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


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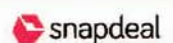
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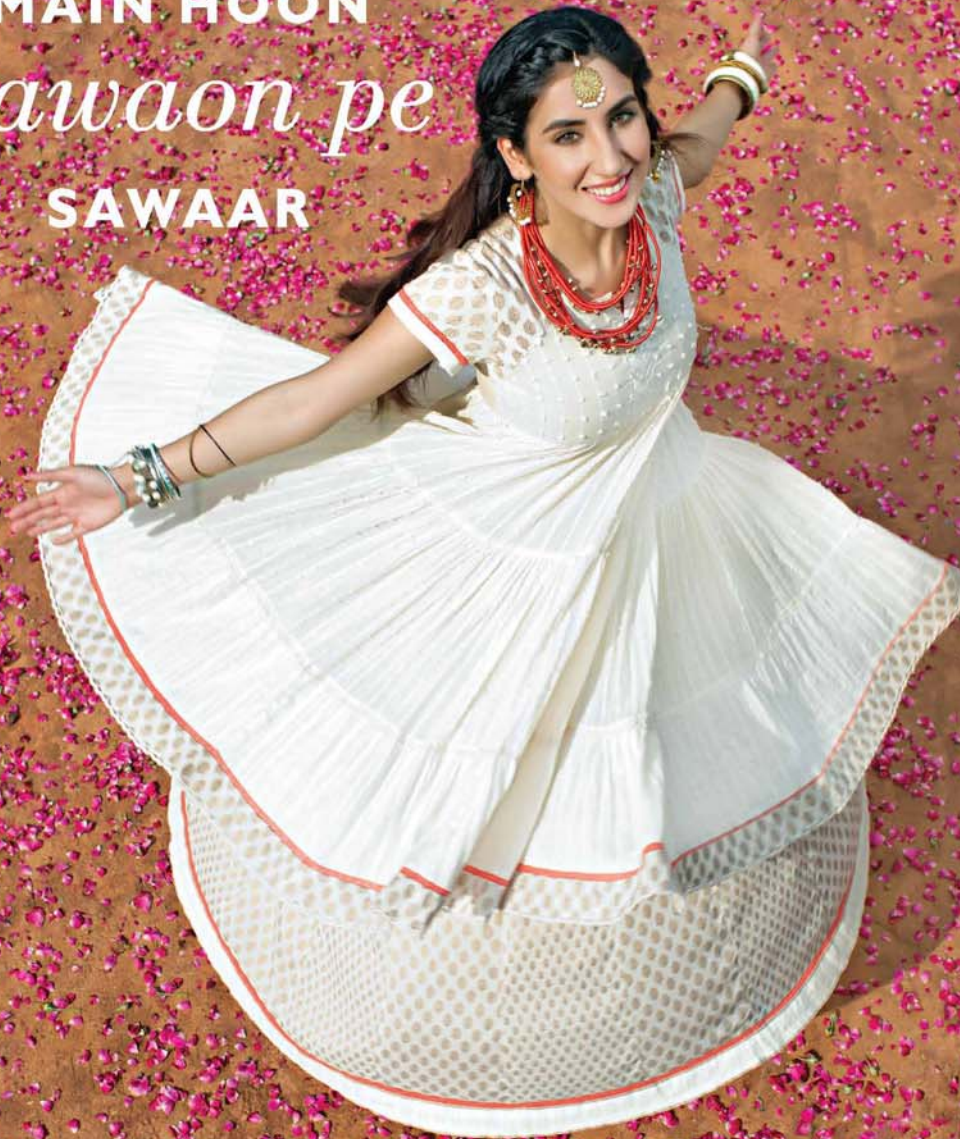
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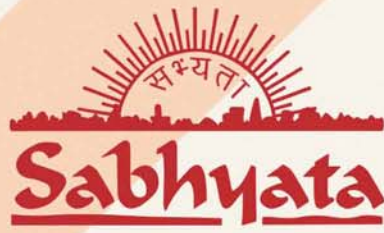


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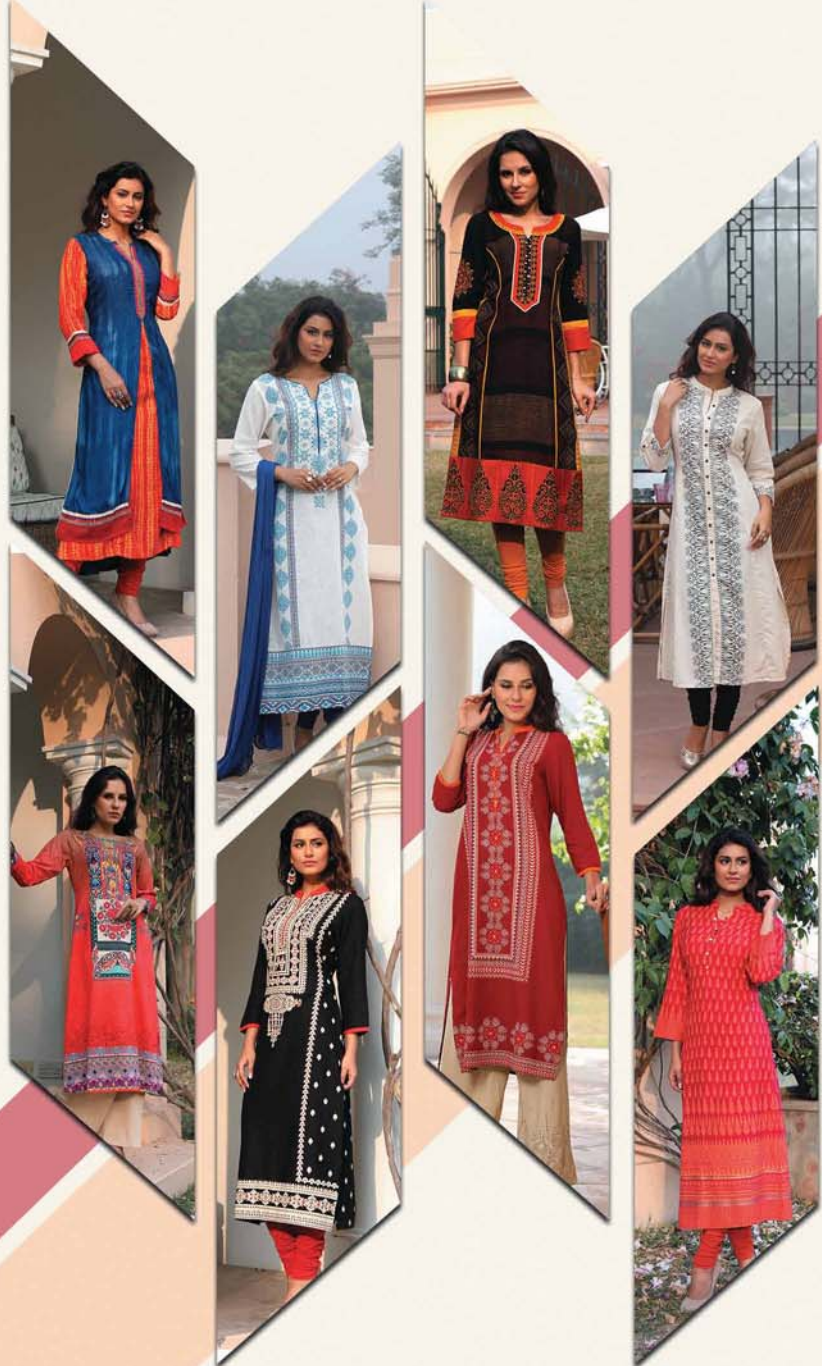
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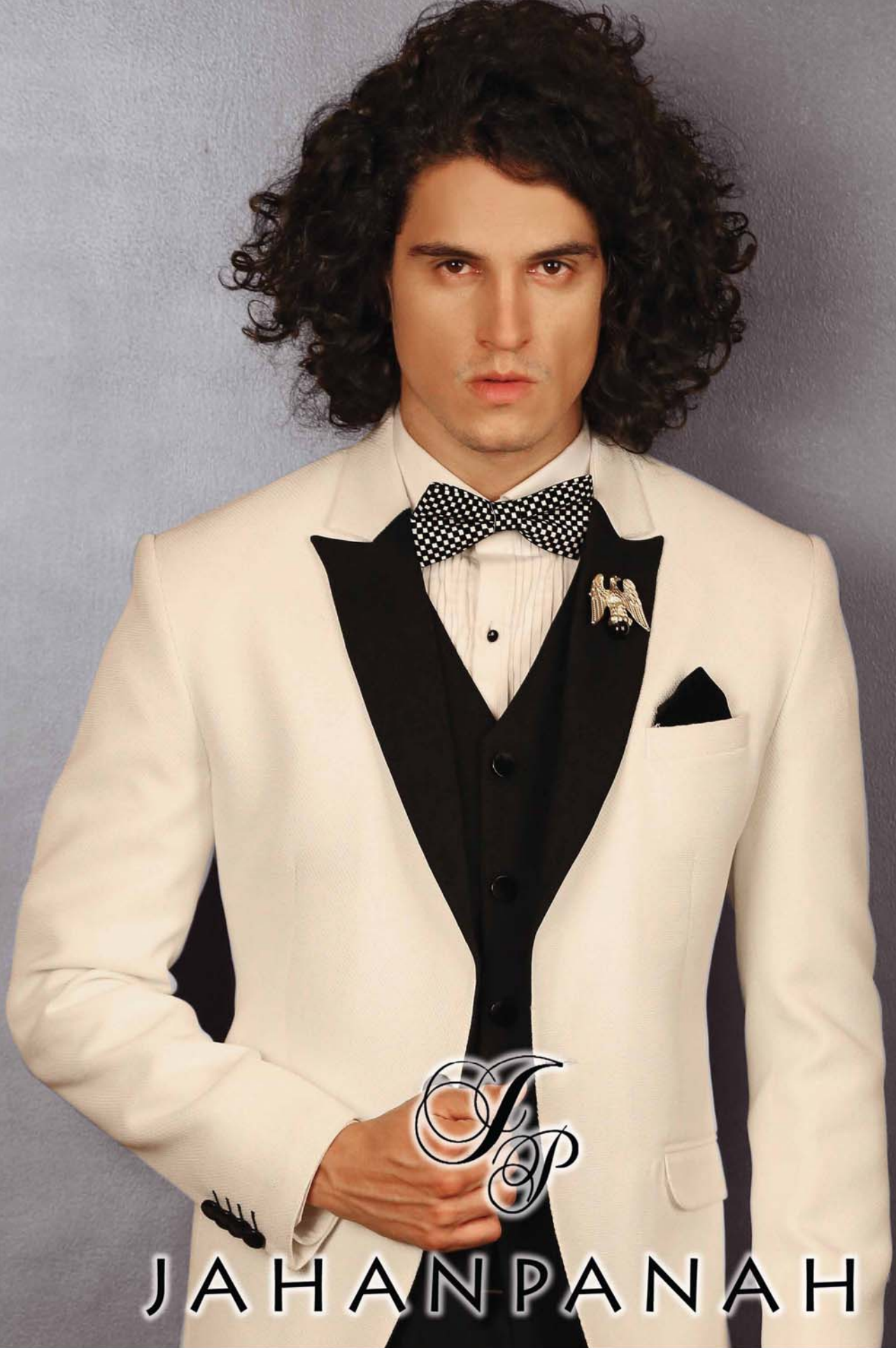
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Dear Friends,

Welcome to the first issue of the year and I would like to wish you all a very happy new year. I sincerely hope that this year turns out to be prosperous both for you and your business.

As we do every year, we are pleased to present before you the annual **Brands of India Special Issue** of *IMAGES Business of Fashion*. While we showcase brands, we also ponder upon the art of creating a brand. In fashion, creativity and business go together. How does one turn a piece of garment into a composite entity that seemingly represents a whole range of emotions? Also, while creating a brand is ephemeral, the business attached to it is endlessly complex. In the following pages, we showcase a few young and rising stars, as well as established stalwarts — both home grown and from across the world — who are in the process of creating a brand or have already been successful.

This special edition is a key part of our mission to catalyze fashion retail business in India. The issue helps in aiding retailers with a survey that catalogues fashion brands, their collections

and their current status in the markets. It also elucidates upon the brand identities and consumer cores they satisfy to help Indian fashion retailers build a highly profitable business around them. It traces and presents dominant as well as emerging brands that are leading the latest definition of fashion. As the featured brands introduce themselves to you, I hope that other brands also find success stories that inspire.

Also in the issue is an exclusive study— **Delhi - The Fashion Capital of India**. This maps the emergence of Delhi as the top fashion market and creative eco-system in India. It unveils the growth drivers, current size and future potential of the Delhi NCR fashion market. It individually reveals the retail scenario and future projections of 10 zones of the region -- North Delhi, West Delhi, South Delhi, East Delhi, Faridabad, Noida, Greater Noida, Ghaziabad, Faridabad and Gurugram.

I hope you find the issue meaningful.



Amitabh Taneja

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ADVERTISER'S INDEX

9	RED RIDING
10	MASH UP
11	DEAL JEANS
12	VAMI
13	SKECHERS
14	MEXICO JEANS
15	CHASE
16	CANDOUR
17	POISON
18	HATS OFF
19	ZOLA
20	MARSHMALLOW
21	ENDICOTT
22	BONJOUR
23	OFFICER
24	VALA'S
25	IRONY
26	BIBA
27	RANGRITI
28	SABHYATA
29	SABHYATA
30	JASHN
31	JASHN
33	JAHANPANAH
34	ORION MALL
37	CLONE MANNEQUINS
38	INLOOK
41	CRUSOE
42	EQUATION
43	EQUATION
44	DESI BELLE
45	DESI BELLE
46	FOCUS
47	FOCUS
48	INFINITI
49	INFINITI
50	CMAI
51	CMAI
59	JUNIPER
63	YKK
65	LIVE YOUNG
69	BEEVE
73	SUNNEX

77	SHERIFF
81	AFOX
83	STATUS QUO
85	ZORRO
87	HUES
89	TURTLE
91	LEAGUE
93	SUCCESS
95	APPLEEYE
97	CITY GIRL
99	TANTRA
101	RAJSHAHI
103	E2O
105	LUX ONN
107	EARTHWEAR
109	TWISTER LEGGINGS
111	LUTHAI INDIA
113	UFO
115	FLACON JEANS
121	HOFFMEN
123	SHREE
125	TOONZ
127	TANGO
131	SPARK-1
133	LUX COZI
137	GIRLISH & ARK
139	SPRINGFIELD
143	NOVIO
151	LONDON BRIDGE
153	TAEKO
157	ZERO
159	PLUS TIME
165	KHADIMS
167	TEXAS
169	TULIP
171	BUTTON NOSES
173	COMFORT LADY
175	FITZ
177	RECADO
181	LIBERTY
183	PUFF JEANS
187	SCOTLANE
191	F-STREET
193	HARD CURRENCY

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201	MODA ELEMENTI
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207	KIVON
209	NUTEEZ
215	CAA
217	DOLLAR
221	BLACK PANTHER 1
222	BLACK PANTHER 2
223	BLACK PANTHER 3
224	BLACK PANTHER 4
225	BLACK PANTHER 5
226	BLACK PANTHER 6
227	BLACK PANTHER 7
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231	SCAN
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243	LI'L TOMATOES
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RESEARCH

Growth of E-commerce in Fashion

TRENDS

Milano Unica Spring Summer '18

LAUNCHES

KVIC - Khadi Lounge
Impressions - The OCM Fashion Store

Stores



**Impressions:
The OCM Fashion Store**
Pg No. 52



LAUNCH
**KVIC LAUNCHES ITS
NEXT GEN RETAIL
OUTLET**

KVIC's Khadi Lounge showcases a designer line of garments and an exclusive range of handcrafted fabrics to cater to trend conscious men and women.
Pg No. 54



RAMP
Wool Runway Design Competition

Highlighting the venerable talent of today's fashion design students and the versatility of Merino wool, the competition was a runaway success.

Pg No. 56

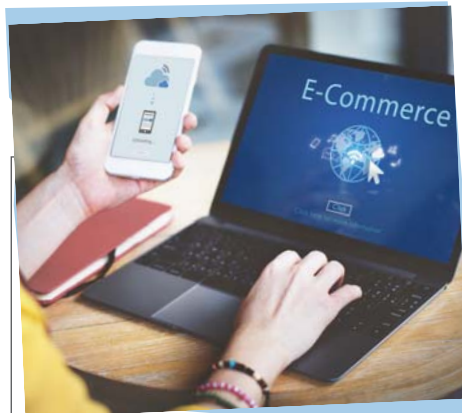


POLICY

**LOOSE GARMENTS
EXEMPTED FROM PACKAGED
COMMODITY ACT**

With the collaborative effort of Ministry of Textiles and Ministry of Consumer Affairs, Food and Public Distribution, loose ready-made garments have been exempted from Legal Metrology (packaged commodities) Act 2011.

Pg No. 58



RESEARCH

Growth of E-commerce in Fashion Business

THE INDIAN RETAIL INDUSTRY WITNESSED A BOLSTERED GROWTH CURVE AFTER THE ADVENT OF E-COMMERCE. AMONG THE SEVERAL SIGNIFICANT CHANGES WE SEE BUSINESSES EMBRACING TECHNOLOGY AND INNOVATION AT AN UNPRECEDENTED PACE. TECHNOLPAK TAKES AN OVERVIEW.

Pg No.60

MY THOUGHTS

Women & Fashion Denims

Women consumers control about USD 28 trillion in annual consumer spending. Diagonal Consulting (India) analyses the history and evolution of jeans as a modern dress habit for women.

Pg No. 70



TRENDS

MILANO UNICA: SPRING-SUMMER '18 TRENDS

The iconic fashion trade show unveils its forecasts of what to expect in SS'18.

