New York and Boston. Texas is also a huge market, and there is still a great appreciation for high quality leather.

Tell us about your complete product portfolio which you are displaying for the US market.

VK: We have about 180 active SKUs. Most of the product is men's bags such as city bags, messengers, briefcases and zip top work bags and duffels. We are increasing the women's handbags range. And we have a good range of wallets. We are now introducing women's wallets and we will soon be introducing RFID blocking men's wallets. These are wallets with a material inside, which prevents someone with a RFID reader from gaining access to the information inside your wallet such as the information on your credit card or ID.

Technology is the backbone of every company and its processes. How is your company gearing up for the same?

VK: We incorporate technology in lots of different areas within our business. We are constantly making improvements in our tannery where for instance, we have a very sophisticated facility to treat and clean any pollutants used during the tanning process. Our manufacturing is also adopting the latest global standards. And in our retail stores, we have a fast growing loyalty and gift card program powered by the best company in the business, QwikSilver.

Tell us about the customer engagement with you brand. Do you have a loyalty program in place?

VK: Yes, we have a strong and growing loyalty program. In addition to our formal loyalty program, we see huge customer engagement for some of the events, competitions and campaigns we work on. For instance, every year, we host an event called The Art of Reuse where we provide our customers with scrap material from our manufacturing units (leather, metal hardware, tools) and they created beautiful leather products. The products are then posted on our facebook page and our 8,50,000 facebook fans from all over the world vote for their favourites. The purpose of the campaign is to promote recycling and reusing of material, but it is also a brilliant way to communicate with our customers offline and online.

Share specific details on marketing/promotions strategies.

VK: Our marketing is really focused on building brand awareness and customer loyalty. We want our customers to relate personally to the brand, and to understand what Hidesign as a brand, believes in. I think our customers can expect more events and brand building exercises in the future. Apart from building brand awareness in the past 4 years, we have started to cautiously participate in end of season sale events.

Tell us about the American trends and demands for handbag and the perception of Indian brands.

VK: The American design sensibility is quite different, and Hidesign as a brand is not really doing enough to design for the US market. This is an area where we need to work harder. One of the most popular women's bag styles here is a large tote, with no inside compartments. We have found these bags difficult to sell in India. Indian women want lots of compartments and want the bag to have a zipper closure. In the US, men often like a more casual look, and there is lot more canvas in the product.





BEING HUMAN: SPREADS ITS WINGS IN INDIA AND ABROAD

Being Human Clothing, since its very inception four years ago, has been working on expanding its reach to more than 15 countries. Presently, the brand has 50 exclusive stores in India alone and has plans to add 30 more stores by FY '17.

Being Human Clothing, the clothing line with a heart, has been successful in making a strong hold all over the country with its massive presence in the past four years. The brand received tremendous support from its customers in every city it has embarked in. It closed FY '16 with 51 exclusive stores in India including one in Nepal. Currently, Being Human Clothing has vastly expanded its presence across the length and breadth of the country, having a footprint in 35 cities with a total retail size of approximately 66,181 sq.ft.

Kunal Mehta, VP-Marketing and Business Development, Being Human Clothing, said, "We are thrilled to have reached a milestone of 51 exclusive stores and overall 350 point-of-sales in just four years of inception. It is overwhelming to see such a great response not only from our customers, but also our partners who have supported the brand to reach maximum pincodes in the country. We are looking forward to continue to share our love in newer markets."



“We are proud to announce that we are available in more than 15 countries and across 500 and more point-of-sales. We are focused on enhancing Being Human’s presence not only locally but also internationally by tapping new markets this year. Our aim is to make Being Human a global fashion brand that every individual can connect with.”

—Manish Mandhana,
Director, Mandhana Retail Ventures Ltd.

REGION	STATE	CITY
North	Delhi NCR	New Delhi, Noida, Gurgaon
	Punjab	Ambala, Amritsar, Bathinda, Chandigarh, Ludhiana, Mohali, Jalandhar
	Uttar Pradesh	Allahabad, Aligarh, Kanpur, Lucknow, Varanasi
East	West Bengal	Kolkata
Central	Madhya Pradesh	Bhopal, Jabalpur
South	Andhra Pradesh	Hyderabad, Vijayawada
	Karnataka	Bengaluru
	Kerala	Kochi
West	Gujarat	Ahmedabad, Rajkot, Surat, Vadodara
	Maharashtra	Mumbai, Nagpur, Pune, Thane, Kolhapur
	Rajasthan	Jaipur, Kota, Udaipur
International	Nepal	

MARKET PRESENCE

Being Human Clothing is selling through more than 200 point-of-sales in India through major retail partners such as Central, Jade Blue, Globus, Lifestyle, Shoppers Stop, Splash and Westside and is available across 150 multi-brand-outlets across India. Additionally, the brand is available with the top e-commerce partners in India such as Abof, Amazon, Flipkart, Koovs, Jabong, Myntra and Snapdeal.

In France, Being Human Clothing is sold in approximately 50 selling points and its European website delivers to 14 countries worldwide. In the Middle East, the brand is sold in seven countries with 130 selling points. Likewise, the brand is sold in South Africa with its e-commerce partner Zando.

ITS GENESIS

Being Human Clothing was launched in France in 2012, and has since seen a widespread global growth. With 500 point-of-sales worldwide, the brand is available in over 15 countries across Europe, Middle East, Nepal and India and with its online sales channel set up in Europe, India, Middle East, UK, USA and South Africa.

DEMERGING ITS WAY

Until now, the brand was operating as a retail division of Mandhana Retail Ventures Ltd. (MRVL), the flagship

company of Mandhana Industries Ltd. Henceforth, from FY '16, MRVL has been demerged from Mandhana Industries and now the business vests with MRVL, who will manufacture, retail and distribute the brand.

MOVING AHEAD

The brand plans to take the number of stores to 80 by the end of FY 16-17. Similarly, amongst its global expansion plans, Being Human Clothing launched its first exclusive store in Bordeaux, France in March 2016 along with stores at the Selfridges in London, Birmingham and Manchester, as well as on their online channel with the brand’s AW’16 Collection in July 2016. The brand is all set to launch its official e-commerce website for USA after having its e-commerce presence in Europe and United Kingdom.

Talking about the global expansion plan, Manish Mandhana, Director, Mandhana Retail Ventures Ltd. shared, “We are proud to announce that we are available in more than 15 countries across 500 and more point-of-sales. We are focused on enhancing Being Human’s presence not only locally, but also internationally by tapping new markets this year. Our aim is to make Being Human a global fashion brand that every individual can connect with.”





soch

MAKES A BIG PUSH TOWARDS BEING A FAST FASHION BRAND

Vinay Chatlani, Managing Director & CEO, Soch, shares his insights on the women's wear market in India and the growth and future prospects of his brand Soch.

By Gurbir Singh Gulati

The Indian women's ethnic wear industry has taken great strides over the past few years. Moreover, with changing lifestyle, rise in the number of working women, rapid urbanisation and increasing awareness, the category holds a strong future. Today there are brands in the category that need no introduction. One such popular and successful name is Soch. The company started as an in-house brand of Favourite Shop in 2002. It's journey as an independent retail brand began in February 2005 with the launch of its first exclusive outlet in Forum Mall in Bengaluru. The family has been in the retail industry for over 60 years with its third generation now working at the firm. Today, it boasts of 65 stores operating across India and has a fully integrated online store - www.sochstudio.com.

From being a pure ethnic player in the initial days, Soch has today transformed into a stylish designer brand that retails fusion products such as readymade cocktail blouses, tunics, kurti suits and palazzos apart from traditional staples such as salwar kameez, churidar, kurtis, and sarees at affordable prices. The focus at Soch is on providing consumers with a wide variety of high quality designer products at affordable prices.





Vinay Chatlani,
Managing Director & CEO, Soch

“Soch as a brand, does not believe in fashion seasons like spring/summer or autumn/winter. As is the case for the rest of the year, we will be constantly launching new designs and collections throughout the summer months. However, to give you an indication, this summer, we will be focusing on brighter hues with vibrant prints, light breathable fabrics and comfortable cuts that suit all body types.”

Tell us about your company philosophy and the USP of your brand. What makes Soch different from any other ethnic wear brand in the market today?

VC: Quality, service and a wide selection of merchandise has always been a cornerstone of our brand’s success. In addition to these core values, we pride ourselves on being an innovative brand. We were the first brand to introduce product catalogues to enhance our customer’s shopping experience. We also recently introduced a new product concept called kurta suits. These are just a few examples of our innovation as well as our response to consumer patterns and ability to be at the forefront of changes in the industry.

Being a fast fashion brand, Soch doesn’t believe in traditional seasons like spring/summer or autumn/winter. Keeping with the ever changing fashion trends, we launch fresh collections every 15-20 days in the major ethnic product categories. The speed and frequency with which we



introduce new products coupled with our incredible value for money, plays a critical role in differentiating us from other brands in the market.

Tell us about your product basket and its core items.

VC: Soch offers a wide range of ethnic wear products that enable our customers to shop with us, when looking for anything from casual wear to occasion wear. The designs and styles available at Soch ranges from traditional ethnic wear to contemporary fusion. While we pride ourselves on the width of our product categories, we have no core products as such. However, our top three selling product categories are kurtis, sarees and kurta suits.

Share your product expansion plans.

VC: Indian women are growing increasingly fashion conscious and this has led to brands focusing on ethnic fusion wear to capitalise on this trend. We have launched our first range of readymade cocktail blouses and fusion kurta suits last year. We are also planning to introduce accessories, lehengas and ghagra cholis in the near future.

Do you have plans to launch a face or celebrity clothing line to boost your product portfolio?

VC: No, as of now, we do not have any plans to launch a face or celebrity clothing line to boost our product portfolio.

Do you also wish to tie-up with designers and create collections for your discerning customers?

VC: No, we do not currently have any plans to collaborate with any designers. Our in-house team conceptualises all our designs and collections.

What has been your current retail mapping through your EBOs and the cities in which you are present?

VC: Today, Soch has 63 EBOs. Our current pan India presence comprises of 65 stores operating across India at convenient

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locations in 21 cities across 9 different states such as Bengaluru, Mysore, Mangalore, Hubli, Chennai, Coimbatore, Cochin, Hyderabad, Mumbai, Thane, Pune, Kolhapur, Vijayawada, Lucknow, Indore, Bhopal, Belgaum, Visakhapatnam, Dharwad and Gulbarga. In addition to further expansion is the South and West, we're looking at expanding our geographical presence to the North and East. Over the next 2 years, we plan to enter and open at least 15 stores in Delhi, NCR and Kolkata alone.

What has been your progress through online retail?

VC: Soch has been in the e-commerce space for some time now. We have a fully integrated online store that offers services like 'click-and- collect', where online buyers can pick up products from stores. The website allows customers to exchange their online purchases at our physical stores and get alternations done. This service will continue even on the new e-commerce site which will be a focus area for the brand in the future.

Also, we will be servicing overseas orders shortly. This will expand our customer base immensely. We have been present on most marketplace portals and have seen great traction on the same. Connecting the online and offline space is something that we are constantly working on.

We have also heard that you are in the process of some more innovative sales touch points; what are they and how are they being planned?

VC: To strengthen our relationship with our digital age customers, we have now installed video walls across our stores to digitise our catalogues. Designs and styles from the latest catalogues and trends are shot to create these video catalogues. These videos have been integrated with our ERP system to ensure that only merchandise that is available in the store is played on the video walls. This helps customers to visualize the merchandise available and make informed buying choices. We are the first ethnic wear brand in India to start video cataloguing of our merchandise.

We will soon be providing tablets to our customers with a wide range of merchandise that is available at the store. This way, they can browse through and choose the pieces they want to see or try on. We are also working on developing a mobile application which will help us to provide our customers with superior service and experience.

Are you looking at export markets outside India? Kindly share your plans in detail.

VC: We do intend to go international in the near future. Currently, we are exploring various international markets and plan to open our first international store in the next financial year.

Which are the new cities or towns you are planning to target in future?

VC: In addition to expanding our brand into the East and North in primary cities such as Delhi and Kolkata, we are also looking at several other tier II cities across

IMPORTANT MILESTONES ACHIEVED BY SOCH

- **2002:** The Soch label is launched as an in-house brand of Favourite Shop
- **2005:** Soch rides the success it has enjoyed as an in-house label and launches its first EBO at Forum Mall, Bengaluru
- **2012:** Soch introduces its first range of Catalogue collections
- **2012-13:** Soch achieves annual revenue of over ₹100 crore
- **2013-14:** Soch starts its online sales presence by launching its own website and partnering with Flipkart and Fashionara
- **2014-15:** Soch opens its 50th store
- **2015-16:** Soch achieves annual revenue of over ₹250 crore
- **2015-16:** Soch starts its digital initiative with its video cataloguing

the country.

What are your future expansion and growth plan for your brand?

VC: We intend to open 35-40 more stores by the end of 2016. Soch will be a 350 crore plus brand by 2017.

Tell us about some out of the box retail and marketing strategies and plans for brand building.

VC: Apart from traditional media such as outdoor, print, radio, in-mall branding and promotion, we are also in touch with our customers through personal direct e-mailers. We have entered the social media space a couple of years ago and now have over four lakh followers on facebook. Realising that it's important to reach out to the newgen customers through the web, we are active on Pinterest and are soon coming up with a personal blog page and also plan to connect with our younger consumers through instagram.

We are also investing a lot into the audio visual space, which is evident in our video catalogue initiative. This content can further be leveraged into numerous media forms. We are also working on innovative pop up store concepts, large LED installations at high traffic areas, innovative influencer marketing techniques, and even some viral marketing ideas.





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actors. And second home
to this architect turned
actor.

SANA

"Be natural!" she says.
She makes remedies for
skincare. And isn't
afraid of following only
what she loves.



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WOMEN'S WEAR MARKET: BOOSTING THE ECONOMY OF INDIA



KEY FACTS

- Soch achieved annual revenue of over ₹250 crore in 2015-16.
- The brand starts its digital initiative with its video cataloguing in 2015-16.
- Planning to introduce accessories, lehengas and ghagra cholis in the near future.
- Soch has 63 EBOs. The company has 65 stores operating across India at convenient locations in 21 cities across 9 different states.
- The brand is looking at expanding its geographical presence to the North and East.
- Over the next 2 years, they plan to enter and open at least 15 stores in Delhi, NCR and Kolkata alone.
- The company intends to go international in the near future.
- Soch plans to open 35-40 more stores by the end of 2016.
- Soch aspires to be a ₹350 crore-plus brand by 2017.

Tell us about the women's wear market in India.

The Indian women's wear market is going through a very exciting phase right now. With the increase in the disposable income of people, and the growth of the influencers through media and internet, people's tastes have evolved and demands have increased. Unlike in the past, where ethnic wear was restricted to being an apparel of choice to the specific segment, it has now transitioned itself into a fashion essential. Today's customer is more seasoned in her requirement. She demands fresh prints, modern and flattering cuts, elegant designs and over practical dress concepts. Clothes today have become a statement. You are what you wear and hence people want to wear the best that they can afford. In the recent years, the entry of brands has infused a new life into the ethnic wear sector. The organized retail sector is now beginning to see penetration not just in the metros but also in the smaller cities and towns. Smaller towns that didn't have easy access to branded apparel are now ordering them in numbers through various e-commerce portals.

Could you throw some light on the size of the women's ethnic wear market in India? By what rate do you think it is growing? What's your market share?

The ethnic wear market in India, being an unorganized segment, has grown leaps and bounds in the last couple of years. Over 85 percent of the industry is contributed by the women's wear segment which is at an estimated ₹54.425 crores, of which the organized ethnic wear market share is miniscule with majority of the segment being unorganized. Consumers earlier treated ethnic wear as occasion wear, but now that's changing as most women prefer to wear ethnic even to work. This change started first in the metros but now can be seen even in tier II cities. The women's ethnic wear segment has grown steadily by 8 percent over the last couple of years.

Tell us about the key growth drivers in the western women's segment in the next 3 years.

A number of factors such as rapid



urbanisation, higher disposable incomes, ever changing consumer demands and easy access to branded garments are some of the key growth drivers in the western women's wear segment. The entry of various international brands will also contribute to growth of the industry.

Do you feel women in India are making a shift from tailored clothing to ready to wear?

Yes, there is a shift from tailored clothing to ready to wear which is growing at a steady pace in India. This growth can be attributed to widely available ready to wear garments, rapid urbanisation, global exposure and changing consumer demands.

In your business sphere, how do you position your brand vis-a-vis other industry brands?

Over the past few years, Soch has perfected the art of offering the best merchandise, widest range, good quality and affordable prices to its customers. We focus primarily on delighting each and every customer. Our USP is fast fashion philosophy and wide range of products and designs. Hence, our percentage of loyal customers and repeat buys are very high. Being around other ethnic players is actually advantageous because this allows our customer to truly appreciate the quality and value of the products that we offer them.

As closing remarks, what are the two aspects of business in which you believe a new brand should invest resources?

Investing in talent acquisition and strong supply change management.



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'Dynamic Stretch'

by Tommy Hilfiger
Denim

Internationally renowned American designer fashion brand, **Tommy Hilfiger** launches Dynamic Stretch by Tommy Hilfiger Denim. The new collection presents the new Dynamic Stretch denim for men and women.



The Innovation

The innovative fabric has an 80 percent stretch factor and a high-recovery finish, ensuring it retains its second-skin fit without losing elasticity — even after prolonged wears. The super-stretch fabric uses a high content of elastane to provide an incredible ease of motion and superior comfort, without losing its authentic denim look. It is supportive without being restrictive and allows for effortless movability.

The Collection

The Dynamic Stretch women's collection includes a skinny silhouette in low, mid, high and ultra-high-rise options in a variety of washes and rinses. The palette features light, mid and dark denim; black, white, pale blue and royal blue, while select styles feature destructed finishes and bleached whisker details.

The men's Dynamic Stretch collection features a super-stretch skinny silhouette and a slim silhouette in washed gray-black, rinse-washed black and vintage light, mid and dark blues. Select styles are finished with random bleaching, 3D whiskers and scraped hemlines.

Price Range & Availability

The Dynamic Stretch Denim collection will be available at select Tommy Hilfiger stores across India. The collection is priced at ₹5,999 for women and ₹8,999 for men.





Actress Athiya Shetty and Designer Nishka Lulla with models in 109° F's new collection

109° F LAUNCHES ITS NEW COLLECTION BY NISHKA LULLA

Women's wear fashion label, 109° F with fashion designer Nishka Lulla, unveiled the brand's new collection at Tote on the Turf in Mumbai. The collection design is inspired by floral and tribal arts, and reflects the bohemian mood of the urban girl who is passionate and fuss-free.

Ideal for every young woman with streaks of irreverence hot-stamped into her DNA, the styles can be identified by young women all over. The splashes of neon reflect their fun, non-conformist side and inspire the free-spirited women to flaunt their true colours. The collection would be in stores in the first week of April in Mumbai, Delhi, Bengaluru, Kolkata, Hyderabad and Pune. The price ranges from ₹1,800-₹3,500.

Speaking about the association, Rahul Mehta, Managing Director, 109° F, said, "This is one of our most exciting new collections and it's truly global in its aesthetic. It gives you a fresh burst of confidence and energy."

Designer Nishka Lulla shared, "I am so glad to collaborate with 109° F. I think it's a great fit as the focus of the brand is comfort and style which compliments my sensibilities as a designer."

109° F is a high-street, new age fashion brand that brings finely-crafted designs for the urban Indian woman.





IFF 2016 EXHIBITION: **THE FUTURE OF FASHION ON VIEW**

One of the key parts of the 16th edition of India Fashion Forum 2016, presented by Exclusively.com, was the grand India Fashion Forum Exhibition Arena. IFF has always been the place for all major Indian and international fashion brands and retailers to showcase and expand footprints in India. Over the years, IFF has played host to many a top global brand launch. The annual congregation of top retailers also attracts a host of exhibitors who wish to connect with and reach out to them. Organised from March 15-16, IFF'16 witnessed an overwhelming response of players in core and support functions and created some truly new-age and engaging fashion business displays.

The new IFF format based on the 7 agents of change, facilitated a new dimension of change with Technology and Retail Support truly coming into the fore, and empowering very focused and targeted networking. This year saw the participation in the exhibition being led by this new brigade. Surely, technological empowerment and moving into the omni-channel era was a key concern for all players. However, as a brand growth and showcase destination; and with retail brands hosting bigger and more glamorous stalls, the brands continued to occupy the largest space share. The trends for the future were surely established by this year's IFF fashion exhibition.



Fashion

As every year, the fashion and footwear brands were at full strength at the India Fashion Forum Exhibition. Apart from the brands featured below, a lot of brands had participated in the India Brand Show which include brands like Adidas, Celio, ID, Jack & Jones, Vero Moda, Only, Lee Cooper, Pepe Jeans, Provogue Shoes, Skechers, Raymond, Tommy Hilfiger and Vitamins. Skechers and Latin Quarters had additionally also put up innovative branding display. We had sponsored the hostess's costumes and undertaken #UNUSUALS branding on chairs and also secret gifting exercises. Pearl Academy of Fashion also facilitated the attendance of its students at the conference.



"IFF 2016 has been one of its kind platform that brings about wholesome and rich experiences and learning under one roof."

-Sanjeev Rao,
Director- Business Development, Raymond Limited

"IFF, provided us a good platform to meet people from the industry, like distributors, etc., that can help us realize our goal. It is a good platform for B2B relationships."

-Ojas Nishar,
Director, Vitamins Kids

"Tommy Hilfiger has, over the years, been using IFF as a platform to showcase something new to display. The highlight for this season was our inner and lounge wear collection, for which Rafael Nadal is the brand ambassador. Our experience at IFF has always been exciting."

- Shailesh Chaturvedi,
CEO, Tommy Hilfiger India

Benetton

Benetton Group has presence in the most important markets of the world with a network of around 5,000 stores. With a wide retail presence of 600+ EBOs and 5,000+ MBOs across the country, Benetton also retails through various e-commerce portals. Benetton clothing offers a universally recognized style encompassing design, taste, a sense of history and beauty, which reflect the Italian style of the brand. Benetton displayed a vibrant range of clothes for men, women and kids from its latest Spring/Summer 2016 collection at IFF. The brand brought summer hues to the stall with vibrant lighting and artificial flower linings. The brand is betting on tropical theme with prints, blocks and cubical shapes and showcased the same at IFF'16.

Raymond

The Raymond Group has transformed from being an Indian textile major to a global conglomerate within few years. Raymonds has some of the leading brands and services in its portfolio including Raymond Ready-to-Wear, Raymond Made to Measure, Park Avenue, Parx & ColorPlus, etc. It has one of the largest exclusive retail networks in the textile and fashion space in India - The Raymond Shop. Raymond retails through over 700 exclusive stores in India and 39 outlets overseas in the Middle East, Saudi Arabia, Sri Lanka and Bangladesh. The brand is also present in a number of large format stores. It also caters to its online customers through e-commerce websites.

For the coming season, Raymond is planning to concentrate on their "Ready to Wear" collection including - blazers, trousers, etc. At IFF'16, Raymonds showcased products on this very line and its stall wore a very classy and formal look, establishing the ethos of the brand.

Vitamins Kids

Sangam Dresses Pvt. Ltd. launched Vitamins in 2000, a lifestyle clothing brand for kids of 1- 16 years. The brand has recently opened a flagship store in Thane and also retails through all major fashion stores across the country. Vitamins also sells through many large format stores and various e-commerce portals. Vitamins showcased its latest Summer/Spring collection for little boys and girls, at the IFF'16.

Tommy Hilfiger

Tommy Hilfiger, one of the world's leading designer lifestyle brands, is internationally recognized for celebrating the essence of classic American cool style, featuring preppy with a twist designs. Tommy Hilfiger delivers premium styling, quality and value to consumers with a breadth of collections including men's, women's and children's sportswear, denim, accessories and footwear. The product basket of the brand consists of apparel and accessories for men, women and kids.



"Woolmark is proud to be a part of IFF. We look forward to collaborate with bigger brands to bring in innovations in wool market and introduce them to the consumers. Indian market is opening up to wool and bigger players like Raymond are readily experimenting with wool. We are now concentrating on introducing fine wool fabrics which can also be called as smart fabric."

-Arti Gudal,
Country Manager, The Woolmark Company

"IFF is a great platform to exhibit and showcase your new brands and collections, where we get to meet key personalities from brands, modern retail and media. Although the setup, timing and ambience was good, the footfall was lower in comparison to 2015."

-Varun Sharma,
Manager-Marketing & Branding, Torero Corporation Pvt. Ltd.

"IFF was a great platform for a new brand like ours to be seen in the same space as other established brands. It is always good to interact with stalwarts from the same industry. IFF also helped us interact with the general public. All seminars at the IFF, were insightful and interactive."

-Pranal Modani,
Chief - Business Development, Sangam India Ltd.

"We exhibit at IFF to build more contacts, for networking with various vendors, and to know about consumer satisfaction with Puma products."

-Abhishek Ganguly,
Managing Director, Puma

The Woolmark Company

The Woolmark Company promotes Australian Merino Wool as the ultimate natural fibre and premier ingredient in luxury apparel. It is a subsidiary of Australian Wool Innovation, a not-for-profit enterprise, owned by more than 24,000 wool growers, that invest in research, development and marketing along with the worldwide supply chain for Australian wool. The Woolmark Company showcased new trends in Sports and Fashion at IFF'16, through The Wool Lab and through the innovations in Wool by different manufacturers and brands under the "Wool Gets Casual" theme.

Torero

Torero Corporation is a leader in leather accessories & shoes and is the exclusive global licensee of multiple global brands such as CROSS, Swarovski IB, Victorio & Lucchino, Torero, Police, Cosmopolitan, amongst others.

The company retails through more than 500 MBOs in India. The Torero products are also available in many large format stores and caters to its online customers through its own website and Amazon. Torero aims to cash in on the growing scope of leather products in the Indian market. Torero recently introduced Police in India. With this label, they want to reach out to people and make leather products a part of their everyday life.

Sangam India Ltd.

The brand C9 of Sangam India Ltd., represents a new wave of seamless wear, in keeping with the needs and lifestyle of today's women. The group has an extensive domestic presence and also has been exporting to more than 50 countries. The company exhibited its Spring/ Summer collection of fashion wear, active wear and inner wear at IFF'16.

Puma

Puma is known for producing athletic and casual footwear, as well as sportswear for the athletes. The brand engages with renowned design brands such as Alexander McQueen and Mihara Yasuhiro to bring innovative and fast designs to the sports world. Puma has created famous sneaker styles such as the Suede, El Rey, Roma, Clyde, Mostro, Speed Cat, Basket, Disc Blaze, GV Special and Trinomic range - as well as icons-to-be like Sport Lite styles and, for women, oh-so-cool sneaker wedges and ballet flats. The company distributes its products in more than 120 countries.

Puma exhibited its IGNITE collection and other sportswear for men and women at IFF'16. The brand sells both through e-commerce websites and brick and mortar stores. Puma's customers include celebrities like Lisa Haydon, Jacqueline Fernandez and Yuvraj Singh. The brand has tied up with Red Bull, Football team Arsenal FC and musical star Rihanna for further business expansion.





"Being a part of IFF gave us an opportunity to get the exposure that the brand required at this stage when Deezeno is working towards brand maturity."

- Shadaab Khan,

Head- Business
Development & Strategies
Alliances, Deezeno

Springfield Fashions

Springfield Fashions has been offering clothing and accessories in tune with the latest international trends for men and women. Having started with manufacturing top quality formal men's wear, the brand has entered into the casual wear range also. Springfield Fashions has its own labels - Springfield, Dark Slates, YSF (Yogi Shetty Fashions) and SGK (Suave Guru King of Style). Springfield Fashions showcased its latest range of formal as well as casual collection for men at IFF.

Deezeno

Blending international and contemporary fashion with tastefully crafted apparel for men, Deezeno strives to strike a balance between uncompromised quality and affordability. Deezeno retails only through online portals and their own website. Deezeno aims at establishing itself as a men's quintessential fashion wear label whose USP is international style and quality.

Changyi Chenyang Household Textile Factory

Changyi Chenyang Household Textile Factory is located at east of Weifang. The concept came into being in 2007 with its first store opening in Bengaluru. Leveraging its unique proposition of offering mid-to-premium high quality merchandise of renowned brands across all price points, the concept has struck a strong chord with consumers.

The company claims to have satisfied customers in more than 10 countries.

United Three Endeavours

United Three Endeavours Pvt. Ltd. has conceived an innovative and unique concept 'BAGFOREVER' to promote the reuse of bag and prevent people from using plastic bags. BAGFOREVER is a foldable multi-utility colorful bag made of environment friendly parachute fabric. These bags are lightweight, portable, water repellent and have a capacity to carry up to 25 kg weight. At the IFF'16, United Three Endeavours Pvt. Ltd. showcased their range of 'eco-friendly bags'.

Celio

Celio is a French men's wear brand and is present across 1,000 stores in 60 countries. It carries the latest international range in India of casual wear, denim wear & smart work wear through its exclusive 40 standalone stores and 128 shop-in-shops in leading departmental stores. Decoding trends to offer smart and contemporary men's wear, is the brand's forte.





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FOOTWEAR

Footwear players also had strong presence at the India Fashion Forum. The main exhibitors were Carvel, FitFlop, Alberto Torresi, Valentino, Aveitos, Selene, Derby, Reliance Footprint, PRO and Helios. Apart from the main exhibitors, Crocs, Inc.5, Metro, Ruosh and Hello 10 took up display branding.



Carvel

Carvel Fashion India is a subsidiary company created from Carvel D.O.O. The company recognizes India as a potential market which would ultimately help them to spread its Brazilian Grendene (Ipanema and Rider Brand) footwear - flip-flops. Carvel provides comfortable and stylish footwear for men and women through its two exclusive stores in Bengaluru. Carvel footwear are 100 percent eco-friendly. The brand has further tied up with Swarovski and Philippe Starck for business growth.

FitFlop

FitFlop, a UK based brand from the house of Urban Shore Wholesale India Pvt. Ltd., offers comfortable shoes, clogs, sandals and boots. The brand has adopted triple-density Microwobbleboard™ and the slim but cushSupercomFF™ midsoles technologies for advanced comfort. It can diffuse areas of high pressure underfoot, is ergonomically engineered by British biomechanists, has pressure-diffusing dual density EVA, is lightweight and flexible. At IFF'16, FitFlop showcased a range of comfortable yet trendy footwear for men and women. The stall wore a serene and simple look with white background and white lightings. Fitflop retails through various e-commerce portals and also supplies to other retailers like Nytro, Gossip and Lords.

Alberto Torresi

The Alberto Torresi footwear are fitted with shock cushioning and sturdy gripping soles to reduce strain on legs, back and feet. The brand is known for unparalleled elegance and panache and also ensures customer delight through product durability and reliability. The footwear has been ergonomically designed to ensure a perfect fit and optimum comfort for men. At IFF'16, the brand exhibited a vast range of formal leather shoes and casual footwear for men. **The stall was kept simple in white colour background with white light fixtures and spotlights at the cubicle racks to highlight the collection.** For Indian customers, the brand designs footwear like flipped, classic footwear, etc., while for international clients, they design light wear shoes, brush-up footwear, etc. The brand retails through various e-commerce portals.