Pg No. 74

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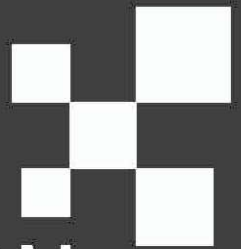
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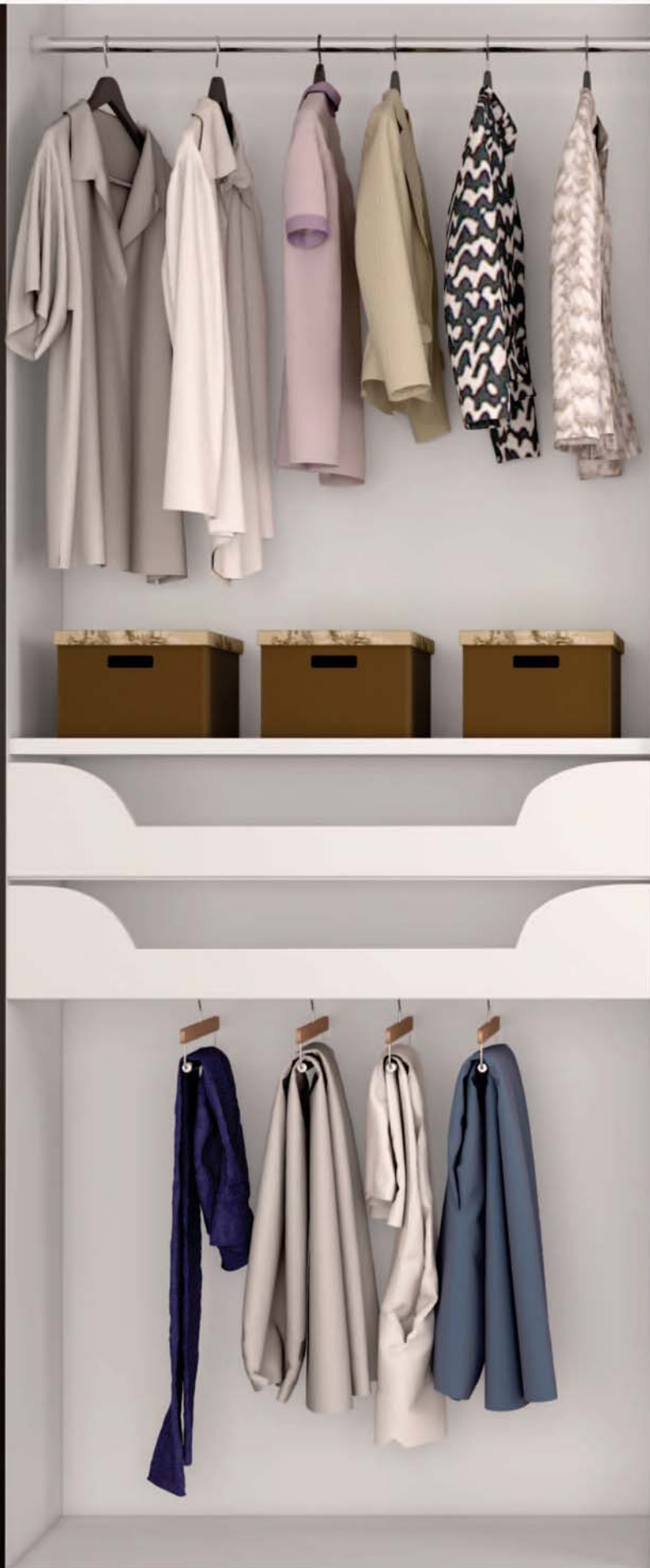
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IMPRESSIONS

THE OCM FASHION STORE

BRAND:

Impressions - The OCM Fashion Store

PROMOTER:

OCM Private Limited

LOCATION:

New Delhi (Rajouri Garden)

SIZE OF THE STORE: 1,700 sq.ft.

COLLECTION:

Impressions is the first exclusive franchise store launched by OCM in Delhi. For men, the new product line-up at Impressions are stylish jackets and for women with discerning taste, there is a vibrant ethnic wear collection and more. Building on its credentials of woollen expertise, OCM is also offering an amazing range of high fashion sweaters, designed by top notch Italian designers, for the season to be sold at its exclusive franchise store in Rajouri Garden, New Delhi. High quality fabrics designed in Italy are part of the offering and will provide the benefit of personalised tailoring for men's suiting and jacketing.



STORE INTERIOR:

Impressions - The OCM Fashion Store opens up an upscale ambience and ease to the customers for a reassuring shopping experience. It lets them choose from a wide variety of styles of contemporary ready-to-wear garments and high quality fabrics. The store is done up in soft and soothing shades of white and subtle tan. The light fixtures at the newly opened Impressions store add to the calm and easy going interior of the outlet and also draw shoppers' attention to the merchandise on display. The placing of the shelves is simple and effective, while merchandise is placed carefully on the classic wooden shelves according to different categories.

STORE THEME:

The store features a new, sleek design concept, complementing the brand's first outlet and the collection on display. The merchandise is placed on the shelves according to their categories for the ease and convenience of the customers.

ABOUT PROMOTERS:

OCM, one of India's largest fabric manufacturers, is a longstanding household name and a trusted brand name of India. The company has its sprawling manufacturing facility in Amritsar, Punjab with its corporate office in Delhi. In the wake of new business opportunities and growth, OCM has geared up to cater to the modern Indian customers by offering an extensive product range of high quality all-wool and wool-blended worsted fabrics to stylish ready-to-wear garments, across all age-groups, for men and women customers.



***“Khadi for Nation,
but now it should be
Khadi for Fashion.”***

-Narendra Modi,
Hon'ble Prime Minister

KVIC LAUNCHES NEXT RETAIL OUTLET

KVIC's Khadi Lounge showcases a designer line of garments and an exclusive range of handcrafted fabrics to cater to the trend conscious men and women.

By Gurbir Singh Gulati with inputs from Bharati Sood

Khadi and Village Industries Commission (KVIC) inaugurated a new series of khadi India outlet- Khadi Lounge on 7th January in the premises of KVIC at Vile Parle, Mumbai. The store was inaugurated by Haribhai Chaudhary, MoS, MSME, Govt. Of India. The next generation store is in line with the clarion call given by Narendra Modi, Hon'ble Prime Minister that before independence the slogan was “Khadi for Nation, but now it should be Khadi for Fashion.” The new modern high-end khadi outlet showcases designer line of garments and exclusive fabrics for men and women in major metropolitan cities. The designer wear includes high fashion garments including ready-to-wear designed by the acclaimed fashion designer, Ritu Beri.

This store will provide khadi a niche among the fashion conscious Mumbaikars and trend conscious youth with modern hand spun fabric and garments. Similar such high end stores have been set up in Delhi and Jaipur also which will be inaugurated during the month. The idea of Lounge series of khadi outlet is to showcase country's best handcrafted



fabric and products in a modern outlet. Vinai Kumar Saxena, Chairman, KVIC said, “The lounge will be opened in Delhi, Mumbai, Jaipur and at Lucknow airport, which will stock premium collection of elegant, stylish khadi silk and newly designed ready-mades which will satisfy the quest of khadi lovers.

With this KVIC reconfirms its commitment towards ‘Make in India’ initiative and aligned with Prime Minister’s vision for khadi. This will create multiple employment opportunities and will empower artisans, especially women in rural India by selling their premium products.”

Usha Suresh, CEO, KVIC said, “ KVIC has taken the initiative to implement the mission of our Prime Minister for making of khadi, a fashionable garment. This lounge will cater to the taste of the fashionistas and will promote the sales of khadi to a significant extent. Empowering the artisans and enriching their livelihood.”

Presently, the growing demand for khadi apparels are on an ever increasing

pace, that even the GoI’s decision to demonetize ₹1,000 and ₹500 currency notes failed to have an impact on Khadi sales, according to KVIC Chairman V.K.Saxena. Though in the initial 2 and 3 days, there was a slight dip in the sale, however this was quickly overcome by encouraging more modes of digital payments and also introducing an incentive scheme for providing gifts on purchases for more than ₹2,000 per bill through digital payments. KVIC also allowed 1 percent additional discount in its departmental sales outlets on payments through digital modes. The Khadi India outlet in New Delhi has registered an increase of 14 percent in the sales during the month of December 2016 as compared to the same period during the previous year.

KVIC that sells Khadi and Village industries products through more than 7,100 sales outlets across the country, of which 14 outlets are its own, has a production capacity of ₹1,065 crores today. KVIC is expected to touch the ₹2,000 crores target for this year and ₹5,000 crores target in the next two years.

“ KVIC has taken the initiative to implement the mission of our Prime Minister for making of khadi, a fashionable garment. This lounge will cater to the taste of the fashionistas and will promote the sales of khadi to a significant extent. Empowering the artisans and enriching their livelihood.”

-Usha Suresh,
CEO, KVIC



WOOL RUNWAY DESIGN COMPETITION

HIGHLIGHTS THE VERSATILITY OF MERINO WOOL

By Gurbir Gulati



The Woolmark Company hosted the Wool Runway Design Competition (WRDC) in Mumbai. The competition was aimed at giving fashion students from various reputed institutions a kick-start to their fashion careers. The company announced four winners of its inaugural WRDC in which Ankit Kajla was declared the winner, Kavya Daultani bagged the first runner up, Miloni Kothari scored the third position and Apoorva Wadhwa came fourth. The winners not only won financial support, but also exciting internships with Raymond, Madura Fashion & Lifestyle and fashion magazine Grazia.

The main objective of the WRDC was not only raising awareness but also to educate the next generation of consumers and inspire emerging fashion designers to work with Merino wool. The students' designs were a spectacular visual representation of avant-garde, and wearable



Students from leading design schools in India, namely the National Institute of Fashion Design, National Institute of Design and Pearl Academy were invited to work with Merino wool and were mentored by Gautam Vazirani, fashion curator IMG Reliance.

fashion that highlighted the versatility of Merino wool. Industry leaders and influencers who judged the award, included President of Raymond Ltd., Sudhanshu Pokhriyal; Creative Director of Louis Philippe and Simon Carter, Karunesh Vohra; Editor of Grazia India, Mehernaaz Dhondy; Creative Director and Founder of White Board, Kapil Batus; and Fashion Designer Payal Khandwala. The jury carefully selected the winning designs against strict judging criteria, including the use of at least 80 percent wool per outfit.

A key highlight of the awards night was an exclusive fashion show held by the House of Raymond, which included its made-to-measure, ready-to-wear and fine fabrics ranges.

Arti Gudal, Country Manager India, The Woolmark Company said, "The winning designs were a beautiful display of the students' abilities as fashion designers. They have thoroughly studied the fibre and used it to its full potential which directly reflects in their quality of work. It is our constant endeavour to unleash budding talent and bring them to the

forefront as they explore the infinite possibilities of working with Merino wool. We are happy that Wool Runway has done just that and been a nurturing and innovative platform for students of this generation. It has been an exciting journey right from the beginning and we are so happy to have industry leaders and designers support Wool Runway."

Sudhanshu Pokhriyal, President - Suiting Business, Raymond Ltd., added "Being a leader in the textile industry and the largest importer of wool in the country, Raymond is reckoned for offering consumers highest quality fine fabrics crafted from wool. With our numerous pioneering innovations with wool, we are committed to increase the consumption of this all-weather fabric in India through our array of offerings. While there is an inherent need to educate consumers about the versatility of wool, Wool Runway is the perfect platform for sensitising the design community that plays a pivotal role in taking fashion to consumers."

×

LOOSE GARMENTS EXEMPTED FROM PACKAGED COMMODITY ACT

The readymade garments sold in loose form have been exempted from Legal Metrology (packaged commodities) Act 2011. This has been possible with the collaborative effort of Ministry of Textiles and Ministry of Consumer Affairs, Food and Public Distribution to be beneficial for the apparel industry.

By Gurbir Singh Gulati



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



Olga Vasilyeva / Shutterstock.com

Sharing his views on the reform, Rahul Mehta, President, Clothing Manufacturers Association of India (CMAI) whilst welcoming the decision said, “This move by the Government of India is a game changer for the apparel industry. It not only gives us the ease of doing business but also provides freedom from the undue demands of the inspectors and their inspector raj. I am thankful to Smt. Smriti Zubin Irani, Hon’ble Minister of Textiles, Government of India and Shri Ram Vilas Paswan, Hon’ble Minister of Consumer Affairs, Food and Public Distribution, Government of India for taking this progressive step to resolve a long standing demand from the apparel industry.”

As per the Legal Metrology (Packaged Commodities) Act 2011, there were no clear labelling guidelines for loose garments, which made it difficult for apparel retailers to demarcate the labelling procedure between the pre-packaged and loose garments, thus causing unnecessary inconvenience during inspections at apparel retail showrooms. The provisions of the act were very severe for any offense and directors of the company were directly responsible for the same.

Loose garments by their definition and usage should not have been under the ambit of the packaged commodities act. These were archaic laws that were irritants for apparel retailers.

Now, with the new notification, loose garments are out of the purview of this act and the labeling norms simplified.

In case of readymade garments sold to consumer in pre-packaged form, mandatory labelling along with size of the garments needs to be mentioned in metres or centimetres. Further, details such as S, M, L, XL, XXL, etc., will be treated as additional declaration.





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GROWTH OF E-COMMERCE IN FASHION BUSINESS

The Indian retail industry witnessed a bolstered growth curve after the advent of e-commerce and its impact on the fashion industry is very eminent. Among the several significant changes that the industry has witnessed in recent years the fact that businesses are embracing technology and innovation at a pace unfamiliar to date is a testament to the country's evolving retail market.



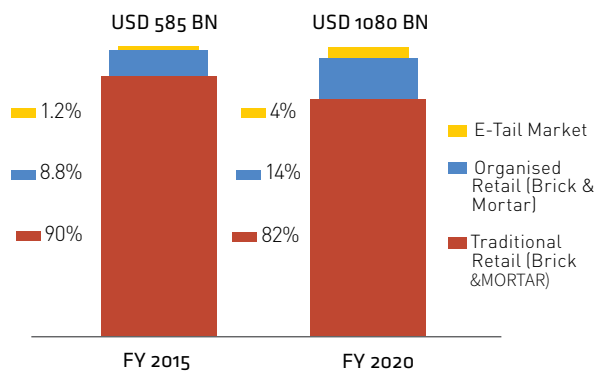
Authors Amit Gugnani, Senior VP - Fashion; and Sakshi Chhillar, Associate Consultant - Textile and Apparel, Technopak detail the e-tail industry in India, along with typical consumer behaviour, growth drivers and the challenges.

The Indian retail market is expected to grow at CAGR of 13 percent to reach USD 1,080 billion in 2020 with current market size of USD 585 billion. The share of apparel in Indian market is 8 percent. Organised apparel retail contributes to 21 percent of the total apparel retail while organised lifestyle contribution in total lifestyle retail varies from 32 percent in footwear to 49 percent in watches.

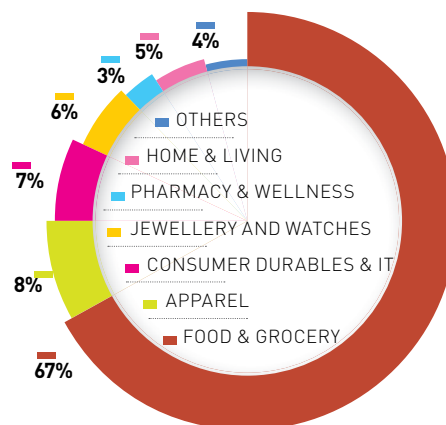
The Indian fashion retail market has witnessed several significant changes in recent years, which indicates country's evolving fashion retail market. One of the significant changes is advancing online retail or e-tail of fashion products across the country. The current online retail accounts to about 1.2 percent of total retail market.

EXHIBIT 1: INDIAN RETAIL MARKET

BREAK UP OF INDIAN RETAIL MARKET

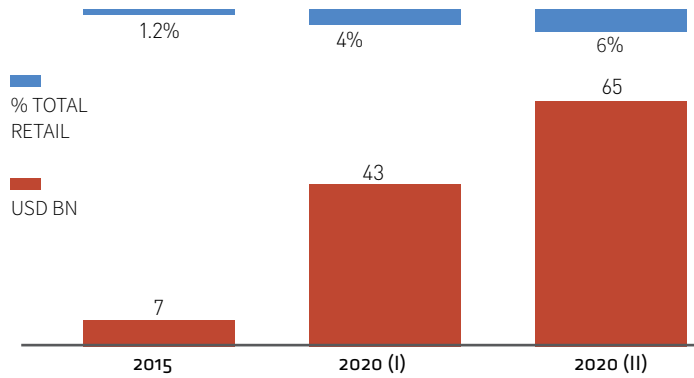


SHARE IN THE TOTAL RETAIL BASKET



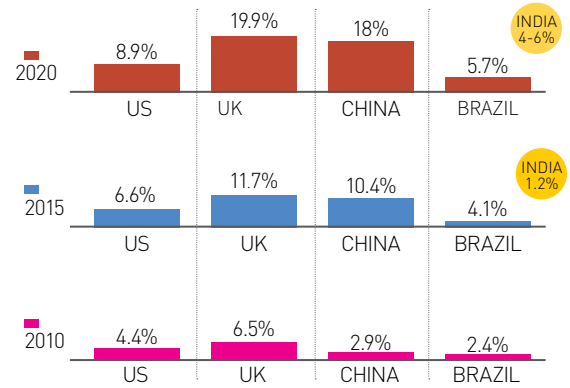
Source: Technopak Analysis

EXHIBIT 2: E-TAIL MARKET IN INDIA



Source: Technopak Analysis (Based on GMV)

EXHIBIT-3 % SHARE OF E-TAIL ACROSS MARKETS



Source: Technopak Analysis

The e-tailing opportunity in India is expected to unfold as per the two scenarios in 2020: e-tail at 4 percent of retail (USD 43 billion) or e-tail at 6 percent of retail (USD 65 billion).

E-TAIL IN INDIA

World over, e-tailing took-off around 2007 driven by advancements in quality of internet access, payments and computing on mobility platforms that dramatically changed consumer behaviour towards internet consumption. This ecosystem creation has altered the consumer behaviour of a sizeable consumer mass (referred to as active internet user base). This active internet user base is a key consumer of online retail.

The online retail growth has followed a disruptive trajectory across markets. In relatively mature markets, like USA where organised retail penetration is high, multi-channel retail chains lead the online market. In a relatively newer market like India (with 10 percent organised retail) and China (with 20 percent organised retail) web-only players are dominating the market, given the low organised retail penetration. The e-tailing opportunity in India is expected to unfold as per the two scenarios in 2020: e-tail at 4 percent of retail (USD 43 billion) or e-tail at 6 percent of retail (USD 65 billion).

CONTRIBUTION OF FASHION IN E-TAILING

The e-tailing evolution started in India with books and media as a key category. Electronics got adopted next and apparel, lifestyle gained acceptance at the next level. The other categories that have found traction include baby care, home and living, etc. E-tailing market at present is led by electronics category with a share of 45 percent followed by apparel and lifestyle that contributes 30 percent of the market with the rest being captured by others. The category split of e-tail is projected to remain same





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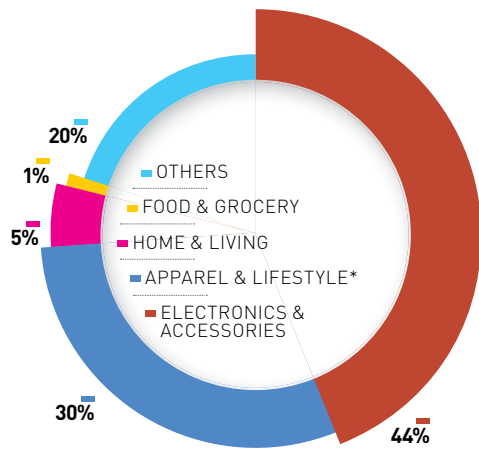
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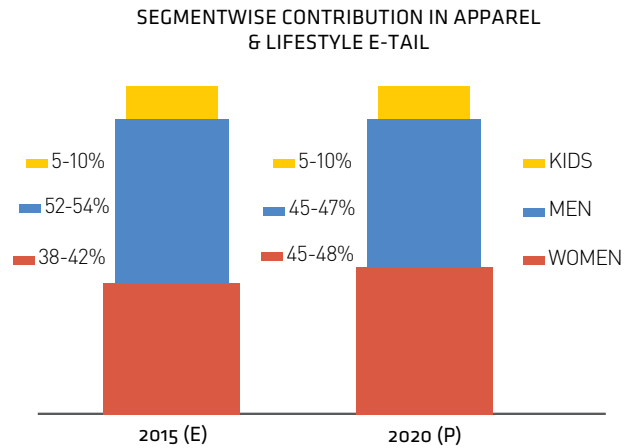
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EXHIBIT 4 CATEGORY SPLIT OF E-COMMERCE IN INDIA



*This will include categories like footwear, bags, belts, wallets, watches, etc.

EXHIBIT 5 CONTRIBUTION IN APPAREL AND LIFESTYLE E-TAIL



Source: Technopak Analysis



in 2020 with electronics contributing to 44 percent of the total e-tail market in India followed by apparel and lifestyle at 30 percent.

Currently, men's wear dominate the fashion and lifestyle space with contribution of 52-54 percent followed by women contributing to approximately 38-42 percent and contribution of kids ranges from 5-10 percent. However, in light of increasing women in the workforce with more financial independence, the share of women in e-tail is expected to increase to 45-48 percent, whereas men's segment is expected contribute 45-47 percent, with kid's section to remaining constant around 5-10 percent.

KEY GROWTH DRIVERS OF E-TAIL IN INDIA

India online retail will grow from 1.2 percent of the total retail market in 2015 to 4-6 percent of total retail by 2020. This will be driven by a number of factors that can be classified under four broad categories: growth of digital penetration, limitation of brick and mortar formats, growth of internet habitual customers and improved supply side.

Digital Penetration: As physical and digital retail space converges, the shopping experience finds more places. Digital retail has reached critical costs where interactive displays and mobile connected stores are now able to actualise at much lower cost.

Smartphones and internet penetration are boosting online retail industry. The internet penetration in 2015 is estimated to be 25 percent and is expected to reach 43 percent by 2020 (Source: Internet and Mobile Association of India, Technopak Analysis). This shall lead to increased penetration of fashion e-tailing.

Growth of Internet Habitual

Customers: Internet habitual consumers are rapidly growing in India. An Internet habitual consumer is a consumer who is adept and comfortable conducting complex tasks on the internet. With growing niche of internet habitual customers, e-tailing shall grow at a faster pace. Online portals for social e-commerce for fashion enthusiasts are an added advantage to these internet habitual fashion customers that let users post pictures of their outfits, which are





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then surfaced and showcased to others, who are also given details of where they can go to buy them — both online and at offline outlets near them.

Limitation of Brick-and-Mortar

Formats: Organised retail (primarily brick-and-mortar) has been in India for two decades now, it's contribution to total retail is still low (~10 percent in 2015) due to structural issues faced by brick-and-mortar retail. Organised retail (brick-and-mortar) is concentrated in top 25-30 cities (where retail consumption is concentrated). Majority of the brick-and-mortar brands are concentrated in larger cities and are unable to meet the rising aspirations in smaller cities across India. This skew in retail presence is fuelling the growing demand through online channel owing to wide reach and delivery to even smaller cities and towns where brick and retail stores are either not viable or will take years to reach.

Owing to fast penetration of the e-tail, many brick and mortar fashion retail brands have started entering online retail.

Improved Supply Side: The availability of discounts and promotions, cash on

delivery, wider product range, better product details, easy returns, faster delivery, option for EMIs and mass media campaigns and events have contributed towards further penetration of e-tail in the fashion industry. Also, 3D trail room concept is developing across fashion e-tailing portals to provide experience of virtual trials for apparel and lifestyle products.

KEY CONCERNS AND CHALLENGES

Fashion is a fast evolving segment. As customers progress from research to purchase to fulfilment stages, their expectations change fast. E-commerce companies need to understand these change drivers and adapt their proposition accordingly. Also, there is a need to focus on new brands and products and simultaneously tackle a hyper competitive pricing environment.

Another key challenge is ensuring the quality of the product. There is higher percentage of Customer Initiated Returns (CIR) in apparel and lifestyle segment in comparison to other segments. This increases the cost of reverse logistics. Higher CIR is the result of dissatisfactory product quality and size. This adds to concern of e-tailers dealing with apparel and lifestyle.



CONCLUSION

The digital advancement is becoming eminent in the fashion retail industry where online businesses are embracing technology and innovation at a pace never evident in the past. With a growth rate of 44 percent online retail is estimated to contribute 4-6 percent of total Indian retail market in 2020. Apparel and lifestyle is estimated to contribute 30 percent of the total online retail market in 2020, same as in 2015. However, category split for women apparel and lifestyle is expected to increase from 38-42 percent to 45-48 percent, whereas men's segment is expected to contribute 45-47 percent to the category, with kid's section remaining constant around 5-10 percent. This shift accounts to increase in women entering the workforce, which shall lead to increased demand for different retail categories. With financial independence, more women will have higher discretionary spending power. This can have an impact across multiple categories (clothing, personal care and grooming, accessories, etc.).



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WOMEN & FASHION DENIMS

Women consumers control about USD 28 trillion in annual consumer spending. Diagonal Consulting (India) analyses the history and evolution of jeans as a modern dress habit for women.

Dr. PR Roy & Nirav Shah,
Diagonal Consulting (India)

It has always been exciting and interesting to track the global female economy. Harvard Business Review, in the recent years dealt with the topic to have a fresh assessment. “Women now drive the world economy”.

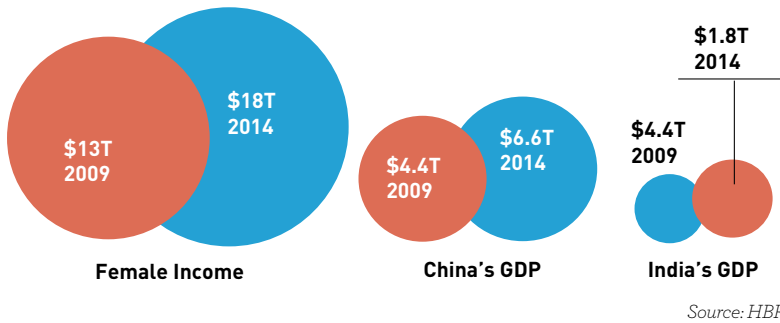
Globally, women consumers control about USD 28 trillion in annual consumer spending. In aggregate, women represent a growth market bigger than China and India combined – more than twice as big, in fact. Given those numbers, it would be foolish to ignore or underestimate the female consumer. And yet many companies do just that, even ones that are confident.

Michael Dells’ experiment with women’s laptops has been a classic example of the above that forced him to go to the School of Marketing Hard Knocks. “You spoke and we listen”—Dell had to respond to the users.

The history of women’s fashion has been as old as the human civilization and that too widely varying in different parts of the world, greatly influenced by the monarchy, society and historical culture and habits. However, fashions in the sense of modern dress habits including jeans and pants are fairly young.

The World's Largest Opportunity

A growth forecast (in trillions)



“Jeans is an attitude, not a pair of pants”. Jeans had originally been designed as men’s work pants but in the 1870s, western women who worked along with men on ranches and farms began to wear men’s jeans. Savage refers to Willy Mathews, who in the 1870s outfitted herself in her brother’s clothes to get a job as a cowpuncher.

Fashion has always been key to how women have presented themselves to the world and how society has wanted to present women to the world. From panniers that emphasized wide hips to shoulder pads that emphasized power, the fashion of the time tells our history in great detail.

During the First World War, women worked in factories, drove ambulances, tended the wounded in fielded hospitals and by necessity re-managed their wardrobes to suit the times — skirts became even shorter, hair was either tied up or cropped and fashion designers were for a time outpaced by the march of history itself.

In 1930, Vogue magazine ran an advertisement depicting two society women in tight fitting jeans, a look that they called “western chic”. About 80 years ago, Levi Strauss and Co., forever changed women’s fashion with the introduction of Lady Levi’s Jeans — the world’s first jeans exclusively for women. Historically, women and jeans

did not mix. At the same time, they were fighting for their right to vote, women spunky enough to don denim were ridiculed. To practice functionality of jeans, some wore their husband or brothers’ 501s. Levi Strauss & Co., took a risk altering the course of women’s fashion.

First developed for western women wearing Levi’s jeans on farms and ranches, the new line was also aimed at women vacationing at dude ranches, working cattle or horse ranches, that welcome guests flocking from the eastern states or even Europe.

Although jeans for gals were brand new in 1934, Levi Strauss & Co., had been offering women’s clothing as early as 1918. That year company created “Freedom - Alls” a one-piece garment whose name evoked the emotion of World War 1.

Creating women’s jeans, a decade later proved progressive. The liberating lady Levi’s line caught on quickly in the west.

By the mid 1930’s, department stores were stocking Levi’s jeans and western boots in the women’s section. After World War 2, jeans manufacturers would offer a pant for women, similar to those of men, but with a “side opening” instead of a fly front opening. It was not until 1958 that adjustments were

>



KEY TRENDS IN DIFFERENT PHASES OF DEVELOPMENTS:

1950's	Bootcut
1960's	Straight, Bellbottom & Flare
1970's	Skinny, Super Skinny, Pack-it & Baggy
1980's	Mom Jeans, Tight fitting & Distressed
1990's	Baggy, Peek-A- Boo, Boyfriend
2000's	Flares & Hipsters

made in the design of women's jeans to account for female shape, and in the 1960's, women's jeans became available with the fly-front zipper opening. Lady Levi's gave women - a rare option at the time - pants - tot customary through World War 2.

The sense of fashion freedom that lady Levi's jeans inspired

80 years back continues with today's latest denim fits and finishes that are now available across the globe. We, in India, in the recent years are in the same footsteps including spandex based women's jeans.

Marilyn Monroe, one of Hollywood's top names steered US female fashionistas towards jeans that eventually was led by designers like Gloria Vanderbilt and Calvin Klein. Post 1980's - 90's and in the new millennium, the fashion changes came through various cuts, fits, styles and feels.

Recent study by the present authors reveal a list of leading brands/retailers catering to women's jeans for the upmarket fashion wears. Some such names are Gucci, 7 For All Mankind, True Religion, Diesel, Dolce & Gabbana, J Brand, Armani, G-Star, Levi's, Nudie etc.

In the new millennium, sustainability leads to fashion needs over and above look, feel and solid performance. D-Bar at Beverly Hills, Destination Denim at Selfridges, Swedish Cult 'Nudie', MiH - Made in Heavens, Benzak - a super-premium Japanese Jeans, all are creating ripples in the women's fashion jeans segment.

Replay, very recently introduced a brand-new jeans for women which the brand feels is a perfect blend of smooth factor, sensuality and a rich and attractive fabric. The jeans use a patented RECALL system to abolish creases in the knees and bottoms.

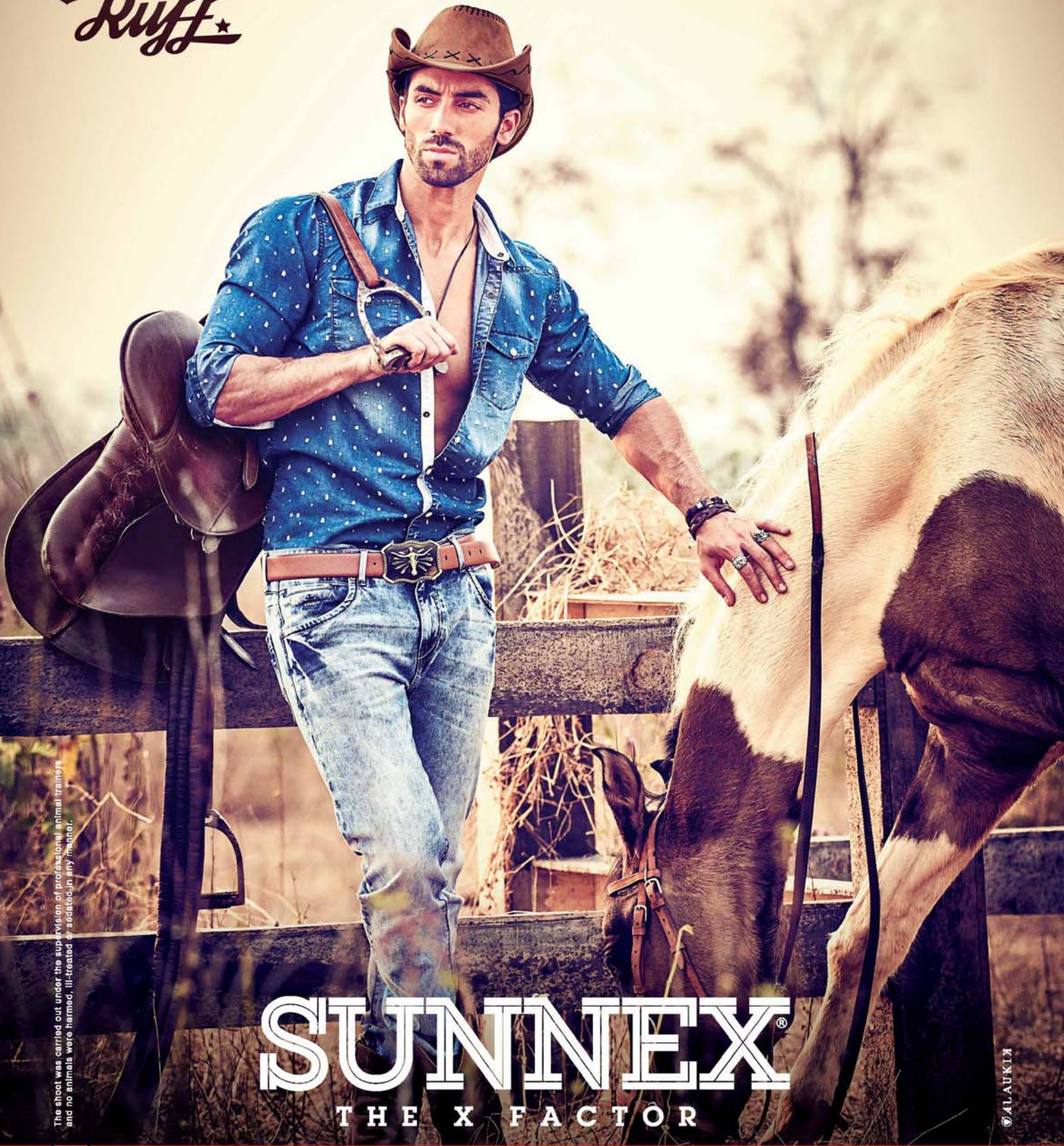
Alexa Chung predicts 2017's new denim trend as enters 'He for She', a global activist group demanding gender equality worldwide, from abolishing child marriage to eliminating wage gaps. 'He for She' works with leaders in every field to champion human rights. "We decided the party should be in their honour," Alexa explains because it is important. India, still by far predominantly, a saree market for women is inching towards jeans in the urban and semi urban markets. Coming years would be more definitive in accepting jeans culture, thus creating a new fashion segment. Denims' phenomenal growth in the recent years in India pinpoint the direction.

References: Harvard Business Review & History of Levi's Jeans


ABOUT DR. P R ROY

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

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MILANO UNICA:

SPRING-SUMMER '18 TRENDS

By Rajan Varma

The Italian trade show Milano Unica has unveiled new trends for Spring-Summer 2018. The theme revolves around the pleasures of travel, exploring different cultures, connecting the past and the present and re-discovering historical figures of aesthetic and cultural importance.

The collection showcases three basic themes - 'Nefertiti in Ibiza', 'Kazimir Malevich in Sorrento' and 'Carlo Mollino in Tehran'. Impressive combinations of historical characters and the historic places, both reminiscent of their glorious past and their everlasting collective imagination value.

'Nefretiti in Ibiza' represents the ideal of timeless beauty and the embodiment of love and spiritual intensity. While the Russian artist Kazimir Malevich is relayed in Sorrento's southern sunshine. Carlo Mollino, architect from Turin, has been flown to Tehran following the path of Iranian culture. The combinations are daring and unusual.



Nefertiti in Ibiza

Nefertiti, the legendary Queen of Egypt, has been brought to the Balearic islands on the isle Ibiza, a world heritage site. A place where trends are born, rituals take place and the young people feel free. The theme features floral décors, Egyptian preciousness, kaftans, golden colours and interior decorations of Ibizan houses.

Materials

The materials are inspired by the sands of Ibiza, the dunes, the mummies, balm smelling bandages, thickly woven linens of the typical Ibizan dress and fine Egyptian papyrus and silks resembling vellum paper. Many parallels can be drawn between the two worlds in terms of fabric, enhanced by decorative elements. The theme features use of overprinted fabrics in bas-relief; pleated sketches; pleated gauze; vertical and horizontal double mesh; plisse effect obtained on the loom; pleated tulle enriched with prints; silks with papyrus paper effect; uneven reliefs created on the loom; gauze overlaid on jacquard



giving a cave painting type effect; golden 'fil coupe' printed with golden pigments; gold veined crispy silks; giant prints with brush strokes and hand painted effects; matt and shiny taping; printed suedes with transparent gold lacquers lined with gold; pale gold silk lined with ornamental patterns; silk-viscose rush matting and precious silks with stencilling allusions.