Valentino

Valentino is a brand owned by Guru Shoes Tech Private Limited in Agra. The company boasts a state-of-the-art leather footwear manufacturing facility with a world-class CAD design centre. Guru Shoes has also launched another in-house brand- WEST PORT - for exports to UK, Mauritius, U.A.E. and Saudi Arabia. Valentino is available in more than 600 MBOs and also caters to online customers through online portals and company website. The brand also has an exclusive brand outlet in Agra.

"This is the second time we are conducting an exhibition at IFF. It helps us to tie up with many other retailers for the betterment of business."

-Ruchika Wadhwa,
Assistant Operations
Manager, Urban Shore
Wholesale India Pvt. Ltd.

"IFF is a good experience overall as one gets to interact directly with the distributors and potential clients that can get us better reach....."

-Chandra Daultani,
Director, Guru Shoes
Tech Pvt. Ltd. (Valentino)



Aveitos

Aveitos, a footwear brand from United States, has been making shoes with supreme comfort along with unique styling aspect. The brand uses the best quality leathers and adopts manufacturing techniques that make comfortable shoes for the happiness of feet. Aveitos shoes help to absorb shock and keep the back from straining. Aveitos exhibited its collection of men's footwear including classics, brookes and slip-ons, at IFF 2016. The footwear were categorically placed in zig-zag cubicle racks with white light fixtures at the top. The background was kept bright red, in sync with the colour of the brand logo. Made of pure as well as synthetic leather. Aveitos footwear are exported to UK, US and Australia. The company also sells to brands like Next, Clarks, etc.

"We have been participating at IFF since past four years for promotions and to grab potential customers..."

-Deependra,
AGM Sales, Real
Footcare India (Derby)

Selene/ Affluence

A luxury brand for men, Affluence dresses up the feet for fashionable individuals. The brand aims at providing every consumer with shoes of good fit, great quality and high standard. The company built on ethics adhering to every norm of the world: checked and periodically audited, corroborates to put its best for the Indian consumers.

"IFF is an excellent platform to create brand awareness and also gives a great opportunity to meet new vendors."

-Soumendra Barik,
Head- Operations, Aveitos

Derby

Derby, a brand by Real Footcare (India), produces high quality leather footwear for men from the age group of 12 to 40 years, at affordable price. The company acquires its maximum sale from Jalandhar in Punjab. Derby exports its products to gulf countries like Dubai, Riyadh and to European countries like Spain, Greece and Poland. At India Fashion Forum 2016, Derby displayed a range of men's footwear including formal shoes, floaters, semi-formals, comfort shoes, etc. The brand's stall was kept simple with white light fixtures and white background, while the flooring was done in a complementing brown colour.

Reliance Footprint

Reliance Footprint, a multi-brand footwear retail chain, caters to the entire family's footwear needs through its extensive collections. Having grown its pan India presence to over 261 doors today, Reliance Footprint plans to expand further through its online presence.





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"Surround yourself with people who inspire you, encourage you and believe in your dreams. IFF & ISAF is the place to meet, work & collaborate."

-Lokesh Chopra,
Sales Head - Specialty
Trade, MV Shoe Care
Pvt. Ltd.

"IFF is an opportunity to sit and interact with the who's who of the industry, get their opinions, meet people who can help expand the business, keep a track of what is happening new in the market and what others are doing."

-Sahil Gupta,
Director, Helios



PRO

Introduced by MV Shoe Care Company, PRO is a premium shoe care brand that meets the special requirements of care and wearing comfort of shoes. MV Shoes Care is a customer-oriented enterprise with innovative products and brands. PRO claims to be the first company in India to launch solvent free, water based shoe care products.

The brand offers a wide range of products that almost cover every aspect of shoe care, ranging from shine, colour, protection, and overall care. PRO showcased a range of shoe care products at IFF 2016. The brand kept the stall's look very classy and subtle, with great lighting and display.



Helios

Helios, from the house of C.P. Marketing Inc., is a leading brand of high quality shoe care products offering a range of approximately 70 shoe care products at an affordable price. The brand also caters to online customers through its own e-commerce portal and also through other shopping websites. Helios retails through 500+ MBOs in India and is also present in many large format stores. The brand is also focusing on feet care products. Helios is also planning to come up with eco-friendly products for a sustainable growth.

The IFF was supported by TRRAIN, CLE, FDDI and AIFMRA.



"IFF is an awesome opportunity to deal with other brands and gain customers. This is the platform where every buyer and seller can meet with each other."

-Aqeel Ahmed,
Regional Chairman,
South, CLE

TRRAIN - Trust for Retailers & Retail Associates of India is an 80G certified public charitable trust founded in the year 2011. Started with the vision of empowering people in retail by acting as a catalyst to create sustainable platforms through thought leadership, TRRAIN has touched millions of lives in retail since its inception. TRRAIN also works towards skilling abled & disabled youth through its initiatives Pankh & TRRAIN-Aptech Education Program.

The Council for Leather Exports (CLE) is an autonomous organization under the aegis of Ministry of Commerce & Industry, Government of India. The CLE is the notified Export Promotion Council for Leather & Leather Products namely leather tanning, footwear, leather garments, leather goods & accessories, gloves, harness & saddlery products, etc. The CLE has also forayed into leather accessories, leather garments, gloves, leather goods, saddlery products, harness, etc.

Footwear Design & Development Institute (FDDI) is one of the premier design and management institutions in the world, conducting wide range of UG & PG programmes in Retail Management, Fashion Designing, Footwear Technology, CAD/CAM and leather goods and accessories. All programmes offered by the institute meet the international standards.

All India Footwear Manufacturers and Retailers Association (AIFMRA) also participated at IFF'16. AIFMRA is a PUBC incorporated on 06 January 2011. It is classified as an Indian Non-Government Company.

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RETAIL SUPPORT

The main retail support players, keen to reach out to the retailers, who exhibited were Safexpress Pvt. Ltd., INSYNC-Safe Enterprises, Bhagwati Iron and Steel Works and WGSN Ltd. IFF'16 was also supported by leaders in retail space that included Orion Mall, Quest, Inorbit Mall, Infiniti Mall and Select City Walk.



"The IFF was a true representation of the Indian fashion, a compilation of flare and depth. A plethora of knowledge was served in a package full of fashion, done with style and with panache."

-Huzefa Merchant,
Managing Director, Safe Enterprises

"It was the first time that we exhibited at IFF and our experience was awesome. The visitors learnt about our concepts of display fixtures in a better way. We got great response from the visitors, all with the help of very promising staff of IFF. We're surely looking forward to participate again next year."

-Dinesh Panchal,
CEO, Bhagwati Iron & Steel Works

"IFF is a great platform for networking with the leading brands. We had an interactive forum where we presented 4 macro trends to an audience comprising retailers, buyers, top brands, students, with everyone sharing their experiences and challenges, as well as the brand heads to voice their opinion on what they look for while finalising designs, keeping Indian consumer and the market in mind."

- Anupreet Bhui,
Senior Editor, Street Style

Safexpress

Safexpress has today entrenched itself as the 'Knowledge Leader' and 'Market Leader' of supply chain and logistics industry in India. It offers innovative solutions which are designed to meet all the distribution requirements of an organization, through its fully-integrated surface, air and multimodal infrastructure and facilities. The firm provides value-added logistics services for 8 different business verticals ranging from Apparel & Lifestyle, Healthcare, Hi-Tech, Publishing to Automotive, Engineering and Electrical Hardware, FMCG and Consumer Electronics and Institutional. At IFF'16, Safexpress showcased its services with a 'Go Green' stall. The brand successfully gained remarkable visibility with display branding at the venue with a large hoarding, wrist bands, chair and table branding and floor branding.

INSYNC - Safe Enterprises

INSYNC was founded in 2010 to channelize the knowledge gained by Safe Enterprises while executing over 40,000 projects, spanning an estimated 18 million sq.ft. of retail space across the country. INSYNC is also India's first company to create a dedicated shop fitting design and development unit and has a comprehensive range of standardized shop fitting components bundled into a 300 page technical manual, used by leading design houses and retailers of various countries, while planning their retail identities. INSYNC is looking forward to empower Indian retailers with the technology to conquer the omni-channel war.

The product range varies from quick adjustable shelves, sleeker, stronger fittings, better finishes, in-built lightings and digital hangers among other things. The latest trend set by the company is the touch screens, which allows easy browsing of products and also payment assisting technology.

Bhagwati Iron & Steel Works

Bhagwati Iron And Steel Works is one of the leading designers of high quality shop fitting products. Their products are used in various public circumstances, such as malls, departmental stores, tiles display, furnishing display and so on. The company claims to be competitive in quality control and cost saving and is noted across the globe for the same. The shop fittings offered by the company include metal and glass racks, display furniture, folding furniture, etc. The company caters to local clients as well as international brands like Kazoo. At the IFF 2016, the company showcased a range of display fixtures like display racks, slatwall, the newly developed sliding racks and much more, for the fashion industry.

WGSN Limited

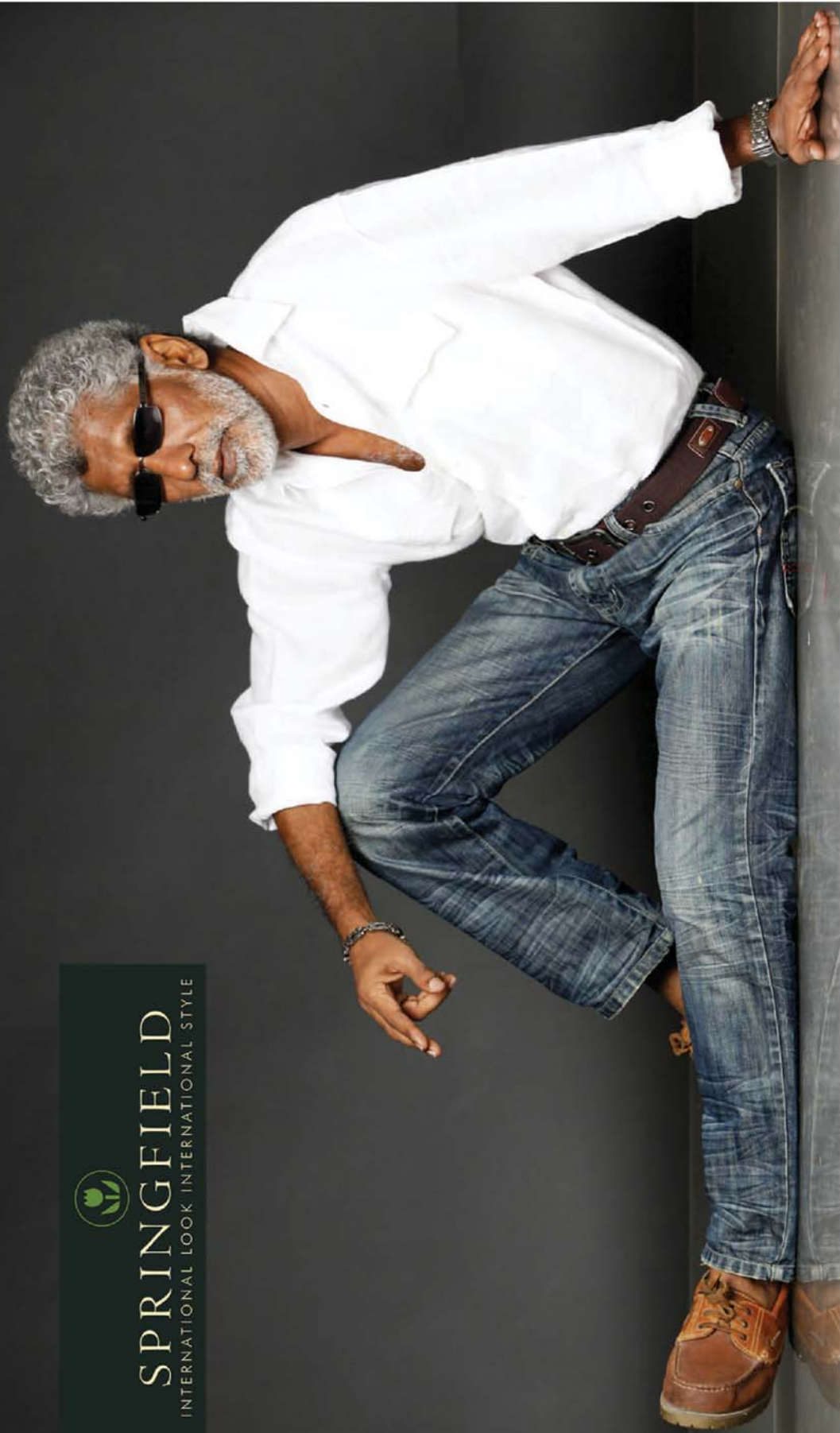
WGSN is the world's leading trend authority, serving fashion and the creative industries providing trend insight and inspiration to 7,000 of the world's most influential brands and retailers. Anupreet Bhui, Senior Editor, Street Style, presented "The Vision- Future Fashion Trend for Spring/Summer 17". WGSN's services cover fashion and lifestyle forecasting, data analytics, crowd-sourced design validation and expert consulting.





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TECHNOLOGY

The technology players had one of the strongest presence ever at the IFF Exhibition 2016. Apart from the exhibitors, Intelligence Node Consulting Private Limited, Shop CJ Network Pvt. Ltd., Atom Technologies Ltd., Mobmerry Technologies Pvt. Ltd. and Flipkart Internet Pvt. Ltd. also participated through display branding, audio-visual branding, demos, or by session sponsorship.

"IFF helps us in networking, to have a hand shake, to know needs of our customers, and an opportunity to meet retailers."

-Dharmesh Meena,
DGM-Category,
Askmebazaar.com

"We have been looking forward to IFF for introducing our concept to as many as possible in the industry. The concept is in its initial stage and thus, we think that this platform would help us grow in strength with more ideas and suggestions pouring in and brands joining Pretr for better business expansion."

-Yazdan Irani,
AVP- Sales, Pretr

"IFF is a perfect platform for brands, retailers and service providers to interact with each other and to acquire the knowledge of latest trends. Our overall experience was good. We were able to showcase our product portfolio to the brands. The conferences covering the latest trends, technology and industry insights attracted us the most."

-Prashant Lohia,
CEO & Founder, Ginesys

AskMeBazaar

AskMeBazaar is India's fastest-growing horizontal online marketplace, fuelling growth of SMEs in India by bringing their offline businesses, online. Its unique hyper-local model, with next day delivery available in 50 cities, enables offline retailers in neighbourhoods to come online for business expansion and also for building consumer loyalty.

AskMeBazaar has 1.5 lakh sellers on board and over 5 million SKUs and receives about 1 million orders monthly, along with 100 million searches a month. AskMe has also made crucial forays in the grocery & furniture verticals. AskMe started operations in Malaysia in March 2015 and is moving towards launching in Kuwait, Indonesia, Philippines, Thailand and Africa. AskMe is also all set to launch a disruptive offline & online payments platform called AskMe Pay in 2016.

Pretr

Pretr, an omni-channel app by Ambab, aims to revolutionize the way retail operates and promises to revolutionize a consumer's overall shopping experience. Pretr orders a consumer app that helps shoppers to discover and buy products from nearby stores. Pretr offers an integrated in-store order management system to brands and retailers, which empowers store associates with sophisticated in-store assistance. Pretr is a two way concept. The same app has a consumer side and a retailer side. It is helping brands build an omni-channel presence for itself.

Ginesys

Ginesys is launched by Ginni Systems Ltd., one of the best retail software providers and point of sales in the market. Started in 1999, Ginesys today, claims to have more than 500 plus happy and satisfied customers nationally. At IFF'16, the company showcased 'Ginesys Retail ERP: A Comprehensive Solution for Retail Value Chain'.



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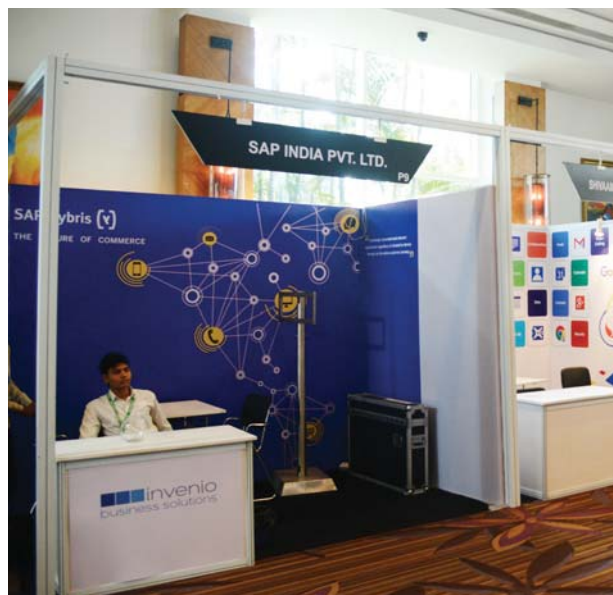


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Logic ERP Solutions

Logic ERP Solutions Pvt. Ltd. is an India based ERP software solutions provider. Logic ERP caters pan India to the industry vertical, retail, distribution and manufacturing sectors. The company has client base of more than 500+ corporate customers with 23,000+ installations, 35,000+ end users, and 4,000+ cloud users pan India. Logic ERP showcased its technologically advanced softwares, developed for diversified laterals and fields in a business at IFF'16. Logic ERP is the pioneer in providing the best solutions in the form of ERPs and vertical-specific software & applications that bridges the gap between stores & headquarters, thereby making it easier to access real-time data & information across various stages.

International Customer Loyalty Programme

ICLP (a Collinson group company) is a worldwide leader in loyalty marketing and customer devotion strategy with presence in over 18 countries across the globe. The company follows a unique consultative selling approach to conduct audit, design and deliver bespoke client solutions. ICLP's programme design is underpinned by data and the company draws actionable insights through analytics. ICLP gives the customers compelling reasons to engage, spend more and become loyal advocates - whilst delivering commercial results for their business. The company claims

to have such deep understanding of all the key variables, financial liability and loyalty programme benchmarks, which helps customers make an informed decision for better profits.

SAP India

As a market leader in enterprise application software, SAP (NYSE: SAP) is at the center of today's business and technology revolution. It works to help companies of all sizes and industries run better and use business insight more effectively to stay ahead of the competition. SAP applications and services enable approximately 3,00,000 customers to operate profitably, adapt continuously and grow sustainably. At IFF'16, SAP India Pvt. Ltd. showcased its advanced software for industry leaders.

Invenio Business Solutions

Invenio is an award-winning Business System Provider, headquartered in Reading, UK. The company supports over 45 customers in the government, media and manufacturing sectors, in areas that include industry-specific enterprise resource planning (ERP) focussed on SAP, tax and revenue management, business intelligence and big data, mobility, CRM, e-commerce and enterprise integration services. The company has subsidiary offices in India, Germany, Mauritius, Saudi Arabia, Dubai and the USA.



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“Participating at the IFF 2016 was a great experience for us. It was all about understanding the industry trends, meeting industry leaders and connecting with prospects and customers.”

-Suyash Dubey,
Head - Enterprise Marketing, Dassault Systèmes India Pvt. Ltd.

“We had a great experience at the IFF and gained a lot of knowledge of the retail industry. We met many people from various verticals and especially from the retail industry, which helped us in putting forward our brand to them. The major attraction was the trends in the fashion that were brought in by the exhibitors.”

-Punit Thakkar,
Managing Director, Shivaami Cloud Services Pvt. Ltd.

“Our presence at IFF offered us an opportunity to introduce our new applications to the brands and labels who were not part of our family yet.”

-Kiran Hiriyanan,
Manager- Brands, Voonik Technologies Pvt. Ltd.

Romans MNS CAD

Strategies, a French company, develops a collaborative software platform, which allows to link retailers, designers, cost managers and manufacturers. It has a global presence and more than 11,600 customers. The company has helped major names in the footwear and leather bags industry to streamline their processes, and to manufacture for consumers. Strategies began in 1988 when a group of inspired engineers realised that the use of 3D software to create and develop 3D models could become an invaluable tool to streamline shoe, luggage and furniture manufacture. So, the Romans CAD project was born and developed in conjunction with luxury shoe manufacturers. In 1995, the first 3D shoe software was released in the market, with a comprehensive set of complementary products, such as 2D, SL, Lumière, 3D Sketch, following in subsequent years.

Dassault Systèmes India

Dassault Systèmes India Private Limited has a registered office at Defence Colony, New Delhi. Dassault Systèmes, the 3D Experience Company, provides business and people with virtual universes to imagine sustainable innovations. Dassault Systèmes’ collaborative solutions foster social innovation, expanding possibilities for the virtual world to improve the real world. The group brings value to over 1,90,000 customers of all sizes, in all industries,

in more than 140 countries. At IFF’16, the company showed its capabilities with illustrations at a well lit stall. Major clients of the company include Jaguar, BMW, Mynta and Hugo Boss among others. Dassault Systèmes helps the fashion retailers come across better products with 3D experience, thus giving the customers an even better experience.

Shivaami Cloud Services

Shivaami Cloud Services Pvt. Ltd. is the premier partner of Google For Work India and have helped a range of small and medium businesses find the solutions they need in the cloud. Shivaami deploys Google app for business, adding its own brand of 24x7 personalized services. At IFF’16, Shivaami showcased its technology driven apps. The company aspires to introduce cloud solution to the fashion industry and show them the benefits of cloud.

Voonik

Voonik is India’s largest fashion app company for women which showcases clothing, jewellery and accessories. With 5.2 million + app downloads and 4.2 star rating, Voonik has successfully reached lakhs of women population. The application provides a more personal and customized service to its users. Voonik claims to be hosting the highest number of fashion and accessories brands and sellers in India as compared to any other fashion application so far.



MobiQuest Mobile Technologies

MobiQuest Mobile Technologies uses the mobile devices to create the largest ecosystem of performance advertising, last mile data capture and data analytics, in both digital and offline world. Millions of consumers today, use MobiQuest platforms to be connected with their favourite brands, their dealers, agents, managers and constantly get just the right offers/ information anytime, anywhere. Some of the major brands using the MobiQuest Mobile Technologies include, Gini & Jony, AND, VLCC, Major Brands, Aldo, Forever New, Godrej, Mango, Raymond, Inglot, Debenhams, W, Tresmode, GAS, Charles & Keith, La Senza, etc. The company recently presented themselves at the India Fashion Forum for a better market visibility. The MobiQuest's latest offering - m'loyal- is a digital platform which has been used by many brands today and their millions of customers. This application keeps the consumer constantly updated about latest offers from their favourite brands. This is also building a community of loyal customers with features like cashless shopping and loyalty program points.

Incom Services

Incom, an enterprise by Iksula, was launched in 2014 with the objective of delivering managed eRetail services to brands in India such as, Marketplace Management. Website and mobile app development, omni-channel solutions, performance led digital marketing, warehouse & fulfilment services, customer support, etc. The company has

successfully developed end-to-end, creative & cost-effective e-retail solutions for clients like Amazon, Snapdeal, Big Bazaar Direct, The Mobile Store and many more. At IFF'16, Incom showcased its omni-channel technology and marketing solutions.

Ambab Infotech

Ambab is a leading internet and mobility engineering company, which partners with the best entrepreneurs, enterprises globally to build their digital footprints from scratch. Some of the recent developments at Ambab include, Shoppers Stop, Indiaroots, Askme.com, DLF Brands, AND, Global Desi, Anita Dongre, Metro Shoes, Lavie, Samsonite, and GVK to name a few. Ambab helps them ramp on demand extending omni-channel technology, go to market operations, content marketing and deep business analytic at every step. Ambab is well equipped to engineer the right products for every business needs. Ambab takes care of various tasks like, taking business online, building solutions, bringing in omni-channel retail technology. The company has recently launched an application where customers can shop online, sitting at home and pick the products from a nearby store the very same day or can get delivered at their doorstep.

"IFF has always provided us with a platform where the company can meet more brands, form potential future associations, understand the immediate requirements of the industry, etc."

-Meenakshi Upadhyay,
Assistant Manager- CRM
& Sales, MobiQuest Mobile
Technologies

"The speaking sessions were very insightful and had too many takeaways. We enjoyed all these conferences, especially the opening sessions by the leading retailers of the country."

-Samarjeet Singh,
President & CEO, Incom
Services Pvt. Ltd.

"We got good response from various retailers at IFF. It's a great opportunity and networking place..."

-Karan Arora,
AM Sales, Ambab
Infotech Pvt. Ltd.





Exclusively.com

THE PRESENTOR OF 'THE SPECTACULAR IFF'

Exclusively.com is the 'Ultimate Online Fashion Destination' for global consumers. An online market place for 'branded' fashion, offering the best of designer fashion and lifestyle across apparel, beauty and accessories. It has a global outreach across 150+ countries and 5,000+ Indian cities, with the largest database of Indian online shoppers. Exclusively.com targets global customers in the age group of 25- 40 years and aspires to become 'the affluent youth's' reference point for latest trends in fashion.



"As the title sponsor and exhibitor we have always believed that we should work towards the empowerment and growth of the fashion industry across India. IFF has been evolving year on year and this year was a particularly superlative experience. The renowned speakers and excellent panel discussions facilitated thought leadership and sharing of ideas to scale up the Indian fashion industry."

Amit Maheshwari,
CEO, Exclusively.com

What did you showcase at the IFF 2016 Exhibition?

AM: At India Fashion Forum 2016, we showcased our achievements for 2015-2016 and our vision for the future, to the fashion fraternity. As we evolve into the ultimate premium fashion marketplace, it was a great opportunity to be able to showcase our web and app platforms and Exclusively Edit, our e-magazine and blog to designers, luxury labels and premium brands, giving them a complete solution and enabling them to reach out to a wide and discerning audience at just a click of a button.

What do you think is the relevance of the India Fashion Forum?

AM: With fashion retailers and fashion creators as the main audience, IFF was the ideal avenue to launch Exclusively.com as a global platform and the ultimate online fashion destination. It serves as an avenue to connect and understand the changing nature of the industry, the evolving business needs and the future of fashion.

What are your major takeaways from this year's event?

AM: The key takeaway is that 'technology is the future of fashion' and is going to change the way the fashion business operates. Fashion 2.0 will be about inspiring consumers by catering to their specific fashion needs through technology. While online and offline will co-exist, the online growth rates will be higher.

What attracted you the most at the 2-day India Fashion Forum 2016?

AM: The IFF 2016 was a spectacular affair. Right from the ambience to the finesse with which every event was conducted, be it the fashion night, the designer and luxury conclave, the Exclusively cocktail event and the awards night, it was a remarkable experience and a great success.

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In this context, Our clients filed a suit against Levi Strauss India Pvt. Ltd. in March, 2015 bearing Suit No. 509 of 2015 before the Hon'ble Bombay High Court for infringement of our trademarks and passing off of its goods / products in question along with damages, delivery up, appointment of receiver, etc.

The Hon'ble High Court of Bombay, by its order dated March 2, 2016 ordered M/s LEVI STRAUSS (INDIA) PVT. LTD. (Levis) to remove the words "LIVE IN" from its hoardings and other materials in respect of its campaigns or advertisements and to remove the offending materials containing the words "LIVE IN" from its goods and advertisements and other material. Levis have stated before the Hon'ble Court on April 21, 2016 that they have discontinued the usage of "LIVE IN LEVIS" in all forms.

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Notice is hereby given that our client will take all action available under the law both civil and criminal against such manufacturer/ dealers / traders who deal with any unauthorized use of our client's trademark, without any further notice.

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Ganesh, NIFT Alumnus

NIFT ALUMNI MEET 2016:

BACK TO THE ROOTS

By Aastha Tandon, Divyani Marwah and
Nikhil Dehadray, NIFT, Mumbai.



The Indian Fashion Forum 2016 created the lovely opportunity to get the NIFT alumni together.

The evening of March 16 was presided by Sudhir Tripathi, Director General, NIFT. Also present at the event were Nilima Rani Singh, Director, NIFT, Mumbai; Brijesh Madhukar Deore, Joint Director, NIFT, Mumbai; the esteemed faculty and the spirited alumni. The event kicked off with the Director and the NIFT (Mumbai) faculty members' reminiscing discussion with about 40 NIFT alumni, who made a successful effort to mark their attendance for the meet, held at Renaissance Hotel, Powai.

The affairs of the momentous evening followed Tripathi addressing the former students and all present, with an announcement that the NIFT will soon be having such alumni meetings at an All India level, with the help of government aid. He also added that with technological upgradation, the need to consolidate and regulate the flow of information with a periodic electronic newsletter would definitely be met.

Moving on, Director Nilima Rani Singh graced the dais, as she shed some light on the magnificent connect NIFT has always shared with its alumni over the years. She said that this remarkable connect has, in a way, been a driving force in the making of the institution. Singh acknowledged that all the alumni had, in every way, been there for the institution,





Sudhir Tripathi addressing the gathering



Nilima Rani, Sudhir Tripathi and Sushil Raturi



Kiran, NIFT Alumnus



Lipi Choudhary, NIFT, Mumbai

whenever and however required. She quoted the example of NIFT alumni who have helped many financially-weak talented students to enroll themselves in the prestigious institute. Singh also welcomed suggestions which can prove to be helpful for expansion plans of the NIFT Mumbai campus, and also for any change required in the curriculum in order to prepare the students better for the industry.

The discussion then moved on as the alumni took over the stage, expressing their concerns and excitement. They affirmed that having a NIFT student as part of their teams at work place always comes as a pleasant experience and went on to confirm that they give the students the same mentorship and guidance, as was given by the institute to them in their initial days. However, they also maintained that there still is a need to meet the graduating students before taking them onboard a professional field.

Kiran, a NIFT alumni, currently working for Voonik.com, suggested that the students needed to be encouraged more to indulge in their respective interest areas or go for start-ups, rather than going for safe jobs. Further elaborating his point, Kiran said that start-ups nowadays, are paying more to the freshers with motivated, creative minds and in spite of this, students are choosing to be in a comfort zone and are opting for a job with the likes of Madura Garments. He was of the view that despite the training imparted in all aspects of garment designing, etc., students personally lack motivation to go out of the way.

Sushil Raturi, Associate Professor, Head-Industry, Fashion Management Studies, speaking on behalf of the NIFT faculty, responded that the recommendations of the alumni will definitely be considered, as a symbiosis is imperative to reach a solution. He also maintained that the focus still lies on an urgent need for a platform that can link alumni from all the centres with the students.

Thereafter, Lipi Choudhary, Assistant Professor, Centre Coordinator, Fashion Management Studies, emphasised on how the wheel of retail has been more of a macro-economic nature, in the present times. She said that as the country evolved, the industry was seen as shifting from manufacturing to an evolved retail system and that the time had made the industry shift its primal focus. Choudhary also pointed out that the trend of students joining exports or merchandising is changing drastically as both the present students and alumni are opting for retail, unlike the earlier times. She acknowledged that the transforming scenario is obvious courtesy the increasing labour cost in India, that cannot be ignored. Choudhary continued that the export business is still surviving in countries in Bangladesh and Vietnam, because the





Tanmay Kandekar, NIFT, Mumbai



Deepak Kumar, NIFT Alumnus



Nagender Pratap Singh, Creative Head, Raymond, along with NIFT Alumni



labour cost is comparatively low in these areas. She even said that going with the times and needs of today, NIFT will give the industry what it needs, that is, more managed and successful retailers.

NIFT has future plans to launch incubation centers, enabling the students to have a guidance in order to well manifest their ideas of start-ups, etc. The alumni were requested to help make incubation center a reality from just an idea. It was also said that NIFT, as a brand, would be rejuvenated only with continuous support of the alumni.

The NIFT alumni meet was a fruitful discussion with alumni speaking candidly with all present, sharing their insights and experience in the industry and talking about how they can be a guiding light in shaping the future of the institute. One of the most important and interesting ideas that came up from the discussion was a much needed centralised database or format that would connect the NIFT alumni with all the campuses. Also, a formal interactive space recognized by the NIFT organizing committee to open a platform for conversations between the current and future students with the alumni. It

was also realized that the key to match the industry requirements was to modify and re-modify course structure and curriculum, in order to better equip the students as per the needful.

Furthermore, the alumni meet also lauded the Bengaluru NIFT alumni meet as being a successful brainstorming session which included discussions on required modifications needed in the syllabus, in order to prepare the students for the present industry.

Also, the IMAGES Group was acknowledged and thanked for making the event possible and successful. The meet concluded on a nostalgic note with old memories being shared over wine and cheese. The bond between the NIFT students and its alumni was revisited and relived with a promise of creating a bigger and better future together.



THE KNITWEAR STUDY

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Knitting is one of the oldest forms of clothes-making. Team BoF delves into the past to unravel the tangled history of knitwear.

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OPINION

THE GROWTH DRIVERS IN THE INDIAN KNITWEAR SEGMENT

Nischal Puri, Managing Director, Horizon Consulting India, explores.

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CATEGORY WATCH

KNITTING: A SUCCESS STORY WITH KNITWEAR IN INDIA

Voices From the Industry. Images BoF talks to leaders on the latest vistas in the knitwear industry in India.

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CATEGORY WATCH

TRENDING WITH T-SHIRTS

The easiness of just slipping into a t-shirt and pairing it with almost anything makes it a perfect investment and a long lasting one as well. Images BoF takes a look at t-shirts in India.

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QUICK TALK

HATS OFF TO HATSOFF

Images BoF talks to Sanjay Vig, Director, Hats Off Apparels, on his brand's success and future plans.

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CATEGORY WATCH

INNERWEAR: MARKET ROUNDUP

Renowned innerwear brands and manufacturers share insights with Images BoF, on the evolving innerwear market and on the changing consumer demands.

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CATEGORY WATCH

ACTIVEWEAR: A PROMISING CATEGORY

Today, activewear is not just restricted to clothing worn for hard core sports. Many brands today have a strong portfolio, offering trendy and affordable active wear in India, finds Images BoF.

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KNIT INNOVATION

INVISTA'S NEW KNITTED DENIMS

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NIKE REINVENTS RUNNING WITH KNIT TECHNOLOGY

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CATEGORY WATCH

LOUNGEWEAR: A NEW EVOLVING CATEGORY

Brands are growing the lounge wear category by coming up with fancy designs and styles in light weight, highly breathable and skin friendly fabrics, finds Images BoF.

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The Knitwear Study



COVER RESEARCH

THE GROWING KNITWEAR MARKET IN INDIA

The knitwear market is today very lucrative. Experts from Technopak, outline the key statistics, trends and growth drivers of the Indian knitwear industry.

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CATEGORY WATCH

KNITTED LEGGINGS: CHANGING LEGWEAR CATEGORY IN INDIA

There is a revolution in the bottom wear market with the introduction of knitted leggings this process continues till today, explores Images BoF.

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INNOVATIONS IN WINTER WEAR CATEGORY

Weak winters have pushed brands to re-engineer their product lines with light weight fashion Images BoF brings to the fore, the new innovations in the segment.

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CASE STUDY

PRINGLE OF SCOTLAND

Pringle is the First Luxury Knitwear Manufacturer in the World

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KNITTING

A PRIMORDIAL CRAFT

Knitting is one of the oldest forms of clothes-making. Mass manufacturing of this age old craft has embroiled the history of fashion itself. Shivam Gautam, Team BoF, delves into the past to unravel the tangled history of knitwear.

History documents contrasting accounts of the origins of knitwear. While some historians claim that the art of knitting came from Scandinavia, others claim that it actually originated among the Coptic Egyptians in the 5th century AD and gradually arrived in Europe in the 1400s. But wherever the roots may be, knitting, without a doubt, is one of the most ancient textile crafts that has over the centuries metamorphosed considerably, from being just a necessity to a craft hobby. Today, knitwear has graduated into the epicentre of the fashion explosion to become the newest fad among the millennial generation.

The word knitting is apparently derived from the old English verb to knot (cnyttan) and the Dutch for the same (knutten). During ancient times, knitting was highly preferred as it empowered people to produce fabric without a loom; with just a pair of needles. It is this accessibility that made it an invaluable craft among itinerants, who, as historians widely

accept, single-handedly helped spread the technique throughout the world.

As mentioned earlier, the origin of knitting remains hitherto debated, with myriad theories speculated from the fragments kept in museums around the world. A section of researchers and experts claim that a fair share of the confusion is also contributed by nålebinding, an antediluvian single-needle fabric creation technique predating both knitting and crochet. Archaeological specimens of fabric made by nålebinding can be difficult to distinguish from knitted fabric.

The oldest knitted artifact discovered yet is the 'Coptic socks' from Egypt, dating back to the year 1,000 CE. The sample exhibited detailed colour patterns in shades of white and indigo, and highly evolved craftsmanship which clearly indicates that the art of knitting was present long enough to have evolved to that state by then. These discoveries add weight to the hypothesis that knitting



originated in the Middle East and spread to Europe through the nomadic travellers that frequented the woolen trade route. At this stage, knitting was largely a luxury trade item; it was created from imported silks and cottons, and made into non-vital things like pillows, liturgical gloves, and small bags.

By the 14th century, knitting gained popularity among the royal families in Europe who roped in Muslim knitters for their exquisite craftsmanship. Samples of their knitting prowess can still be found preserved in the tombs in the Abbey of Santa María la Real de Las Huelgas, a royal monastery, near Burgos, Spain. Gradually, knitting became popular, especially in Scandinavia and Britain and several styles of knitting evolved, including the enduring purl stitch. Several European paintings of that era depicting Virgin Mary knitting; called Knitting Maddona began to resurface. During this era, the manufacture of stockings was of vast importance to many Britons, who knitted with fine wool and exported their wares. Knitting schools

were established as a way of providing an income to the poor. The fashion of the period, short trunks for men, made fitted stockings a fashion necessity. Stockings made in England were sent to the Netherlands, Spain, and Germany. Knitting also became an important occupation in Scotland during this time. Some pattern techniques find their modern origins in Scotland, eg., Fair Isle patterns, Argyle pattern, etc. The hant shawl endured especially in Scotland, which, in contemporary times, has become synonymous with knitwear.

The dawn of the 16th century witnessed the invention of the mechanical knitting machines and commercial production of knitwear. In 1589, the Rev William Lee of Nottinghamshire, England, constructed one of the first hand looms for knitting hosiery following which the city flourished as a major hub for fine knitting and lacing. With the improvement of steam-powered knitting machines in



the mid-nineteenth century, machine knitting increasingly shifted to factories to accommodate the larger machines.

THE TWENTIETH CENTURY

1920s

Knitwear became a fashion by the 1920s. There was huge demand throughout the western countries and sweaters/pullovers became essential part of the new fashion-of-the-age for men, women and children alike. It was also the most preferred sportswear of the decade; while white sweaters/pullovers, often with coloured stripes (club colours) in the collar became common for tennis and cricket, Fair Isle knitted sweaters became synonymous with golf. High fashion also embraced knitwear, with Coco Chanel making prominent use of it and various coverages by the infamous Vogue magazine.

1930s AND THE GREAT DEPRESSION

Knitwear's popularity prevailed and the change in fashion was prominent with newer introductions like zippers and synthetic yarns. As the Great Depression set in, it transformed knitwear into a necessity. Also, the 1930s saw a rise in





Knitwear gained tremendous boost after the world war; even girls were taught to knit in school. At the same time, fashion magazines gained traction all across the western world, promoting new designs for knitwear.

the popularity of commercial machine knitting and gradually customer preferences also shifted to cheap machine knitted products.

1940s

The Second World War brought violent upheaval in the British economy in the 40s. Since fabric was essential for war purposes (like uniforms), clothes were rationed from 1941. To back this up, the British government introduced the 'Make and Mend - knitting for victory!' campaign, that urged people to mend and recycle their worn out clothes and make new clothing pieces from old fabric. As a result, hand knitting gained popularity both as a hobby, source of income and necessity. Also, knitting woollens for the armed forces empowered those from the 'home front' to contribute to the war effort. The government also provided knitting patterns to make winter wear like balaclavas, tanktops and gloves for the servicemen.

1950s AND 1960s

Knitwear gained tremendous boost after the world war; even girls were taught to

knit in school. At the same time, fashion magazines gained traction all across the western world, promoting new designs for knitwear. All this to be consumed by the rising middle-classes or to be made at home by women. Magazines such as Pins and Needles in the UK carried patterns of varying difficulty including not just clothes, but also blankets, toys, bags, lace curtains and other items that could be sold for profit.

1980 TO PRESENT

The adulation of knitting showed signs of fading by the 1980s. Sales of patterns and yarns waned, and the technique was shelved as outmoded. As technology started developing in leaps and bounds, the market was bombarded with innumerable options, that were more detailed, stylish, easier to care for and above all, pocket friendly. Alternatives to traditional woollen knitwear, such as tracksuits and sweatshirts, which began to be worn as everyday wear rather than only in a sporting context, gained in popularity. The definition of knitwear underwent a complete facelift and became more associated with smart casual wear. By late 1980s, a major chunk of the home knitting market suppliers either shut down and local wool shops suffered a marked reduction in numbers.

However, home knitting still had a loyal following and contemporary craft-revivalist traditions coupled with the internet, finally succeeded in resurging knitwear in the 21st century. Today, knitwear pervades people's everyday lives. There is easier access to exotic yarns and materials, especially through the internet. Myriad natural fibres from animals, such as alpaca, angora and merino and plant fibers, chiefly cotton, along with modern age exotic fibres like silk, bamboo, yak and qiviut are used. Also, celebrities like Cameron Diaz, Kate Moss, Julia Roberts, Winona Ryder, Johnny Depp have played part in popularizing this craft. Designers like Michael Kors, Kim Haller, Leutton Postle, etc., have pushed boundaries and given new definition to this age old craft.



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GROWING KNITWEAR

MARKET

IN INDIA

As knitwear penetrates into the wardrobes of middle aged consumers and women in small towns, the knitwear market is emerging as a lucrative section for brands and retailers. Experts from Technopak, outline the key statistics, trends and growth drivers of the Indian knitwear industry.

By Amit Gugnani, Senior VP - Fashion; and Sakshi Chhillar, Research Associate - Fashion & Textile, Technopak.

The apparel retail scenario is evolving fast, attributable to the higher demand for better design, vogue look and comfort clothing. The trend towards casual look and comfort wearing has contributed substantially to the elevated growth of knits compared to woven apparel. Growing disposable income, favourable demographics and increasing fashion orientation is driving the knit apparel market in India. However, the consumer today, is more value conscious and expects quality products at an affordable price.

Knitwear

Knitwear is an emerging market in India and is expanding into different apparel categories. The key categories across the globe in knitwear are t-shirts, jerseys, pullovers, cardigans, women's suits, dresses, skirts, vests, lingerie, track pants, etc.

In 2015, the Indian apparel market size was estimated to be worth ₹2,72,666 crores (USD 42 bn), of which knitwear accounts to 19 percent (₹53,091 crore). This market is expected to grow at a compound annual growth rate of 11 percent and reach ₹89,461 crore by 2020. The market is dominated by men's and boy's segment contributing more than 57 percent to the total market. However, with growing population of women/girls in workforce, women's/girls' segments is expected to grow at a CAGR of 12 percent against the men's/boy's segment at a CAGR of 11 percent.

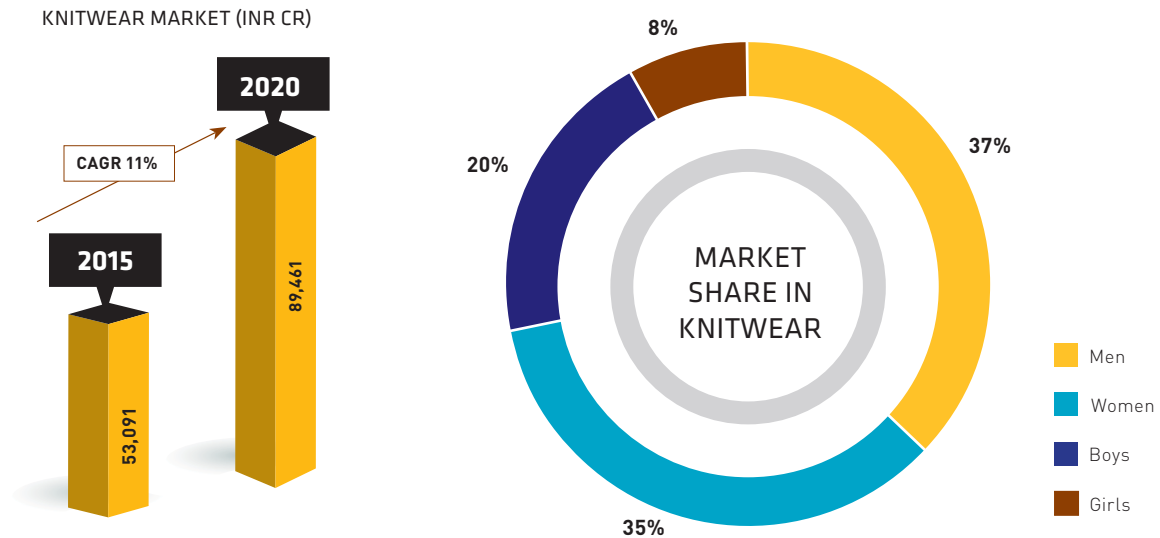
Key Segments

The domestic knitwear market comprises various segments including, winter wear, inner wear, t-shirts, bottom wear for kids, sleepwear, etc. The major contributors to the domestic knitwear market are t-shirts and inner wear, accounting to 35 and 38 percent of the total knitwear market. The t-shirt market of India, that includes knit shirts, polos and knit tops, is estimated to be worth ₹18,428 crores (2015) and is expected to grow at a CAGR of 13 percent for next five years. This market remains dominated by men's/ boys' segment that contributes 83 percent. However, the women's/ girls' segment is expected to register a higher CAGR of 15 percent for the next five years as compared to 13 percent of the men's/ boys' segment owing to increasing acceptance of t-shirts among women and girls. T-shirts is a relatively new apparel category that came into existence in the twentieth century only. Owing to the higher growth of the demand for t-shirts, it is expected that the woven shirts market to t-shirts market ratio will reduce to 2:1 in the next five years from its present value of 2:5.

The Indian innerwear domestic market, worth ₹20,262 crores in 2015, is another leading contributor to the knitwear market. The women's/girls' segment is leading contributor to the domestic inner wear market and is expected to grow at a CAGR of 15 percent in comparison to the men's segment growing at CAGR of just 9 percent.



EXHIBIT 1: KNITWEAR MARKET



Source: Technopak Analysis

The knitwear market in India is chiefly propelled by the developing casual wear market in the recent years. The trend towards increasing utility of knitwear is going to sustain in the future. Even international retailers who have forayed into the Indian market lately, are witnessing opportunities for development in knitwear products.



Other contributing segments of the knitwear market include, winter wear, bottom wear for kids and sleepwear; these segments are expected to register a CAGR of 8 percent, 10 percent and 9 percent respectively for the next five years.

Yet another emerging segment in knitwear is active wear, encompassing gym wear and sportswear. However, the synthetic category is growing at a faster pace in active wear.

Knitwear Exports

India has exported knitwear worth USD 7 bn during the year 2015 (Source: ITC, Technopak Analysis). The knitwear exports have grown at a CAGR of 7 percent over a period of 2010-15. Bottomwear (both men and women) and men's innerwear are fastest growing segments in knitwear, with a CAGR 14 percent and 13 percent respectively. T-shirts are the major contributors to the knitwear exports, accounting to nearly 40 percent of the total knitwear exports from India.

The Way Ahead:

Trends and Growth Drivers

The knitwear market in India is chiefly propelled by the developing casual wear market in the recent years. The trend towards increasing utility of knitwear is going to sustain in the future. International retailers who have forayed into the Indian market lately are witnessing opportunities for development in knitwear products. With entrance of more players, the consumer will also witness variety of products in the markets. This distinct trend towards casualization will continue to act as the biggest growth driver for the knitwear.

Increasing acceptance of knitted t-shirts in corporate culture is a welcoming trend. Even professional services companies, over the years, have relaxed their dress code to allow casual t-shirts in the office. In June 2015, one of the leading software giants of India officially announced its relaxation of dress codes to permit smart casuals.



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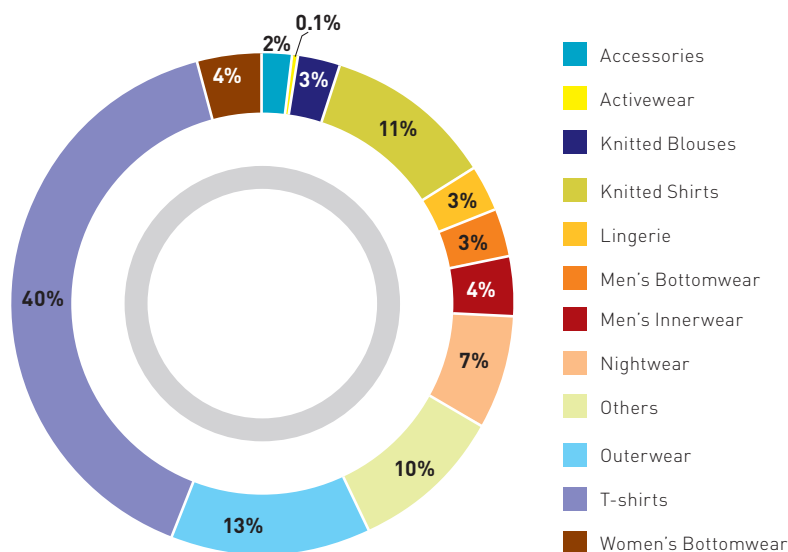
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EXHIBIT2: SHARE IN KNITWEAR EXPORTS



Source: ITC, Technopak Analysis

The Indian consumer is beginning to customize his wardrobe on the basis of occasion and utility—party, gym, yoga, sports, etc. This has provided a boost to the demand of knitwear. Along with casual wear and t-shirts, knitted innerwear brands are increasingly gaining traction across the consumer base in India.

Demand of customized knitwear products is an increasing trend too, especially among the students, youth and corporate houses. Students in various educational institutes have an inclination towards knitwear items with customised logos and slogans that are specifically created for them to reflect their solidarity with various causes, groups, educational streams, hostel ethos, student societies, etc. Corporate houses additionally furnish knitwear (t-shirts) to representatives with logos incorporated on them.

The digital advancement is becoming eminent in the fashion retail industry where online businesses are embracing technology and innovation at a pace never witnessed previously. Recently, many retailers selling knitwear



products have started utilizing online retail channel to attract their young, technology savvy consumer base.

Consumption of knit apparel products is spread throughout all demographics. Although the youth is the chief customer base, knitwear, today, has managed to create a niche for itself even in the closets of middle aged and older consumers.

The future of the players of the industry in the developing markets for knits will rely on their ability to customize the product quality and product design in accordance with the specific prerequisites of the target customers of the local market. Ability to innovate in product design and styling will determine the success of players in the fashion knit apparel segment.

The growing prominence of knitwear is attributable to its easy-care and wrinkle free properties. In light of the growing demand and popularity of knitwear, the industry players have to design delicately crafted strategies to establish sustainable businesses in the competitive market.

Although the youth are the chief customer base, knitwear, today, has managed to create a niche for itself even in the closets of middle aged and older consumers.





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EXHIBIT 3: TRENDS

- ✓ Preference for casualwear wear coupled with trendy look
- ✓ Occasion and utility based consumer wardrobe customization
- ✓ Demand for customized t-shirts and knitted apparels among Indian youth
- ✓ High acceptability across all demographics

EXHIBIT 4: GROWTH DRIVERS

- ✓ Growing acceptability for casualwear in corporate culture
- ✓ Increased penetration due to e-tailing
- ✓ Growing number of women in workforce
- ✓ Trends towards contemporary fashion and favourable demographics with high proportion of youth



The knitwear market in India now has huge opportunities for industry players due to increasing penetration of the category into smaller towns, rural areas, middle aged consumers and women.

The brands and retailers who are able to sense the beat of the shoppers in terms of their price sensitivity, brand loyalty, value perception and expectation, will be able to capture the opportunities better. Innovative approach towards product development with practical view of end product differentiation will help to attract and retain the fashion-oriented consumer.

Conclusion

The knitwear market in India now has huge opportunities for industry players due to increasing penetration of the category into smaller towns, rural areas, middle aged consumers and women. The untapped potentials of knitwear market come with its own set of challenges. Introducing innovative product design

to cater to various segments of knitwear consumers, managing product designs and product innovation, ability to handle a large number of SKUs, ensuring dimensional stability of knit apparel, etc., will be the key to tackle such challenges.

Brands that were customarily centered around woven products have now started venturing into knitwear as well. In a growing market, there is enough scope for all these brands and retailers. But as the market starts moving towards a more matured stage in the coming years, it is expected to witness cut throat competition. Brands and retailers that could innovate and cater to consumer needs with business prudence, are expected to lead the knitwear market in the near future.




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THE GROWTH DRIVERS

IN THE INDIAN KNITWEAR SEGMENT

How global brands are driving the segment

By Nischal Puri

Stories of India offering opportunities to global brands have been doing the rounds for the past two decades, however it's only been in the last decade, and more in the last five years, that the global brands have executed successful India penetration strategies. Be it marquee apparel brands or global retailers, the activity has been witnessed more in the casual wear space. Knitted garments are the staple and core of the casual wear segment. Some overt and some tacit, there are many influences that global brands are exerting, leading to an accelerated growth of the Indian knitwear segment.

The high entropy that the Indian apparel market is witnessing is an outcome of multiple forces, each playing in different realms. One way of understanding the Indian apparel segment is woven vs non-woven classification. This taxonomy is a healthy beginning point to segmentize the industry. Under the non-woven, knitwear is a very substantial percentage. From the perspective of the Indian market, knitwear comprises of almost 80 percent of the non-woven category.

For better understanding, we can group the growth drivers under two broad categories, the intraneous and the extraneous factors. The intraneous catalysts are largely the shared growth drivers of the apparel segment. Without sounding rhetoric, the demographic advantage, the rise of fashion consciousness, the rise of comfort quotient of Indian consumers are some of the top most intraneous drivers.

It's the extraneous drivers where much action is being witnessed in the last couple of years. The extraneous factors are external elements that are differently influencing and hence strategically shaping the category. One of the most pertinent extraneous factors has been the global brands making their India strategy more aggressive and focused.





The Indian knitwear category is witnessing a very strong, determined and definite revolution. The flag bearers of such a revolution are the global retailers and brands.

Fast fashion chains like H&M, Zara, Forever 21, Vera Moda, Marks & Spencer, discount fashion chains like Max are responsible for unleashing one of the most effective growth driver. These retailers have now perfected the value proposition for the Indian consumer and the price, fashion and quality dynamism has been customized to ensure adaptability of the Indian consumer.

On the other hand, brands like US Polo, Diesel, Mango, Benetton, Jack & Jones, besides the Indianised global brands like Nike, Adidas and Levi's have been the key category drivers.

All the global chains have been heralding an era of global fashion wear at comfortable Indian wallet prices. Marks & Spencer has successfully garnered healthy market share of the premium lingerie market. Women knitwear of Marks & Spencer has a distinct global fashion flavour and the mid to premium prices become further affordable during the discount periods. The brand can also

be credited with launching fashion ranges of Modal Lycra, at affordable process. As per customer feedback, the quality of the garments and international colour palette are something that were missing in other brands.

Zara, with 16 stores, has taken the Indian market by storm. The low density of the garments in the store, coupled with limited quantities per style has been appreciated by the consumers. The fast turnaround of the styles wherein the consumers can expect something new almost every week, has emerged as one of the key USPs of the brand. Polyester Lycra garments coupled with chiffon women tops has been an inspiration to various other brands. Zara has offered to Indian consumer best global designs at Indian prices. The fashion quotient in Zara store has been a delight for the consumer.

H&M, the latest global entrant in the Indian market has been the pioneer of economical fast fashion. The brand has

garments with shorter lifecycle, with durability not the key benefit the brand is expected to be a hit among the 17-20 years age bracket. Innovative washes in t-shirts with high fashion embellishments is expected to inspire many brands to follow suit.

Forever 21, with 10 stores, can be categorized as a trendy and affordable fashion retailer. The brand is often associated with confidence, for anyone's first international brand purchase. A wide range of knitwear fabric like modal cotton, lycra cotton and stretch denim is being used in garments and the wide colour palette has gone well with the consumers.

Riding the wave of affordable fashion is Max. The format from landmark is everything about fashion at inexpensive prices. The Max format reported a turnover of ₹1,400 crore in the last fiscal year. If Max is regarded as a clothing brand then it is one of the biggest clothing brand in India today. The innovation quotient is perhaps lowest in Max comparatively, but the same is compensated with greater pocket friendliness.

>

Product innovations by these brands have led to two significant changes in the consumption pattern:

1. With innovative fabric and prints and modern silhouettes, the buying cycle of the consumers have shortened. The opportunity to buy has increased, with disposable income of the targeted consumer base not being a constraint. The product offerings from these brands are attractive enough to reverse the consumption trend wherein the consumer likes the merchandise and then discovers the occasions to wear, unlike the prevalent pattern of shopping for particular usage.

So, better designed apparel is making consumers occasion agnostic and resulting in higher frequency of purchase.

In urban India, shopping is less a functional engagement wherein consumers shop for special occasions, and have become an occasion in itself. The era of consumer indulgence has just initiated in India and these brands are at the forefront of skimming it to the hilt:

2. The second significant consumption pattern change observed is “category expansion”. With global design and international styling, there has been expansion in product categories. While a t-shirt has always had a singular connotation and skirt used to have one particular silhouette, these brands have successfully introduced fusion silhouettes. So, the new patterns like long vest tops for women, jersey cardigans, wide trousers.



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Newer silhouettes and newer product categories are one of the key subtle growth driver the consumers are enjoying as a wide range of options are available now and the consumers’ fashion desire is getting fulfilled. It’s expected that other brands will take a cue from the product offerings and develop similar product categories and make them available in their own brands. Inspirations from

global brands have been the hallmark of the Indian brands.

Brands like Ed Hardy and Diesel have successfully enhanced the categories in terms of design and print qualities. These brands become showcase brands for the Indian brands, the global brands successfully skim the innovation for a season and the competition post acquiring relevant inspiration popularizes the innovation, leading to expansion of the category.



Global brands and global retailers are expected to play a significant role in driving the growth of the knitwear category in India with innovation in newer fabrics, newer garment washes, newer silhouettes and fusion product categories. These extraneous factors coupled with the vibrancy being witnessed in the consumer buying and demographic advantages that India offers, the future of knitwear category is extremely bright to ensure double digit growth in all the categories of knitwear.



ABOUT NISCHAL PURI

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

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KNITWEAR

A SUCCESS STORY IN INDIA

The knitwear industry in India can, by all means, be considered a sunshine industry for the country, keeping in mind the exports and also the growing domestic consumption of knitwear garments within the country. Where woven cotton no doubt has always been the forerunner, knitwear is catching momentum as well.

The Stepping Stones

A boost to knitwear industry rests with the changing preferences of consumers today in terms of their dressing. Usha Periasamy, Director - Brands and Operations, Classic Polo, aptly explains, “The entire trend is inclined towards casual dressing. The pure formal category has lost its identity. The customer today, is basically looking for a casual touch even with their formal clothing. Knitwear category is clearly demarcated in the casual wear segment. This is gaining momentum in terms of business and a play with big names in the industry.” She further shares, “Knitwear is all about comfort and style. Earlier, this category was given preference as a functional aspect only whereas now with its growing popularity, it has become a fashion statement for every day wear. It is a preferred choice with youngsters and with ages above 30 years, who have made knitwear a part of their weekend dressing.”

Where the road ahead looks promising for knitwear industry in India, there are roadblocks to overcome in terms of competition and price. Elaborating on this, Narinder Singh, Managing Director, Numero Uno shares, “Knitwear market is growing at a very fast pace. However, brands in India are faced with huge challenges in terms of fancy knitwear fabric development as the existing markets for sourcing knit fabrics are not so technologically advanced and cannot compete with the development pace of markets in China which are very advanced in fabric innovation and developments. Small brands are not able to import fabrics easily from China due to

heavy fabric duties as well as minimum order quantity (MOQ) issues. Hence, they have to live with the limitations of domestic sourcing.”

Adding to this and aptly setting the context of the story, Animesh Maheshwari, President, Suditi Industries and representing the brand, Riot, shares, “Despite being strong in woven, the knitwear industry in India is on a double digit growth. Despite the growth story, the segment is facing its own set of troubles and rising cotton and yarn prices is the most immediate one.” As pointed out by Kuntal Raj Jain, Director, Duke, “The knitwear industry in India has been unable to realise its full potential. There has been an absence of structural change and policy reforms which is responsible for the decline.”

Where on one side, Maheshwari shares the potential of the industry, he also makes it a point to reveal the most pressing challenges this industry is facing that is causing a bottleneck in its growth story. He also shows concerns related to strong competition from global brands and the fragmentation of the industry stalling the industry’s growth. These are the issues we shall discuss in detail in this article.

Industry Dynamics

Talking about fragmentation, the industry (apparel as a whole and not restricted to knitwear), according to experts, is struggling to find a balance, keeping in mind that it still has a strong unorganised share. The knitwear industry is facing a challenge in streamlining operations and giving it a fine structure to make it a part of the organized trade thus contributing to the export market. Maheshwari explains, “The production structure of the Indian apparel industry is fairly segmented, leading to significant



“For us, the growth has been tremendous, it is challenging for us to keep up with the pace of international trends in terms of fabric innovations and other details.”

-Saurabh Singh,
Head Design - Men's wear,
Being Human Clothing



“India, owing to its integrated cotton value chain, has advantage in t-shirt production. However, countries like Bangladesh and Vietnam are preferred markets for t-shirt over India due to its cost advantages and free trade. To drive this category, it is important that government steps up to provide subsidies and benefits like free trade.”

- Sanjeev Makhija,
Managing Director,
Breakbounce Streetwear





"The total apparel industry is growing at CAGR 6.6 percent. The major contribution currently is coming from the metros. There is a gradual volume growth observed in tier-II and -III cities with the demand shifting from formal to casual."

- Narinder Singh,
Managing Director, Numero Uno



"The Indian textile industry, when it comes to knits, has been plagued by obsolescence, labour problems, raw material vagaries and lack of modernisation. The post fabric stage like processing technology is lagging, yet it is now coming up fast with infusion of various processing technologies."

- Animesh Maheshwari,
President, Suditi Industries (Riot)

differences in productivity levels. First, there are relatively unorganised suppliers who sell to exporters directly. Then, there are organised manufacturers with factory operations, who export their products overseas. Due to such discrepancies, there are major set backs in the exports."