Accessories

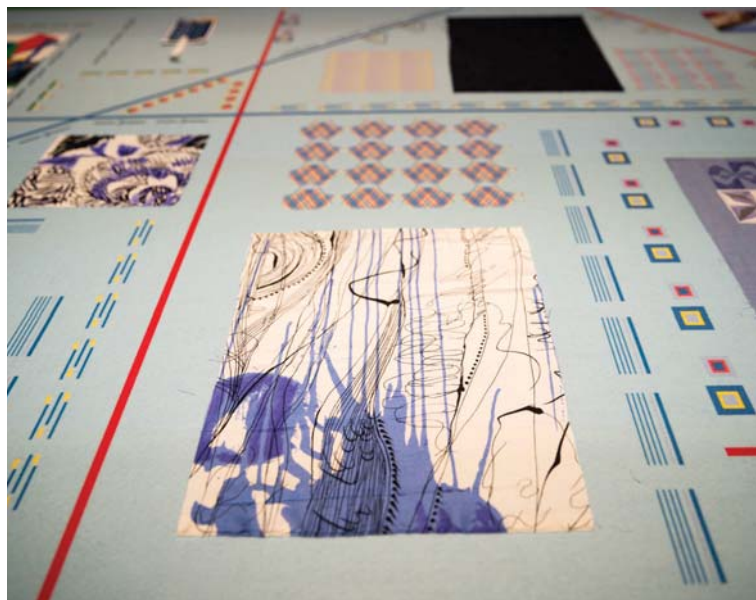
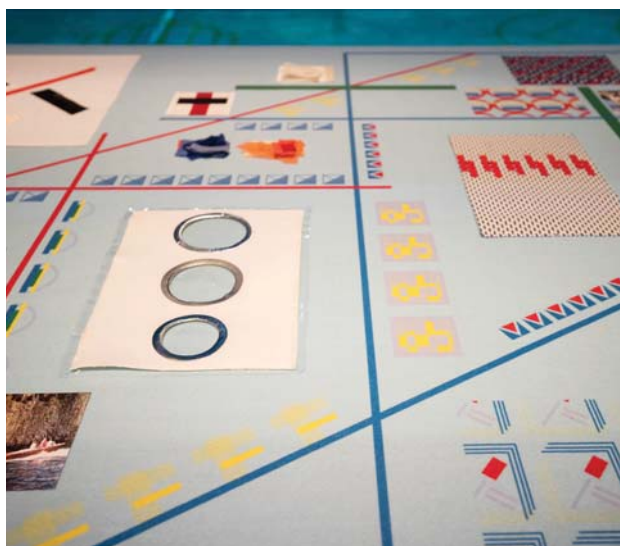
The accessories are extremely decorated and revisited in a technopop version to minimize the opulence and the preciousness of the fabrics. Leather techno collars; lacquered and lasered, stylised patterns enriched with

iridescent materials; patches of various polyurethane films, fabrics and other materials; central decorative patterns with chain and stone inserts forming geometrical drawings; cotton and linen bases for ribbon fringes and weaves made with gold application; plisses with net golden finish effect; and Egyptian inspired decorative elements.

Colours

The colour chart consists of godly gold, amethyst purple, amber brown, warm yellow, make-up beige and kiwi green.





Kazimir Malevich in Sorrento

The theme focuses on colours and geometric patterns. It is inspired by the works of the Russian artist Kazimir Malevich, who introduced the historical Avant guard movement, the Suprematism, which mixes up with the patterns of Sorrento's tiles and ceramics. Portraying the dynamism of the architectural forms of Sorrento as seen by Malevich.

The main elements include dimensional geometries, colours reconstructing depth, dynamic perspectives, graphics alternating with decor and natural elements stylized in an abstract mood.

Materials

The materials used are hand-printed silks, soft touch cottons, textured micro open weave stretch cottons, three-chromes originating from thermo applications and seemingly incidental techno juxtapositions and graphic effects.

Giant sketches on jerseys give a three dimensional effect. The trend also features thick striped cotton jerseys in alternating colours; unique graphic abstracts with mixed materials; striped and pinstriped patterns. A mix of transparencies and lacquers, jersey patches, outlined pinstripes alternating with polka dots, irregular pinstripes and double-faced organzas.

Accessories

In accessories, there has been a generous use of ribbon and lines of varying dimensions alternate with extremely colourful appliques. Gross-grain ribbon compositions heat sealed with polyurethane, colour blocks made with labels and zippers, buttons inspired by Sorrentine ceramics. Overlapped laser drawings recall both majolica and Malevich's abstract vision.

Colours

The colour palette consists of sky blue, majolica blue, emerald green, sulphuric yellow, fever red and tangerine orange.



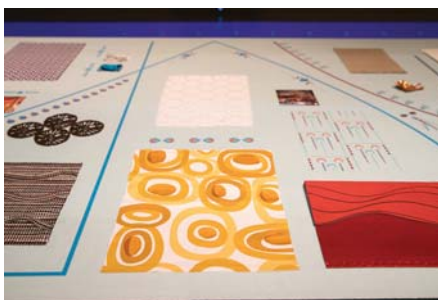
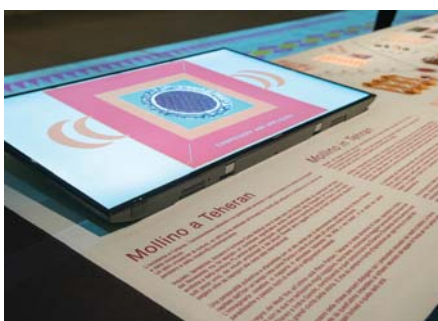


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Carlo Mollino in Tehran

This is the theme of the osmosis between east and the west, between the impudent Persian beauty and grandeur and the Savoyan authoritativeness. Teheran and Turin - the Shah and the architect. A theme dedicated to the connection between the worlds on the opposite poles, in tune with both osmosis in thought patterns and contemporary creativity. On one side are the mosaics, while on the other is the furniture. Single pieces with rounded forms and floral decorations. In this theme the rose windows of the Persian church seem to be conversing with the detailed decorations of Mollino's furniture. His beloved organic forms hold vivid references to the naturalistic elements of the Persian rugs and seductive royal atmospheres of Turin and the Shah.

Materials

The theme features use of jacquards embellished with gold threads to compose geometrical designs; flakes of metallic leather offering a 3D effect to printed silks with micro floral patterns; leather lasered rose window shapes for a three dimensional effect; cottons printed with designs inspired by the oriental majolica; print patches on cotton shirts; jacquards with cyclical sketching; jacquards with lace effects; pigmented and overprinted fabrics; sophisticated jacquards with bas-relief threading; bas-relief embroidered laces; hand knotted silk paper with mosaic

prints; delicate jacquards inspired by Hammam interiors; silk ties with lace in rose window shapes; cotton laces in maxi cellular designs; double cotton with inserts to create bas-relief patterns; maxi rush matting cottons; and jerseys with organic patterns and 3D effects.

Accessories

The theme features use of rich and decorative accessories. Featuring oriental ornaments in embroidery and appliques; decorated laces and macramé; decorative patches; laser trims; engraved buttons and zippers; embroidered ribbons and edges; macramé and metallic appliques.

Colours

The colour chart has been inspired by the jewellery sapphire mixed with the turquoises of church windows. There has been use of warm woody colours selected by Mollino, and Pompeian reds inspired from the prayer mats. The palette consists of sapphire blue, Arabesque copper, Pompei red, Malachite green, turquoise and silver.

Trends and neutral colours

The Spring-Summer 2018 also features a range of neutral colours such as zinc white, graphite black, creamy white and neutral grey, which work well both with single themed shades or alone.



IMAGES BUSINESS OF FASHION

Brands in India

2017



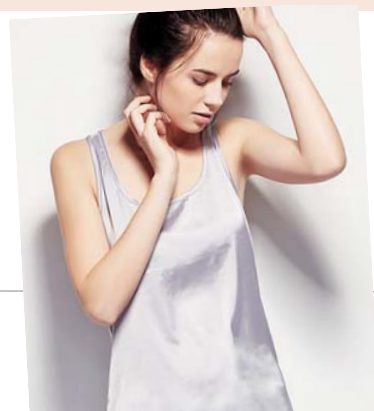


THIS, THE LATEST EDITION OF THE ANNUAL "BRANDS IN INDIA" SPECIAL ISSUE TAKES A LOOK AT SOME OF THE FINEST FASHION BRANDS IN INDIA. A VENERABLE ARRAY OF FASHION LEADERS THAT NO MERCHANDISER AND RETAILER CAN AFFORD TO IGNORE.

- 82 AFOX
- 84 ANTIGRAVITY
- 86 APPLE EYE
- 88 ARK
- 90 B:KIND
- 92 BEEVEE
- 94 BLACK PANTHER
- 96 BONJOUR
- 98 CANDOUR LONDON
- 100 CHASE
- 102 CLASSIC POLO
- 104 COMFORT LADY
- 106 COURTYARD & KRABURS
- 108 CRUSOE
- 110 DE MOZA
- 112 DEAL JEANS
- 114 DESI BELLE
- 116 DOLLAR ULTRA THERMALS
- 119 E2O ACCESSORIES
- 109 EARTHWARE
- 122 EASIES
- 124 ENDICOTT & SKYKING
- 126 EQUATION
- 128 F-STREET
- 129 FITZ & SOLEMIO



- 130 FLACON
- 132 FLAIRMEN
- 134 FOCUS JEANS
- 135 GARBO
- 136 GRISHTI
- 136 GIRLISH
- 140 HARD CURRENCY
- 141 HATS OFF
- 142 HOFFMEN
- 144 IN-LOOK
- 149 INTEGRITI
- 150 IRONY
- 152 JAHAPANAH
- 154 JUNIPER
- 155 KILLER
- 156 KIVON
- 158 LAABHA
- 160 LAWMANPG3
- 163 LEAGUE
- 164 LI'L TOMATOES
- 166 LONDON BRIDGE
- 168 LUX COZI
- 170 LYRA
- 172 MARSHMALLOWS
- 174 MASH UP
- 176 MEXICO
- 178 NOVIO
- 179 NUTEEZ
- 180 OFFICER
- 182 OKS BOYS & OKS MINI
- 184 ONN
- 185 PINK 'N' PURPLE



- 186 POISON JEANS
- 188 PUFF
- 189 RAJSHAHI POSHAK
- 190 RANGRITI
- 192 RED RIDING
- 194 RICADO DENIMS
- 195 ROCKSTAR JEANS
- 196 SABHYATA
- 198 SCOTLANE
- 199 SHERIFF
- 200 SKECHERS
- 202 SOCH
- 204 SPRINGFIELD
- 205 STATUS QUO
- 206 SUCCESS
- 208 SUNNEX JEANS
- 210 TAANZ
- 211 TANTRA
- 212 TEXAS JEANS
- 213 TOONZ
- 214 TULIP
- 216 TURTLE
- 218 TWILLS
- 219 UFO
- 220 VALA'S
- 228 VAMI
- 230 W2F
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AFOXBrand: **AFOX** | Company: **SIDDHI VINAYAK CLOTHING**Launch Year: **2007** | Brand Website: **WWW.AFOXCLOTHING.IN**

The casual wear brand Afox, from the house of Siddhi Vinayak Clothing, specialises in manufacturing bottomwear for men. In a short span since its launch in 2007, the brand is today recognised as one of the top brands in men's bottomwear in the country. It is also known for its quality and fits.

Core Product Offering/ Categories:

Afox offers a complete bottomwear range for men in casual and formal categories. Its wide assortment includes jeans, cotton trousers, corduroy pants, printed and jacquard trousers.

Target Consumers:

The brand targets men in the age group of 18 to 35 years.

Brand USP:

Internal detailing, fits and finishes are some of the unique qualities that put Afox above its competitors.

Future Expansion Plans:

The brand has plans to partner with major e-commerce players to increase its reach. In terms of product expansion, the brand aims to diversify into men's accessories category.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 500+

Major LFS/ MBOs/ Departmental Stores Present in: Afox is available at Jadeblue, Pothys, Jaihind, etc.

No. of Indian Cities Currently Present in: Pan India

Brand Turnover (estimated for FY 2015-16): ₹12 crores

✕





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ANTIGRAVITY

Brand: **ANTIGRAVITY** | Company: **GO GO CREATIONS PVT. LTD.**

Launch Year: **2015**

Antigravity is a casual chic brand for young men and women. Launched by Go Go Creations Pvt. Ltd. in 2015, Antigravity now designs collections for those who believe that it's not where you come from, it's about where you're headed and also about having a good time getting there. Antigravity Clothing reflects the buoyant, restless philosophy that mirrors today's youth. The brand is built for those who never compromise on fashion, style, quality and value.

Core Product Offering/ Categories:

Antigravity offers t-shirts, sweat shirts, joggers and jog shorts for men and t-shirts, tops, sweat shirts, jeggings and joggers for ladies.

Target Consumers:

The brand targets youth, both men and women in the age group of 21 to 26 years.

Brand USP:

Antigravity's USP lies in offering international fashion focused on good quality soft fabrics, which are comfortable, young and fit.

Brand's Mission:

The brand works with a mission to dress the Indian youth in chic, cool, trendy, international fashion clothes at affordable price range.

Future Expansion Plans:

Antigravity is planning to venture into two new states this year and to spread out to East India and South India in the next year. The brand will also open one EBO this year. Also, the fashion brand is working on making its presence in large format stores either this year or by the next year.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to target the cities of Bengaluru, Hyderabad, Chennai, Kochi, Kolkata and Patna.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 200

Total no. of SISs: 15

Total Space Covered by EBOs & SISs: 3,000 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in stores like Options, Boy London, Sagar, Amarsons in Bombay; European Catalog, MyMy in Ahmedabad; Blue Club in Rajkot; Jaihind and Bizzare in Pune.

Major E-commerce Portals Present in:

Antigravity retails through e-commerce websites like Koovs, Myntra, Jabong and Abof.

No. of Indian Cities Currently Present in:

20

New Territory/ Region Added:

Brand Turnover (estimated for FY 2015-16): ₹20 crores

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APPLE EYE

Brand: **APPLE EYE** | Company: **STITCH FAB INDIA PVT. LTD.**

Launch Year: **2008** | Brand Website: **WWW.APPLLEEYE.CO.IN**

Headquartered in Kolkata, Apple Eye is a modern kids wear brand, launched by Stitch Fab India Pvt. Ltd. Adhering to international standards, Apple Eye has set new trends in kids' fashion. An Apple Eye product is a personification of intricate design, research and experiment.

Core Product Offering/ Categories:

Apple Eye offers a trendy casual wear range for the little cherubs.

Target Consumers:

The brand targets infants and kids in the age group of 0-16 years, from the middle and upper middle class families.

Brand USP:

The brand's USP lies in its trendy designs of international standards that it shells out at affordable prices.

Future Expansion Plans:

Apple Eye is planning to expand its business in more large format stores and also wishes to open 8-10 EBOs in times to come.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to expand its presence in Bangladesh.

Total space covered by EBOs & SISs:

17,000 sq.ft.

Major LFS/ MBOs/ Departmental

Stores Present in: The brand is present at Reliance Trends.

Major E-commerce Portals Present

in: Apple Eye retails through major e-commerce portals like Amazon, Flipkart and Paytm.

No. of Indian Cities Currently Present

in: Pan India

New Territory/ Region Added: Rajasthan and the Middle East

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 35%



BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 7

Total no. of MBOs: 2,000

Total no. of SISs: 25





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ARK

Brand: **ARK** | Company: **NEW KANIKA FASHIONS**

Launch Year: **2014**

Ark was launched by New Kanika Fashions in 2002 and later relaunched in 2014. The brand is known for its superior quality, ethnic designs and patterns. New Kanika Fashions is engaged in manufacturing and export of a wide range of women evening gowns, kurtis, kids clothes, etc. These are widely appreciated for their attributes like shrink resistance, colour fastness, neat stitching and high tear strength.

Core Product Offering/ Categories:

The brand offers kurtis in the price range of ₹799 to ₹2,999, skirt sets, trouser sets and also evening gowns.

Brand USP:

Ark's USP lies in offering latest trendy ethnics for ladies at a very fair price range.

Brand's Mission:

The women's brand works with a mission to offer best quality products at a reasonable price.

Future Expansion Plans:

Ark is planning to focus more on providing best of services to its top buyers and also on spreading its wings to different markets all over India.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the areas in Uttar Pradesh and North-East India in times to come.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 500+

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in major stores like Chunmun, RmKV, Mebaz, G3, Half Ticket, Kalyan, Sheetal, etc.

No. of Indian Cities Currently Present in: 16

New Territory/ Region Added: Chennai and Kolkata

Brand Turnover (estimated for FY 2015-16): ₹15 crores

Turnover CAGR over last 3 years for FY '16: 20%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 30%

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B:KIND

Brand: **B:KIND** | Company: **B:KIND CLOTHING INDIA PVT. LTD.**

Launch Year: **2010** | Brand Website: **WWW.BKIND.IN**

B:Kind was born out of the desire to offer a line of clothing for the young and the stylish, contemporary woman of today. The brand was created out of eclectic influences, whimsical themes, a riot of colours. B:Kind offers a varied collection, conjuring a kaleidoscopic range.

Core Product Offering/ Categories:

The brand offers chic and edgy designs of tunics, tops, bottoms and outer wear. It has also frayed into denims and dresses too.

Target Consumers:

The brand caters to unpredictable, individualistic, globetrotter and vivacious young women.

Brand USP:

B:Kind inspires its customers to be curious, enigmatic, become a dreamer and be in love.

Future Expansion Plans:

This year, B:Kind is launching its e-commerce portal. They are also planning to expand its market places. In order to increase their visibility, they will introduce new product ranges and increase their presence in more retail stores. Furthermore, they will launch a kidswear brand, 'Oink' this summer.

Towns or Cities Targeted in the Next Couple of Years:

The brand would target all relevant towns and cities, which have a population of 10 lakhs and above.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 450+

Total no. of SISs: 80

Major LFS/ MBOs/ Departmental Stores Present in: The brand is available at Globus stores.

Major E-commerce Portals Present in: B:Kind is present at Jabong, Myntra, Flipkart and Snapdeal.