On the dynamics of demand for Indian textiles and its forecast for 2016-17, a spokesperson from Rupa and Co., shares, "Export of textiles and clothing products from India has increased steadily over past few years, particularly, after the expiry of Multiple Fibre Agreement in 2004 which imposed quotas on the amount of yarn, fabric and clothing, which the developing countries could export to developed countries. India's textile and apparel export are expected to grow from USD 40 billion in 2013-14 to reach USD 65 billion by 2016-17."

Adding on to the industry dynamics, Periasamy shares, knit is growing at a decent pace for past 3-5 years. Big brands are constantly innovating their collection which is a growth sign for this category. Knits today is a 4,000-plus crore market with few branded players. Many of the big and mainline brands have started looking at this category seriously. The unorganised sector in knits is also benefiting with this growth. While we are only looking at the tip of the iceberg, we have yet to see the real potential of this category."

Pranal Modani, Chief - Business Development, Channel 9, makes a valid point when he highlights, "International competition from major country like China, Bangladesh and Vietnam are detrimental to growth of our knitwear

industry. Cost of operations including overheads and labour cost is affecting our costing. Government policies are also not supported for the growth. Increasing labour cost and lack of well skilled technically qualified people are some of the major reasons which have proved to be a spoilsport in making this industry contribute to the overall exports."

Reiterating Modani, Vinod Kumar Gupta, Managing Director, Dollar Industries, shares that neighbouring countries in South East Asia, owing to low manufacturing cost, mainly due to cheap labour and less cotton prices, are attracting global importers. However, he also maintained that, "quality wise, Indian goods are getting more acceptance, the reason for our brand being the largest exporter in Middle East."





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“There is not enough investments to generate high quality knitwear. Issues like pollution treatment plants, sea discharge, etc. have impacted the industry. Hence, the industry has not shifted to high value garments yet.”

- Gautam Saraogi,
Deputy Managing Director, Go Colors



“A strong vendor support is lacking in the market. Because of this problem, the industry has not been able to achieve the growth which was expected from it. Another constraint is the access to skilled and hardworking labours. They are hard to find at a reasonable cost.”

- Udit Todi,
Brand Head, Lux Lyra



Adding to the competition factor, Sanjeev Makhija, Managing Director, Breakbounce Streetwear, shares, “India, owing to its integrated cotton value chain, has an advantage in t-shirt production. However, Indian t-shirt market is expensive. Countries like Bangladesh and Vietnam are preferred markets for t-shirt category due to cost advantages which comes as a result of free trade. There are no duty benefits given to Indian exporters and hence to drive this category, it is important that Government steps up to provide more subsidies and benefits of free trade.”

The increase in cotton price led to people opting for blended fabrics that remain the domain for markets like China. Agnes Raja G, Founder and Director, De Moza, elaborates, “Indian Knitwear is globally known for the quality of cotton used. With the changes in cotton prices, many international brands moved to blended fabrics, which China and Far East markets are strong in. Hence, the knitwear export has been declining over the last few years. However, there is a huge increase in domestic demand and hence, the overall production is still on the rise.” Narinder Singh adds, “Knitwear in India has majorly focused on cottons. There is a huge demand in polyester, in which we lag behind and where other countries like China have an advantage.”

Guneet and Japneet Singh, Directors, Juelle, are of the opinion that the Indian knitwear industry is yet to make a mark internationally. Elaborating on this, they share, “When it comes to the domestic knitwear market, yes, the knitwear industry is huge and it is growing considerably but may be, exports are not growing because we are not able to offer the right kind of pricing and compete with under developed countries like Bangladesh, etc. We are more present in the domestic market.”

They (Japneet and Guneet Singh) aptly highlight the fact that the industry at this moment, needs to have a conscious approach with regards to pricing. To hear it in their words, “We have to be very price conscious. We have to compete with international fashion brands as well as with the unorganised, unbranded sector. So, our product has to be rightly balanced by way of designing, sourcing and by way of newer trends and ideas. Yet at the same time, it should not be over priced giving an opportunity to the premium or the international brands.”

Apart from cheap labour, the other reason for the industry lacking in growth according to Atul Bajaj, Executive Director - Merchandising and Sourcing, Puma, would be the lack of technological advancements made to better the production. He shares, “It is an effect of rapid upgradation in technology by other developing countries in the knitwear industry and their ability to provide higher productivity along with favourable exchange rates.”

According to R Maheshwari, Director, Texperts India and representing the brand Fitz, the reason for India not truly making a strong headway in the knitwear industry is “owing to the fact that we do not have regions within the country that can share the load of manufacturing knitwear.” He elaborates, “In terms of woven fabric, India is known for experimentations and innovations. However, one cannot neglect the steeping growth percentage of the





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“The major challenge in active knitwear is that local production of most styles is not possible in India, while maintaining the quality standards defined by the brand due to which we are not always able to make the brand accessible to all consumers.”

- Atul Bajaj,
Executive Director - Product
Merchandising & Sourcing,
Merchandising, Puma



“Knitwear today has become an accepted form of wear because of the new emphasis on leisure and casualness. One of the major challenge is that the sector is quite unorganised, however one can still build a strong brand.”

- R Maheshwari,
Director, Texperts India (Fitz)

knitwear industry in the past years. Even though, knits have raised the maximum sales for the retailers - both domestic as well as international. One of the major reason it is not gaining the top position is due to the restriction to the knit-centric areas. However, we are observing several big-small joints all across the nation such as Bengaluru, Gujarat, Rajasthan, Vapi and so on.

Gautam Saraogi, Deputy Managing Director, Go Colors, shares, “Not enough investments in high quality knitwear processing, coupled with barriers like low Government investment on pollution treatment plants/sea discharge has impacted the industry. The industry has not shifted to high value garments yet.”

Sandeep Jain, Executive Director, Monte Carlo, brings in an interesting point when he says, “The knitwear industry is growing but it is heavily dependent on the weather. The biggest challenge in this segment is to convert functional customers to functional fashion customers”.

To take an excerpt from an article that recently appeared in Deccan Chronicle, the hosiery hub of Tirupur has emerged the knitwear capital of India, contributing about 50 percent of the total garment production of the country.

The hosiery town which began with a production of a few crore worth of garments three decades ago, has pitchforked into a major hub, grossing an annual turnover of ₹27,000 crore for both - domestic and export markets. The Tirupur hosiery hub is all set for yet another big leap, but lack of price competitiveness appears to slacken its gripping growth storyline. China, Bangladesh and Vietnam are the major competitors for Tirupur exporters. While Tirupur garments are costlier, China, Bangladesh and Vietnam offer it at a considerably cheaper price. This price difference is plying a huge factor in neighbouring countries, flooding the Indian market with their goods as

well. According to M P Muthu Rathinam, president of the Tirupur Exporters and Manufacturers Association, the produce from Tirupur is priced higher than the competing countries by 20 -30 percent. The article further reveals that the Indian knitwear industry contributes to only four percent of the global demand, despite its higher quality and design. Price competitiveness is a major contributor in increasing the share.

As K S Babuji, general secretary of South India collar shirts and Inner wear Small scale Manufacturers Association (SISMA) points out, the north Indian markets are flooded with Chinese and Bangladesh products. Indian products are higher in quality and design compared to China and Bangladesh. But the price difference of about 25 percent gives them an added advantage.

Jain is optimistic that the industry is gearing up for bigger game in the Indian apparel industry. He shares, “The Indian knitwear industry has witnessed strong growth in past years. Today, there is an increased demand for knitted apparels. Knitwear also contributes to the domestic apparel market in India and is expected to grow at a much faster pace in coming years. Its growing acceptance has helped boost the knitwear industry in India. But major obstacle coming in the way, is time and money to build a strong brand on the strength of knits.”

Pressing Challenges

According to Raja, rising raw material cost and getting quality labour are the two major challenges now in India that need attention. Udit Todi, Brand Head, Lux Lyra, elaborates, “In today’s era, the major problem faced by most of the Indian companies is the lack of strong vendor support. Because of this problem,

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"My observation of the market tells that the functional knitwear segment is popular in all three tiers (tier -I, -II and -III), while the fashion segment is popular in tier -I and -II cities."

- Sandeep Jain,
Executive Director, Monte Carlo



"Knitwear is all about comfort and style. Earlier this category was given preference due to its functional aspect only. But now, with its growing popularity, it is a preferred choice with youngsters and with age above 30 years."

- Usha Periasamy,
Director - Brands & Operations,
Classic Polo

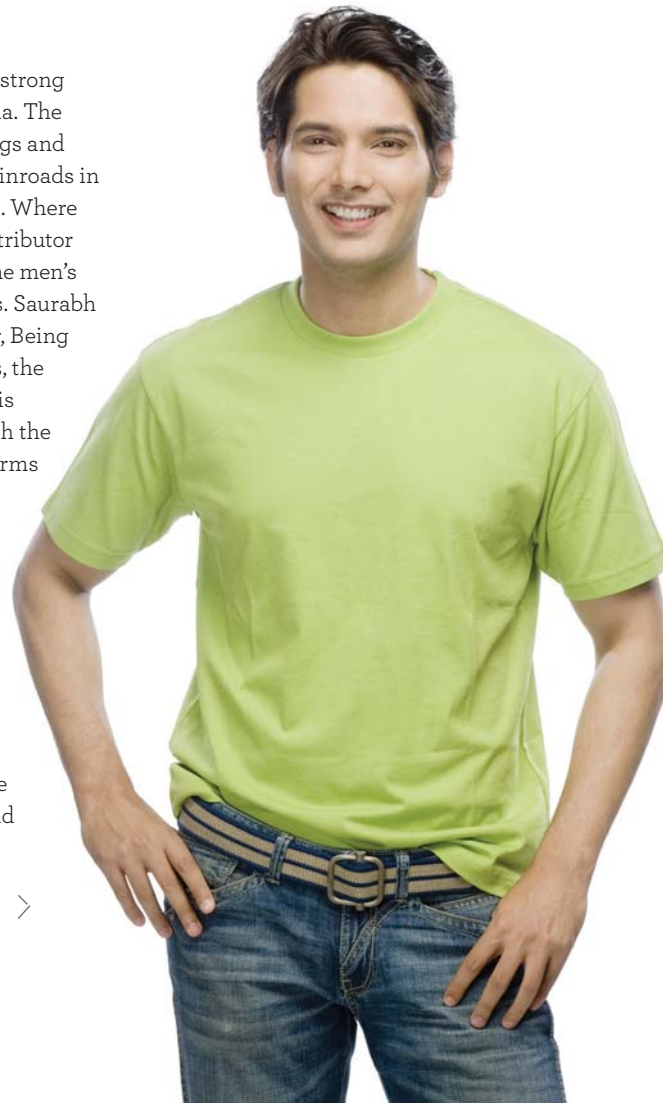
the industry has not been able to achieve that growth which was expected from it. Another constraint faced by the companies is the access to appropriate manpower. Skilled and hardworking labours are really hard to find at a reasonable cost thus causing hurdles in the success route of the industry." Saket Todi, Brand Head, Lux Onn Premium Wear, adds, "Today, higher labour costs because of the dearth of trained manpower is the biggest challenge being faced by the knitting industry in India. Other factors like frequent power cuts and lack of proper infrastructure has worsened the condition of knitting industry." Maheswari adds, "low pace of modernization, lack of scale and high fragmentation and lack of international marketing efforts add to the list of pressing challenges that are hindering the growth of knitwear industry in India."

Brand Story

Brands offering knitwear have a strong patronage from the youth in India. The culture of knitted t-shirts, leggings and other apparels, has made strong inroads in the wardrobe of Indian shoppers. Where knitted leggings are a major contributor when we talk of women's wear, the men's segment is dominated by t-shirts. Saurabh Singh, Head, Design - Menswear, Being Human Clothing, shares, "For us, the growth has been tremendous. It is challenging for us to keep up with the pace of international trends in terms of fabric innovations and other details."

Bajaj minces no words when he reveals, "The major challenge in activewear for us is that local production of most styles is not possible in India. There are quality standards defined by the brand due to which, we are not always able to make the brand accessible to all consumers."

Where the youth remain the primary consumers for knitwear in India, according to Makhija, the category is highly competitive. He explains, "There are a number of brands in the market which makes it difficult for a brand to break the clutter and create an identity of its own. The category, being a highly price sensitive one, matching price and quality to give a fashionable edge is a challenge." The rise of internet penetration which is providing an access to global fashion at the click of a button and also the growing prominence of online shopping is making knitwear desirable and according to Raja, the consumer today, understands the quality and hence is ready to pay for better quality products though, "there is a challenge in getting the right space to reach out to the consumers," he points out.

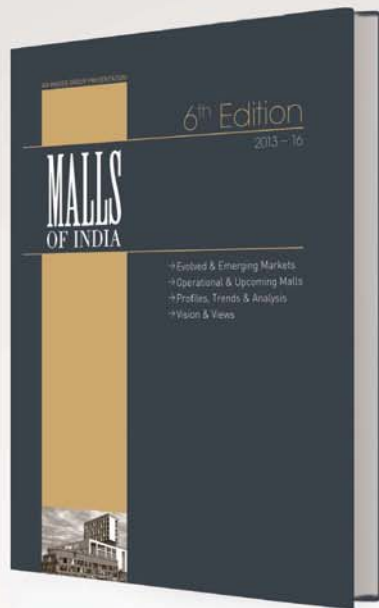


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EXECUTIVE SUMMARY



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“The current knitwear market sees a close competition between the manufacturers and marketers to hit the best bargain and offer promotional discounts to consumers. Cut-throat competition and challenges in the market put brands to prove themselves to its competitors.”

- Manoj Kumar Gupta,
Entrepreneur, Comfort Lady



“The knitwear industry is passing through a difficult phase. The production is getting difficult day by day. The government machinery and the infrastructure support is also lacking as compared to other international manufacturing hubs. So it is not just one particular area but a collective bouquet of changes needs to come up in all sectors so that we can grow.”

- Guneet and Japneet Singh,
Directors, Juella

Is Knitwear a Sustainable Business Proposition?

With Indians getting more and more health conscious and opting for gyming and other outdoor sports, the future of knitwear as mentioned above (provided we overcome the obstacles) is promising. Maheshwari points out that knitwear today has become an accepted form of wear because of the new emphasis on leisure and casual wear. He adds, “One of the major challenge is that the sector is quite unorganised, however, one can build a strong brand.” Singh of Being Human Clothing, aptly explains, “The case in point is active sports brands where at least 90 percent of the apparels they sell are knitwear based; also, there are directional casual wear and street wear brands that only work with knits.” Singh of Numero Uno, adds, “If you have a concept with the know-how, infrastructure and supply for a sustainable all season product, then it is definitely possible to build a strong brand only on the strength of knits.”

Bajaj shares his views based on Puma’s experience in operating in the Indian market, “It is difficult but possible, as has been shown by few of the brands which mainly sell polo and crew neck tees. As we are aware that the options of bottoms in knitwear are limited, it is difficult for a knitwear only brand to sell an ensemble to the customer. For an activewear brand like us, to provide a pair of running shorts or bottoms (mostly knitted) along with the running tees is extremely important to satisfy the consumer.”

Makhija shares a different point of view. He says, “One could build a brand having t-shirts as a main category, but you will have to have other categories to become a complete brand. Focusing only on the

The Top Challenges the Knitwear Industry Needs to Overcome

- High cost of cotton
- High cost of raw material
- Issues related to skill manpower
- High cost of labour
- Lack of infrastructure
- Stagnant government policies
- Power (electricity) issues
- Lower productivity
- Laid back technology implementation
- Low pace of modernisation

t-shirt category won’t be a sustainable long term strategy for any brand.” Maheshwari adds, “It is difficult to build a strong brand only on the strength of knits in India. However, it may be easy for a label to offer only one product like knits, but in order to define it as a brand, it requires branding associations which is not possible without expanding to other product categories.” Saraogi feels that it is better to be in a combination of knit and woven to have a stronghold in the industry or category. Periasamy makes an interesting note on what makes it a challenge for a brand to offer nothing but knitwear, “The idea of building a brand solely on knitwear seems difficult in my opinion and that is why, we are yet to see an exclusive knitwear brand in India doing a roaring business as per the potential of the sector. Many brands have either integrated forward or backward with addition of other correlating ranges, irrespective of their core strength at the beginning stage. Infrastructure involves huge investment and a technical team strength to run the production house. Hence, we do not have many players here.” Sanjay Vig, Director, Hats Off Apparels, talks about what makes most of the brands specialise in shirts as compared to t-shirts and knitwear. “A lifestyle brand still does not give considerable share to t-shirts in their upper wear product portfolio vis-à-vis shirt because knits, in comparison to woven, is a tricky and time consuming subject. Hence, they prefer to keep the t-shirt share small, not giving enough importance to t-shirts and knitwear.”

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According to Rupa & Co the slow absorption of modern technology in Indian textile industry has adversely affected its productive efficiency and most importantly, costs. The introduction of modern technology is of utmost importance for ushering quantitative advancements in the industry.

Raw materials: Cotton, being a major raw material for the industry, poses challenges in terms of supply and price constraints. The technique of ginning of cotton and pressing it, also require major improvements in order to reduce contamination and ensure supply.

Product development: The industry must gear up to changing demands of the consumer and develop infrastructure that could cater to both national and international clientele.

Information technology: Integration of IT tools is of absolute necessity for the textile industry to compete with advanced countries. The technology will help the industry combat major challenges like speed and quality through this technology, thus reducing delivery time lag.



Vig further talks about the ratio for men's wear taking a larger share in the knitwear category, owing to the ease of manufacturing. Explaining this further, he shares, "In Indian market, men's knitwear has a bigger chunk in comparison to women knitwear because women knitwear products, coming in India from China, Thailand, etc. are much cheaper than those manufactured in India. Also, the variety of fabrics and designs with latest fashions are far more attractive in comparison to the product made in India."

Without mincing words, Singh brothers of Juelle, share their views on the importance of having a portfolio that offers not just top but also bottom wear to make a brand successful. They share, "We honestly do not agree that it is easy to build a strong brand only on the strength of knit. Yes, knits are an important portfolio but knits are not the only portfolio for a brand to be strong or to be well established in the masses. It needs to have the right product mix both of the knits, wovens, upper wear and bottom wear. It is only that when you cater to all the categories, all the segments, that you can say that the brand is strong enough to make its mark in the market."

Road Ahead

Where metros and tier -I and -II cities have shown a good acceptance and demand for knitwear, the smaller towns and cities still need to be exposed to the comfort and durability of knitwear. On what drives the industry and why it has a lot of potential for growth, Saraogi shares, "Comfort, durability and stability are the key drivers. Woven provides durability and stability but less comfort." He points out that at present, knits provide comfort and durability but less stability. Adding further, he shares, "With better technology and processing knit would do better than wovens. We have replaced many of the traditionally woven garments with knit fabric."

According to Periasamy, loungewear is the next big product category in the knitwear segment apart from t-shirts. The loungewear category comprises of track pants, shorts, gym vest, capris, crew tops, polo tops, V shape and Henley neck t-shirts and many more. She adds, "The knitwear category in winter wear is another big chunk that has a good demand. But the only restriction is its market size, which is limited to winter affected markets."

Maheshwari concludes on an optimistic note stating, "The knitwear industry is seen to be on a double digit growth trajectory. At the same time, demand for knitwear is increasing and is expected to grow at a much faster pace in the coming years. The knitwear industry is spread across the nation and it is not restricted only to one region. The future for Indian knitting is bright, provided the industry adopt some progressive steps. Lot of products, which were dominantly woven, are now coming in knits like blazers, pants, pyjamas, to name a few. The challenge is that India is not producing such fabrics in abundance, and importing fabrics for garments is not very cost effective due to tariff barriers."

Todi from Lux Lyra, adds, "Knitwear market is likely to grow and expand day by day. I believe the desire for trendy lifestyle, media awareness and an increase in the amount of disposable income has invigorated the growth of the industry."



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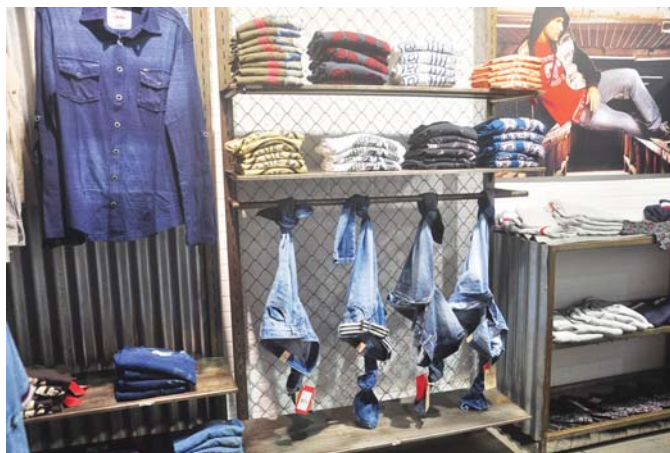
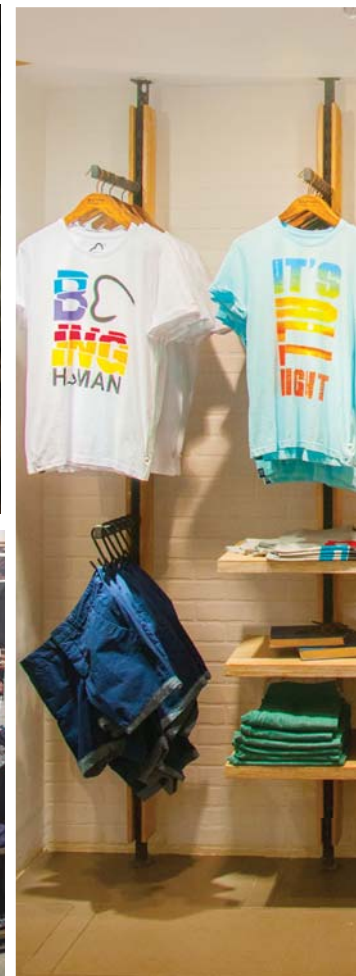
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TRENDING WITH T-SHIRTS

T-shirts have had an undisputed top positioning in the wardrobe. The easiness of just slipping into a t-shirt and pairing it with either denim jeans of any other bottom wear, makes it a perfect investment and a long lasting one as well, when we talk about clothing. You may find a lot many individuals just stocking their wardrobe with 5-7 colours of basic t-shirts and they are done for their weekly dressing. We take a look at the ever evolving category of knitwear in India.

Let's begin with talking about the most recent and creative manufacturing techniques being put in place when it comes to manufacturing t-shirts. Sanjeev Makhija, Managing Director, Breakbounce Streetwear shares, "Environmentally conscious manufacturers are using organically grown cotton and natural dyes, digital printing, with prints directly applied to fabrics with printers etc. are used by manufactures. Air-dyeing processes are used to save water and energy and reduce harmful by products. Direct-panel-on-loom technology, also called smart tailoring to increase fabric efficiency and reduce lead time by manufacturers." If the manufacturing has undergone such a dynamic revolution, the strides t-shirts have made in terms of larger acceptance and trendier look and feel can well be understood.

Neha Shah, Senior Marketing Manager, Pepe Jeans shares the dynamics, "T-shirt market of India that includes knit shirts, polos, knit tops etc. is estimated to be ₹13,830 crore in 2014. This market is expected to grow at an impressive compound annual growth rate of 13 percent to reach ₹24,940 crore in 2019. Availability of t-shirts of a wide price range on online sites attracts consumers of all price segments and all age groups."



Aptly setting the context and sharing the genesis of the category, Narinder Singh, Managing Director, Numero Uno, shares, “The t-shirt market is still a very young growing category in India. It came into existence only around the 20th century. Manufacturing majorly clustered in and around Ludhiana, Tirupur, Kolkata, Delhi, etc. The demand came majorly from the youth in the urban metros. The market now seems in a transitional phase where the consumption is growing up. The global shift from formal wear to comfort casuals is driving the growth market for men’s t-shirt. The acceptance for casual and relaxed dressing as everyday office or business is a big change. The weekend wear and Friday-dressing concept is fading away. Disposable incomes are increasing. Growing interest in other recreational activities. Like travel and fitness is making a shift from traditional dressing of shirt and trouser. There is an increase in occasional wear and hence wardrobe needs are expanding. Today one wants clothing for active wear in the morning, formal wear for office, casual wear for the evening and sleepwear for night. The t-shirt segment is no longer only for the youth. Middle aged and baby boomers are also wearing casuals now.”

Growth Drivers

The t-shirt industry is undoubtedly in its best phase at the moment considering the age of India’s population. Besides that, the entire outlook towards life that is more on ‘easy going’ and ‘cool’ is giving an uplift to the category. After all, ‘Clothes Maketh Man!’

Reiterating on the age factor as shared by Singh of Numero Uno, Saurabh Singh, Head Design - Menswear, Being Human Clothing, shares, “T-shirt market in India is very robust and one of the highest volumes in the ready-made garment segment. Major factors in its growth include high youth population of the country and rise of online retailing in the last couple of years resulting in increase of consumer base amongst branded

products.” Makhija adds, “The t-shirt market is growing well. Because of the younger population demand is growing substantially. It is not just the college consumers but corporates as well are seen adopting to dressing up in t-shirts.” He explains the reason saying, “This change is primarily due to shift in corporate culture which has transitioned to casuals. Even professional services companies, over the years, have relaxed their dress code to allow business casual t-shirts to office. Initially, t-shirts were being permitted only on Fridays, but with time such relaxations have been extended to all working days by some companies and are expected to be followed by many others.”

Animesh Maheshwari, President, Riot, adds, “Indian market has been continuously adaptive to the western market and hence witnessing a constant inclination towards the casual attire. The flexibility of the fabric backed with easy-care, comfort properties, affordability and fashion factor has made t-shirts category acceptable across consumers of different age groups and varying income levels.” Elaborating on the major driving factors that this category has in India, he shares, “We specialise in t-shirt as a category, hence major share into upper wear product goes into casual t-shirts. Comfort characteristics, easy-care properties, affordability, easy-design options using stripes, prints and graphics, and a casual look are the major driving forces propelling the t-shirt market in India. Indian youth seek comfort and style in their clothing, which is better met by t-shirts



“Men’s category has limited options and hence generate a chunk of demand for the category. Women have more options and categories to play with such as dresses, ethnic wear, casuals, smart casuals etc.”

- Sanjeev Makhija,
Managing Director,
Breakbounce Streetwear

“Printed t-shirts have managed to grab attention of Indian consumers. Print and design of t-shirts have evolved to reflect tourist locations, mythological stories, cartoon characters, architectural monuments, famous personalities and attractive slogans.”

- Neha Shah,
Senior Marketing Manager,
Pepe Jeans

“Comfort characteristics, easy-care properties, affordability, easy-design options using stripes, prints and graphics, and a casual look are the major driving forces propelling the t-shirt market in India.”

- Animesh Maheshwari,
President, Suditi Industries (Riot)

compared to shirts, due to which lifestyle brands are now prioritizing this category. There is immense competition in this category, we see new players who are selling on t-shirts with variation in it.”

Category Catcher

Western wear for women is witnessing a strong traction in India but still, we do have a long way to go. The penetration of t-shirts in a women’s wardrobe no doubt is making inroads but we way still find cotton tunics having a larger share as they can be clubbed with leggings and for those who come from orthodox background, a duppata is always there to making it resemble a churidar – kameez look.

T-shirt category has evolved for both men and women segment. Makhija feels that the reason for t-shirts doing well than women because when it comes to women’s wear, the options before them are quite some bit as compared to men who only have shirts, t-shirts and kurtas. He shares, “Men’s category has limited options and hence generate a chunk of demand for the category. Women have more options and categories to play with such as dresses, ethnic wear, casuals, smart casuals etc. while these options are limited in case of men’s category.”



Sanjay Vig, Director, Hats Off Apparels shares, “In Indian market men’s knitwear has a bigger chunk in comparison to women knitwear because women knitwear products coming in India from China and Thailand etc., are much cheaper than being manufactured in India. Also the variety of fabrics and designs with latest fashions are far more attractive in comparison to the product made in India.”

Singh of Being Human Clothing, reiterates, “Men’s segment is relatively simple in terms of product range and that is the reason t-shirts are a big part of menswear, on the other hand for women’s wear also the knit is quite big but it gets divided in to other product categories as well apart from just t-shirts, knits are used for leggings, dresses, shrugs, scarfs etc. And women’s t-shirts have evolved quite a lot from new silhouettes to new fabric blends that are used today.”

Trending

Shah points out the growing acceptance of printed t-shirts and the prints are not restricted to ‘designs’ and ‘graffiti’ alone. She reveals, “Printed t-shirts have managed to grab attention of Indian consumers. Print and design of t-shirts have evolved to reflect tourist locations, mythological

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“Collared t-shirts have always been strong in polos as well as fashion and clubwear, but the round necks also are doing pretty well since last few years. V-necks are a bit slow in comparison. The Henleys and the crew necks are not very well accepted by Indian consumer.”

- Sanjay Vig,
Director, Hats Off Apparels

“Every time we have introduced a high quality fashion product, the response from consumers has always been positive. But I would also like to add that the decision to pay more depends on the kind of value addition done, if its something which adds to the appeal of the product or if it is a result of some new trend then certainly consumer will be willing to pay more.”

- Sandeep Singh,
Head Design - Men's wear, Being Human Clothing

“Fancy yarns are in demand. For our brand, natural fibre and blend work well. Slubs, grindles, dual coloured speckled fabric is on the rise. We are also working on linen and linen blends for commercial selling. Fabric, printing techniques and denim looks is the key trend in knits today.”

- Narinder Singh,
Managing Director, Numero Uno



stories, cartoon characters, architectural monuments, famous personalities and attractive slogans. Demand of t-shirts with embellishments, fluorescent colours, etc. have gained momentum among the youth in recent times.”

According to Makhija the focus on washes (vintage washes) are trending, distorted graphic prints are seen with focus on detailing such as seams, construction, branding elements. Hand crafted Indie tribal art motifs, soft pop art, summer iconography, reinterpreted vintage prints, mix of psychedelic floral and solarised prints are trending. Sublimation print techniques is currently seeing a lot of traction with a lot of plays in various wash techniques.

Vig opines, “Collared t-shirts have always been strong in polos as well as fashion



and clubwear, but the round necks also are doing pretty well since last few years. V-necks are a bit slow in comparison. The Henleys and the crew necks are not very well accepted by Indian consumer.”

Price Parameters

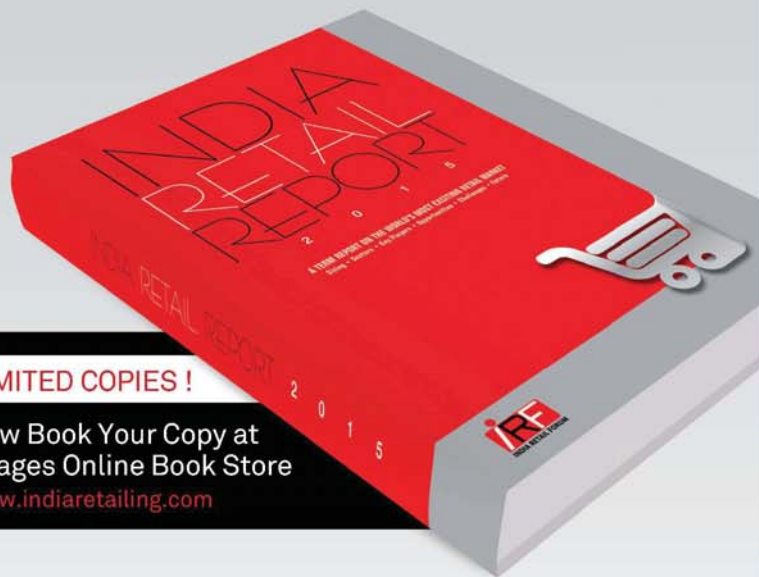
Keeping in mind the price consciousness that overrules the Indian shopping habits, it is not surprising that majority of the brands have segmented their t-shirt portfolio based on the price points. Yes, the segmentation is based on above factors. Singh of Being Human Clothing accentuates this fact saying that the segmentation is totally based on price and quality factors like super premium, premium, upper-mid and economy. He shares, “The price points start from as low as ₹199 for basic t-shirts and can go up to ₹4,000 and even beyond in case of some premium brands.”

But having said that, the new-age Indian consumer does not shy away from loosening his purse string to pay more for what attracts and appeals to his eyes. He adds, “Every time we have introduced a high quality fashion product in Being Human the response from consumers has always been positive. But I would also like to add that the decision to pay more

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Besides cotton, India depends on imports for polyester based t-shirts or t-shirt fabric due to the relatively underdeveloped value chain within the country.

Polyester based products, which have high applications in active wear categories, imported from China, Taiwan, Korea, etc.



“T-shirt as a category has grown by over 15 percent in Jack & Jones. The shirt category has almost doubled. Graphic design and fabric quality remain the parameters for the brand's core sales proposition.”

- Vineet Gautam,
Country Manager, Best United India
Comforts (Jack & Jones)

“Classic Polo constantly defines new fashion trends catering to the latest consumer preferences. This season we have planned more of fashionable category products whereby we will differ from other brands and this would be our unique selling products.”

- Usha Periasamy,
Director - Brand and Operations,
Classic Polo

depends on the kind of value addition done, if its something which adds to the appeal of the product or if it is a result of some new trend then certainly consumer will be willing to pay more.”

Singh of Numero Uno rightly points out that t-shirts that are well marketed and packaged along with value addition will manage to command a higher price. Maheshwari adds another differentiating factor saying, “It is not only the price and quality even the print technique, material used and style of the t-shirt can be the factors to determine price points.”

Fabric Fascination

According to Singh of Being Human Clothing, cotton remains the fabric of choice but new blends of cotton with polyester, modal, linen etc. have also sought acceptance. He elaborates, “Organic t-shirts concept is not very aggressive at the moment as there is still a lot of awareness which needs to develop in consumers regarding the advantage of being environmentally conscious and accept the slightly higher prices of organic t-shirts.” Makhija shares his views on the acceptance of new fabrics, “There are qualities like poly-cotton that exists in the market which is conformable and also cost effective and are gaining acceptance. Organic has just started in India and

because they are priced higher, it will take some time for it to pick up and gain mass acceptance.”

According to Shah, besides cotton, India depends on imports for polyester based t-shirts or t-shirt fabric due to the relatively underdeveloped value chain within the country. Polyester based products, which have high applications in active wear categories, imported from China, Taiwan, Korea, etc.

Elaborating on the current top fabric and design trends, Singh of Numero Uno shares, “Fancy yarns are in demand. For our brand, natural fibre and blend work well. Slubs, grindles, dual coloured speckled fabric is on the rise. We are also working on linen and linen blends for commercial selling. Fabric, printing techniques and denim looks is the key trend in knits today. The idea is to use these fancy fabrics in basic silhouettes and make them desirable. The other is print play. Going bold and shouting out your brand's attitude with advanced printing techniques through digital printing, character tees and AOP. Also Indigo and washed tees are creating a fashionable mix of hot selling products.”

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Brand Story

Jack & Jones launch in India had a huge impact on the buying habits for t-shirts amongst the SEC -A and -B set of target audience. T-shirts in a way got their 'chic' and 'cool' quotient with this brand. Vineet Gautam, Country Manager, Jack & Jones, shares, "T-shirt as a category has grown by over 15 percent in Jack & Jones. The shirt category has almost doubled." According to Gautam, graphic design and fabric quality remain the parameters for the brand's core sales proposition. The brand has a presence across 181 SISs and 63 EBOs besides a strong presence online across all major e-commerce portals.

At Being Human, though the t-shirts category has been the star performer. With 52 EBOs and presence across 70 MBOs and SISs and 156 LFS, the brand has a strong presence online as well. This year, the team is expected to launch its exclusive shopping portal. For the brand, crew neck is the biggest contributor, followed by polos and then v-necks. Singh says, "Long line and asymmetric hem shapes and lot of cut and sew details are doing extremely well in the last couple of years."

In the women's category, the percentage of round neck is 70 percent, boat and deep neck is 25 percent and the remaining 5 percent is distributed amongst other categories.

Talking about fabrics, he shares, "In terms of fabrics softer handle fabrics like cotton modal blends in both stretch and non stretch are doing very well, in terms of design; street sports trend of long line t-shirts and sporty details like use of zippers are working very well for us." On the colours for SS 16, he shares, "Grey is the colour of the season followed by soft pastels and range of ink and indigo blues will do very well this season. Saturated



dark tones of orange, teal green, brown, navy, red along with dark monochrome tones of charcoal and black will do well for AW 16 season."

At Numero Uno, according to Singh, the t-shirts category for them has been growing at a faster pace in last two years as compared to shirts, prior to which their growth was almost at par. He shares, "At Numero Uno we intend to offer a mix of everyday affordable classics and wearable global fashion trends styled to customise for the Indian casual wardrobe." The priority for them remains in fit, feel, styling, fashion quotient and pricing. He adds, "To strike a balance, the approach is to unite all these aspects in the order of priority. The balance is in details. We do create a fine balance hence all are winners. Though styling takes the marginal win." With a presence across 550 MBOs and 203 EBOs, Numero Uno has a truly strong foothold in the country. The brand is also present across 48 outlets of Shoppers Stop and is available across major e-commerce portals as well.



At Breakbounc Streetwear, Makhija reveals that they have seen almost 100 percent growth in the category. He shares, "Initially bottom wear was our strength however we see an almost 100 percent growth in the t-shirt category and it contributes to 20 percent of our product portfolio now and is growing." The brand has a presence across 140 MBOs, 40 SISs and also large format stores like Central, Lifestyle, Splash and Globus. With one exclusive store, the brand also plans to launch its e-commerce portal. The core sales proposition for the brand rests with washed and edgy fashion forward trend. Makhija adds, "Streetwear by definition is fashion oriented and we claim it through our designs in the t-shirt category. Fit and design are core to our brand. Pricing is more of a perceived value of a product. With better designs and quality we are able to claim a higher perceived value for the category and the consumers are accepting it." At Breakbounc Streetwear, Henley's and v-neck are great performers and contribute to more than 60 percent of the category.



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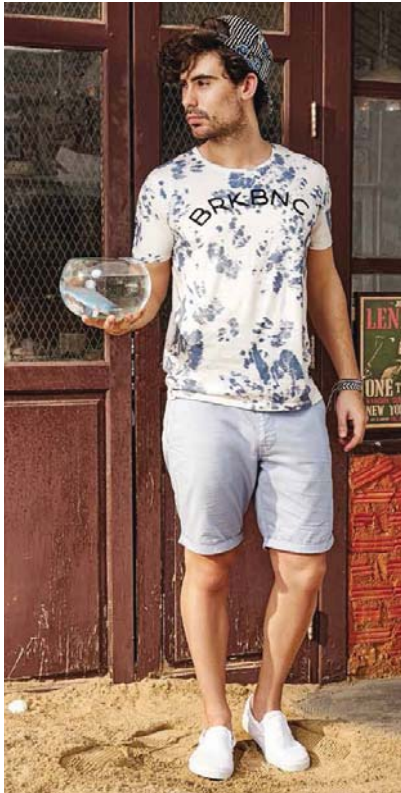
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**Top 10 Issues in Fashion 2017

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Brand Spykar has managed to have a strong patronage over the years for its range of t-shirts and jeans. The brand has recently launched its online platform. Sanjay Vakharia, Chief Operating Officer, Spykar shares, "Spykar has had a presence in the market for quite some time now – however, the brand wanted to create a dedicated platform for its young patrons who form a major part of the digital universe." He further reveals, "Since the target audience for the brand is the urban youth, online availability of its products is a remarkable step. The brand's e-commerce presence will reach out to customers across all tier-I, -II and -III cities in India." On contribution of t-shirts, he shares, "Lifestyle brands generally have 30-35 percent of t-shirts out of the total top wear category. At Spykar it is 20 to 25 percent."



On finding the right balance to manufacture what suits the TA, Vakharia talks about Spykar's modus operandi, "The fit, feel and styling is designed based on the fashion and trend forecast survey. They are very fabric driven e.g. fabrics with stretches have a slimmer block, accordingly the price is little higher when we choose the stretch fabric. We have a team which works with designers to monitor the pricing and suggests changes in fabric, styling to make it a saleable product."

Maheshwari talks about Riot saying, "T-shirt is our forte, we manufacture t-shirts in various fabrics, prints, styles and even graphic techniques. Riot is a brand for youth and a wide young audience is inclined towards the casual wear that mainly comprises of causal t-shirts. T-shirt as a category dominates in our brand." The brand has its own e-commerce portal and 6 EBOs. In terms of MBOs, it is present across 150 outlets and is available across major e-commerce portals well. At Spykar, according to Vakharia, "We have polo and non-polo about 40:60 percent respectively, then non polo is further divided in Henley's, crew, v-neck. Share depends on the markets demand for the season." Spykar has a strong presence across India with a presence 900+ MBOs, 200 EBOs and 40 SISs.

Sharing a break-up of sales figures based on the necklines, Gautam shares, "The ratio of round neck is to v-neck is 75:25.

V-neck has improved." On the fabric and design trends, he adds, "Cotton and linen blends, indigo dyed fabrics, big bold and quirky graphics (some of them are hand drawn)." On the percentage of acceptance based on neckline, at Numero Uno, polo and collared neck comprise 35 percent; v-neck is 30 percent; round neck is 20percent; crew neck would be 10percent and Henley at 5 percent. He shares, "Henley has clearly improved in the last two years." And as for the per centage share seen in the category of women's t-shirts, round neck is at 35 percent; v-neck at 35 percent, boat or cowl neck at 28 percent, high or turtle neck at 2 percent and sweetheart neck stands at zero percent.

Maheshwari shares, "Major chunk is with men t-shirts, round necks are high on demand as compared to other styles. Basic polos, henley neck have also shown a remarkable increase in the sales over the past two years." He adds, "Compared to men's t-shirts, women's t-shirt has been lower, however, with various styles and trends entering the market, and hype of friday dressing, woman have started to opt casual t-shirts too. The round and v-neck in the woman category have picked up on sales in the past few years."



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Colours for 2016

Usha Periasamy, Director - Brand and Operations, shares, "Classic Polo's core strength lies in knits. The brand constantly defines new fashions trends catering to the latest consumer preferences. This season we have planned more of fashionable category products whereby we will differ from other brands and this would be our unique selling products. We have taken a fresh look at this season's colour ranges and we highlight the most important tones to focus on. Our never-out-of-stock colours are the essential tones of the season and those making the biggest impact across the India." According to Gautam, for SS 16, orange, viridian green, imperial blue, beeswax would do well and for AW we shall see the trend moving towards, khaki, samba, syrah, classic blue."

Shah points out the growing acceptance of printed t-shirts and the prints are not restricted to 'designs' and 'graffiti' alone. She reveals, "Shah feels that SS 16 is all about a bright and relaxed colour palette. She adds, "Vintage reds, sporty greens and tropical yellows dominate the colour palette this season. In AW, the colours are richer and earthier. Burgundies, navys and monochromes dominate the palette." Singh of Numero Uno shares his pick for colour trends for SS and AW, "Core colours

for SS 16 would be black, grey melange, grey, white, navy. "Serenity" the colour predicted by Pantone as 2016 colour of the year is sure to be a best seller. The others would be coral, sand, sea foam green and olive and for AW 16, core colours would be black, architectural greys, ultramarine, airforce and midnight blues; fashion colours would be rust orange and brick red is our prediction. The others would be military olive, berry tones, rustic and chocolate browns and sunset oranges." Makhija' pick for SS 16 is pastels with a dash of vibrancy. Vintage washes in soft pastel colors such as code red, vermil red, mellow and smoke green, sky and pastel blues are some of the fresh colours. Darker hues in green, orange, greys, blues, jet black are forecasted by him.

Road Ahead

On a concluding note, Singh of Numero Uno, shares, "Technology is the driving force for innovation. Influencing innovation at every level from fibre to production. There are no major differences between India and abroad in terms of trend because of the advent of 'internet of things' and glorification of sharing and consuming information whenever and wherever you are. The gaps are getting narrower. Though the cultural, climatic, geographical and demographical differences make all the difference to make the Indian consumer unique. One can observe huge innovations in fabrics for both casual and sports wear lifestyle products. New fancy fibres, blends and counts coming together for commercial viability. Defects are Effects today is a big innovation. The once known knitting defects are being treated as fancy effects for a new creation today. High stretch, performance, utilitarian and ultra light fabrics is the buzz in the sports wear category. The advancement in printing technologies like 3D-printing, digital printing is tackling design to a whole new level. Dyeing and washing techniques have also given way to new breakthroughs in worn-in vintage tee looks."

Vintage washes in soft pastels colors such as code red, vermil red, mellow and smoke green, sky and pastel blues are some of the fresh colours. Darker hues in green, orange, greys, blues, jet black are being forecasted.





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HATS OFF TO HATS OFF!

Team Images BoF talks to Sanjay Vig, Director, Hats Off Apparels, on his brand's success and future plans.

By Zainab S Kazi

A passion for good clothes and exposure to apparel trends abroad, led Sanjay Vig, a young entrepreneur, to enter the world of knitwear with his own brand of fancy t-shirts. This was in 1989, a time when t-shirts had yet not come out of the closet to be seen and worn for an evening out or for occasional wear. This is when he decided to launch Hats Off Apparels.

Backing Vig was his engineering degree and his father's (Om Prakash Vig) support. With no experience in the field of garments and textiles, Vig decided to take a plunge and make his passion work for him. To hear it in his words, "I was always fond of wearing good clothes and I thought I could design them as well. My international exposure led me to thinking about introducing fancy t-shirts in India. With this in mind, I decided to enter the field of manufacturing knitwear and specialise only in men's t-shirts."

Headquartered in Mumbai, Hats Off apparels has been one of the leading fancy t-shirt manufacturers for men since its inception in 1989. With a strong manufacturing unit in place, the company has built a capacity to produce 1500 pieces of



The brand's experience with online channels has led them to pull it off they found even after signing an agreement, their t-shirts being sold at a discounted price and this was going against their offline model.

t-shirts in a day. Vig elaborates, "Spread across 50, 000 sq.ft. of area with various units for manufacturing, warehousing and administration purposes; Hats Off Apparels is based in Mumbai. The team at Hats Off ensures smooth transition of production work through the various stages of a t-shirt making right from procuring raw materials, cutting, stitching, designing, printing, washing, embroidery and finishing."

Further, he shares, "With in-house designers and merchandisers, the brand has an upper hand in creating not only exclusive designs but also the latest designs. An in-house Quality Control Team (QCT) is an integral department to keep a check on common issues like shrinkages and color bleeding."

According to Vig, the brand has a strong distribution system in place which has helped the brand spread across the country. Hats Off has consciously decided to not be available through online channels. Vig shares, "My experience with online channels has led me to pull the brand off as even after signing an agreement, we found out that our t-shirts were being sold at a discounted price. This breaks off the offline model."

The company believes in constantly upgrading to the latest technology to keep up with the changing times. A member of The Clothing Manufacturers Association of India (CMAI), Hats Off Apparels has been an active industry participant and has contributed immensely towards the growth of the sector.

On a concluding note, Vig remarks, "We started off at a time when nobody was interested in fancy t-shirts. But we can proudly say that times have indeed



Sanjay Vig, Hats Off

On the initial set of roadblocks and challenges, Vig shares, "There were not many t-shirts brands when I started off with the brand. The challenge was to create an awareness for knitwear in India. People were not too comfortable with t-shirts having collars and that too fancy t-shirts. They would never imagine that t-shirts can have fancy prints and that t-shirts could be even worn as an evening wear. When we launched Hats Off, the market really appreciated what we had to offer and we had a first mover advantage." He shares, "People who travelled a lot, they did have awareness and understanding of t-shirts and sweat shirts. My personal travel gave me an edge and push to get into manufacturing fancy t-shirts for men." "Pricing was not a challenge as there was no competition for us as there was nothing called as fancy t-shirts. We were welcomed by retailers across the country. Reaching out was one to one that I had to do with my sample set and give them a presentation, convincing them on quality," he shared.

changed and we have played an important part in making the times change with our innovative ideas and designs. Awareness of knitwear has definitely grown. Though we follow international trends, we also mold as per Indian tastes. I believe that is the USP of our brand, which is one of the fastest growing aspects in the country and abroad."





INNER WEAR: MARKET ROUNDUP

Renowned innerwear brands and manufacturers share insights on the evolving innerwear market
and on the changing consumer demands.

By Manisha Bapna

Innerwear is no longer bought privately in brown paper bags from some small basement shop with dainty lights and poor displays. No longer has one heard the pheriwalas circling the lanes selling the mill made fine cotton drab slips and boring shorts for the lads of the streets. Premiumisation has given birth to aspirations and confidence to go beyond. "Indulging in a chocolate is same as buying an innerwear," says Preeti Acharya, a working professional. The distinctive shift from price to brands, whites to neons, occasion-led-wear threaded with lavender pinches and fragrances is what defines the innerwear market today. "Introduction of various retail formats and the growing dominance of e-commerce has largely affected consumer expectation and hence innerwear is no longer considered as an add-on category. Instead it demonstrates a more provocative and thoughtful appeal," says a spokesperson from Rupa & Co.

Technopak has estimated the innerwear market in India (organised and unorganised) at ₹17,750 crore and expected it to grow three times in 10 years. Women's wear accounts for 61 percent of the total innerwear market. In volume terms, men's and women's innerwear markets are almost equal in size. But in value terms, the women's lingerie segment constitutes 66 percent share of the total market. The per capita consumption of innerwear in the women's category has increased considerably owing to growing awareness among women about health and hygiene, and growing number of working women. Besides, men's segment also shows a significant growth due to changing fashion trends, growing fashion consciousness amongst men, new retail formats, technological innovations and rising disposable income.

The kidswear market is slightly inclined towards the boyswear segment, which stands at USD 4.3 billion compared to USD 4.0 billion of girlsweat segment. However, with the fading divide between boy and girl child and increase in the spending on the latter, the girlsweat segment is expected to grow at CAGR 11 percent over the next 10 years. The boyswear market is slated to grow at a CAGR of 10 percent over the next decade.

Journey from Mill Cotton to Organic Cotton

From cotton lawn fabrics, sheer silks, heavier brocades, batiste, quilted and layered coarse lowers along with a pannier skirt, innerwear fabrics have come a long way. Finishing plays a very important role in the textile and garment industry due to its varied features and value and therefore functional finish helps alter the performance of the fabric and fulfil specific roles. Brands today use evolved cotton lycra knit, micro modal, supima, linen, vegetable dye materials along with organic cottons to produce various innerwear garments.

In addition to cotton, synthetic cottons, moisture wicking materials like wool and bamboo are being widely used. "There is lot of innovation especially in the women category, due to the growing demand for sleek and stretchable fitting garments," shares the spokesperson from Rupa & Co. He further says, "There's a certain health hazard associated with the use of mix cotton (mostly sold by the unorganised sector), due to use of chemicals in the dyeing process. Population which are health conscious are looking at organic



"Dollar Bigboss is now experimenting with geometrical shapes trendy pattern with pop colours, signature broad waistband, cool shades and body friendly fabric."

—Vinod Kumar Gupta,
Managing Director,
Dollar Industries



"Products made of a perfect blend of various fabrics are currently ruling the market."

—Saket Todi,
Brand Head, Lux Onn
Premium Wear

Starting from loud themes and patterns, technology has evolved the way innerwear looks and wears today.



cotton in order to safeguard themselves, especially kids, from the ill-effects of mix cotton. However, as organic cotton is expensive, it is most used by SEC -A and -B only.”

Dollar Bigboss trunk, a renowned brand from Dollar Industries, is made of superior micro-modal fabric for premium feel and comfort, its managing director, Vinod Kumar Gupta, shares, “The brand is now experimenting with geometrical shapes trendy pattern with pop colours, signature broad waistband, cool shades and body friendly fabric.”

“Products made of a perfect blend of various fabrics are currently ruling the market,” shares Saket Todi, Brand Head, Lux Onn Premium Wear.

Technology & Style

Starting from loud themes and patterns, technology has evolved the way innerwear looks and wears today. According to the spokesperson of Rupa & Co., over the years, technologies have been used in some amazing ways. From 3D-printing to Near Field

Communication (interactive clothing) are being trailed right now with the potential to change the world of inner wear. The US army researchers have developed smart underwear with sensors secretly put inside elastic waistbands that track the heart rate, body temperature and perspiration and beam the statistic back to a central monitor.

“Regarding technology we can say that there is more and more automation in cutting and stitching which helps in producing strong yet comfortable products. Advanced machines with various features have really changed the pattern of production in recent time,” says Todi.

Dollar Industries is the first Indian innerwear company with fully integrated manufacturing unit equipped with the latest processing technology with Sclavos and MCS dyeing machines and the top most finishing range like Bianco padder, Strahm padder, Strahm dryer, Monfong’s stenter, Lafer, etc. “We are also experimenting with compacting machines to produce finished raw material dyed in any possible colour,” shares Gupta.

Segments on the go

“I believe that segmentation in this field is principally due to positioning of the brands and price. Quality does play certain role here, but we think it’s just a perception,” says Todi.

The Indian innerwear market is segregated into four major segments—super-premium, premium, medium and economy—based on product pricing. Super premium belongs to higher price range, followed by premium. Medium follows an average pricing, whereas economy belongs to lower price ranges. But consumers in this industry are segmented on the basis of their buying behaviour and brand loyalty. But there are affluent few who buy looking at pricing, style, quality, convenience of purchase, easy availability, etc.

“I wish to wear Victoria Secrets as I love the styling of colours and accessories on the innerwear, but at the very same side, I am cautious of spending,” says Rishita Verma, an aspirant consumer from Indore.

Categories & Sub-categories

The women innerwear market is considered to be more dynamic with many design variations and innovative



Most of the organised category have established their brands in SEC -A, -B and -C and all these branded category products are highly conscious to attract customer to create a brand pull in their respective segments.

product introductions. The sub categories in women's innerwear include brassieres, panties, camisoles, basic t-shirts, shorts, pyjamas, sleep wear, active wear and maternity wear. Consumers in this category mostly purchase branded brassierers and panties constituting more than 90 percent of the category mix. However, the penetration of brands is comparatively low for other sub categories like camisoles and sleep wear etc.

Dollar Bigboss offers premium range of men's inners, brief, vest and trunk with designer touch as well. Almost 60 percent of the sales come from Bigboss; 20 percent from Missy; 15 percent from kids innerwear; and 5 percent from thermal wear.

"Our major collection consists of the fashion range like Denimz, Casualz, Premiumz, Bling, Italia and Trendz for the youth, and an active range called Sportz. In terms of sale we can say, Grande and Comfortz has contributed a lot," says Todi

Rupa & Co.'s product portfolio include vest, brief, drawer, bermuda, capri, t-shirt, lounge wear, boxer shorts and sleep wear for men; and bra, panty, camisole and leggings for women. It also offerings exclusive products for the infants and toddlers like baba suit, bloomers, slips, lounge wear, bermuda, t-shirt and thermal wear for all age group.

Most of the organised category have established their brands in SEC -A, -B and -C and all these branded category products are highly conscious to attract customer to create a brand pull in their respective segments. "Depending on the segment, brands are being advertised by taking ATL and BTL route. One cannot imagine attracting super-premium or premium customers without a brand name; and when there is a brand there's an inevitable need to create a brand pull, which cannot be achieved through push marketing" says the spokesperson from Rupa & Co.

Marketing & Promotion

Dollar Industries has presence in over 70,000 MBOs all across the country and a robust online presence. Internationally, it has presence in UAE, Oman, Basra, Jordan, Qatar, Kuwait, Bahrain, Yemen, Iraq, Uzbekistan, Myanmar, Nepal and Africa. "Digital campaign is a regular exercise for us to connect with our consumer directly. We are in social media like Facebook, Twitter, Instagram, Pinterest, Youtube, etc.," shares Gupta.

Lux Onn Premium Wear has 9 EBOs, while being present in 20,000 MBOs and 1,400 SISs. The brand is also available in Hypercity, Central, Pantaloons and Spencers. Also, they are retailed through major online platforms like Amazon, Flipkart, Jabong, Myntra, Homeshop 18, etc. "We have plans to open 11 more outlets in 2016," shares Todi.

ZERO: BUILT OVER TRUST AND RATIONALITY

Growing at a CAGR of 20-25 percent year-on-year, the renowned infantwear brand, Zero shouldn't be asking for more. Zero was launched by Cotton Casual some twenty-five years ago, today it is the undisputed leader in infant wear market and boast of offering 100 percent cotton apparels for 0-24 months old children.

Manufacturing & Technology

With a state-of-the-art technology, which refrain the company from outsourcing any of the manufacturing processes including cutting, dying, etc. "Even the elastic that is used in the bottom wear for infant apparels are manufactured in-house," shared Pradeep Arora, Director, Cotton Casual (India) Pvt. Ltd.

"When we started Zero, we only manufactured for children between 0-18 months. But when the demand arose for bigger sizes, we started putting upto 24 months. However, we had to halt ourselves because we believed we specialises in infant wear," declares Arora. The brand shares that they uses around 35 types for fabric for various styles and designs needed for an infant apparel. Earlier, they had even used 65 types of fabrics, which according to them was difficult to manage so they had to cut it down to 35 fabric range.

Price it Right

It is very important to identify your customers and understand their pocket sizes more so when it is about infant apparel buyers; because according to Arora, an infant requires 12-18 pair of cloths on an average in a day. "You can not sell these garment pieces at Rs. 1,000 calling it infant wear. They have to be aptly priced," he appraises.

Referring to an anecdote he shared, "It was after 2-3 years into the business, he had manufactured an infant frock at ₹33, while our competitors were selling at ₹98. I was warned and asked to look into my



cost strategies." He did checked it with his business partner and they find their strategies in place and observed that they can increase the price unless they are looking for high margins. "Its been 25 years, we have not looked into margins. Rather, we have fought and stood on the margins and brand's price point," he said.

Marketing Strategy

Having built the trust amongst its buyers in over two decades, Zero is marketed through word-of-mouth publicity. "We do not require big campaigns and propoganda. Our customers are our publicist. They campaign for us through their trust words," he shared.

Arora finds pride in the fact that in the last twenty-five years they have not sold a single piece under discounts. He claims, "When the prices are too high who will buy. We believe that we are not producing goods, we are making one perfect piece which will go to the buyer and that one piece has to be good. Our marketing process is to make one proper piece and not to manufacture dozen garments. Turnovers do not excite us and we do not look at the balance sheet that way."

He concludes, "I want my wholesalers to be a bridge between my customers and me. I understand my brand and it should reach the customers."

While Rupa & Co's retail presence is spread across all the major towns and cities in India. It has two exclusive outlets at strategic locations in Kolkata. "We are also present internationally in GCC, Africa and Asia Pacific," shared the company's spokesperson.

Contrary to e-commerce webstores, www.rupaonlinestore.com is the exclusive online destination from where the customers can buy Rupa & Co's products. The brand's portal features all the brands manufactured and marketed under the company.

Future Potential

With many international brands Victoria's Secret' of the US and 'Agent Provocateur' of the UK, Hunkemoller, while Japanese lingerie brand Wacoal has already made a proposal to the Foreign Investment Promotion Board to form a joint venture to open single brand shops in the country, the competition and growth potential will be huge. Delhi-based Groversons, which has been selling women's innerwear in the country for 60 years, plans to go public within a couple of years to fund a big-ticket expansion. Other domestic lifestyle brands are also innovating to provide a 360 degree solution to their customer base through various initiatives like visual merchandising, spreading awareness among the consumers, and stocking innovative products.

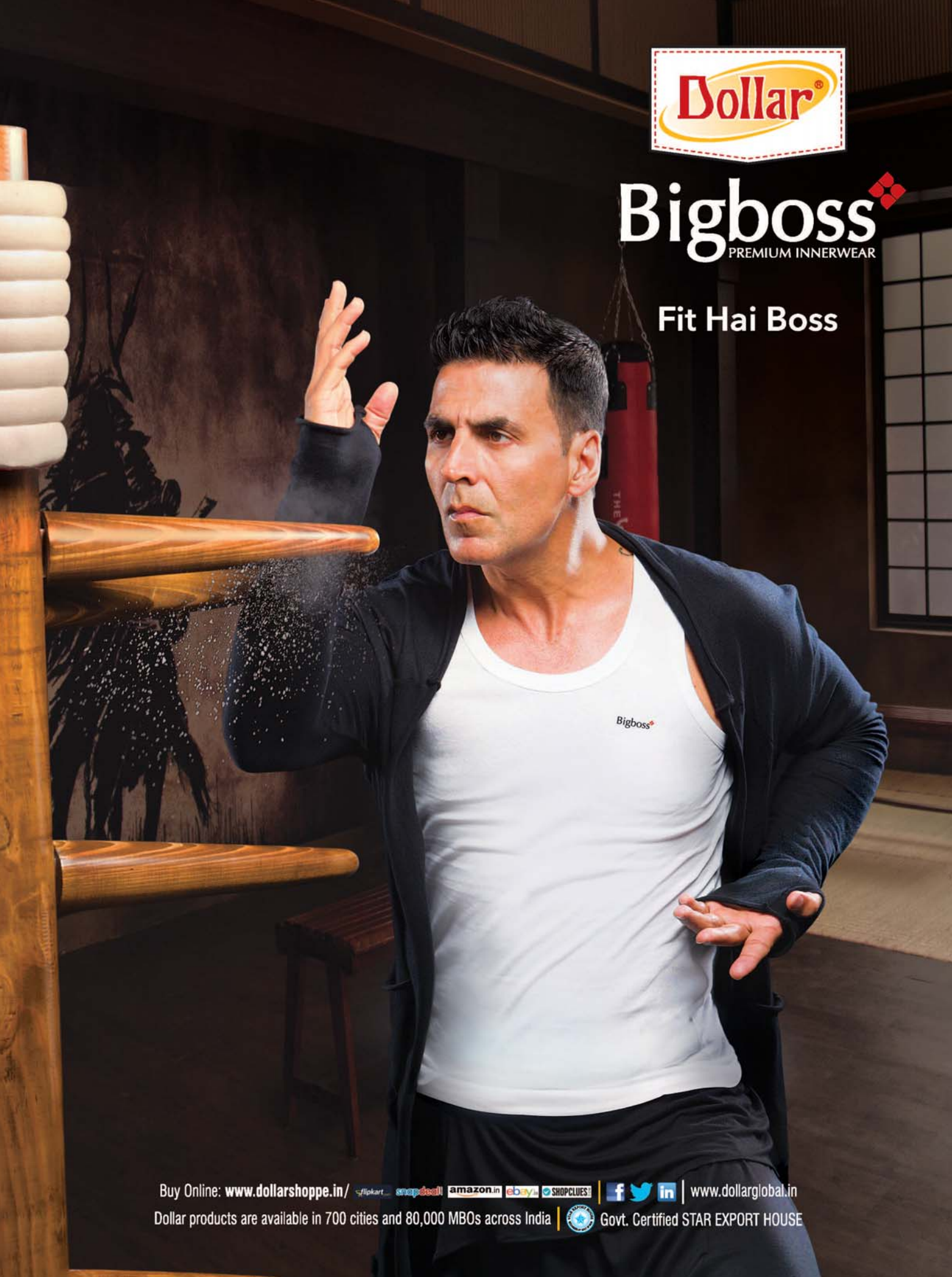
Lux Industries is soon going to start a new hosiery manufacturing unit near Serampur in West Bengal according to industry sources. Jupiter Knitting Company in Tirupur recently added 100 more machines to enhance its capacity for 'briefs' manufacturing. On the other hand, 6 months old, Kotan Apparels, Tirupur just entered into innerwear (vest and briefs) export. It is also targeting the domestic market with its brand ZYOKE.