No. of Indian Cities Currently Present in: Pan India

New Territory/ Region Added: Rajasthan and Hyderabad (Andhra Pradesh)

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BEEVEE

Brand: **BEEVEE** | Company: **REVOLUTION APPARELS**
 Launch Year: **1999** | Brand Website: **WWW.BEEVEE.IN**

Beevee offers a complete and revolutionary range in cargos specially designed for the new age men. The brand's bottom wear collection adds splendour to various occasions, moods and attitudes. Crafted using the finest cotton and other quality materials, it offers an array of classic designs with international styling and quality in cargos to choose from.

Core Product Offering/ Categories:

Beevee's brand offering comprises shorts, three-fourths, track pants, cargos, trousers, jogger pants and knitwear.

Target Consumers:

The brand targets men in the age group of 18 to 40 years.

Brand USP:

The brand offers a wide range of selection with international quality at competitive prices.

Brand's Mission:

Beevee endeavours to grow as an established youth-wear brand specialising in cargos.

Future Expansion Plans:

The brand aims to add more shop-in-shop stores to show its presence in large format stores and multi-brand outlets.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 1,200+

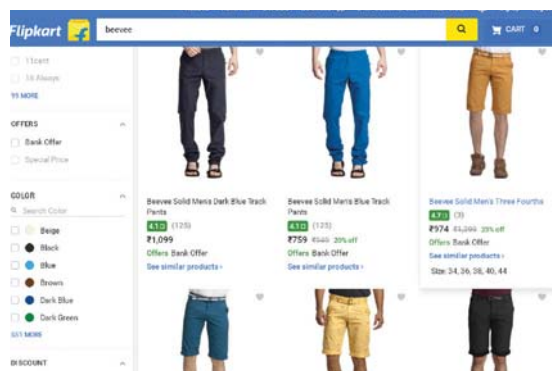
Total no. of SISs: 36

Major E-commerce Portals Present in: Beevee is available on Flipkart, Amazon, Snapdeal, Abof, Paytm, Limeroad, Jabong and Shopclues.

No. of Indian Cities Currently Present in: Pan India

Brand Turnover (estimated for FY 2015-16): ₹720 million

Turnover CAGR over last 3 years for FY '16: 22%



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BLACK PANTHER

Brand: **BLACK PANTHER** | Company: **JUNEJA GLOBAL**
 Launch Year: **1984** | Brand Website: **WWW.BLACKPANTHER.INFO**

Black Panther was launched when the concept of branded sportswear did not exist in India, it began by selling to sports stores only. It is known as India's foremost manufacturers of sports, fitness and leisure apparels and accessories. The brand has integrated manufacturing facilities for all its products, ranging from production of raw materials like yarns and elastic along with knitting and processing of hosiery fabrics. A state-of-the-art plant coupled with its commitment to providing international quality, have enabled them to establish a formidable track record in the active wear segment.

Core Product Offering/ Categories:

Black Panther offers apparel for men, women and kids covering, t-shirts, track suits, jogging bottoms, athletic vests, cricket wear, etc. The brand also manufactures accessories like socks, wristbands, headbands, athletic supporters, knee caps, sport bags, caps and the like.

Target Consumers:

The brand mainly targets men, ladies and kids, essentially anyone who wishes to live and/or project an active lifestyle.

Brand USP:

Black Panther's USP lies in offering India's largest range of apparel, accessories and also swimwear. It also boasts of an impeccable in-house, integrated manufacturing unit.

Brand's Mission:

"Think Fitness, Think Black Panther", the brand's mission lies in being present in every association with sports and fitness.

Future Expansion Plans:

The sports and leisure wear brand has plans to expand its business to the markets of East and North-East India. It is also planning to expand its product portfolio in the performance clothing category.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target East and North-East zones, along with West Bengal and Odisha.

Integrating Omni-channel Operations:

Each channel has a separate regional head, all of them reporting to the NSM. Trade

policies and pricings are finely tuned so as to avoid overlap or cannibalising. The LFS operations are run as a separate profit centre.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 8

Total no. of MBOs: 5,000+

Total no. of SISs: 200

Total Space Covered by EBOs & SISs: 3,000 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in major large format stores like Shoppers Stop, Hypercity, More, Megamart, Spencers, Brand Factory and Globus.

Turnover CAGR over last 3 years for FY '16: 18%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 16%





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BONJOUR

Brand: **BONJOUR** | Company: **ZONAC KNITTING MACHINES PVT. LTD.**
 Launch Year: **1989** | Brand Website: **WWW.BONJOURRETAIL.COM**

Established in the year 1989 with the vision of becoming the first Indian multi-national socks brand, Bonjour has today become one of the most respected brand for its quality standards. Design, versatility and innovation have been the key words behind the success of Bonjour. The brand utilises renowned patented technologies to produce hygienic products and matches the most stringent global quality norms. Even the raw materials are procured from the country's best spinning mills.

Core Product Offering/ Categories:

The brand offers socks, tights, leggings and handkerchiefs.

Target Consumers:

Since the brand is a mid-premium segment, it caters to people from Section A, B and some of its collection to the Section C of the society.

Brand USP:

Bonjour is popular for the high quality products it offers to the customers and the style attached with it. Bonjour is also known for its customer service. A team of qualified and well trained marketing executives help in reaching out to every individual dealer for personalised services.

Future Expansion Plans:

The brand is looking forward to penetrate into the markets of tier-III cities.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 15

Total no. of MBOs: 10,000

Major LFS, MBOs/ Departmental Stores Present in: The brand is present in several major large format stores including Reliance Footprints and Lifestyle.

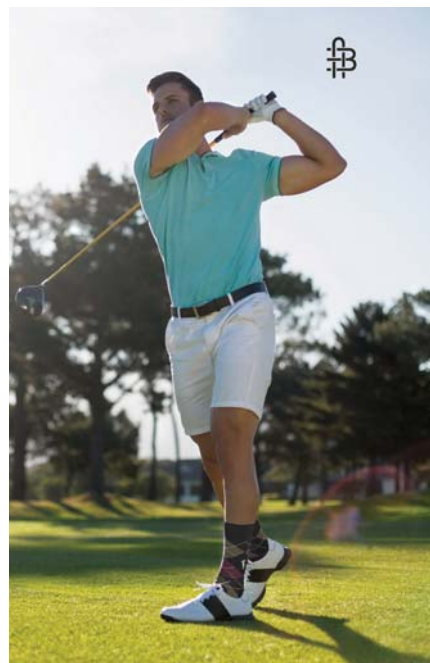
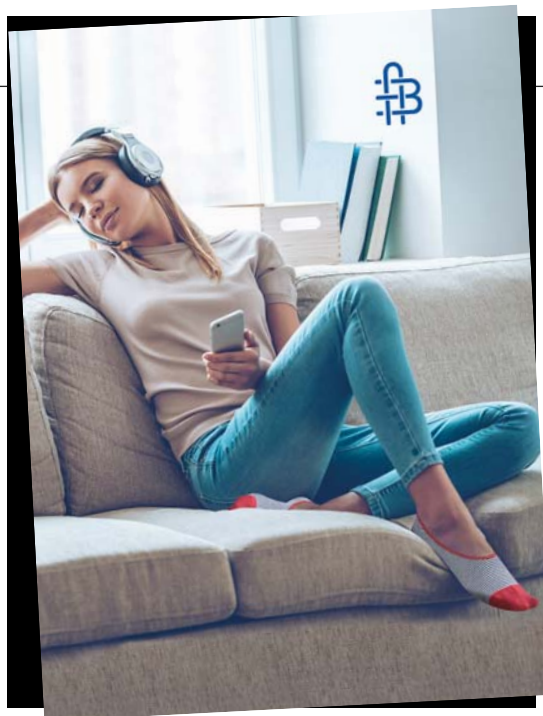
Presence in Online Retail: Bonjour started operations in online retail in 2013. It retails through 23 major e-commerce portals and also through its own online store www.bonjourretail.com.

No. of Indian Cities Currently Present in: The brand currently retails through stores in around 400 cities across the country.

Brand Turnover (estimated for FY 2015-16): ₹100 crores

Turnover CAGR over last 3 years for FY '16: 25%

×





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CANDOUR LONDON

Brand: **CANDOUR LONDON**

Company: **CANDOUR LONDON FASHION CULTURE PVT. LTD.**

Launch Year: **2016** | Brand Website: **WWW.CANDOURLONDON.COM**

Candour, by definition, means the quality of being open and honest and it was a conscious decision to give the brand a name which exemplified the ethos and approach of both its products and business. It is a youth fashion brand that believes today's youth are the true change agents of the future.

Core Product Offering/ Categories:

The brand offers extremely well-crafted and fashionable lingerie and night wear. The brand offers collections like, Candour Lush, Candour Bliss, Candour Jazz and Sundowners, which comprises of padded wired bra, non-padded u/w bra, push up bra, t-shirt bra, nightwear, etc.

Target Consumers:

Candour London targets teenagers and young generation in the age group of 20-30 years.

Brand USP:

The fashion brand's USP lies in offering products of premium quality, fashionable styles, in exceptional colours and great fabrics, all at a value pricing.

Brand's Mission:

Candour London believes that today's youth are the true change agents of the future and the brand runs with a mission to offer the best quality and collection to the youth.

Future Expansion Plans:

The brand has plans to be a leading brand name and choice of every woman in India.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to spread its presence pan India in the next six months.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 100

Total no. of SISs: 10

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in stores like Style One, Gopalsons, Ankur, Moksha, Surbhi, Body Hug, Silvee, Body Basic, Donaa Kids, Viva Supermarket, Nisa, Miss Universe, Private Lives, J.P. Collection, Poonam, Crystal, Jainson, Jain Fashion, Jasleens Nest, etc.

No. of Indian Cities Currently Present in: The brand currently retails through stores in Mumbai, Bengaluru, Chennai, Hyderabad, Secunderabad, Mysore, Ludhiana, Chandigarh, Mohali, Panchkula, Patiala, New Delhi, Anand and Ahmedabad.

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CHASE

Brand: **CHASE** | Company: **VISHAL CREATIONS**
 Launch Year: **1999** | Brand Website: **WWW.CHASEKIDS.IN**

Established in 1999 by Vishal Creations, Chase is a kidswear brand that specialises in boys shirts. The brand's offerings perfectly blend traditional styles with modern trends and are the preferred choice of teenagers who wish to look fashionably smart. Today, the brand has presence in several prestigious stores in Mumbai, Pune, Hyderabad, Chennai and cities in Gujarat.

Core Product Offering/ Categories:

The brand offers linen shirts, designer shirts, digital-print shirts, denim shirts and premium cotton shirts.

Target Consumers:

Chase is an MBO-oriented brand, hence their target customers are parents who visit MBOs to shop for kids.

Brand USP/ Advantage Over Competition:

Chase is popular for quality and fashionable shirts for boys. The brand remains on its toes to keep up with the latest trends.

Future Expansion Plans:

After consolidating the position in kids wear under shirts category, the brand is planning to expand the client base by offering value-for-money range, but keeping the quality intact. According to the brand, the value-for-money segment is a huge market, especially in kids wear. Chase is planning to launch its own web-store soon. The brand will also tie-up with major e-commerce portals for business expansion.

BRAND UPDATES (information as on 31st December 2016)

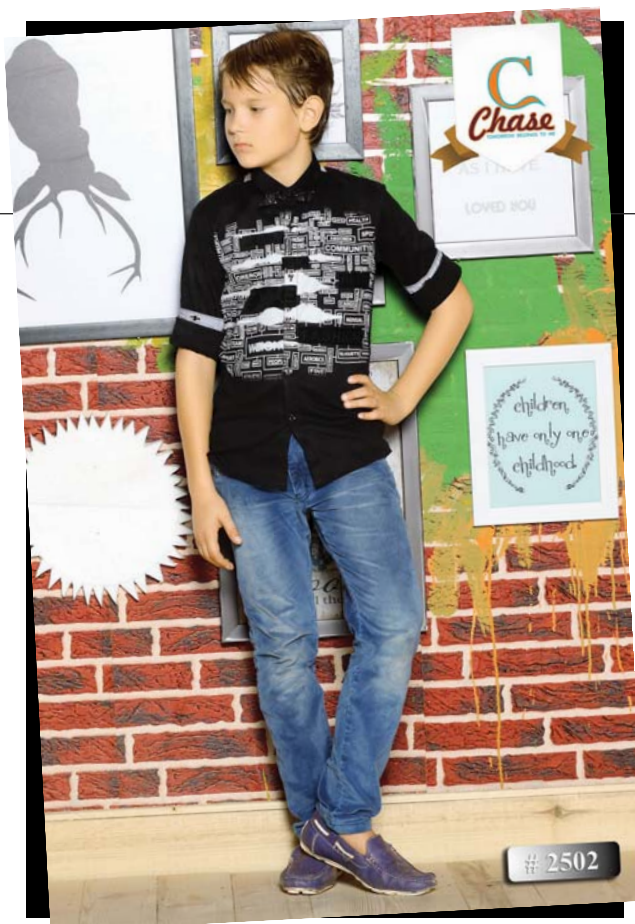
Total no. of MBOs: 750

No. of Indian Cities Currently Present in: 24

New Territory/ Region Added: Punjab

Turnover CAGR over last 3 years for FY '16: 75%

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CLASSIC POLO

Brand: **CLASSIC POLO** | Company: **CLASSIC FASHIONS DIVISION**

Launch Year: **2001** | Brand Website: **WWW.RCG.IN**

Launched in 2001, Classic Polo is known for its wide range of t-shirts and has garnered a sizeable share in tees in national market in the mid-premium segment. The brand offers value for money and superior quality products. The success of the brand is credited to its outstanding state-of-the-art infrastructure, loyal and long standing trade partners, best policies and practices in the industry, well equipped design team and its quick adaptability to change and delivery-on-time with its 100 percent vertically integrated set-up.

Core Product Offering/ Categories:

The brand offers wide range of products like knitted t-shirts, woven shirts, trousers, denims, lounge wear, innerwear and accessories.

Target Consumers:

Classic Polo targets men aged 28 years and above, while CP BRO caters to young men in the age bracket of 18-28 years.

Brand USP:

The brand's USP is its core product categories. The brand has strived to offer an affordable range of superior quality apparel collection to its customers. Quality, at Classic Polo, is measured in terms of design, durability of the garment and value for money.

Brand's Mission:

Classic Polo works with a mission to grow horizontally and vertically in all formats of business through continuous innovation by offering unparalleled value in terms of quality and design.

Future Expansion Plans:

The brand is planning to aggressively expand to South, West and East India and also aims to open 30 franchisee stores in the year 2017-18 in tier-II and -III cities across India.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to target almost all and major tier-II and -III cities such as Chennai,

Bengaluru, Hyderabad, Cochin, Calicut, Hosur, Belgaum, Nasik, Ahmednagar, Aurangabad, Indore, Bhopal, Ranchi, Bhubaneswar, Jaipur, etc.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 90+

Total no. of MBOs: 5,000+

Total no. of SISs: 15

Total Space Covered by EBOs & SISs: 500 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in major stores like Reliance Trends, Central, Mega Mart, Globus, Brand Factory, More, Unlimited, etc.

Major E-commerce Portals Present

in: Classic Polo retails through major e-commerce stores like Flipkart, Snapdeal, Amazon, Paytm, Limeroad and also through its own online store www.classicpolos.com.

No. of Indian Cities Currently Present in:

Pan India

Brand Turnover (estimated for FY 2015-

16): ₹150 crores

Turnover CAGR over last 3 years for FY

'16: 40%

Growth in the first 3 quarters of FY '17

over the same quarters in FY '16: 40%

×





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COMFORT LADY

Brand: **COMFORT LADY** | Company: **D S CREATIONS**

Launch Year: **2010** | Brand Website: **WWW.COMFORTLADY.CO.IN**

Since its inception in 2011, Comfort Lady strives to be the first choice of females when it comes to buying leggings. The brand prides in having a direct control over the entire manufacturing process right from the selection of knitting to manufacturing of the end products, which gives it a complete competitive edge over other brands in terms of quality and range. Started with a humble beginning, the brand now boasts of having a complete range of leggings and garments selling over 5 lakh pieces per month.

Core Product Offering/ Categories:

Comfort Lady primarily offers leggings, which further bifurcates into churidars and ankle-lengths. The brand also offers palazzos, shimmers, capris, printed leggings, camisoles, jeggings and baby leggings.

Target Consumers:

The brand targets females in the middle and upper-middle segment. The products are priced between ₹250-₹699.

Brand USP:

Going by its tagline "Play With Colors", Comfort Lady has tried to present its consumers with a plethora of shades. Besides, the brand always tries to be a trendsetter in the leggings division by introducing superfine quality fabric with easy stretchability and bio-wash, which can be worn for the whole day.

Brand's Mission:

Comfort Lady runs with a mission to be the first choice for all females and keeps up to its own commitments of providing the customers delight with every product at the best possible price.

Future Expansion Plans:

The brand is planning to introduce a new range of ladies tees in its product basket.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 1

Total no. of MBOs: 400

Total no. of SISs: 50

Total Space Covered by EBOs & SISs: 400 sq.ft.

No. of Indian Cities Currently Present in: Pan India



BARE YOUR DENIMS



COURTYARD & KRABURS

Brand: **COURTYARD & KRABURS** | Company: **ARTEX CREATION**

Launch Years: **2015**

L launched in 2015 under the house of Artex Creation, Courtyard and Kraburs has proved their mettle in the fashion industry in a very short span of time. The brands offer luxurious denims at rock bottom prices meeting the preferences of Indian masses. They have expanded the business to over 250 MBOs and are committed to satisfy the desires of its customers.

Core Product Offering/ Categories:

While Courtyard offers jeans, trousers, jackets and blazers for men; Kraburs offers jeans, corduroy pants, etc., for women.

Target Consumers:

The brands target young males and females in the age group of 16 to 35 years, preferring sober designs with best of quality at a reasonable price.

Brand USP:

Courtyard and Kraburs prides in being the urban fashion brand for the youth of the country.

Brand's Mission:

The two brands run with a mission to provide fast, affordable and fashionable garments to its discerning consumers.

Future Expansion Plans:

The two brands are planning to increase their production capacity by three times and also to come up with a wide collection of ladies jeans with tearing effects.

Towns or Cities Targeted in the Next Couple of Years:

The brands are looking forward to expanding in Uttar Pradesh with a target on Lucknow, Gorakhpur, Allahabad, etc., while in Madhya Pradesh with a target on Bhopal, Indore and Gwalior, etc.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 250

Total no. of SISs: 5

Major LFS/ MBOs/ Departmental Stores Present in: The brands are present in stores like Shree Shoppers, Mahanam Garment, Citi Choice, K C Dass Fashion Store, Dreamz, etc.