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ACTIVWEAR

A PROMISING CATEGORY

An active lifestyle means an active wardrobe. Flashback a decade ago or something and a pair of track pants and a t-shirt would qualify for sportswear for a lay man. But today, sportswear is not just restricted to clothing worn by hard core sportsman. A lot many brands today have a strong portfolio, offering trendy and affordable sports or active wear in India.



Easy availability of apparels has led to people experimenting with their wardrobe. Credit to create demand for apparels, to a large extent goes to the onset of mall culture and online shopping phenomena in that order respectively. Alluring in-store and other strategic advertising leads customers to usually shop out of impulse. Sportswear is one such category that has grown multi-fold, based purely on the need created for a healthy and active lifestyle. No wonder today, we have so many brands entering this category and no wonder we have so many people actively looking for active wear. The advantage that this category has, is that it easily gels as part of being casual wear and a lot many people do not mind stepping out in their active wear attire to make a style statement.

Market Dynamics

A quick search on any of the leading online portals that offer apparels, have a dedicated section for sports and activewear. In fact, niche lingerie portal like zivame.com too has an exhaustive range of activewear to offer. The fact that Myntra and Flipkart recently launched

Japanese brand Mizuno, speaks volumes of the demand generated by activewear in India. Mizuno is a popular Japanese sportswear brand and is expected to be available exclusively through Myntra and Flipkart. Myntra said it will offer more than 140 styles in footwear and sports apparel with prices at ₹1,299 to ₹13,999.

Aptly explaining the reason for a rise in activewear in India, Atul Bajaj, Executive Director, Product Merchandising and Sourcing, Puma, shares, “The activewear market in India is consistently growing at a high rate. Exponential increase in desk jobs has made more people cautious about their fitness, giving them reasons to join fitness activities such as gym, aerobic, yoga or to take up any sports. This has led to an overall per capita increase in consumption of activewear.” Adding further on changing consumer dynamics, he shares, “As consumers are becoming more aware about fitness, they are steadily moving from traditional cotton based t-shirts to active wear in order to feel more comfortable and enhance their





performance across different sports and fitness activities. With easy information flow over social media, consumers are getting sufficient information on the latest developments and benefits of activewear.”

With 300 exclusive brand outlets (EBO) and a presence in 1,500 multi brand outlets (MBO) along with 250 shop-in-shops (SIS) and also presence in large format stores such as Shoppers Stop, Lifestyle and Planet Sports, Puma by far, is one of the most active brands offering a range of sports and activewear for men and women. The brand has seen a 30 percent growth year-on-year in this category.

Fabric Innovation

The rise in demand for activewear has led to brands innovating in the use of fabrics – from using silver technology to dry cell. Bajaj talks about Puma’s offering, “Puma, being a category leader, is using various technologies; a few of them being dry cell (for better moisture management), storm cell (water resistant garments for protection against rain and storms), and PWRwarm (thermal regulation) to help athletes perform better in their respective fields.”

Bajaj elaborates that apart from cotton, fabrics like polyester and nylon with performance finishes are gaining traction among the Indian consumer. He shares, “Polyester is renowned for its strength, quick drying ability and less water retention, which helps in keeping the athlete comfortable and dry and eventually helps in performing better. Organic cotton is catching the consumer’s attention as consumers are becoming more and more aware and responsible towards the environment.”

Bajaj adds, “Currently, the use of polyester and nylon along with lycra and performance finishes to bring in additional comfort through increased stretchability, is the latest trend and are also becoming popular as these give a snug fit and comfort to the athlete. Use of bright colours with a heather texture is in trend for both men and women.”

R Maheshwari, Director, Texperts India, talks about fabric and fibre innovation at FITZ, “Some of our action and sports garments are made up of stretch filament. Out of our total range around 8-10 percent range is made up of value added fibres. Nowadays, regenerated fibres like tencel, modal are quite popular. Moreover, fabrics with properties such as cool dry, moisture management, thermo regulation and anti-

bacterial, are catching up the market at a faster pace. Sustainable bamboo fabrics are in great demand and well accepted due to its inherent comfort and anti-microbial properties.”

Talking about innovation, Bajaj shares, “Compression tops and bottoms with Silicon taping are one of the latest developments allowing for better toning of the body and offering a better recovery after the training.”

Reaching Out

To reach out to their target audience, the brand undertakes active, below-the-line promotion activities like partnering with sports related events that involve the participation of lay man. Bajaj elaborates, “Chiefly through store staff training, in store communication and associations with few of the biggest running groups across the country. We are associated with running events like “Delhi Half Marathon”, “Tata Steel 25K”, “Ignite Your City”, etc., which provide us an excellent opportunity to interact with some of the biggest running enthusiasts of the country.”

The space share for activewear in regular retail stores is limited currently. However, this is changing at a fast pace with even lifestyle retailers and brands launching their activewear lines. For sure, sports and activewear in India has caught on a great momentum and it is for brands to make the most of it.





INVISTA'S KNITTED DENIMS REVOLUTIONIZING

The Denim Industry

New knitting technology can now produce knit denim fabric with the same properties as that of woven denim fabric. This will ultimately revolutionize the denim industry and provide an alternative to the woven denim users, explores Aarti Kapur Singh.

Denim has been a hot topic in fashion - more so, over the past two years - undergoing not just a renaissance in popularity, but also lots of innovations. Now, thanks to Invista, there will be a knitted denim that washes and wears like high performance active leggings.

Invista, in partnership with Garmon S.p.A, a leading denim finishing house, has debuted its knit denim concept collection, based on the Lycra Hybrid technology, at the Kingpins Show in Amsterdam, in March. It is a circular knit that looks like woven but features the qualities of knit fabric.

Stretch denim is nothing new and the very innovation would not be possible without the super stretch and recovery of Lycra fibre, so why make the leap from woven to knit?

“In looking at the industry mega trends, it is no secret that demand for active wear garments have been increasing,

particularly yoga wear; and sales of denim have been declining as a result. We really wanted to do something, as part of the denim industry, so that denim could capitalise on the active wear trend,” says Jean Hegedus, Global Segment Director – Denim at Invista.

Introduced at the last Kingpins Show in October, Lycra Hybrid technology enables mills to create denim fabrics that combine the comfort and flexibility of knitwear with the authentic aesthetics and performance, typically found in woven denim. Through its collaboration with Garmon S.p.A., Invista aims to show the variety of aesthetic possibilities that can be achieved with knit denim fabrics using Lycra Hybrid technology. Fabrics made with this technology use patented and patent pending constructions that combine the authentic look of a woven denim fabric with the comfortable fit and freedom of a knit. They offer a high degree of multi-directional stretch with low growth and low shrinkage.

Alberto De Conti, Chief Marketing Officer at Garmon Chemicals, says, “We are seeing a growing consumer desire for casual apparel that incorporates both performance attributes and environmentally sound manufacturing practices. The combination of knit denim containing Lycra Hybrid technology and garment finishes using GreenScreen® assessed chemical auxiliaries, spark unique product attributes as well as design and quality excellence.”

With leading brands including Lycra, Coolmax, Cordura, Stainmaster and Antron, Invista is one of the world’s largest integrated producers of chemical intermediates, polymers and fibers. The company’s advantaged technologies for nylon, spandex and polyester are used to produce clothing, carpet, car parts and countless other everyday products. Headquartered in the United States, Invista operates in more than 20 countries and has about 10,000 employees.

Another mill that has developed fabrics with Lycra Hybrid technology is Willy Hermann, the Austrian mill, famed for its superfine knitted fabrics. Ralph Herman explains the revolutionary nature of this technology as, “The Lycra Hybrid technology is a concept of using both Lycra fibre and Invista’s Lycra T400 fibre in one fabric together with a natural fibre. The machines need to be adapted for the needs of the three different fibres to work together in a

delicate balance and finishing needed to be adapted dramatically for the Lycra Hybrid technology.” He adds that the development required “some proprietary machine adjustments and additional devices were installed and adapted to provide the necessary technical fine-tuning for the knitting.”

“Once this was done,” he added “we proceeded with a number of finishing trials – we developed processes and recipes to provide the best possible outcome of the fabric made with Lycra Hybrid technology. After testing, the final hurdle for the new fabric was finishing. In addition, a lot of post processing trials were done on test garments to prove usability in post-treatment (laser, stonewashing, overprinting, garment dyeing).”

Jeans made with Lycra Hybrid technology have wear force comparable to an active wear legging, which has less than half the wear force of a conventional jeans. “So the wearer can move easily and feel comfortable while wearing a garment that looks like a traditional jean,” says Hegedus.

Once fabrics were developed, Invista tested them to check its performance. “We made garments and put them on our fit models. Sensors on the fit model’s body measured the force she was feeling as she wore the garments and performed

different moves, such as squats. A comparison was made between active wear leggings, conventional jeans and Lycra Hybrid technology,” elaborates Hegedus.

The new technology also offers an added bonus, that is, it creates a smooth line on the body. Hegedus says that Invista is currently working on finishing, applying new textures and finishes to the Lycra Hybrid fabrics, so that they look like woven. “At the same time, we also want to make the Lycra Hybrid fabrics look unique, so we are striving to provide both functionality and visual appeal,” closes Hegedus, while elaborating on the future of the Lycra Hybrid Technology.



FABRICS WITH LYCRA HYBRID TECHNOLOGY CAN BE ENGINEERED FOR JEANS HAVING A VARIETY OF END-USES:

- Shaping jeans that feature a high-level of stretch and recovery with low normalised hysteresis. They are tested against quality standards that are based on scientifically determined metrics that characterise both shaping performance and comfort.
- Athleisure-wear that provides just the right balance of freedom and support. Because they look and feel great, these jeans can go wherever your active lifestyle takes you.
- Everyday denim fabrics that provide exceptional comfort, fit and freedom of movement so that consumers can go about their daily activities while looking and feeling great.



NIKE

REINVENTS RUNNING USING KNIT TECHNOLOGY

The runners' world has got a new entrant in the family, giving them an effortless ride with ultimate underfoot sensation. Nike recently launched its LunarEpic Flyknit model, featuring a revolutionary mid-height collar design and a new tooling system,

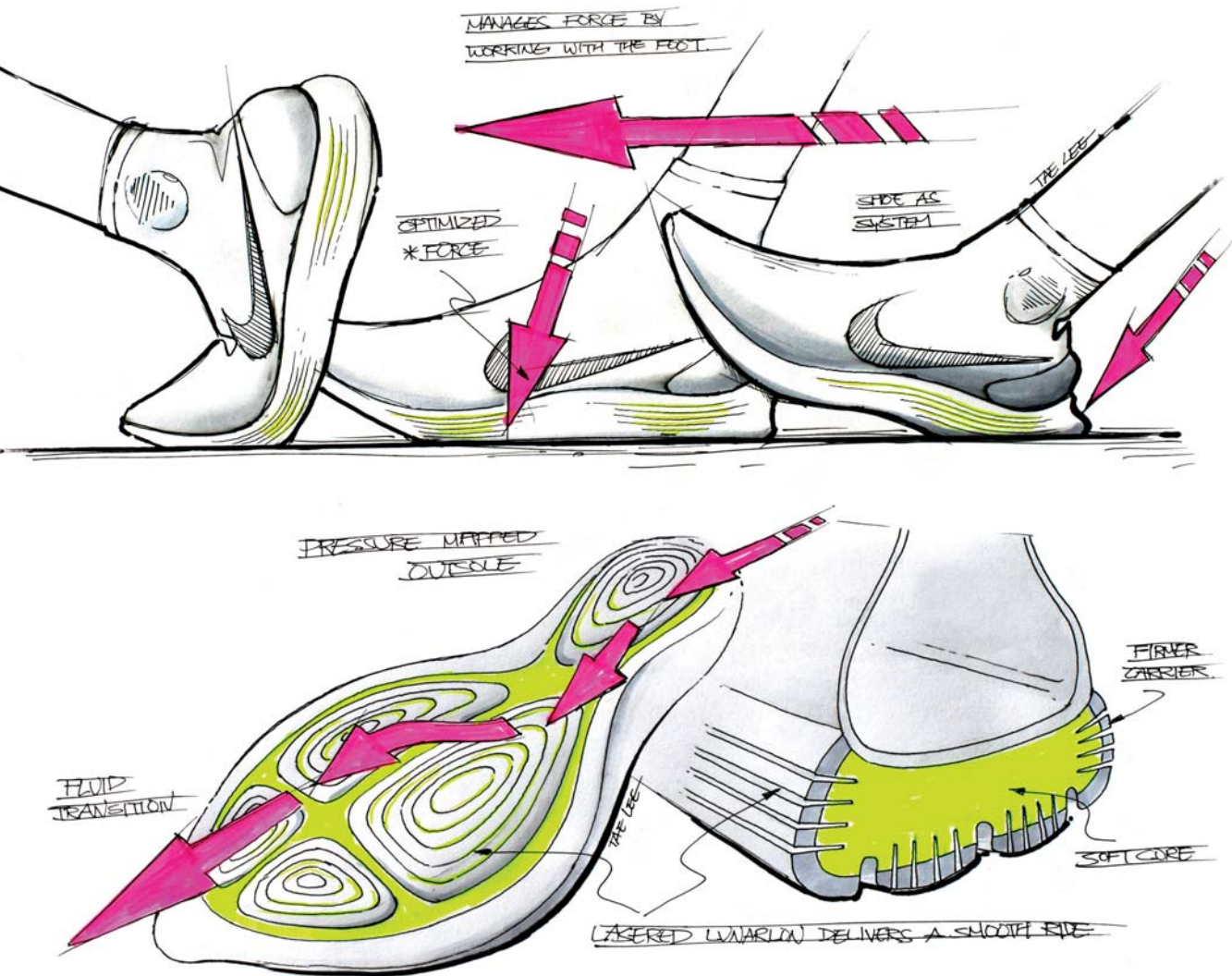
Nike, the leading sportswear specialist, has developed a new LunarEpic Flyknit model, featuring an innovative mid-height collar design and a new tooling system, which is said to offer a great fit, fluid feel and superior softness. The work on the new LunarEpic Flyknit design began over 18 months ago with the examination of a global football boot. Taking insight from Nike's Magista, which allows the foot, ankle and lower leg to work together as a single unit to emphasize natural movement and a feeling of fluidity, the company's running designers aimed to create a shoe that imparted this same concept, while still serving runner's key needs, which are: fit, feel and force.

It is truly revolutionary. The mid-height collar design apart, there is a new tooling system that adds a fluid feel and softness.

LIGHT WEIGHT & BREATHABLE

The company's designer team began by constructing a lightweight, breathable one-piece Nike Flyknit upper, engineering different densities directly into the knit for precise support: a snug fit at the arch, heel and forefoot. At the same time, the aforementioned mid-height collar was added to facilitate lockdown, both physically and sensorially, and Nike Flywire cables were knitted in for additional strength and a close, dynamic fit, the company reports. **Moving to the midsole, the designers employed a new dual-injection technology. Using heat, instead of glue, they fused two foams into one piece that still features the traditional Lunar Ion construction, with an IU foam carrier and soft IP core. Laser sniping on the side of the midsole is said to facilitate cushioning and targeted flexibility.**





RUBBER-FREE OUTSOLE

As a next step, a rubber-free outsole with laser-siped geometric pistons inspired by pressure maps of the foot was added. Constructed of Lunar lon foam, each piston moves individually, enabling pointed compression, that results in an exceptional ride, the manufacturer reports. Maximising both cushioning and traction, it is said to provide smooth heel-to-toe transitions and propelling energy return.

“When combined, these few potent components form an unprecedented shoe with a virtually vanishing fit that adapts to the body in motion for a fluid feel and superior softness,” says Phil McCartney, Head-Running Footwear Division, Nike.

WHY THE FLYKNIT

If McCartney is to be believed, the Nike Flyknit is a material that will revolutionise running because of its breathability. “The

beauty of Nike Flyknit is its versatility; it allows us to be very precise and detailed in construct in different areas of the upper. Nike Flywire technology woven into the Nike Flyknit upper, integrates with the laces for a dynamic, supportive fit through the midfoot. Nike Flyknit also allows us to add a motion fit collar in an integrated way. The performance benefit is a superior fit and an incredible sensation. We have used a different Nike Flyknit material in the collar to what is elsewhere on the upper. We put elastic yarns in the collar to ensure ease of entry for the foot into the shoe. Runners repeatedly told us during wear testing that they feel the shoe vanishes on their foot,” emphasises McCartney.

The LunarEpic Flyknit is available on Nike stores from March 3, 2016 onwards at select retail locations worldwide and also at www.nike.com starting this March.





A new evolving category

LOUNGE WEAR

The desire to look trendy and yet be comfortable at home has fueled the loungewear craze amongst consumers. Brands are coming up with fancy designs and styles in light weight, highly breathable and skin friendly fabrics.

By Manisha Bapna

The students and young professionals were the first ones to sport loungewear attire, in a quest to integrate the quirkiness and fun quotient into dressing. The desire to be trendy yet look casual and comfortable and a clothing which is practical and de-stressing drove players into this segment. Today, it has become a lifestyle statement for all those people who have been eagerly looking for a third wardrobe to wear at home after coming from work and to lounge around in before going to bed.

Lounge wear was earlier considered as an extension of intimate wear. People used to mix-and-match casual brands by way of a lower and a top. Purely because they were not aware of the existence of a separate category. Western influence, changing trends, work-from-home culture has fueled this new loungewear craze into the day-to-day life of people. "There is a transit change in people the way they are thinking of dressing from formal to informal and lounge wear. Increase in double income and surplus budget per capita consumption is pushing growth in the lounge wear segment and facilitating our growth as well," says Pranal Modani, Chief - Business Development, Channel 9. Also, the hot weather and casual work culture



is prompting people to buy more loungewear. “Hence, comfortable and natural fibre products will always be major part of our lifestyle. Lounge wear is relaxed clothing off-work primarily within home,” believes Hitesh Ruparelia, Director, Sweet Dreams. Ruparelia further adds that lounge wear as a category is not completely registered as a category with the customer alone, its usage is in every individual lifestyle. The category will take few more years to get registered with the consumers and need a lot of visibility and promotion of the category.

Categories & Sub-categories

“Global market share for loungewear within the apparel section is 8-12 percent which varies in different markets. India is still in an infancy stage and in the next 10 years, market will continue to grow. Sweet

Dreams continues to grow at CAGR 20 percent and we are expecting the same,” shared Ruparelia. Men and women of today look at wearability, affordability and comfort.

In women the best selling loungewear includes camisole tops with fitted tees, streamlined bottoms with special emphasis on fashion, trends, colours and prints. While, men look for drawstring bottoms and loose-fitting t-shirt tops.

“If you look at fashion—style, fit, feel and price—then our products are more skewed towards fashion and feel. Our major collection consists of inner wear, active wear and fashion wear.

We are expecting a growth of 40 percent in the lounge wear in next 1-2 years,” said Modani.

“Women category is an evolved category, but men’s lounge wear is being offered by very few companies and Sweet Dreams is one of them since past 25 years. Coordinated pyjama sets, Jamican sets and Bermuda sets are most popular in men’s category,” affirmed Ruparelia. The brand offers sleepwear, sportswear and loungewear collections in sets for men. Women category has bridal signature collection, active and sports wear, nighties and lounge set collections.

Fabric & Style

Brands prefer fancy designs and styles with detailing and embellishments like imported trims, embroidery, floral motifs and laser cut along with digital prints, discharge and reactive prints. While the top is knitted, the lowers are mostly woven with yarn dyed fabric. “Fabrics used today are more light weight, comfortable, breathable, airy, skin friendly, in stylish fits and cuts. Consumers prefer cotton and natural fabrics with vintage styles and modern graphics in mix of prints,” shares Modani. He further says, “We have utilised expertise of national and international experienced designers and integrated it with high profit styling element to get the desired collection.”

“Cotton and cotton blends in textured jacquard are in fashion for men in sleep and lounge wear. Best quality fabrics are sourced from large and system driven mills in the world. We use a lot of new innovative fabrics like rayon, knitted modal and jacquards,” explains Ruparelia. He believes fits in lounge wear is primarily followed by fashion and styling.





“Cotton and cotton blends in textured jacquard are in fashion for men in sleep and lounge wear.”

– Hitesh Ruparelia,
Director, Sweet Dreams



“There is a transit change in people the way they are thinking of dressing from formal to informal and lounge wear. Increase in double income and surplus budget per capita consumption is pushing growth in the lounge wear segment and facilitating our growth as well.”

– Pranal Modani,
Chief - Business Development, Channel 9



“There is a huge demand for leggings with long tunics for women and trendy boxer shorts for men. In summers, sleeveless tops with capri length leggings seem to be a preferred wear. Patterns like dots, butterflies, flowers and hearts will be selling strongly on the shelves,” confirms Pooja Jain, a fashion designer and garment exporter.

While Ruparelia predicts, **“Bright pastels are the colours for SS '16. For women, pink and green would work whereas for men it will be grey and beige.”** On the other side, Modani feels that for SS '16 colour trend will be dominated by vivid brights like blue, green, yellow and pastel shades such as lilac grey, peach echo, etc. The current trends in lounge wear would be cosy, comfort, multi-functional, light and breathable.



“Loungewear is about tops and lowers, so it doesn't come cheap. Controlling MRPs is the biggest challenge in this category market. So we try to keep prices attractive,” says, Ruparelia.

Market Presence

The brand is sold through both multi brand outlets and exclusive brand outlets spread across high streets and malls in metros, tier -I, -II and -III cities.

“We are present on major online platforms like Jabong, Flipkart, Snapdeal, Myntra, etc., and our garments are exported to various countries. We plan to have our own brand store in near future,” shares Modani. Sweet dreams enjoys its presence in 40 cities along with international presence in Dubai and UAE. “We are also operating through online platforms both in market place and inventory model,” says Ruparelia.

Though the lounge wear market is growing at 15-20 percent year-on-year, yet it is not devoid of its challenges including mix-and-match garments business, margin pressures, inventory surplus, changing fashion, unorganised players, rigid labour policies, taxes and regulations, price conscious customers to name a few. But despite of the bugbears, loungewear brands (national and international) are looking to spread their retail footprints in the Indian markets.





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KNITTED LEGGINGS

Changing the Leg Wear Category in India

By Zainab S Kazi

The bottom wear market for India was set in for a revolution with the introduction of knitted leggings almost a decade ago. From woven churidars to knitted churidars (closely resembling leggings), the wardrobe of a women in India (more so in metros and tier -I and -II cities and towns) went in for a complete transformation. The mix-match category saw a momentum as well, based on the easy availability of knitted leggings.

The Changing Market Dynamics

The fact that Go Colors, a recently launched brand (for bottom wear with a

good chunk dedicated to leggings) has managed to spread itself thin across India with more than 82 exclusive brand outlets (EBO) and a further presence in more than 1,200 multi brand outlets (MBO), a strong presence in the format of shop-in-shop (SIS) across 300 outlets besides a presence online through major market place models as well as through their own e-commerce portal, goes to accentuate the strength of this category in India.

Setting the context of the story to follow, Gautam Saraogi, Deputy Managing Director, Go Colors, shares, “The shift from two piece tailored or saree to mix-

“Legging trend started from the year 2008 and gained customer attention post all popular brands have moved from woven churidar to knitted churidar. And now leggings have become one of the most essential category in women’s wardrobe.”

Agnes Raja G,
Founder and Director, De Moza

and-match two piece started a decade back. Over the last 7 to 8 years, the segment has picked up and has grown at a rapid pace, thanks to the growing women work force in corporate India and a large young consuming population.” He further says, “The legwear segment has been a neglected one from a consumers’ need. The consumer had to make do with what was dished out by way of private labels by lifestyle brands and in the retail segments she had to do with the unbranded, local and unorganised segment. Only in the last seven years has the segment seen some serious players entering.”

Leggings for men in India has yet not caught the fancy of shoppers, hence the term ‘legging’ is more seen to be a fit for women’s wear category. Vinod Kumar Gupta, Managing Director, Dollar Missy, shares, “In India, we consider leggings as a women’s wear and a better substitute of churidar. This is the main reason behind the popularity of women’s leggings. In India, there is no demand of men’s leggings.” Dollar Industry’s brand, Dollar Missy, caters to women’s leggings. According to Gupta, “The fastest selling category is mid-premium segment which has come in to the price range of ₹300-400.”

As Saraogi rightly points out, the market for leg wear in India has seen a transformation in the last 7-8 years, it would not be an exaggeration to say that this transformation has its root in the introduction of knitted leggings. No MBOs or LFS today can afford to not have a section dedicated to leggings. Usually, this section finds a place in the mix and match category where two to three racks are dedicated to leggings and then there is one dedicated to dupattas. Patialas too have started catching the fancy of women but leggings surpass the buying frequency considering that leggings are low on maintenance in terms of washing easy and its no-ironing feature. Besides, leggings extend a formal look as well if teamed up with a right tunic, kurta, kurti, etc.

Agnes Raja G, Founder and Director, De Moza, aptly reveals, “Legging trend started from the year 2008 and gained

customer attention post all popular brands have moved from woven churidar to knitted churidar. And now leggings have become one of the most essential category in women’s wardrobe.” With 12 EBOs and a presence across 4 MBOs, De Moza is available in 28 Central stores across India besides a strong online presence. He points out that today, any major retail format (for apparels) would see leggings contributing to 10-15 per cent of the space. De Moza has seen a growth of 80 percent in the last three years and that accentuates the strength of this category again!

Lux Lyra advertisements on television came in as a sweet surprise as majority of the brands in the knitted category are strong on their advertisements for men’s undergarments. The brand has rapidly expanded its leg wear category for women and has a presence across 10,000 MBOs besides a strong online presence as well.

Udit Todi, Brand Head, Lux Lyra, shares, “The legging market is definitely expanding and escalating rapidly. Since most of the female population in India, even today, prefers to wear Indian attires, the market is ever growing and here to stay. I think, the trend of leggings picked up with the growing number of working women in the country. This is because leggings are comfortable to wear and easy to carry. Also, it gives you a smart and formal look.”

According to him, the kind of demand leggings have in the market, forces retailers to provide a wide range of space to the legging segment. He adds, “Nowadays, it’s a must for all LFS stores to provide variety of leggings to its customer to smoothly run their outlets.”

Similarly, Manoj Kumar Gupta, Entrepreneur, who runs the leggings brand Comfort Lady, feels that leggings are the best inexpensive women’s clothing that they can have in their closet. The USP of leggings is that they can be worn during any season and occasion without



Go Colors store



The hottest fashion trend

any hassle. So, retailers are also mix-and-matching ethnic wear and western dresses with leggings.

Fabric & Price Funda

The stretch and fabric comfort that a legging extends, remain the top two parameters besides the price point when it comes to buying of leggings. Todi points out, "Today, people prefer to use leggings made up of premium cotton spandex which provide comfort and snug fit." He adds, "There are segmentations in leggings. The silk leggings that we produce come under super premium product category, while ankle-length leggings, capri and winter leggings comprise the premium category. Economy category mainly consists of our churidar products. As per the current trend, products from economical category, that is, churidar is the fastest selling category."

Gupta of Comfort Lady shares, "There are few segments in the market today, which defines the quality of the fabric used in leggings but it does not control the buying pattern of women. Premium leggings are very much in demand whereas economy leggings cater to remote zones."

"Women are very conscious about quality and fashion, preferring fitted clothes for

their daily routines to stay fit and healthy. They like stylish leggings, so they are also ready to incur that extra cost for their purchase," he further shared.

According to Gupta of Dollar Missy, in fabric, cotton and lycra are doing well and in terms of designs, printed leggings are trending this season. On the colours for SS'16, he shares, "Black, white, red and royal blue would be the colours for the season."

The Brand Story

The growth CAGR of Lux Lyra in the last three years has been 60 percent which further reiterates the importance and reach of this category in India. On the range and collection from the brand, Todi shares, "Our major collection comprises various products like capris, churidars, printed leggings, kid's leggings, winter leggings, etc. Our super premium product, Lyra silk leggings is also an important part of our collection. We are also planning to introduce a complete new range of women innerweares and palazzos in the near future."

Go Colors has over 20 different leg wear styles from ethnics like leggings, churidars to Indo-Western of harems, patiyala and innovations like knitted pants and super stretch jeggings and a range of western wear like palazzos, palazzo pants, super stretch denims, ponte pants and many more.

Talking about Dollar Missy, Gupta shares, "Our leggings are made from 95/5 four way stretch fabric, with the quality of moisture absorbance, super soft and skin friendliness, crafted with body hugging and shape retain technology. We have over 65 shades to choose from; with some very trendy colours like bubble gum, brinjal, parrot green, mango, mauve, fuchsia, fourleaf green, true blue, falsa and so on. Our major collection consists of with churidars, ankle lengths and capris. Ankle



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length and capris can be worn as casual wear teamed up with long tees, tops and kurtis. Churidars can be teamed up with kurtas, kurtis and also with long tops."

Sharing a volume break-up of collection under De Moza, Raja shares, "Printed leggings contribute to about 30 percent, palazzos would be 20 percent, basic leggings in vortex viscose stretch is 30 percent and tops contribute to about 20 percent of our overall sales."

As the tagline reads "play with colours", Comfort Lady offers the widest plethora of shades to its customers. Gupta says, "We have always tried to be the trendsetter in the leggings by introducing superfine quality fabric, easy stretch and bio-wash treated leggings that can be worn the whole day. Our major collection is leggings which further divides into churidars and ankle lengths. We also

offer palazzos, shimmers, capris, printed leggings, camisoles, jeggings and baby leggings."

In-Trend

The leggings category has given way to a lot of innovation in the leg wear category for women, where from leggings, we also have a good presence of jeggings, super stretch denim jeggings to printed leggings. Shares Todi, "Nowadays, the trends of printed leggings with bold prints and patterns are ruling the leggings market. Along with it, leggings with denim finish are also in demand, especially among the young girls."