Major E-commerce Portals Present in: The brands cater to its customers through Flipkart, Snapdeal, Amazon and Paytm.

No. of Indian Cities Currently Present in: 5

New Territory/ Region Added: They recently ventured into the markets of Guwahati, Tinsukia and Tezpur in Assam.

×



A woman with long dark hair is the central figure, wearing a white tunic with blue geometric patterns on the sleeves and a matching blue and white patterned skirt. She is standing in a rustic setting with a wooden door and a stringed instrument (possibly a veena) on a stand to her left. The background features a wall with white decorative patterns and a large dark pot on the right.

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CRUSOE

Brand: **CRUSOE** | Company: **JAGANNATH TEXTILE CO. LTD.**
 Launch Year: **2009** | Brand Website: **WWW.CRUSOEWORLD.COM**

Headquartered at Coimbatore, Crusoe is a premium men's innerwear brand from the house of Jagannath Textile Company. The brand was launched in 2009 and extended its presence pan India in a very short span of time. Crusoe is about adventure and it talks to the adventurer inside every man.

Core Product Offering/ Categories:

Crusoe's product basket comprises innerwear, sportswear, leisure wear, thermal wear and socks.

Target Consumers:

The brand's identity has been designed around 'adventure' and Crusoe targets men in the age group of 16 to 35 years.

Brand USP:

The brand's USP lies in creating a range of designer innerwear that has never been attempted before in this category.

Brand's Mission:

Crusoe runs with a mission to create a distinct and enviable position as the market leader in premium innerwear category.

Future Expansion Plans:

Crusoes has plans to soon launch its range of ladies lingerie and also kids' innerwear.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to target the markets of Odisha, Chhattisgarh and Uttar Pradesh.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in Central, Reliance Trends and Spar Hypermarket.

Major E-commerce Portals Present in:

Crusoe retails through Amazon, Myntra, Mr. Voonik, Paytm and also through its own online store www.crusoeworld.com.

No. of Indian Cities Currently Present in:

Pan India

New Territory/ Region Added:

Karnataka and Andaman & Nicobar Islands

Turnover CAGR over last 3 years for FY '16: 40%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 40%

×



BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 6

Total no. of MBOs: 5,000

Total no. of SISs: 100

Total Space Covered by EBOs & SISs: 7,500 sq.ft.






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DE MOZA

Brand: **DE MOZA** | Company: **AUDAZ BRANDS RETAIL INDIA PVT. LTD.**

Launch Year: **2013** | Brand Website: **WWW.DEMOZASTORES.COM**

Launched as a basic legging brand in kiosk format in 2013, De Moza now offers complete everyday fashion bottom wear across casual to ethnic wear. The brand owned by Audaz Brands Retail India, today it operates across all the channels with over 50 different product categories. The company comes with over 15 years of technical know how of making superfine cotton and viscose fabrics and garments. The brand offers the latest fashion with best in class quality at affordable price.

Core Product Offering/ Categories:

The brand's product basket comprises leggings, pants, skirts, palazzos, dhoti pants, essential tops and accessories.

Target Consumers:

The brand's name is derived from Spanish word De Moza, meaning "attractive girl". It targets females in the age group of 20 to 30 years.

Brand USP:

De Moza's USP lies in being a fast fashion brand, which is quick to market. The brand also prides in having its in-house manufacturing facility.

Brand's Mission:

The women's brand runs with a mission of providing everyday fashion with the best in class quality for utmost satisfaction.

Future Expansion Plans:

De Moza is looking forward to opening another 10 EBOs in 2017 and also planning to expand into other large format stores.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to target markets of Mumbai, Ahmedabad, Pune, Surat and Delhi-NCR in the years to come.

Integrating Omni-channel Operations:

The brand's centralised ware house manages complete offline and online demands with its special software.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 13

Total no. of MBOs: 22

Total no. of SISs: 35

Total Space Covered by EBOs & SISs: 10,000 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in large format stores like Central, Ethnicity, Influence and Pothys.

Major E-commerce Portals Present in:

De Moza retails through Myntra, Jabong, Amazon, Flipkart and also through its own online store www.demozastores.com.

No. of Indian Cities Currently Present in: 30

New Territory/ Region Added: East India

Brand Turnover (estimated for FY 2015-16): ₹5 crores

Turnover CAGR over last 3 years for FY '16: 33%

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DEAL JEANS

Brand: **DEAL JEANS** | Company: **DEAL GLOBAL FASHIONS PVT. LTD.**

Launch Year: **2000** | Brand Website: **WWW.DEALJEANS.COM**

Deal Jeans is a fast fashion women's western wear brand that believes in bringing fresh fashion from every fashion-forward corner of the world to the trend seekers. The journey began with designer denims 16 years ago. Today, the brand is offering 14 exclusive product categories in around 2,500 artistic styles crafted every year, delivering excellent fits and vivacious styles to its customers.

Core Product Offering/ Categories:

Deal Jeans product portfolio consists of 14 categories from designer denims to collotes in bottom wear and chic tops to dresses in top wear.

Target Consumers:

The brand caters to women between 18 to 38 years and girls between 6 to 16 years who are mainly fashion seekers with a lot of style, attitude and flair.

Brand USP:

Deal Jeans is positioned as a bridge between casual and designer denims. According to them, offering exceptional quality, fits and fabric in competitive price is what builds brand's position in the market.

Brand's Mission:

"Together, let's make this world a fashionable place to live in!"

Future Expansion Plans:

Deal Jeans is expanding its presence overseas by opening its first exclusive brand outlet in Lebanon. Also, it plans to open 50 stores in 2017.

Towns or Cities Targeted in the Next Couple of Years:

Deal Jeans already has pan India presence through all major large format stores and multi-brand outlets, while expansion through exclusive brand stores in various cities is also in pipeline this year.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 5

Total no. of MBOs: 1,350 | **Total no of SISs:** 112

Total space covered by EBOs & SISs: 14,500 sq.ft.

Major LFS/ MBOs/ Departmental Stores Present in: Deal Jeans is available at Shoppers Stop, Central, Globus, Kapson's, Chunmun, Meena Bazaar, Appeal, Yougal Sons, Xpression London, Monalisa, Bindal's, Suvidha, Options, G3 Fashions, Half Ticket, Asopalav, Dress Land, Kambalghar, Bachoomal's, Incense, Blueclub, Big Shop, Sohum Shoppee, The Hub, Jack & Jill, Shree Shivam, Agrawal Stores, Bharme Fashion & Lifestyle, etc.

Major E-commerce Portals Present in: Deal Jeans has its presence in Shoppersstop.com, Myntra, Jabong, Abof, Amazon and Ajo.

No. of Indian Cities Currently Present in: 416

Brand Turnover (estimated for FY 2015-16): ₹128 crores



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DESI BELLE

Brand: **DESI BELLE** | Company: **RE-SOURCEWORLD EXIM PVT. LTD.**
 Launch Year: **2012** | Brand Website: **WWW.DESIBELLE.COM**

Lunched in 2012, Desi Belle is a women's wear brand specialising in Indo-western category. Catering to the fashion-conscious young women, it was conceptualised with the idea of evolving the way women dress in India.

Core Product Offering/ Categories:

The brand offers tops, tunics, kurtas, maxi-dresses, palazzos, pants, leggings, skirts, culottes, etc. Its product range includes both western and Indo-western styles.

Target Consumers:

The brand targets ladies who are fashion inclined.

Brand USP:

Desi Belle's USP is the variety and quality in fabric it offers, also the placement prints and silhouette that suits one and all.

Brand's Mission:

The brand's main goal is to become a leading contemporary brand that creates the ultimate bridge between high street and luxury fashion brands. A brand that is built upon strong values with a clear target upon its audience.

Future Expansion Plans:

Desi Belle has recently launched another brand, Miss Desi Belle, which is a western wear range targeting at young ladies. Miss Desi Belle will give competition to the existing prime western wear brands in the market.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 10

Total no. of MBOs: 750

Total no. of SISs: 102

Major LFS/ MBOs/ Departmental Stores Present in: Desi Belle has presence in Central, Pothys, G3, G-Studio, Dressland, Bachoomal, The Chennai Silks, Jolly Silk, Agarwal Store, etc.

Major E-commerce Portals Present in: It also has presence in online portals such as Amazon, Jabong, Flipkart, Snapdeal, Shoppers Stop, Limeroad, etc.

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DOLLAR ULTRA THERMALS

Brand: **DOLLAR ULTRA THERMALS** | Company: **DOLLAR INDUSTRIES LTD.**

Brand Website: WWW.DOLLARGLOBAL.IN

Dollar Industries is considered as a leading company in hosiery and apparel market. Ranked among the top three innerwear companies in India, it focuses on achieving global excellence in cost, quality and productivity. Dollar Ultra Thermals, whilst staying in tune with the latest fashion, provides maximum protection under the coldest winter conditions. The brand prides in offering original wool cot fibers brushed on the inside of the thermals to provide extra warmth and comfort.

Core Product Offering/ Categories:

The brand offers thermals in V-necks and round necks with full and half sleeves and trousers, for men. For women, Dollar Ultra Thermals offer full sleeve as well as sleeveless vests and camisoles. For kids, it offers round neck thermals.

Target Consumers:

The brand targets men, women and children from all age groups.

Brand USP:

The USP of Dollar Ultra Thermals lies in providing quality product at a reasonable price to its customers.

Brand's Mission:

Dollar Ultra Thermals pledges to offer the thermals which gives the consumers the much needed comfort as well as a fashionable look at the same time.

Future Expansion Plans:

Apart from tier -I and -II cities, the brand aspires to spread its range of clothing to inspirational women customers residing outside the top cities. Realising this potential, Dollar Ultra Thermals is spreading across 26 states.

Targeted Cities or Towns in the Next Couple of Years:

The brand is planning to target all major rural cities and towns, in years to come.

BRAND UPDATES (information as on 31st December 2016)

Brand Turnover (estimated for FY 2015-16): ₹830 crores

Turnover CAGR over last 3 years for FY '16: 12.85%

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E2O ACCESSORIES

Brand: **E2O ACCESSORIES** | Company: **EVEN 2 ODD FASHION PVT. LTD.**

Launch Year: **2013** | Brand Website: **WWW.E2OFASHION.COM**

E2O Accessories is a premium fast fashion accessories brand desiring to deliver elegance through its intricately crafted designer handbags with captivating colours and richly textured fabric. The journey began in 2012, when a core team member of Deal Jeans, Apeksha Patel, intended to expand operations into the ladies accessories segment. Since then, E2O Accessories has been expanding and reaching out to women who believe in living every day in a fashionable way.

Core Product Offering/Categories:

E2O Accessories' product portfolio is diverse ranging from wallets, clutches, slings, satchels, backpacks, hobos and totes.

Target Consumers:

It caters to women in the age group of 18 to 45 years having chic, trendy and bold fashion sense.

Brand USP:

The brand's handbags have made a mark in accessories segment for their designer pieces delivering finest quality in competitive prices.

Brand's Mission:

It aims to be the first choice of every woman and girl's wardrobe!

Future Expansion Plans:

E2O Accessories has its presence in most of the cities through large format stores and multi-brand outlet channels. The brand is planning to increase its presence through exclusive brand outlets in the coming years.

Towns or Cities Targeted in the Next Couple of Years:

The brand has presence across the country.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 416

Total no. of SISs: 76

Major LFS/ MBOs/ Departmental Stores Present in: E2O

Accessories has its presence at Central, Shoppers Stop, Pantaloons, Kapsons, etc.

Major E-commerce Portals Present in: E2O Accessories is available at Shoppersstop.com, Myntra, Abof, Amazon, Ajio, Snapdeal and Jabong.

No. of Indian Cities Currently Present in: 148

New Territory/ Region Added: The Middle East Countries



EARTHWEAR

Brand: **EARTHWEAR** | Company: **EARTHWEAR RETAIL PVT. LTD.**

Launch Year: **2011** | Brand Website: **WWW.EARTHWEAR.IN**

Born in 2011, and based out of Kolkata, Earthwear is dedicated to the revival of Indian crafts and skills. Earthwear is a unique brand that brings together natural, handcrafted, cost effective, yet aesthetic wearables under one roof for the modern Indian woman. Earthwear products are inspired by the rich Indian heritage and craftsmanship, that incorporate natural environmental friendly fibres.

Core Product Offering/ Categories:

Earthwear's wide and varied range of wearables include kurtas with hand embroidery by rural women of Bengal; skirts, tops, shirts and dresses with ethnic prints by the artisans of Rajasthan; colourful Bagru printed dupattas and churidars, and classic kurtas in hand woven fabric from Andhra Pradesh and Madhya Pradesh.

Target Consumers:

Earthwear targets modern Indian women who are simple yet classic. The brand has a penchant for tradition.

Brand USP:

The brand offers products in natural fiber incorporating handcrafted techniques like block-printing, hand-embroidery and weaving.

Brand's Mission:

Earthwear functions with a mission to uplift rural artisans and to promote Indian crafts.

Future Expansion Plans:

The brand is planning to expand its reach through EBOs only in Bengaluru and Hyderabad as well as explore opportunities through its own online portal.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the markets of Bengaluru and Hyderabad in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 3

No. of Indian Cities Currently Present in: Presently, the brand retails through stores in Kolkata.

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 30%

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EASIES

Brand: **EASIES** | Company: **KEWAL KIRAN CLOTHING LTD.**

Brand Website: **WWW.EASIES.IN**

Easies is a smart casual wear brand for men who are young and also those who are young at heart. 'Live Easy' is the mantra the Easies man lives with, in the ever so demanding world. The campaign 'Live Easy' is shot in various international locations portraying the life of the Easies man.

Core Product Offering/Categories:

The brand offers shirts, t-shirts, pants, jackets and denims.

Target Consumers:

Easies targets young men, who are successful professionals in the age bracket of 24 to 45 years.

Brand USP:

The brand believes in offering smart casuals for men at work and play.

Brand's Mission:

'Live Easy' is the mantra the Easies man lives with, in the ever so demanding world.

Future Expansion Plans:

The brand has plans to increase its distribution network across the country. It also aims to increase its presence in large format stores and through more online partnerships.

Towns or Cities Targeted in the Next Couple of Years:

The brand will penetrate more into tier -II and -III cities to reach out to more customers.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 150+ (K-Lounge stores)

Total no. of MBOs: 150+

Major LFS/ MBOs/ Departmental Stores Present in: The brand is available at Central stores.

Major E-commerce Portals Present in: Easies is also available on Amazon.

No. of Indian Cities Currently Present in: 150

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ENDICOTT & SKYKING

Brand: **ENDICOTT & SKYKING** | Company: **STITCH APPARELS**

Launch Year: **1988**

Stitch Apparels specialises in men's trousers. It launched Skyking as a formal trousers brand in 1988, and Endicott was launched later as a casual trousers brand. The brands, in time, became a one place solution to all the trouser needs of today's fashion conscious men.

Core Product Offering/ Categories:

Skyking, the formal trouser brand offers formal and semi-formal trouser collections displaying clean cuts and dark colours. While, Endicott has in store, trousers in a lot of prints and checks in corduroy fabric for casual wear.

Target Consumers:

The two brands target upper class young men who are 20 years and above.

Brand USP:

The brand understands the men's trouser market. The products from these brands carry a different style and innovation.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 400 (approx.)

Total no. of MBOs: 300+

Brand Turnover (estimated for FY 2015-16): ₹10 crores

Turnover CAGR over last 3 years for FY '16: 20%

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EQUATION

Brand: **EQUATION** | Company: **DFRNT CLOTHING PVT. LTD.**
 Launch Year: **2016** | Brand Website: **WWW.EQUATIONMEN.COM**

Lunched in early 2016 by Dfrnt Clothing, Equation is a new offering in the economic menswear segment. The idea is to offer an enriched product with affordability, brand aesthetics and an aspirational value. It was launched with a high decibel and differentiated campaign that has already tasted success in a very short span of time.

Core Product Offering/ Categories:

Equation offers men's shirts in formal, smart-formal and club-wear categories.

Target Consumers:

The brand targets urban male in the age category of 20 to 45 years.

Brand USP:

Offering trendy styles, contemporary cuts, top-notch quality with high brand aesthetics at affordable prices makes the brand more desirable over its competitors.

Brand's Mission:

Equation aims to become the preferred lifestyle brand offering new age and contemporary styles at attainable prices.

Future Expansion Plans:

The brand plans to expand its presence in South India, and plans to add a few daily-wear categories in its menswear segment.

Towns or Cities Targeted in the Next Couple of Years:

The brand aims to be present in all the major cities in South India.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 100+

Major LFS/ MBOs/ Departmental Stores Present in: The brand is being retailed through Mahalekshmi Silks, Parthas and Kans Wedding in India; and Al Manama Group (UAE), Regal Group (Saudi Arabia), Smile Group (Oman) and at Mall 360 (Kuwait) abroad.

No. of Indian Cities Currently Present in: 25+

New Territory/ Region Added: The Middle East Countries

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F-STREET

Brand: **F-STREET** | Company: **SHIPRA COMMERCIAL PVT. LTD.**

Launch Year: **2016** | Brand Website: **WWW.F-STREET.IN**

F-Street is a men's casual wear brand targeted at the young aspirational Indian, a.k.a., 'aam aadmi'. The urban youth wishes to identify with brands at every line of purchase, which brings F-Street to the big mid-segment dilemma, i.e., brands are expensive and unbranded isn't cool enough. The brand ideology is borne out of that gaping hole in the system. F-Street was launched in July 2016 and aim to be the No.1 casual wear brand in the mid segment.

Core Product Offering/ Categories:

F-Street's product basket comprises of t-shirts, casual shirts, formal shirts, denims, cotton trousers, formal trousers, shorts, longers, blazers, waist coats and fashion accessories.

Target Consumers:

The brand targets young Indian middle class men.

Brand USP:

F-Street's USP lies in offering a variety of high quality and fashionable products at the right price, for the discerning young men. F-Street claims to be a fashion forward brand and always looks forward to bring unique products to its customers.

Future Expansion Plans:

The brand is planning to open 20 new stores by April 2017 and a total of 50 by the end of 2019. It is also looking forward to increase its SISs and online presence across the country.

Towns or Cities Targeted in the Next

Couple of Years:

F-Street has plans to target tier -II, -III and IV cities in East India. The brand is focusing on expanding its reach to West Bengal, Odisha, Jharkhand and Bihar. It is also looking at cities like Kolkata, Asansol, Durgapur, Ranchi, Dhanbad, Cuttack, Bhubaneswar, Patna, Gaya, etc., for business expansion.

Integrating Omni-channel Operations:

The brand believes that integration of all these channels requires an efficient planning

and supply chain process. For F-Street, the key is to make its products available to its customers through any channel possible. The brand is working, through a centralised inventory at its warehouse, for its channels at the moment and looking forward to utilising the power of technology to manage the best that is omni channel.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 7

Total no. of MBOs: 15

Total no. of SISs: 5

Total Space Covered by EBOs & SISs: 5,500 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in large format stores like Favorite Shop and Citi Style.

No. of Indian Cities Currently

Present in: 17



FITZ & SOLEMIO

Brand: **FITZ & SOLEMIO** | Company: **TEXPERTS INDIA PVT. LTD.**

Launch Year: **2002** | Brand Website: **WWW.FITZSTUDIO.CO**

With the passion of providing a complete solution to the textile fraternity, Texperts India was conceived in the year 2002. Moving from yarn to fabrics and fabrics to clothing, it has created two mens wear brands – Fitz and Solemio. Fitz offers active wear range for men, while Solemio offers mens wear range for the corporate class.

Core Product Offering/ Categories:

Under its brands, the company manufactures shirts, trousers, chinos, t-shirts, track pants, Bermudas, shorts, jackets and sweatshirts.

Target Consumers:

The brands target the ‘GenY’ and ‘GenZ’ consumers. They are educated, upwardly mobile, experimental, fashion and fitness conscious youth of India.

Brand USP:

Chic, contemporary and affordable clothing for millennials inspired by Italian designs is the USP of the brands.

Brand’s Mission:

The mission of Texperts India is to delight its customers through aspirational lifestyle brands.

Future Expansion Plans:

After establishing the brands in large format stores, the company has moved into multi-brand outlets, high streets and distribution channels. They are also strengthening their e-commerce presence and successfully catering to institutional and B-2-B customers.

Towns or Cities Targeted in the Next Couple of Years:

The brands are charting its presence in Aurangabad, Bhopal, Coimbatore, Jaipur, Jalandhar, Nagpur and Patna.

BRAND UPDATES (information as on 31st December 2016)

Total no. of SISs: 65

Total Space Covered by EBOs & SISs: 9,750 sq.ft. (SISs stores only)

Major LFS/ MBOs/ Departmental Stores Present in: The brands are being retailed through Spencers, Brand Factory, More, Reliance Retail, etc.

Major E-commerce Portals Present in: It has presence in Myntra, Jabong, Limeroad, Voonik, Flipkart, Amazon, Snapdeal, Paytm, etc.

No. of Indian Cities Currently Present in: 34



FLACON

Brand: **FLACON** | Company: **OM CLOTHING CO.**

Launch Year: **2007**

Launched in 2007, Flacon is a women's denim wear brand that is known for its trendsetter collections. The product range is made exclusively from soft denim fabrics along with exceptional designing and tailoring skills.

Core Product Offering/ Categories:

The brand offers ladies jeans in various styles such as skinny fit, ankle length, power stretch denim, jog denim, etc.

Target Consumers:

The core customers of Flacon are fashion conscious ladies.

Brand USP:

Flacon manages qualitative and quantitative product range with best prices that sustains for a long time.

Brand's Mission:

The mission of the brand is to build a family of world class fashion retail brand.

Future Expansion Plans:

Flacon has plans to expand its retailer base by updating them with new launches regularly such as bikers denim, embroidered denim, etc.

Towns or Cities Targeted in the Next Couple of Years:

The future plan of the brand is to frequently create new designs and collections for its customers and retailers so that they can enjoy its product range and help in expanding the domestic retail reach.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 400

Major LFS/ MBOs/ Departmental Stores Present in: Flacon has presence in The Chennai Silks and various other multi-brand stores across the country.

No. of Indian Cities Currently Present in: 7

New Territory/ Region Added: Uttar Pradesh and Punjab

Brand Turnover (estimated for FY 2015-16): ₹4 crores

Turnover CAGR over last 3 years for FY '16: 70%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 6%

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FLAIRMEN

Brand: **FLAIRMEN** | Company: **FLAIRMEN LIFESTYLE SERVICES PVT. LTD.**

Launch Year: **2011** | Brand Website: **WWW.FLAIRMEN.COM**

Flairmen was started by Sarita and Harshal Pawar with the intention to cater to men's lifestyle needs. The brand offers an array of exclusive and limited range of crafted leather goods for men through online and offline channels.

Core Product Offering/Categories:

The brand offers premium range of leather bags, wallets and semi-formal shirts exclusively for men.

Target Consumers:

Flairmen caters to corporate executives, businessmen and upper class young men with elegance and style.

Brand USP:

The brand's USP lies in delivering elegant designs and quality products.

Brand's Mission:

Flairmen aims to offer quality products to men and give them the feeling of oneness with the brand.

Future Expansion Plans:

The brand has plans to increase its apparel line by offering new designs. It will also launch non-leather bags and wallets.

Towns or Cities Targeted in the Next Couple of Years:

It has plans to enter the markets of Bengaluru, Chennai and Mumbai.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 3

Major E-commerce Portals Present in: The brand is available on Amazon and Flipkart.

No. of Indian Cities Currently Present in: 3

Brand Turnover (estimated for FY 2015-16): ₹22 lakhs

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FOCUS JEANS

Brand: **FOCUS JEANS** | Company: **B ENTERPRISES**

Brand Website: WWW.FOCUSJEANS.CO.IN

Born from passion – passion for inimitable style, for superlative finish, for a perfect class, Focus Jeans started with a very humble beginning about a decade ago. The brand, today, is available across 2,500 retailers throughout India. Today, the brand is renowned as one of the most contemporary and stylish brand seen at par with any international brand in the country that delivers value for money products.

Core Product Offering/ Categories:

The product range is classified under eight categories such as classics, true blues, premium, vogue – designer jeans, exclusive jeans, jeggins, cottons and hotties.

Target Consumers:

The brand targets today's women, who are highly conscious about the image, product quality and are aware of the latest fashion trends. The discerning customers comprises between 18 to 36 years.

Brand USP:

Focus Jeans's USP lies in its collection which is designed keeping the Indian women in mind. Offering international quality jeanswear at Indian prices keeps the brand above its competitors.

Brand's Mission:

The brand aspires to be present in the wardrobe of each and every Indian women.

Future Expansion Plans:

Focus Jeans aims to be present in almost 4,000 to 5,000 outlets across the nation within a couple of years. It is also seeking distributors and agents who partner with them in their long term growth plan.

Towns or Cities Targeted in the Next Couple of Years:

In the next couple of years, the brand targets SEC A, B+ and C category towns.

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GARBO

Brand: **GARBO** | Company: **NATIONAL CLOTHING SUPPLY (I) PVT. LTD.**
Brand Website: **WWW.GARBOCLUB.COM**

Garbo is an artistic designer wear brand for boys who are stylish, groovy and yet subtle. National Clothing Supply (I) Pvt. Ltd., established in 1949, launched the brand with the mission of giving the best clothing to the urban children. The company has over 5 decades of experience in the garment manufacturing and textile industry and is located in Kolkata. The brand is known for its quality products. From designing to procurement of materials, from screen-printing to stitching and packaging, every detail of the production process is meticulously supervised by trained experts.

Core Product Offering/ Categories:

The brand's product basket comprises of baba suits, rompers, t-shirts, woven shirts, woven pants, etc.

Target Consumers:

Garbo targets kids from middle and upper middle class of tier -I and -II cities of the country.

Brand USP:

The brand's USP lies in offering the best fashion clothes with quality and comfort. The production line is enriched with imported state-of-the-art machinery. Routine quality checks are performed after cutting, after screen-printing and sewing. The end result is an excellent quality-price ratio.

Brand's Mission:

Garbo believes in giving a lot of detailing and providing quality at reasonable prices.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the markets of Madhya Pradesh and Gujarat.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 500

No. of Indian Cities Currently Present in: Pan India



GRISHTI

Brand: **GRISHTI** | Company: **GRISHTI**

Launch Year: **2015** | Brand Website: **WWW.GRISHTI.COM**

Grishti, the women's fashion accessories brand was initiated in 2015. The brand observed a wide opportunity for designer stoles and wraps in the market among discerning women consumers. Since its launch, it has been well appreciated in the market. The brand endeavours to be creative, enthusiastic and committed; this vision is ably supported by a highly motivated team of creative professionals.

Core Product Offering/Categories:

Grishti offers a wide variety of printed and designer stoles, scarfs in solid colours, etc.

Target Consumers:

The brand targets females from girls to middle-aged women.

Brand USP:

Its USP lies in being the only brand in the country that offers a wide range of fusion of ethnic and western neckwear.

Brand's Mission:

The brand's mission is to 'glamorise vision' by accentuating any outfit and to enhance the sensuality and fashion forward style of women.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to enter the markets of Jammu & Kashmir, Uttar Pradesh, Punjab, Telangana, Tamil Nadu and Kerala.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 500

Total no. of SISs: 50

Major E-commerce Portals Present in: It has presence in Snapdeal, Flipkart, Myntra, Voonik, Shopclues, Jabong, Ebay, Amazon, Paytm, Limeroad and Craftsvilla.

No. of Indian Cities Currently Present in: 96

New Territory/ Region Added: Odisha, Rajasthan and Delhi

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GIRLISH

Brand: **GIRLISH** | Company: **NEW KANIKA FASHIONS**

Launch Year: **2002**

Girlish is a fashion brand, launched in the year 2002 by New Kanika Fashions, to provide fashionable garments for the little ones. The company was established in 1994, and has been engaged in manufacturing and export of a wide range of kids clothes, evening gowns and kurtis, etc. These are widely appreciated for features like shrink resistance, colour fastness, neat stitching and high tear strength. Equipped with latest technology, the company has a sophisticated infrastructure to manufacture a high quality range of kids' clothes, kurtis and evening gowns.

Core Product Offering/ Categories:

Girlish offers products like kids lehenga cholis, gowns, suits for the little angels.

Brand USP:

The brand's USP lies in maintaining a consistency in designing its products and in offering best quality products with perfect finishing.

Brand's Mission:

Girlish runs with a mission to provide fashion for the delicate little darlings.

Future Expansion Plans:

Girlish is planning to spread its business pan India.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the areas in Uttar Pradesh and North-East India in years to come.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 300

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in major stores like RmKV, G3, Half Ticket, Chunmun and Sheetal.

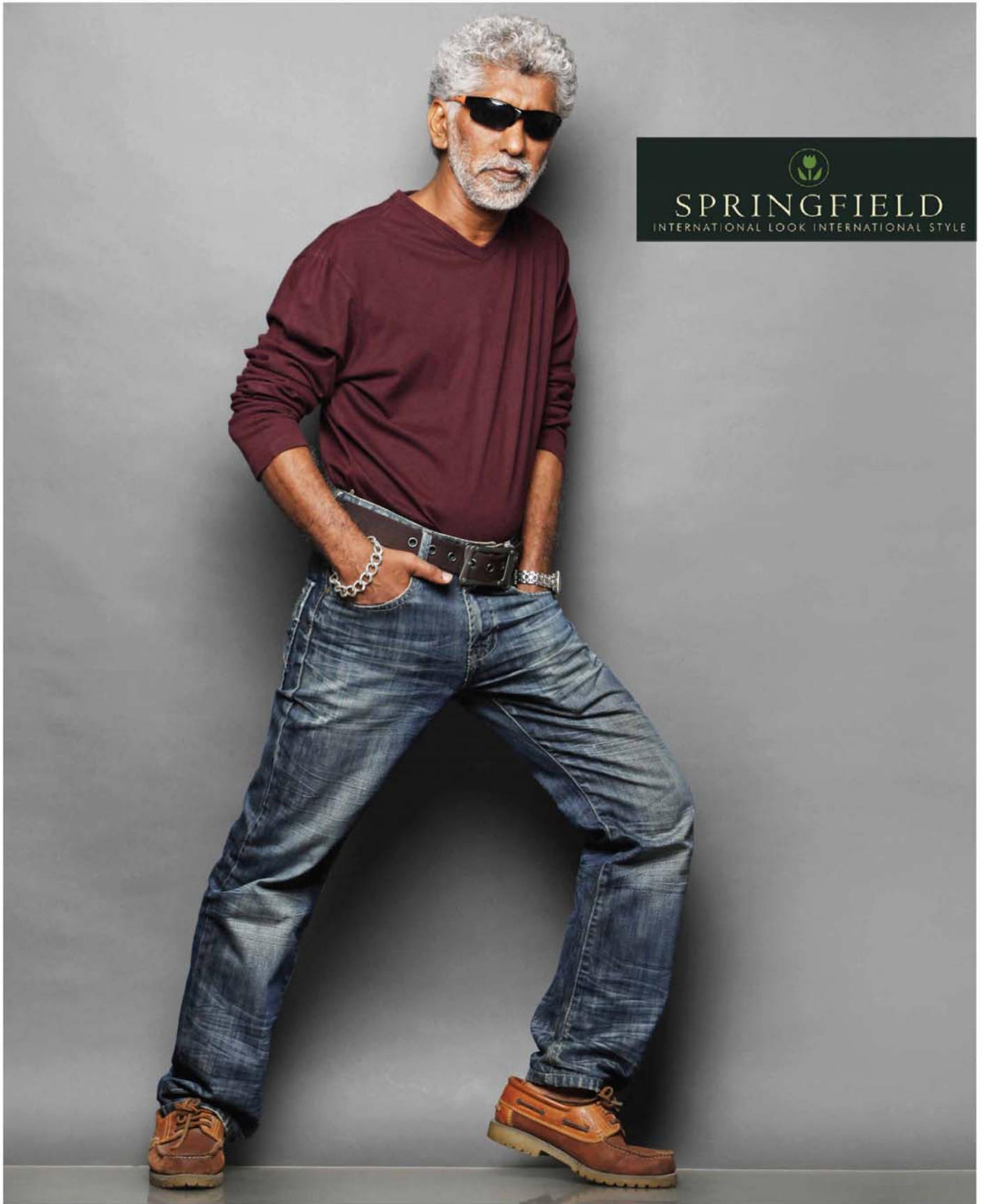
New Territory/ Region Added: Kolkata (West Bengal)

Brand Turnover (estimated for FY 2015-16): ₹15 crores

Turnover CAGR over last 3 years for FY '16: 20%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 30%








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HARD CURRENCY

Brand: **HARD CURRENCY** | Company: **ARU ENTERPRISES**
Launch Years: **1995** | Brand Website: **WWW.HARDCURRENCY.COM**

Established by Paresh Chandan in Bengaluru in 1995, Hard Currency has come a long way as an exclusive denim wear brand for men. The brand started on a very small scale with limited manpower and production capacity. In a short span of time, it has grown into a company that is equipped with modern machinery and a production capacity of half a million pieces per annum. The brand follows strategy of manufacturing new designs round the year in limited quantity to maintain exclusivity and keep up with the rapid changes in trends. Thus, its clients are provided with a set of new styles and fresh designs, every fortnight.



Core Product Offering/ Categories:

The brand's product portfolio comprises of jeans for men only. Hard Currency have three ranges of jeans, namely 'Core', 'Fashion' and 'Premium'. However, it does not like to constraint itself in any core product offering. Hard Currency has become both an established modern classic for its sophisticated fits as well as a leading trendsetter for its newest fashion forward washes and custom-made designs, paying much attention to quality control.

Target Consumers:

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

Brand USP:

The brand's USP lies in introducing new designs round the year in limited quantity to avoid slow movement of any product due to fast changes in trends. The denim brand prides in offering to its customers a set of fresh styles and designs, updated with the current trends, at least twice a month.

Brand's Mission:

Hard Currency runs with a mission to deliver high fashion and quality clothing to its discerning consumers.

Future Expansion Plans:

Hard Currency is planning to create a

presence in rest of the states where it has not ventured yet, in India.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to target areas of Andhra Pradesh, Chhattisgarh and Madhya Pradesh.

New Territory/ Region Added:

Uttarakhand, West Bengal, Assam, Rajasthan and West Uttar Pradesh.

Brand Turnover (estimated for FY 2015-16): ₹18 crores

Growth in the first 3 quarters of FY '17, over the same quarters in FY '16: 15%

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 450 +



HATS OFF

Brand: **HATS OFF** | Company: **HATS OFF APPARELS**

Launch Year: **1989**

Hats Off is one of the leading t-shirts manufacturers for men, since its inception in 1989. With in-house designers and merchandisers, the brand has an upper hand in creating latest and exclusive designs. From the choice of fabrics to the price points, the brand offers something for every Indian youth.

Core Product Offering/ Categories:

The brand offers collared fancy t-shirts for urban men.

Target Consumers:

Hats Off caters to boys and men, who wish to have a trendy style statement. The brand is planning to target teenagers in the forthcoming seasons.

Brand USP:

The brand functions on the foundation of constant upgradation with latest technology. It's USP lies in its in-house quality control team, affordability and country wide network.

Future Expansion Plans:

The brand is planning to reach out to the untapped interiors in certain cities in the country. The company's online portal is also under construction and will be brought into action in times to come.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 1,600

No. of Indian Cities Currently Present in: Pan India

New Territory/ Region Added: Madhya Pradesh, Uttarakhand, Kerala and Karnataka

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HOFFMEN

Brand: **HOFFMEN** | Company: **HOFFMEN FASHIONS PVT. LTD.**

Launch Year: **1991** | Brand Website: **WWW.HOFFMEN.COM**

Hoffmen was launched in 1991 with a humble beginning in Kolkata. The brand started with offering basic heavy jeans for men. Carefully priced, these 'essential jeans', the first jeans to be manufactured during those times, were a huge success that erased the perception of denim being a western wear garment. In 2011, as a part of its product expansion strategy, it introduced Ms HFN for women which was a complete line of apparels for the ladies.

Core Product Offering/ Categories:

The brand's product portfolio comprises mainly of denims, casual and semi- casual shirts, trousers and t-shirts.

Target Consumers:

Hoffmen caters to male as well as female consumers in the age bracket of 18 to 35 years, from the middle and upper income groups.

Brand USP:

Hoffmen's USP lies in being a brand which offers value for money to its customers.

Brand's Mission:

The brand aspires to be one of the best value for money fashion brand.

Future Expansion Plans:

In the immediate future, Hoffmen has planned to go slow and consolidate. The brand aspires to open 10 EBOs every year.