Raja shares, "Jacquard, digital printed, velour, velvet, shimmer printed, leather coated are some of the new technologies done in leggings." On the fabric and design trend, he further says, "Vortex Viscose, placement printed and all over printed leggings and palazzos are doing well. Core colours like yellow, green, pink, red and brown family are strong colours for the year." He forecasts that colours like gold, silver, brown, olive along with accent of neon pink, yellow are strong for FW2016.

"As India's weather is generally hot and humid, hence we make cotton and spandex leggings to give maximum breathability and comfort to the wearer. We offer leggings in basic colours like black, white, red and cream. Women are also showing interest in dark green, rosy pink, blue and orange colours," shares Gupta of Comfort Lady.

On a concluding note, Saraogi shares, "Improving the stability, quality and comfort in the fabric are the key drivers that the consumer is looking at." That could be a thread, manufacturers and brands could pick up from here to offer leggings that are just right for women - price wise and quality wise.





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Innovations in WINTER WEAR CATEGORY

By Manisha Bapna

Layering is a trend which defines winters in India. Balmy winters of 2015 and slow demand for bulky winter wear, pushed brands to innovate and re-engineer their product lines with light weight and fashionable winter wear.

With time, the ratio of fashion to wool versus non wool winter segment is considerably changing. Earlier, wool concepts were very much in demand. “People had a preference for wool mark and wool blend sweaters, jackets and coats. But now since climatic changes have come, winters are not very harsh and relatively less cool, winter wear is changing from a winter protective garment category to more of a fashion category” believes Guneet and Japneet Singh, Directors, Juelle.

Traditionally, winter wear used to be only functional and there was no style or value addition in terms of looks and feel. But gradually with research, winter wear is now evolving to be

stylish and trendy. Since it is fashionable, people nowadays have started buying multiple winter clothing and hence the consumption has gone up," added R Maheshwari, Director, Textperts India.

Marks & Spencer, Pepe India, Woodland re-engineered their product lines and focused on light knits, cable knits and cashmere jumpers, more of sweatshirts and lighter denim jackets, fleeces, bomber and gilet jackets, etc. Even for Monte Carlo, last winter was an exceptional season because the cold wave did not settle and sale of winter merchandise across the industry was badly hampered. "We are fortunate inspite of bad season that we could sustain growth and achieved a growth of 12 percent YOY," says Sandeep Jain, Executive Director, Monte Carlo.

Pure Wool - Fashionable Cotton Wool

It is the Al Nino effect or due to global warming, the Indian subcontinent has been reeling under soaring mercury, which directly translates into more usage of cotton fabrics as compared to any other fabrics. "Nowadays, shelves of pure wool or acrylics are shrinking for many reasons. The collection of fabrics in basic and fashion knits is changing all the time in terms of colour, trends and seasons," believes Kuntal Raj Jain, Director, Duke. So when a segment is replaced from being a need segment to a fashion segment, it becomes more casual. Hence, the preference for non-wool or synthetic or manmade or experimental fabric or yarns come into play, and so the Singh brother's of Juelle, feels, "Fashion knits, polyester blends, modal, tencel and all kinds of newer yarns have made it more of a non-wool category and less of a wool category especially for fashion brands."

Light weight thermal is gaining popularity faster as compared to traditional thick thermals. Generally, wool, acrylic, cotton or polyester blends are used for winter wear. Cotton and polyester are also used a lot to develop non-breathable garments.

"In men, the ratio of wool versus non-wool is 70:30 and in ladies, it is 20:80. 14 and 16 gg fabrics are in good demand. We have introduced modal, lycra and rayon in our current winter wear range. Around 10 percent of our collection is in these yarns," says Jain of Monte Carlo.

"We have used lycra in some percentage, mixed with cottons & polyesters for t-shirts and sweaters. 10-15 percent of our range has lycra blends," declares Jain of Duke.

"We are working with new kinds of fabric, like space dyed fabric with moisture management, soil free finishes and anti-bacterial, thermo regulator, finished fabrics and garments," says Maheshwari. He adds, "We specialise in active and sports garments and they are made of stretch filament. Out of our total range around 8 percent to 10 percent range is made up of value added fibres." However, brands dealing with thermal wear are also experimenting with other fabrics such as anthramélange, denim mélange, grey mélange, cotton polyester with difference in the texture of fabric and so on.

New Innovations

Innovation in winter wear has completely undergone a major transformation. Brands are promoting them as dressing up options rather than as seasonal protective clothing. Thermal wear, which is not very coarse and still keeps one warm, is a regular innovation subject. "We also do regular research and make our products warmer yet finer. We have experimented with reversible jackets with modern style and prints,"

>





adds Maheshwari. “Sustainable bamboo fabrics are in great demand and well accepted due to its inherent comfort and anti-microbial properties,” he shares.

Jain further reiterates, “We have played with a lot of interesting and innovative yarns and few silhouette with ladies garments.” Sweaters and sweatshirts have changed drastically from functional product category to fashion statement and has become a hot innovation in the category today. Sweaters and sweatshirts needs to be both functional as well as fashionable; as during winters, one wants to look magnificent yet warm and comfortable. The category is back with a bang and now it has become a prominent fashion statement for all age groups.

Customers are looking for fashion items with added functions, which is infact, a driving force for new product developments.

When it comes to new collection and current style trends, the brands are concentrating more on prints, new shades, new silhouette and new fits. They are trying to deviate from the regular stereotype winter wear collection.

“This category has two kinds of customers; one is need based & other is consumers who use them as fashion accessory. We feel both are important and the right direction is towards functional fashion. We are working towards more fine gauges and pre-winter blends for the next season,” says Jain of Monte Carlo.

“Sweatshirts and sweaters have taken over as a fashion statement to great extent. Young people love to dress themselves in trendy styles and our collection is exactly designed to make it as such. We have developed multiple designs in sweaters and sweatshirts using innovative fabrics and trendiest colours. Light weight sweaters, quilted interlocks and fancy jacquards are new innovations this year. Functionality and fashion, both equally contribute to the product. Infact, they complement each other,” says Jain of Duke.

New Colour, Style and Mix Trends

“When it comes to the new collection and the current style trends, we are concentrated more on prints, new shades, new silhouette and new fits. We are trying to deviate from the regular stereotype winter wear collection. Indigos, prints, light weight knitted concepts, fashion jackets and coats are in. We are very hopeful to grow by 15-20 percent, as compared to last season,” declares the Singh brothers. The brand has tried to introduce a range of light weight pre-winter tunics and tops, lounge wear and track suits.

While Monte Carlo is working on some new categories, which include indigo washes and digital prints for men, and ponchos, capes, fusion dresses and open cardigans for women. “We have invented many new colour concepts in stripes



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It is expected that winter wear market will demonstrate a compound annual growth rate of 8 percent, expected to reach ₹33,590 crore by 2024.



and different techniques of printing and embroidery in our collections, which give us an edge over the others. This year, we would be proceeding with European winter fashion,” says Jain.

“For the upcoming season, the brand is coming with new range of gym wear, French terry track pants in various fits and styles, mix and match fleece jackets (jacquard, micro woven, etc.), knitted denim joggers, heavy GSM micro poly track pants, French terry bermudas, etc. However, not much change is anticipated in the per capita consumption in the winter wear segment,” says Maheshwari.

On the contrary, according to Jain of Duke, “Light weight garments in wool blends and cotton blends is in demand. Prices have increased because of excise

duty levied by the government. What has changed is the kind of purchase the consumer is doing.”

The consumers are basically experimenting with more variety and less number of pieces per category. The consumer is more inclined towards fashion and light weight garments, urban street wear, etc. The price points have not changed as neither the players, nor the market is supporting any major upward or downward movement in prices. Knits will always grow, for a simple reason that it's very comfortable, flexible, acquires body shape, as compared to woven.

“This,” says Maheshwari, “brings lots of opportunities as the products which were earlier made by woven, are now coming in knits like blazers, pants, pyjamas, to name a few. To keep up with stylish and fashionable looks, it is challenging for the brands in the industry to keep on innovating in order to produce garments that are comfortable and trendy for everywhere use.” The unbranded textile segment forms a major share of around 75 percent to 80 percent of the total winter wear market. From sweaters to thermals, there is a wide collection offered by both - branded and unbranded segments. It is expected that winter wear market will demonstrate a compound annual growth rate of 8 percent, expected to reach ₹33,590 crore by 2024.



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PRINGLE OF SCOTLAND

Pringle of Scotland is a time honoured British label known for their signature argyle pattern and classic twin-set with a rich heritage dating back to 1815. The brand is often considered to be the first luxury knitwear manufacturer in the world, having expanded throughout Europe, the US and Asia during the 19th and 20th centuries.

Knitwear to Scotland is what bikini is to Hawaii. The mist enveloped highlands of Scotland have such a rich knitwear history that a fair section even claims that it is the birthplace of knitwear itself. While the authenticity of the claims remains hitherto uncertain, Scotland's contribution in the evolution of knitwear, over the centuries, is pronounced. Be it Harris Tweed, Ballantyne (Caerlee Mills) or Pringle, almost all the best knitwear brands of the world hail from this land of lochs and legends.

Pringle of Scotland, or Pringle, is the most celebrated of all the names that came out of Scotland. With roots dating back to the 19th century, it is widely acclaimed that it was the first manufacturer to

propose knitwear as outerwear, that literally transformed twentieth century wardrobes.

Robert Pringle established 'Pringle of Scotland' in 1815 in the Scottish Borders. Initially, the company simply produced hosiery and underwear, and have been producing cashmere since as early as 1870. But it was only in 1934, when Otto Weisz was appointed as the first full-time designer, that things started to change for the company. The designer not only invented the twin-set, but also adapted the ancient-Scottish Argyle, that Pringle of Scotland is synonymous with. The twin-sets became an instant hit and went on to become the quintessential knitwear staple of women's wardrobes during the 1950s. Even Hollywood stars such as Audrey Hepburn, Marilyn Monroe, Margaret Lockwood, Lauren Bacall and Grace Kelly were frequently seen flaunting twin-sets on and off the screen.

In 1967, Pringle of Scotland was acquired by Joseph Dawson (Holdings) Limited, who were later renamed Dawson International Plc. As leisure wear and sportswear dominated the trends during the 1980s and 90s, Pringle started sponsoring British golf players, including Nick Faldo and Colin Montgomerie, and became a staple on football stadiums around the world.

Throughout the 1990s, the label shifted focus from the Argyle patterns and cashmere to producing largely run-of-the-mill sports knits. By the later part of the decade, Pringle increasingly lost its way both style-wise and financially, becoming unfashionable, associated mainly with sportswear and falling victim to the rise of cheap imports.



The highlight of the collection were looks like creamy white, high-necked knit tank top with a twisted detail at the waist, paired with a slouchy maxi-skirt and heavy Chelsea boots and oversize, shearling yarns sweater worn over a ribbed maxi-skirt.

In 1999, Hong Kong based S.C. Fang & Sons Company bought the brand and its remaining factories in Hawick and Galashiels from Dawson International Plc. Former Marks and Spencer Director Kim Winser was appointed as the new CEO, who revamped it as a modern, exclusive designer-driven, vintage-tinged line available only in high street boutiques and luxury department stores. With the new concept in place, aggressive marketing followed and in Pringle's first salon in the London Fashion Week in 2004, stars were once again photographed wearing Pringle of Scotland.

RTW Fall 2016 - Women

Pringle of Scotland's Design Director Fran Stringer unveiled the Ready to Wear Fall Winter 2016 at the London fashion week in February. This was Stringer's first runway collection for the heritage knitwear firm, after she was appointed as the Design Director for their women's wear section.

The collection featured the house's signature knit techniques, worked in laid-

back, nineties-inflected silhouettes which she gently imbued with a fresh, youthful sensibility. Emphasizing that the designs are "relaxed and feminine at the same time" she quoted, "the whole idea was to put these beautiful, natural fibers in modern silhouettes."

The highlight of the collection were looks like creamy white, high-necked knit tank top with a twisted detail at the waist, paired with a slouchy maxi-skirt and heavy Chelsea boots and oversize, shearling yarns sweater worn over a ribbed maxi-skirt.

RTW Fall 2016 - Men

Pringle of Scotland's men's wear range for Fall Winter 2016 featured ample classic winter pieces such as oversized coats and knits, v-neck, crochet pieces and turtlenecks.

The brand's Design Head, Massimo Nicosia, quoted that the quintessential influence undermining the collection was "a repetitive use of a repetitive medium", which he drew from the work of abstract painter Agnes Martin.



IMAGES BUSINESS OF FASHION

Trade
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Special

06 The JUNE Issue

THE SHIRT'S SPECIAL

India is a shirt wearing nation. The men's shirts category is one of the largest in Indian apparel market. Brand loyalty factor was always high amongst the consumers of premium and super premium price segment of shirts and had led to the birth of many of India's biggest brands. Off-late the market of shirts has very rapidly grown with **casualisation** and the emergence of **be-spoke**, **women's shirts** and the **super-premium** segments. All signs indicate continued strong growth.

The June issue of **IMAGES Business of Fashion** is a **Shirts Special**. It is a critical issue for all fashion players in India. In this Shirts Special issue, we present a research on the size, segments and opportunities in the Indian Shirts Market, which will also map the super-premium, premium, mid and economy segments individually.

Also in the issue we...

- Debate upon the blurring lines between **formal and casual shirts**
- Study the impact of **global brands** on Indian shirt market
- Study **made-2-measure** and customization in shirts
- Present India's finest **shirting fabric** manufacturers
- Understand why some categories are going missing
- Take a deep look at **denim and linen** shirts
- Project the **top trends** for shirting in 2016-17

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RHYTHM & BLUES

WHETHER CLOTHING OR SHOES, DEPARTMENT STORE OR BOUTIQUE—TIMING IS BEING TALKED ABOUT IN ALL COUNTRIES AND INDUSTRY SEGMENTS. DELIVERY RHYTHMS HAVE CHANGED RAPIDLY IN RECENT YEARS WHILE TRADE FAIRS, A KEY FOCAL POINT FOR KICKING OFF THE SEASON, ARE STILL KEEPING TO THEIR TWICE-A-YEAR SCHEDULE. THAT'S WHY WE THOUGHT IT WAS TIME TO ASK TRADE FAIR ORGANIZERS WORLDWIDE ABOUT TIMING.

Text **Julia Mönnich**

“Times are definitely changing,” says Sam Ben-Avraham, founder of Liberty Fairs, New York. “We continue to see more retailers and brands moving towards a ‘buy now, wear now’ rhythm as buyers purchase closer to the season,” says Brittany Carr, California Market Center, Los Angeles. On this side of the Atlantic, in Europe, the pace has also picked up dramatically. “Delivery cycles are a serious and complicated topic that not only is a matter between brands and retailers but most certainly the ‘new’ consumer with a very global mindset and access to everything desirable online anytime. The industry overall needs to adapt to much more complex consumer behavior today than just 10



“The industry overall needs to adapt to much more complex consumer behavior today than just 10 years ago.”

—*Kristian W. Andersen, CIFF*

years ago,” says Kristian W. Andersen, CIFF, Copenhagen. The verticals and the high street formats have accelerated the pace tremendously and many people have responded to this: “This makes it more complicated for both brands and buyers,” says Craig Ford, Jacket Required, London.

Today’s fashion market is a complex, multifaceted system, even though the needs of retailers remain unchanged—it is all about the right product at the right time. How can one synchronize it all? “Timing is the most essential thing in fashion,” says Jörg Wichmann, Panorama, Berlin. And the more intense the interactions among the market

participants, the more precisely it’s accomplished: “A trade show is a platform to showcase brands in aggregate to a large group of retailers. But more than that, we are a networking



“Retailers are experiencing being able to buy a trend and get it in the stores really quickly.”

—*Tommy Fazio, Project*

platform where retailers and brands can share ideas and struggles and offer solutions,” says Deirdre Maloney, Capsule. “Both sides of the aisle need one another. It is in their best interest to become good partners. Which is why attending a trade event is key,” says Leslie Gallin, Magic. Chen Dapeng, Chic, Shanghai, says: “Trade shows give the opportunity to discuss completely new business models for meeting the requirements, needs and wishes of consumers. More than ever, a unique meeting point twice a year in the fashion sector is the challenge for developing the business and to adapt to new economic systems.”

Although the pace has been increasing for seasons now—the real function of a trade fair has not changed: “What we can do best is to create platforms and bring the right people to one table,” says

“Besides trying to be as early as possible, it is necessary to use the trade event for more than the pure order business.”

—*Thomas Martini, Bright*



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Anita Tillmann, Premium, Berlin. Even though the coordination of delivery dates and rhythms is not part of the core tasks of a trade fair, organizers are confronted by these activities: “The retailers are wanting closer delivery dates and the whole idea of fast fashion becoming a popular trend—retailers are experiencing being able to buy a trend and get it in the stores really quickly,” says Tommy Fazio, Project, New York. Wichmann adds that even at the Berliner Panorama, more and more attendees ask for immediate order collections. Vanessa Chiu, Axix, even says: “We encourage our brands to bring in-season products for the opportunity of press exposure, seeding industry influencers and for the immediate delivery drops.” It is no longer enough to be a comprehensive provider of information as early as possible: “Trade shows are delicate parts of a very complex system.

They are no longer neutral containers for making requests and offering to meet, but fashion communication projects that play a fundamental role for all insiders who attend them,” says Agostino Poletto, Pitti Immagine, Florence. “Besides trying to be as early as possible, it is necessary to use the trade event for more than the pure order business. It is about information, selection, trends and innovations, not only in fashion, but also in new technologies or business strategies, marketing and meeting your business partners



“We choose to work against this fast fashion mentality.”

—*Maria Klähn, Selvedge Run*

in person,” says Thomas Martini, Bright. For this reason, more trade fair organizers are offering additional services. Lucel van den Hoeven, Modefabriek, says: “It is not only about the buying-selling principles from the industry. Therefore, Modefabriek constantly searches for and offers a wide variety of different platforms and activities.” Liberty’s Ben-Avraham adds: “Last season we started meeting with retailers a month before the show, walking them through our floor plans and brand lists to help them plan for their shows. This season, we are taking it a step further and are meeting with them now to discuss their strategies and determine their needs, and then we will identify brands on our floor that are must-sees for their seasonal plans.” Poletto says: “We have also focused on different dates according to various market segments’ requests in order to satisfy most different needs of both international buyers and companies.” Connecting the online and offline worlds can optimize timing for all market participants, pushing more fair producers to have an online presence. Many organizers are already

working with digital features such as personalized apps and online showrooms. Pitti Uomo has been offering a digital trade show since 2011 and Panorama’s visitors can view the goods offered at the fair on the Web for 180 days after the January event. “We believe that online order tools will play a greater role here in the future,” says Jörg Wichmann, Panorama.

But even if trade fairs take their business online—their essential quality is still the in-the-flesh realtime business. “Our business is product, design, marketing, relationships, and only a small part of that can be replicated online,” says Richard Hobbs of Shanghai-based The Hub.

What are trade fair organizers saying now—will the pace continue to heat up? Kirstin Deutelmöser, GDS, mentions this consideration:



“Everybody wants products earlier for a bigger sales window, especially with discount sales starting earlier.”

—*Craig Ford, Jacket Required*

“How many different dates are really needed is hard to decide since a multitude of order dates does not necessarily result in better ranges in the stores and/or better managed retail areas.” Olaf Schmidt of Greenshowroom in Berlin favors slowing down: “Longevity and quality are part of a sustainable lifestyle. Our customers are not confronted with the problem of delivery dates.” Maria Klähn, Selvedge Run, Berlin, adds: “In contrast to constantly throwing new collections out onto the market by the big players, we choose to work against this fast-fashion mentality.” That arctic parkas are still shipping at the height of summer is not something that will change, according to Ford of Jacket Required: “Everybody wants products earlier for a bigger sales window, especially with discount sales starting earlier.” Is this going to work



“More than ever, a unique meeting point twice a year in the fashion sector is the challenge for developing the business.”

—*Chen Dapeng, Chic*



“We continue to see more retailers and brands moving towards a ‘buy now, wear now’ rhythm.”

—Brittany Carr, California Market Center

out well?

The increasing complexity of the market and the unpredictability of consumers continuously pose the difficulty of offering the right goods at the right time. Would greater speed and more trade fair dates help matters? “Anything more than a two-trade-show-a-year system doesn’t seem timing-appropriate or cost-effective right now in menswear,” adds Ford. Verena Malta of Show&Order cautions against delivery dates happening too often: “Consumers still want originality and quality and these aspects cannot be rushed, and, as a result, the concept of ‘fast fashion’ can’t simply be applied to high-end contemporary trade shows. I believe that the original trade show order platform is here to stay for the foreseeable future, as it is here that one sees the originality and creativity that drives the fashion industry.” Hinrich Kappe, the head of the I.L.M International Leather Goods Fair in Offenbach, Germany, also cautions against too much churn: “Just because sales revenues are going down and the weather happens to be too warm for warm winter shoes, doesn’t mean I have to come up with an intermediate shoe. External effects such as weather—that is something that should not be talked about. That’s only a lazy excuse.”

For bags, he continues, there are also fewer vendors offering intermediate collections: “That often makes a product more expensive because the shipping time frame is short, so air freight is added. This reduces profit, making it less inviting,” Hobbs of The Hub in Shanghai sounds a word of caution: “The truth was/ is that the retailers have fixed seasonal budgets and plan their buys at the front side of the business with minimal flexibility in season. Inevitably this means that they keep any in-season budget for repeats and obvious commercial reasons.” And even if they wanted to—some retailers have no budget available to spend:



“The trend in fashion is to always be going faster, going deeper and focusing more on personalization.”

—Agostino Poletto, Pitti Imagine

“Offering the right product is just as critical as good timing. This applies not only to trade fairs but to stores. It is only possible to find out the best path to take by talking to each other both online and offline, at trade fairs and in stores.”

“Smaller multibrand retailers report tremendous pressure from brands in general to receive goods at a very early time ‘out of season’ to meet bigger brands’ selling-in cycles,” explains Andersen of CIFF. Premium’s Tillmann says: “What needs to be changed the most and what I think is crucial to the industry is the way we do business with each other. Cooperation and flexibility as well as respect and trust are basic values we need to invest in and develop in order to secure profit growth in a global and digital world.” In Asia things are (still) somewhat different: “Our situation is slightly different from the established markets, where we are operating in virgin territory and offering new international brands and experiences to the Greater China fashion world,” says Hobbs. But this market has also increased the pace: “More and more Chinese retailers require several delivery times in a year in order to create more variety in their stores,” says Dapeng. That is why Chic is now being held in Shanghai twice a year.

Whether in Asia, America or Europe—timing is and will continue to remain decisive in fashion. Offering the right product is just as critical as good timing. This applies not only to trade fairs but to stores. It is only possible to find out the best path to take by talking to each other—both online and offline, at trade fairs and in stores.

Our research shows that when trade fair organizers add more dates to what they already offer, it is not necessarily that essential. It is far more important to recognize the exact needs of those attending trade fairs and the requirements of industry and retail, and to respond to that. In fact, that is what they are doing with their many side events, online activities and roadshows. “The challenge is to know who your clients are, who you want to sell to and what kind of fashion to sell,” says Tillmann. Or as Poletto notes: “The trend in fashion is to always be going faster, going deeper and focusing more on personalization and the fragmenting of style choices. This is a matter of fact and this is something that cannot be decided by sitting around a table.”





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Text **Lisa Dartmann**

They go by the names Cosy Pants, Veggie Leather or Cosy Ceramica, and there are new names and styles for men and women added each season—whether as golfing jeans or bike pants.

And you should not forget that Alberto has actually been a pure player for men's pants for quite some time. But the Mönchengladbach-based company has long overcome the gender divide and has marketed its pants to women: The Alberto Golf line triggered this in 2012 when Alberto Golfwoman was also launched. The logical next step was Alberto women's trousers in 2014. Ever since, the product range for women divided into the lines casual, dressy and denim has been continuously extended while gradually expanding distribution.

But all this does not mean a stand-still for the men's collection: Since last summer Alberto has been offering a biker line consisting of jeans with a higher waistline and reflector strips. At Alberto, jogg jeans are called Cosy Jeans because you can just snuggle up in them on the couch. The label's Premium Business Cotton segment offers a clean, dressy office attire. With Alberto Golf, Alberto offers a complete bottom product line for golfing originally inspired by a special order for golf pro Alex Cejka. Innovations include super-fit denims made using 360° stretchy and luxurious T400 material to deliver optimal flex and comfort.

"We need to offer modernity and add-ons. As a specialist for pants we focus on this key product. We represent a certain sense for adventurous styles, creativity, perfectionism, and a strong 'feel good' philosophy," says managing director Marco Lanowy. At times, innovations are quite unconventional and experimental. Alberto left a pair of roof-destroyed denim jeans exposed to the weather on the roof of its headquarters for 12 months to test the effect. The label uses the finest Italian fabric with a soft feel to them as well. One clue to the brand is its size range of Modern fit, Regular, Regular slim and Slim fit. Each model tells its own story and is produced with a high degree of commitment in Tunisia, Romania and Poland.

"Stick to what you are good at, then it is right," is how Lanowy explains the company's straightforward formula for success ever since it was founded as a clothmaker more than 90 years ago. Dr. Albert Dormanns started the company in 1922 as Dormanns' Trouser Factory, in the 1980s his grandson Georg Walendy combined this expert knowledge with trend fashion and as a gesture to the original founder and the Made in Italy hype, the

name Alberto was born. Since 2005, the trio of Walendy, Lanowy and Jürgen Schmiedel have helmed the company.

A new era dawned with Alberto Jeans in 2001. "We stand for innovation and function and offer added value to consumers," explains Lanowy, who is responsible for retail, distribution and marketing at Alberto.

Until recently, the ADenim line was part of the label's family of pants lines. The separate line was introduced just over three years ago with the goal of creating innovative technologies. For now, ADenim is being given a creative break and has only been offered online since mid-2015. In the future, however, Alberto will focus on its main brand, which is continuously being expanded in a core retail pricing range of €99 to €149: The golf jeans and more recently the bike jeans have gradually opened up new distribution areas.

This plays a vital role because there will hardly be more customers to be gained in retail. And even if Lanowy becomes rhapsodic when talking about the art of manufacturing pants: It is true that the sales figures need to add up even with all the beauty in the product. The business is expanding at a constant rate and reported revenues of €44 million most recently. In addition to Germany, its most important markets are Switzerland, Belgium, the Netherlands, Scandinavia, France, Poland and Canada. Its business is experiencing dynamic growth. According to Lanowy, Belgium, Switzerland, Austria, Poland and France are performing very well and he praises the courageous view taken of fashion in international retail: "They take joy in experimenting and unconventionally mixing mid-market brands with designer fashion."

There are many small owner-managed stores which work fantastically. He also points out, though, that a general flexibility in varying product ranges is not very pronounced across industry. "We must create more retail space for demonstrating competence and take customers by surprise with a look-of-the-day," he says about what he feels is the ideal pants department. An app called Alberto Pants Pilot which was released a year ago offers digital assistance at the POS. This allows sales staff to scan in an article and get all the information about the product.

Alberto wants to devote all its energy and passion to the Alberto core brand. The great love of Alberto is and will remain trousers.



UNDERSTANDING ATHLETES' NEEDS

HOW INTELLIGENT MARKETING MADE UNDER ARMOUR BECOME A SERIOUS COMPETITOR IN THE ACTIVEWEAR SEGMENT.

Text **Aparna Sundar**

Carolina Panthers quarterback Cam Newton flaunted his custom-designed Under Armour cleats on Thanksgiving and the growing success of the Under Armour brand is the talk of the day. Success in sports only helps the brand as the company's two top sponsored athletes have both had excellent years. Golfer Jordan Spieth won the Masters, US Open, 2015 Tour Championship and FedEx Cup while NBA player Stephen Curry won the 3-Point Contest at All-Star Weekend, was named league MVP and led the Golden State Warriors to their first NBA championship in 40 years. This achievement underscores Under Armour's claim that the brand's gear helps athletes perform at their best.

While Nike and Adidas tend to sponsor the largest teams and most popular sports because they attract the most attention and revenue, Under Armour makes an effort to sponsor lesser-known teams such as the Canadian Olympic Snowboarding Team, the US Olympic bobsledding team and a Chilean soccer club. By sponsoring these less popular teams, Under Armour is able to both save money and increase its sponsorship portfolio. This tactic has an effect on revenue as well because consumers see the company sponsoring smaller teams and believe that Under Armour truly cares about encouraging athletes to perform at their best, regardless of media cache.

Under Armour is also cautious about rapid expansion, particularly into the international market. Currently, only 7% of the company's total revenue comes from international sales, as compared to 59% of Nike's. This is intentional on the part of the company as Under Armour expands conservatively and tests new markets before diving in with both feet. However, the brand has big plans. Recently, it poached a 22-year veteran Adidas international operations executive to help manage overseas expansion. Kevin Plank, Under Armour's CEO and founder, has been described as "out-Knighted Knight," referring to his tendency to copy and improve upon the business decisions of Phil Knight, Nike's co-founder and chairman. Under Armour has copied Nike's methods of sponsoring and advertising with star athletes and putting its logo on uniforms, equipment and stadiums. Additionally, Under Armour has signed athletes who directly compete with Nike-sponsored athletes. Rather than amassing a large stable of sponsored athletes, Under Armour is deliberate about its sponsorship choices.

The brand has also maintained an uncommon stability in the

market with Plank in charge and active since the company's founding. With a steady hand at the helm, the brand projects an image of a dedicated company, committed to developing athletic apparel for maximizing athlete performance.

In the United States, Under Armour's only real competitor is Nike. Adidas' sales in the US have been declining due to a misunderstanding of the American market and some costly business decisions, and Under Armour has surpassed it. However, even though Nike sponsors more athletes in total—283 NBA players to Under Armour's handful—Under Armour focuses on rising stars or athletes who have faced great odds to become successful. This sort of support for the underdog has benefited Under Armour on the market as well. While not everyone can be the next LeBron James or Michael Jordan, young athletes can identify with lesser known or lower profile athletes and the company that aims to help them perform at their very best.

The brand's success is also due in part to the time and effort it puts into marketing to children and teens. It sponsors and hosts youth training camps and the Junior PGA Tour, allowing the company to get its brand and logo in front of impressionable children. Analyst Sam Poser said, "If you go to a t-ball game, these kids are head-to-toe Under Armour." When these same children exhibit brand insistence, Under Armour's sales increase.

In addition to its younger consumers, Under Armour does not ignore the clout of professional teams and athletes.

One of the biggest reasons for Under Armour's success is the company's insistence on staying true to its original market. The traditional sports clothing powerhouses of Nike and Adidas have spent more time and money making inroads into the fashion market with less attention on the sporting goods market. While both Nike and Adidas have created advertisements and products to target the athleisure market, Under Armour has refused to follow suit. While its athletic clothing is comfortable enough to function as athleisure wear, the company does not actively promote or advertise this use. Instead, it focuses on performance. Poser said that Under Armour "shouldn't market to become fashion, because that's probably fleeting." Instead of following Nike's lead, Under Armour's advertisements usually feature only athletes wearing the products. By staying true to the athletic clothing market and advertising directly to athletes, Under Armour has increased customer perception that it is more serious and dedicated to the needs of athletes.



NAUTIC BY NATURE

IN DECEMBER 2014, OLIVER FRIELINGSDORF TOOK OVER AS CEO AT GAASTRA INTERNATIONAL SPORTSWEAR. HIS AMBITIOUS PLAN: TURNING GAASTRA INTO A LEADING INTERNATIONAL NAUTICAL LIFESTYLE BRAND.

Interview **Melanie Gropler**

Founded in 1897 as a sailmaker, the Gaastra brand launched its first maritime apparel line in 1996. To this day, the company has remained true to its nautical heritage: as a partner of international sailing event organizers and professional sailing teams. Gaastra is currently operating in more than 20 European countries with the core markets being Germany and the Benelux. The brand, which has been a member of the McGregor Fashion Group since 1993, runs 17 of its own stores as well as 40 partner stores.

You have announced an ambitious goal: You want to turn Gaastra into a leading international nautical lifestyle brand. How specifically will you achieve that?

Until now we have been very well represented as a specialist in maritime apparel for men, women and children in Benelux and Germany. We now want to gradually penetrate additional markets. We already operate in Spain, Italy and France as well as in Russia through our distribution partners. We recently broke into the Scandinavian market and are also taking initial steps to get into the UK market. Over the long term we want to operate far more internationally. At the same time I am working on extending and rounding out our portfolio by way of new product categories which are a good fit with our brand image.

So what are you doing on the product side?

We have a large and very wide-ranging collection with many intermediate collections. Our product lines have been streamlined and we reinforced the team: on the one hand in management and also in



OLIVER FRIELINGSDORF
CEO GAASTRA INTERNATIONAL SPORTSWEAR

the production areas of shirts, jackets and pants, as well as denims and flats. In the future we want to focus even more on our price/performance ratio in order to offer more value-for-money products.

Gaastra already made a bet on denim with its Blue line for men in 2012 and Blue line for women in 2013. But these lines were phased out again. What caused them to fail?

Maybe we simply launched Blue a bit too early. We introduced them at a time when the market was undergoing a lot of change. Therefore we decided to concentrate on our core DNA.

What will Gaastra do different this time?

We aren't going to set up our own denim division. Instead we have broken the collection down into three topics or segments while still keeping them within

the Gaastra umbrella brand. They are due for release in spring/summer 2016: There's the Sport segment, which includes high-performance apparel such as jackets that can really be worn when out sailing. The Yacht Club segment caters to family and friends with preppy looks and casual pieces. The Sailmaker line is based on the roots of Gaastra featuring washed denims and vintage styles. We also want to gain a foothold in the premium market segment via highlights and icon products. Based on the superior quality of Gaastra jackets, we are able to compete very well with brands like Woolrich and Canada Goose.

How important is the female target group to Gaastra? And how is Gaastra structured in the womenswear segment?

The ratio of women to men is very balanced at nearly 50/50. That really took me by surprise, too. In womenswear we have to come to terms with changes in the market and the latest trends, but do so without compromising our DNA. It's all about showing more feminine silhouettes and shapes and processing softer materials. And it's about a more complete look versus individual pieces, in order to make the collection suitable for retail.

Your own online shop was recently revamped as part of the new strategic plan. What plans do you have for your own retail presence?

Our own retail operations are going to be consolidated. We have redefined our broader categories with the topics Sport, Yacht Club and Sailmaker and will monitor how to project the look and feel of these in our retail locations. However, that is a larger project which will not be initiated until mid-2016.

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APPROACHING NEW GROUNDS

*DIESEL'S CEO ALESSANDRO BOGLIOLO
EXPLAINS HOW FAR THE DENIM BRAND'S
RELAUNCH HAS PROCEEDED.*

Interview **Maria Cristina Pavarini**



ABOVE: DIESEL'S NEW BENCHMARK STORE IN MANHATTAN;
RIGHT: ALESSANDRO BOGLIOLO, CEO DIESEL.



You had some ambitious goals with the “reboot” of Diesel: According to Renzo Rosso, president and founder of parent company OTB, €950 million sales were set to be achieved by end 2015 (that’s 65% of OTB’s total sales). Were these expectations reached?

Since 2013, with the arrival of Nicola Formichetti as artistic director at Diesel we have faced an overall relaunch and a new development of the brand. The first results are visible now with the opening of our first store with a new design concept in NYC—which we think will lead a global retail revolution—and a more focused distribution network.

Diesel has recently cut its multibrand distribution network for a worth of about €85 million wholesale. Will you continue in this direction?

We did a major work in this direction—both in brick-and-mortar stores, and through the various e-commerce platforms. Right now, our distribution network counts for a total of about 5,000 multibrand stores worldwide and 400 monobrand stores, of which 200 are direct ones. Within the years 2016-2019 we expect to open, relocate or redesign about 100 monobrand stores.

Can you explain by which criteria this “requalifying” was carried out?

Consider, for instance Manhattan, New York. Renzo Rosso opened his first store in the '90s on Lexington Avenue, a path-opening move for those years. After 25 years, keeping a flagship store on a street hosting mostly fast fashion chains had no meaning to us anymore. For this reason, at the end of November 2015, we opened a new concept store on Madison Avenue just next door to Bottega Veneta, Fendi and Hermès. We also opened uptown in Columbus Circle, in a shopping mall hosting brands like Hugo Boss. We also redesigned our SoHo store on Spring Street, just in front of the Burberry and Chanel stores.

What’s special about the new Madison Avenue concept store?

This 300-sq.-meter store was designed by Wonderwall, the Japanese studio founded by Masmichi Katayama. In 2016 we will also open a new concept store in Tokyo in the Aoyama area, our first store in this top shopping area. Other openings or redesigns will follow.

The Asian market seems to be of special interest for you...

Japan is our most successful market and it counts for 20% of our sales. It is followed by the US, France, Germany UK and Italy (10% of our sales). China is our next goal. Chinese consumers initially only looked for luxury brands, but more recently have started appreciating luxury casual products with quality content. We have already opened 15 monobrand stores there.

Don’t you fear that Diesel, by focusing on the premium market and high-end products only, could lose appeal among the younger generation?

When we were studying how to redefine our identity we have asked our team, various experts and 14,000 consumers from seven different countries what Diesel is for them. The survey brought out a very similar transversal image despite sex, income and age (from 20-year-olds to more mature ones). For them, Diesel is an extraordinary fashion brand, not a fashion maison though, but highly specialized for its know-how in denim. All of our surveyed consumers consider us as a “non-ordinary” brand. By refocusing again on premium products we want to state that Diesel, since its early days, has an intrinsic value that also the young will wear.

'I'M LIKE A CRAZY DIGITAL WHORE NOW'

FASHION MULTITALENT NICOLA FORMICHETTI DISCUSSES HIS VIEWS ON DIESEL, DENIM AND THE DIGITAL WORLD.

Interview **Christopher Blomquist** / Photo **Luca Bellumore**

Stylist, designer, DJ—Nicola Formichetti is one of the fashion business' most enigmatic personalities. Having styled famous celebs such as Lady Gaga and engagements at mass retailer Uniqlo as well as fashion house Thierry Mugler this Italo-Japanese artist has lived his passion for denim by being artistic director at Diesel for more than two years now. Days after launching its new boutique-like store concept in New York, he sat down in it to discuss the retail revamp and share his thoughts on style and the digital world.

How much of your influence is visible in the new Diesel?

I work on everything—absolutely everything—from the collection, visuals, stores, marketing to visual merchandising to product detailing and product concept. For me it was very important to keep the DNA of Diesel in all the stuff that I do and rather than re-create things I wanted to take the DNA and modernize it. So all I am doing is updating all the stuff that we have.

The collections are significantly smaller than what they were back in the day and much more tightly edited...

Yeah. That's why I love the size of the store. It's more of a boutique-y feeling. Normally we were famous for those enormous blockbuster stores with everything in them. We are not a high street brand and maybe that was OK in the '90s but in the 2000s where we want to go is to be a little more intimate so people can go and shop in a much more personal way so hence we're keeping this space and collection a little more refined.

What currently inspires you?

At the moment I get really inspired by the digital culture. I'm always on Snapchat and Instagram and live streaming. We love it but at the same time you remember the time when we didn't have all that and we worked perfectly. So it's the idea of appreciating the past more and more now rather than everything about likes and followers.

Do you think no-gender is a topic in fashion right now?

Yes. I love that we are all talking about gender at the moment—it is not a new topic, but it's now a global newsworthy topic that reaches out to everyone.

Why has no-gender-fashion gained such relevance?

For the young generation there is no such border anymore, so this generation never thought the gender to be strictly separated and they have a more fluid approach to it—it's all one thing. So mainstream media are picking on it now, but the subject has always been relevant. It was limited to militant, activist and intellectual groups but now the conversation about gender is available to everyone and that's a really good thing!

Do you think, no-gender fashion has the power to become mainstream?

I hope so. I think in a way it already is. The younger generation already shops within both gender sections in stores or online, depending on what style makes



NICOLA FORMICHETTI,
ARTISTIC DIRECTOR AT DIESEL

them feel at ease or just purely because they like the item whatever the gender it was supposedly designed for.

How can specifically new, younger customers be attracted today?

We need to be relevant and we need to speak their language. I want to talk about what is happening in the world today through digital culture. We do a lot of activation online through Tumblr, Instagram, Snapchat and all that.

And you do stuff on Tinder too, right?

Yeah. And we are going to go into Grindr as well next season. It's just having fun. I love magazines and come from the magazine world and that is never going to go away but we are going to put much more attention to digital than ever before. When

I joined I remember that we had nobody working on digital at Diesel. Maybe one person and he was kind of a tech guy. That was two years ago and since I joined we have a huge team in the digital department.

How would you define or characterize youth culture today?

It has changed a lot. Before in the '80s and '90s when I was younger it was about cliques. You had to dress differently or find something unique to be part of something through radio or TV or magazines and there were different cliques of subcultures. Today there is none of that and it is kind of borderless. You can be into punk and classic literature and art. You can be into anything and you basically just pick and choose what you like.

All the youth are very knowledgeable; they know everything but the dangerous side is that they know nothing because they don't experience it. For them it's just a click and downloading information. I don't want to sound old and boring but I want to make an experience through deeper things by creating something that isn't disposable and you have to explain a little bit more when you do anything.

What stores in general do you find inspiring and where do you shop?

I'm a crazy shopaholic a little bit. No one knows this but I actually never shopped online until this weekend. I'm always about digital culture but I actually never ever shopped online for myself because I have to experience it and go to the shop and try things on. I was home with friends and my friend convinced me because I had to buy some underwear and socks and jeans and it was raining. So I went to diesel.com and I bought some underwear, some Jogg Jeans, some shirts and a biker jacket and it was so easy. It was click, click, click and it was done. And the next day the clothes arrived. Then it was all downhill from there. I went on eBay, Amazon. I spent crazy time buying crystals and Tom of Finland sculpture and books. I'm like a crazy digital whore now.

What was your first pair of jeans?

I just had a pair of jeans that I bought at a flea market. Every time it broke I would just put another patch on top. It was so cool.

How do you approach designing denim today?

Men and women are different and I approach them in a different way. For men it is very mathematical so it was really just refining our matrix of denim styles and treatments and making it more user friendly. You have your core item and you push it but still keep it in the world of denim. With women's it's completely different. It's about shape and fittings. They all need to look sexy and hot.



MORE MUSEUM THAN SHOPPING SPOT:
THE MCQ STORE ON LONDON'S DOVER STREET

GRAVITATIONAL SPACES

THE PRESTIGIOUS DAVID COLLINS STUDIO DESIGNS RETAIL SPACES FOR THE LIKES OF ALEXANDER MCQUEEN, HARRODS AND JIMMY CHOO. WE SIT DOWN WITH THE STUDIO'S DESIGN DIRECTOR, LEWIS TAYLOR, TO DISCUSS HOW TO CONCEIVE STORES THAT COMPEL NEW-ERA CONSUMERS.

Text **Emma Holmqvist**

David Collins Studio is a close-knit family. Most members of the London-based team have been fixtures at the company for at least a decade, working alongside the late David Collins himself, who passed away in 2013. The Irish architect was known for designing many recognized London bars and restaurants but also lent his creativity to the interior of his friend Madonna's London and New York apartments, for instance. His 1985-founded studio has also been active in the retail sphere for many years, developing concepts for the likes of Vivienne Westwood, Victoria's Secret, Bergdorf Goodman and David Morris. But real expansion occurred after the studio established a strong working relationship with Alexander McQueen and its creative director Sarah Burton in 2012. David Collins Studio is the brains behind some 40 Alexander McQueen projects, including the flagships in Tokyo, London and Paris as well as the McQ store on London's Dover Street.

The studio advocated site-specific retail design long before it became the eagerly adopted strategy that it is today. In what way does Alexander McQueen's new Paris flagship, which opened in September 2015, reflect its surroundings? "The store felt particularly precious since it was the first Alexander McQueen store to open in Paris," observes Lewis Taylor, design director of David Collins Studio. "To celebrate the location, we sourced a selection of French antique furniture and objets d'art, including a sculptural coffee table incorporating a golden phoenix by French sculptor Jacques Duval-Brasseur. We mixed these pieces with custom-made designs to create a rich concept, adding a touch of Paris to the world of Alexander McQueen."

The generously proportioned space—400 sq. meters (4,306 sq. feet) spread across two floors—inspired Taylor and his team to create individual areas, each with its own narrative. The eveningwear section features fitting rooms with padded walls upholstered in nude, diamond-tufted nova-suede—a subversive homage to the fashion maestro's asylum-inspired s/s 2001 catwalk collection. To open the uncannily glamorous changing rooms, one has to

wrap one's fingers around door handles cast from worms and centipedes. A hand-illustrated wallpaper adorned with skull and flora motifs also reinforces the brand identity.

The art of compartmentalization is taken to another level when designing individual departments for the sprawling shopping institution that is Harrods. David Collins Studio was brought in to mastermind the almighty Shoe Heaven, which was unveiled in August 2014, and has since designed the eveningwear and luxury collections departments. How can a sense of cohesion be achieved in such an enormous store, with its countless areas? "Though the departments we've designed for Harrods are quite different, they all look as if they belong there," observes Taylor. Before embarking on a new project for the historic retail establishment, the team always pays a visit to Harrods' archive in Hammersmith. "It's an amazing resource," he enthuses. "A very helpful man called Sebastian brings out 150 years' worth of photos brimming with references from the past; the way each department looked at different times in history, and what furniture, type of lighting and fittings were used then... We like to absorb these elements and modernize them as we find it adds richness."

American men's footwear purveyor Louis Leeman is one of David Collins Studio's latest clients. The firm took a playful approach when tasked with designing the brand's first flagship, which swung open its doors in June 2015 in Manhattan. "The Louis Leeman team wanted the store to appear like a 19th century Parisian maison," says Taylor. "This was a bit of a challenge since we only had a corner space on Madison Avenue to play with. We decided to re-create this imaginary maison room by room, starting with the drawing room for the Manhattan store, and continuing with, say, the hallway in London and the dining room in Paris." Eventually, the grand dwelling will be complete, with all its different rooms spread across the world. Concepts like these play up to the theater of retail, encouraging customers not only to linger in-store, but compelling them to seek out its sister shops in other cities. >



LEWIS TAYLOR, DESIGN DIRECTOR AT DAVID COLLINS STUDIO

Taylor notes that the social aspect of shopping is gathering force. “Retail is far more than a transactional affair these days; a well-executed brand strategy could be likened to a club you want to be part of,” he says. “The store should be a place customers like to hang out in, and we’re increasingly adding elements that bring about a social air, such as the champagne bar we created for the Jimmy Choo Townhouse, or the glass cube nestling at the back of Alexander McQueen’s Savile Row men’s store; it functions as an ever-changing mini gallery and it’s curated by Sadie Coles HQ.”

The retail expert stresses the importance of inviting the consumer into the universe of the brand, telling the story as well as offering information on individual products and how they’re made. “Consumers want to know what they’re buying into and physical retail has the ability to convey messages and add detail on a level that’s impossible to replicate online.”

Increasingly, brands are adding customization to their repertoire to offer consumers a sense of exclusivity. This, in turn, has added an additional layer to the remit of retail designers. “We’ve created a made-to-order unit for Jimmy Choo, allowing consumers to monogram and customize their shoes, and we designed a little cobbler’s workshop for the Louis Leeman store. Customers will find the artisan sitting in his beautiful brass unit, ready to transform their items according to their specifications.”

When setting foot in a new retail space due to be transformed, Taylor and his colleagues imagine the customer journey—what he or she will first set eyes on when entering the store and how the navigation of the space may continue. What’s important to bear in mind when designing spaces for specific product categories such as shoes or jewelry? “When realizing a concept for clients such as Jimmy Choo, you have to find ways that highlight the beauty of the shoe properly,” explains Taylor. “We put a lot of effort into designing units that display the shoes individually, such as tiered constructions or shelving systems consisting of little cubes. Product is king and we have to make sure it’s treated that way.” Sometimes, Taylor notes, it’s a matter of considered merchandising. “Filling the shelves with too many shoes is something of a bad habit in shoe shops. We’ve found that breaking up footwear with small leather goods works well.”

Giving the visual merchandiser flexibility is a natural part of the studio’s to-do list. In its work for fine jewelry name de Grisigono, which is due to open a store on Bond Street in London, it developed cabinets that allow for various display options. Some can be fitted with backdrops to create little jewelry-adorned scenes. Entering a slightly new realm, the studio was called upon by the British Fashion Council to provide creative direction for London Fashion Week’s Designer Showrooms in September 2015. In its naked state, LFW’s new Soho hub, Brewer Street Car Park, is a 1,600-sq.-meter (17,222-sq.-foot.) open space that is decidedly industrial in feel. “There were 98 brands to accommodate, so we approached the concept a little like a shopping mall, creating a semi-transparent division between each booth, but not extending them too far, so as to avoid the feeling of claustrophobic cubicles.” The result was open and functional, yet infinitely more inspiring than most trade event landscapes. Participating designers were able to create their own worlds within the booths, using flexible display solutions. David Collins Studio will resurrect the concept for the upcoming edition of London Fashion Week in February 2016. This time, mirrored elements will be added to complement the 70-meter long “catwalk” fixed to the ceiling. Would the team be tempted by further trade event projects? “Yes, certainly,” says Taylor. “As long as we’re free to take a creative approach.” <

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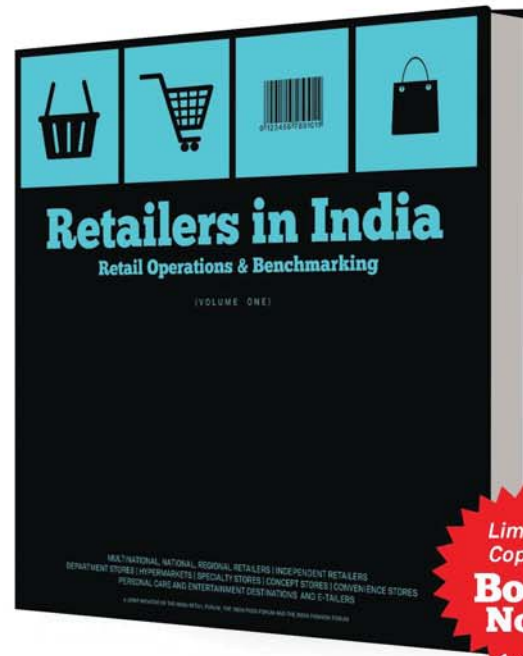
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SIREN CALLS

*HOW TO CREATE SOME LUST FOR SHOPPING?
CHECK OUT THESE NEW STORES AROUND THE GLOBE.*

ATELIER BY FAPAI/WENZHO

768 Mingzhu Road, Wenzhou, China
Opened: April 2015 / Size: 150 sqm
Segment: menswear
Assortment: Atelier by Fapai & Made to Measure
Store Concept: Cloud-9 Design
Photos: Charlie Xia





TOTOKAELO/NEW YORK

54 Crosby Street, New York City, NY 10012, USA

Opened: September 2015 / Size: 780 sqm

Segment: women's, men's, accessories, jewelry, home objects

Assortment: Vetements, The Row, Anntian, Yohji Yamamoto, Ann Demeulemeester, Rick Owens, Boessert Schorn, etc.

Store Concept: Jill Wenger

Photos: Adrian Gaut

SOUL OBJECTS/BERLIN

Prenzlauer Allee 24, 10405 Berlin, Germany

Owner/Store Manager: Kornelius Werhahn-Mees and Oliver Hausner / Opened: April 2014 / Size: 68 sqm

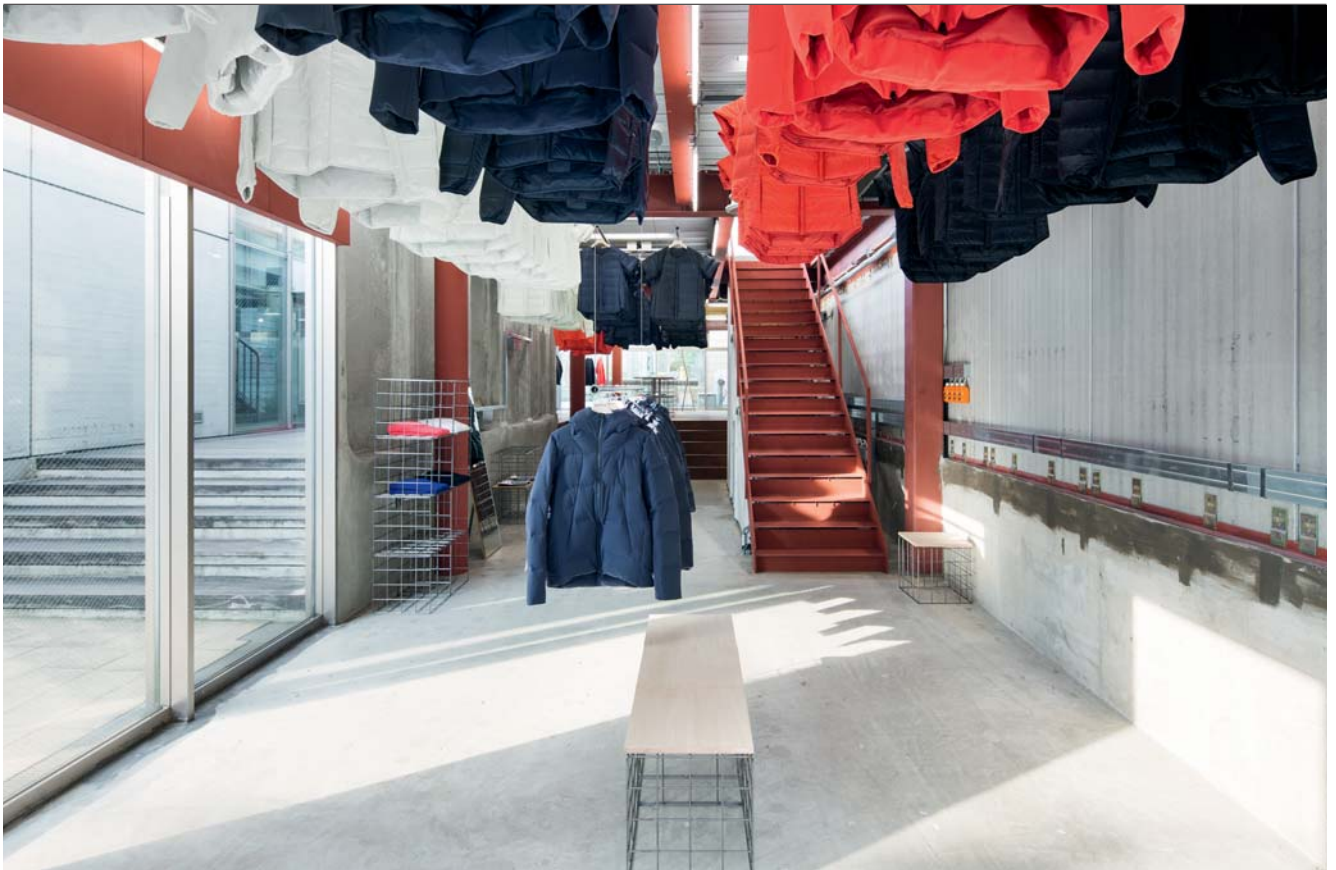
Segment: vintage and antique furniture, men's grooming products, spirits and wine, curated fashion items, handcrafted bags & accessories

Assortment: Price Ecodesign, Avere La Barba, Antica Barbieria Colla, Samaroli, BOIS 1920, Les Indiennes, Il Pigiaino

Store Concept/Shopfitting: Soul Objects / Photo: Kornelius Werhahn-Mees



STORES



DESCENTE BLANC/TOKYO

Cube Daikanyama, 19-4-7 Sarugaku-cho, Shibuya-ku, Tokyo, Japan

Opened: September 2015 / Size: 136 sqm

Segment: men- and women ski apparel

Assortment: Descente Blanc

Store Concept: Jo Nagasaka/Schemata Architects

Photo: Kenta Hasegawa

NIXON/LONDON

31 Neal Street, London WC2H 9PR, England

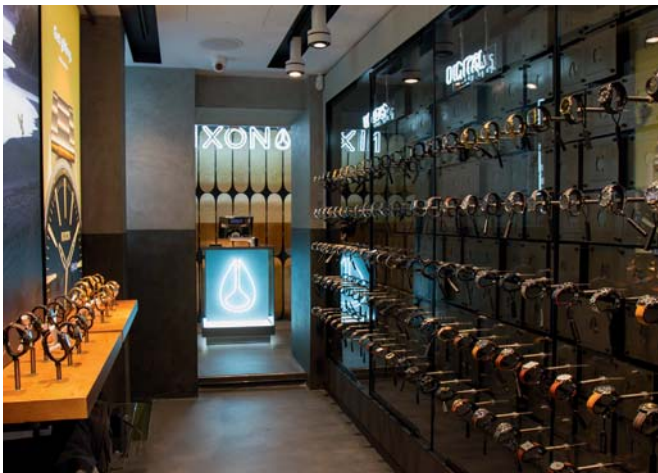
Opened: November 2015 / Size: 62 sqm

Segment: watches, bags and accessories

Assortment: Nixon

Shopfitting: Checkland Kindleysides

Photos: Nixon Europe





TOMORROWLAND/NEW YORK

476 Broome Street, New York City, NY 10013, USA

Opened: September 2015 / Size: 325 sqm

Segment: women's and men's high fashion

Assortment: Tomorrowland, Want Les Essentiels,

Jeanpaulknot, Knott, Knott Men, etc.

Store Concept: TPG Architecture

Photo: Tomorrowland



NOWHERE/DUBLIN

64 Aungier Street, Dublin 2, Ireland

Owner/Store Manager: David Erixon and Brian Teeling

Opened: November 2014 / Size: 49 sqm

Segment: men's high fashion

Assortment: A.P.C., Matthew Miller, Craig Green,

Christopher Raeburn, Cmmn Swdn, Stutterheim, Marni

Store Concept: Abgc Architecture & Design

Photo: Paul Tierney

STORES



MARDOU&DEAN OSLO

Holmens Gate 4, 0250 Oslo, Norway

Owners: Ingrid Bredholt and Patrik Rosenfors

Opened: October 2014 / Size: 82 sqm

Segment: men's and women's contemporary fashion, shoes and accessories

Assortment: Mardou&Dean

Store Concept: Ingrid Bredholt and Patrik Rosenfors

Metal works: Kasper Kaarbø of Sigfred Bentzen & Sønn

Photos: Courtesy of Mardou&Dean



SNEAKERSNSTUFF/PARIS

95 Rue Réaumur, 75002 Paris, France

Owners: Peter Jansson, Erik Fagerlind

(director of international operations: Axel Pauporté)

Opened: November 2015 / Size: 200 sqm

Segment: men's and women's sneakers and streetwear

Assortment: Adidas Consortium, Nike Tier Zero, Reebok Certified Network, Asics Platinum, Converse Tier Zero, Adidas Yzy, Puma Cream, New Balance, Vans, etc.

Store Concept: Peter Jansson and Erik Fagerlind

Architect: Paul Jozsa/APT Design (UK)

Realization/Furniture/Lighting: Bofink Design studio, Jenny Askenfors

Shopfitting: Korus Group

Photos: Adrien Dirand



STORES



SELEKTEUR/DÜSSELDORF

Hohe Straße 6, 40213 Düsseldorf, Germany

Manager: Felix Staeudinger

Opened: November 2015 / Size: 120 sqm

Segment: mens, womens- and kidswear, accessories, beauty products, gadgets, stationary, small furniture, homeware, toys

Assortment: Schott NYC, Menil, Orcival, MHL-Studio, Dr. Bronner, Caran D'Ache, Kaweco, Pendleton, etc.

Realization/shopfitting: Schwitzke & Partner

Photos: Schwitzke GmbH



FEIT INSTALLATION TWO: VOLUME AND VOID/NEW YORK

11A Greenwich Avenue, New York City, NY 10014, USA

Opened: September 2015 / Size: 39 sqm

Segment: footwear

Assortment: Feit

Concept/Furniture/Lighting: Jordana Maisie

Photo: Nicholas Calcott

LOOKING GOOD, HANGING WITH THE WILD BUNCH

IN A (NEW)
BUFFALO
STANCE

Photos **Kevin Sinclair** / Styling **Jessica Bobince**

IAN WEARS BLAZER **TOMMY HILFIGER**,
PRINT PANTS **HYDROGEN**, HAT **JJ HAT CENTER**,
BROCHES **MIRIAM HASKELL**



EFREN WEARS TRACKSUIT JACKET **STUSSY**
GREY SUIT **FREEMAN'S SPORTING CLUB**,
BLACK SHIRT **Y-3**, HAT **JJ HAT CENTER**,
NECKLACE **MIRIAM HASKELL**,
SOCKS **AMERICAN APPAREL**,
SHOES **DR. MARTENS**



LOUIS WEARS QUILTED JACKET **COLMAR ORIGINALS**,
SHIRT **FREEMAN'S SPORTING CLUB**,
LONG SKIRT **Y-3**, HAT **BAILEY**,
NECKTIE **ALEXANDER OLCH**,
BROOCH **MIRIAM HASKELL**,
SOCKS **SUNSPEL**,
BELT AND SHOES **DR. MARTENS**



EFREN WEARS YELLOW VEST **LACOSTE**,
JACKET **DIESEL BLACK GOLD**,
HAT **ALEXANDER OLCH**



IAN WEARS DENIM JACKET **PEPE JEANS**,
FUR STOLE **ADRIENNE LANDAU**
SHIRT **FRED PERRY**,
SHORTS **PUMA**,
SOCKS **LACOSTE**,
SHOES **DR. MARTENS**,
HAT **KANGOL**



LOUIS WEARS TRENCH COAT **CHEAP MONDAY**,
QUILTED JACKET **STUSSY**,
BLAZER **FREEMAN'S SPORTING CLUB**,
SHIRT **SUNSPEL**,
SHORTS **ORLEBAR BROWN**,
HAT **JJ HAT CENTER**,
CLOVES **BLAUER**,
SILVER BROOCHES **DIESEL BLACK GOLD**,
GOLD BROOCH **MIRIAM HASKELL**,
SOCKS **SUNSPEL**,
BOOTS **DR. MARTENS**





EFREN WEARS BLAZER **7 FOR ALL MANKIND**,
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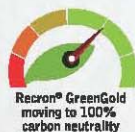
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