Towns or Cities Targeted in the Next

Couple of Years:

Hoffmen has plans to expand to the markets of Raipur, Bilaspur, Bhopal, Guwahati and other cities.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 67

Total no. of MBOs: 450

Total no. of SISs: 12

Total Space Covered by EBOs & SISs:

35,000 sq.ft.

Major E-commerce Portals Presence in:

Hoffmen retails through Flipkart, Amazon, Paytm, Snapdeal and Jabong. It also reaches out to its customers through its own online store www.hoffmen.com.

No. of Indian Cities Currently Present in:

52

New Territory/ Region Added:

Chhattisgarh

Brand Turnover (estimated for FY 2015-16): ₹58 crores

Turnover CAGR over last 3 years for FY '16: 15%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 12%

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IN-LOOK

Brand: **IN-LOOK** | Company: **R H ENTERPRISES**

Launch Year: **2002** | Brand Website: **WWW.INLOOK.IN**

Launched in 2002, In-look specialises in manufacturing western and party wear garments for women, thus satisfying her aspiration for quality, range, colour and style. The brand believes in creating products for women's lifestyle, and to keep the products as simple, while trying to make each part as good as possible, with every stitch. The products are available in different lengths, so that every woman can experience the joy of wearing fashionable garments regardless of her body-type.

Core Product Offering/ Categories:

The brand largely offers ladies party wear kurtis, gowns and formal tunics, dressing and embellishing demure maidens from every corner of the country.

Target Consumers:

In-Look targets young Indian women who have a sense of ultimate style and fashion.

Brand USP:

In-Look's USP lies in offering contemporary ethnic fashion to fashion enthusiasts, at affordable price, in shades of every colour and with irresistible colour combinations and patterns.

Brand's Mission:

The brand runs with a mission to offer collections which make women like and want the brand products even more. In-Look works on the philosophy of "Look Beautiful...Feel Comfortable".

Future Expansion Plans:

In-Look is looking for expansion in international markets and is also planning to open more stores in 2017.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target South zone in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 1

Total no. of MBOs: 800

Total Space Covered by EBOs & SISs: 750 sq.ft.

No. of Indian Cities Currently Present in: 200

New Territory/ Region Added: Rajasthan and Madhya Pradesh

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KAZO





KAZZO



INTEGRITI

Brand: **INTEGRITI** | Company: **KEWAL KIRAN CLOTHING LTD.**
Brand Website: **WWW.INTEGRITICLOTHING.COM**

A lifestyle brand targeted at the young generation, Integriti's communications represent the spirit of youth. It serves as a canvas that narrates the bold and confident outlook on life. By doing so, the brand becomes a partner in their adventures and an extension of their personality.

Core Product Offering/ Categories:

Integriti offers denims, shirts, trousers, shorts, t-shirts, polos and sweaters.

Target Consumers:

The brand primarily targets youth specially college goers, who are between 15 to 20 years from SEC A, B and C segments.

Brand USP:

The brand offers stylish casuals for the new generation who are not afraid of experimenting, exploring new fashion and those who seek thrill.

Future Expansion Plans:

The future target of the brand is to connect with more and more dealers and distributors each day.

Towns or Cities Targeted in the Next Couple of Years:

The brand will penetrate more into tier -II and -III cities to reach out to more customers.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 49 (exclusive stores), 350 (K-Lounge stores) and 15 (Integriti & Lawman Pg3 stores)

Total no. of MBOs: 3,000

Major E-commerce Portals Present in: The brand is available at Flipkart, Jabong and Amazon.

No. of Indian Cities Currently Present in: 150+



IRONY

Brand: **IRONY** | Company: **IRONY CLOTHING PVT. LTD.**
 Launch Year: **1995** | Brand Website: **WWW.IRONYJEANS.COM**

The company, Irony Clothing Pvt. Ltd. started with a humble beginning initially with the manufacturing of cotton trousers. The company started the operations in 1995 with a brand called Terminator, which targetted the economy and mid segment market. Later in 1999, the company launched the brand Irony which targetted the premium segment. The brand today holds a well known recognition in the market for its quality and innovative fashion and enjoys a good share of shelf space with its International competitors.

Core Product Offering/ Categories:

The brand offers casual and fashion trousers, basic and fashion denims, joggers, polo shirts, etc. to its consumers.

Target Consumers:

Irony is positioned as a stylish brand with a focus on design and having an eye on fashion. The brand has a clear target segment in men aged 18- 40 years, who has an individualistic persona and who is a global Indian.

Brand USP:

The fashion brand is acclaimed for its best quality and styling.

Brand's Mission:

Irony works with a mission to build an excellent brand equity in the market and go global.

Future Expansion Plans:

The brand is looking forward to strengthen its product line with new international designs and is also planning to focus its specialisation on bottom wear.

Towns or Cities Targeted in the Next Couple of Years:

Irony aspires to penetrate deeper into the existing markets and capture the brand potential.

Integrating Omni-channel Operations:

Irony has been very instrumental in addressing the demand of both online and physical retail channels. It has different teams to address the needs of both the channels in retail.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 300

Total no. of SISs: 50

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in all major MBOs across India. It also supplies to Middle East market.

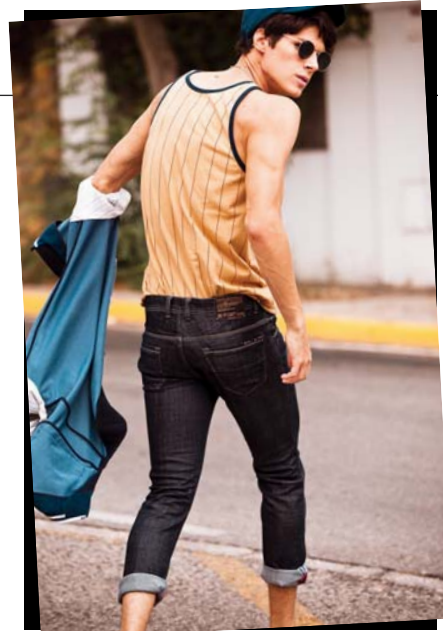
Major E-commerce Portals Present in: Irony retails through Myntra, Jabong, Snapdeal, Flipkart and many more.

No. of Indian Cities Currently Present in: The brand is currently present in markets of Mumbai and other parts of Maharashtra, Tamil Nadu, Andhra Pradesh, Karnataka, Assam, Kolkata, Bihar, Jharkhand, Odisha, Uttar Pradesh, Delhi, Punjab, Madhya Pradesh, etc.

Turnover CAGR over last 3 years for FY '16: 15%



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JAHANPANAH

Brand: **JAHANPANAH** | Company: **MAMTA ENTERPRISES**

Launch Year: **2001** | Website: **WWW.JAHANPANAH.NET**

Jahanpanah is pioneer in customised designer men's wear. Exclusively designed and lavishly crafted, the brand offers a classy range that could be donned for every occasion. The brand is armed with a robust infrastructure and everything is done in-house – right from fabric procuring to manufacturing and embellishing.

Core Product Offering/ Categories:

The brand's product basket encompasses an exquisite range of men's party wear including shirts, party suits, Indo-western and designer dresses.

Target Customers:

Jahanpanah targets the middle class men in the age bracket of 18 to 40 years who love colourful fashion.

Brand USP:

The brand USP lies in the class of its customer base and range of customised products that it offers – with researched craftsmanship and specially hand picked fabrics from different countries.

Future Expansion Plans:

The brand is looking for franchise business (boutiques) with customisation facilities to offer the master of fitting tag Jahanpanah.

Towns or Cities Targeted in the Next Couple of Years:

The brand is planning to expand its presence in South India through large format stores.

BRAND UPDATES

Total no. of EBOs: 1

Total no. of MBOs: 200+

No. of Indian Cities Currently Present in: 90+

Turnover CAGR over last three years for FY '16: 15%

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JUNIPER

Brand: **JUNIPER** | Company: **KISHNA EXPORTS C/O AMAN EXPORTS INTERNATIONAL**

Launch Year: **2012** | Brand Website: **WWW.JUNIPERFASHION.COM**

Juniper is an apparel brand that caters to the modern Indian woman who is independent yet deeply rooted in tradition. It's a classic take on fusion wear. The brand believes in timeless elegance, rustic exuberant creations and trendy take on international fashion. The product basket starts from ₹599 to ₹1,599.

Core Product Offering/ Categories:

The brand offers tops, tunics, placement print kurta, printed and embroidery kurtas, and fashion bottoms like cullots, skirts and slim pants.

Target Consumers:

The brand's core consumers constitute the outgoing working class women - entrepreneur, teachers, bankers, working mothers and to all independent souls.

Brand USP:

Creative, beautiful prints, innovative fabrics, sound production capability and competitive prices are the brand's USP.

Brand's Mission:

"Be confident and fabulous forever", is the mission of the brand. It aims to deliver beautiful Indo-western garments for the new age women

Future Expansion Plans:

The brand, as of now, is focusing on large format stores. It has added Reliance Trendz in the portfolio with 32 POS for Spring/Summer and it plans to take it further to 300 point-of-sales by Fall/Winter 2017. It would also reflect a steady growth of 28 percent year-on-year.

Towns or Cities Targeted in the Next Couple of Years:

Juniper is vying to enter into tier -II cities where population is more than 5 lakhs.

BRAND UPDATES

Total no. of MBOs: 7

Total no. of SISs: 13

Total Space Covered by SISs: 40,000 sq.ft.

Major LFS/ MBOs/ Departmental Stores Present in: The brand is available in Central, Megamart, Spencers, etc.

Major E-commerce Portals Present in: Juniper is also available at Myntra, Jabong, Amazon, Snapdeal, etc.

No. of Indian Cities Currently Present in: 78

Brand Turnover (estimated for FY 2016-17): ₹45 crores

Turnover CAGR over last 3 years for FY '16: 12%



KILLER

Brand: **KILLER** | Company: **KEWAL KIRAN CLOTHING LTD.**
Launch Year: **1989** | Brand Website: **WWW.KILLERJEANS.COM**

Lunched in 1989, Killer is an authentic denim lifestyle brand, which is referred in the market as a denim authority. It is a powerful brand with a unique style quotient and especially designed for the rebellion of youth and the revolution of the spirit that changed the face of Indian denim industry.

Core Product Offering/ Categories:

The brand offers apparel, eyewear, footwear, innerwear, time wear, travel gear, personal care and accessories.

Target Consumers:

Killer targets the mindset of the youth with an “attitude”.

Brand USP:

Killer has been at the forefront of innovation and research, thereby offering unique concepts to the world of denim.

Future Expansion Plans:

The brand is working towards an aim to double the number of their stores and their reach in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 75+

Total no. of MBOs: 1,500+

Major LFS/ MBOs/ Departmental Stores Present in: The brand has presence in Central, Lifestyle, Reliance Trends, Shoppers Stop, Westside, etc.

Major E-commerce Portals Present in: Killer is also available at Abof, Amazon, Myntra, Jabong and Tata Unistore.

No. of Indian Cities Currently Present in: 170

Turnover CAGR over last 3 years for FY '16: 20%



KIVON

Brand: **KIVON** | Company: **KALAMEL GARMENTS**

Launch Year: **2000** | Brand Website: **WWW.KIVONSHIRTS.COM**

Lunched in 2000 by Kamel Garments, Kivon has today created a special niche for itself as a household name in the domestic men's wear market. As an established brand from Gujarat, the fashion brand has the experience and expertise to provide apparel that reflects the confidence of the wearer. Owing to this, the brand enjoys equal popularity in more than 270 cities throughout the country.

Core Product Offerings/ Categories:

Kivon's product basket encompasses a wide range of shirts and trousers in a profusion of fabrics, styles and designs.

Target Consumers:

The brand targets men between the age group of 20 and 50 years.

Brand USP:

Quality, innovation and reliability are the unique selling points of this brand.

Brand's Mission:

Aiding the youth of the nation reflect confidence through their attire.

Future Expansion Plans:

Kivon aims at developing business in Haryana, Punjab and Jammu and Kashmir.

Towns or Cities Targeted for the Next Couple of Years

The brand is focusing on Chandigarh (Punjab), Hyderabad (Andhra Pradesh), Agra and Mathura (Uttar Pradesh).

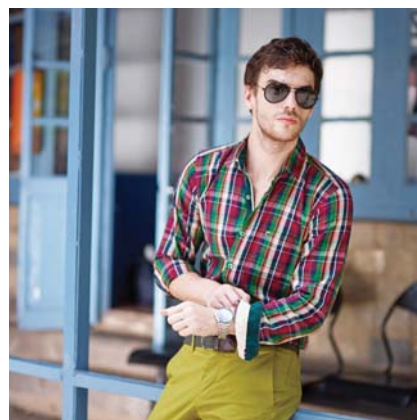
BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 200

Major E-commerce Portals Present in: The brand is available on Flipkart, Snapdeal, Paytm, Shopclues, Jungle, etc.

No. of Indian Cities Currently Present in: 270

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LAABHA

Brand: **LAABHA** | Company: **GUNNO KNITS PVT. LTD.**

Launch Year: **2015** | Website: **WWW.LAABHA.COM**

Laabha is the brain child of Sandeep Goyal who has been in the fabric manufacturing business since many decades. Conceived with the sole vision of serving the country with a brand of international standards to celebrate the beauty of Indian culture, Laabha is known for keeping the essence of Indian ethnic alive.

Core Product Offering/ Categories:

Kurtis, dresses, plazzos, pants, leggings, jeggings, tops, tunics, scarves, dupattas, and artificial jewelry.

Target Consumers:

The brand targets the modern working class women, within the age bracket of 20 to 45 years who are smart, independent and have a progressive outlook.

Brand USP:

Every process is done in-house right from research and development, designing, manufacturing; even fabric dyeing and embellishment. This helps the brand ensure that each product rolled out is impeccable in terms of quality.

Brand's Mission:

Creating a global brand which promotes and celebrates the essence of India which is made in India.

Future Expansion Plans:

The brand is looking towards opening multiple retail outlets through the franchise model and is also in the process of opening 5 flagship stores in Delhi NCR by March first week.

Towns or Cities Targeted in the Next Couple of Years:

Chandigarh, Bengaluru, Mumbai, Ludhiana and Delhi-NCR.

BRAND UPDATES (information as on 31st December 2016)

Major E-commerce Portals Present in: Laabha is available at Myntra, Limeroad, Amazon, Ebay, Jabong, Voonik, and Paytm.

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LAWMANPG3

Brand: **LAWMANPG3** | Company: **KEWAL KIRAN CLOTHING LTD.**

Brand Website: WWW.LAWMANPG3.COM

LawmanPg3 is a lifestyle brand that offers a fashion range from head to toe. Its tag line “Be the Star”, conveys that fame and stardom are within one’s reach. The brand inspires men and women to seek the spotlight and face the world confidently.

Core Product Offering/ Categories:

The brand’s product offering comprises jeans, shirts, t-shirts, trousers and club-wear.

Target Consumers:

Lawman targets customers who are interested in being in the limelight. It helps in boosting that confidence through its range of products.

Brand USP:

With its premium range of lifestyle products, Lawman Pg3 is a gateway for those who aspire to be a star.

Brand’s Mission:

The brand believes that stardom is not restricted to a certain breed. It expresses that stardom is a state of mind and not just about being a celebrity.

Towns or Cities Targeted in the Next Couple of Years:

The brand aims to increase its presence from 1,000 to 2,000 cities.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 15

Total no. of MBOs: 2,200

Major LFS/ MBOs/ Departmental Stores Present in: The brand is available at Shoppers Stop, Globus, Central, Pothys, CMR, Chandana, Chermas, R S Brothers, etc.

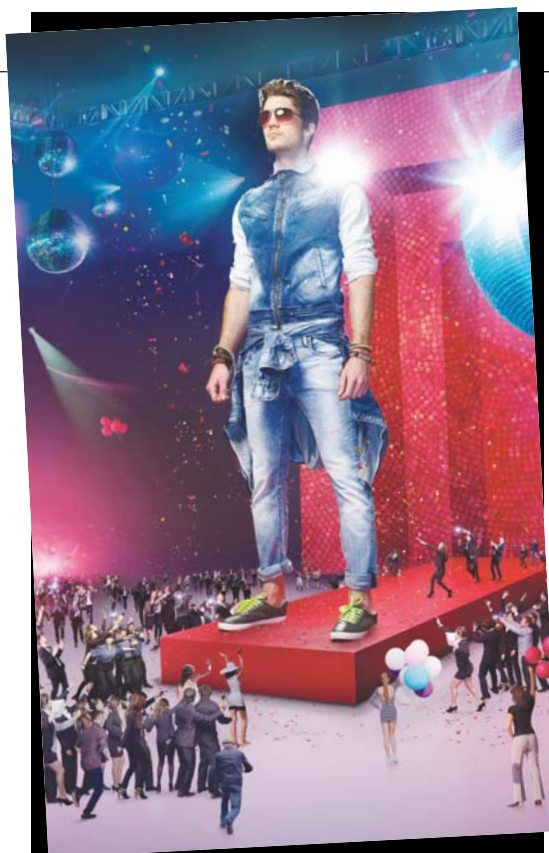
Major E-commerce Portals Present in: LawmanPg3 is also present at Flipkart, Amazon and Jabong.

No. of Indian Cities Currently Present in: 1,000

Brand Turnover (estimated for FY 2015-16): ₹60 crores

Turnover CAGR over last 3 years for FY '16: 20%

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LEAGUE

Brand: **LEAGUE** | Company: **SHREE GINGER ENTERPRISES LTD.**
Launch Year: **2016** | Brand Website: **WWW.LEAGUEFASHION.COM**

League comes from the fully integrated organisation, Shree Ginger Enterprises which belongs to the Krishna Group, forerunners of the Indian textile industry for the last five decades. League aims to provide its customers with high quality and trendy basic fashion wear at unbeatable value.

Core Product Offering/ Categories:

The brand offers men's wear such as trendy, fast-fashion, classic and timeless basic wear.

Target Consumers:

The brand's core consumers consist of men aged between 15 to 60 years.

Brand USP:

League is manufactured by Shree Ginger Enterprises, which is an industry stalwart and one of the largest textile manufacturing houses in Asia. The brand is fully and organically developed in-house from fiber to finish.

Brand's Mission:

League is fully dedicated to provide high quality fashion wear to its customers at affordable pricing in the everyday knitwear segment.

Future Expansion Plans:

The brand intends to keep adding core fashion products to its list. In near future, the brand plans to provide fashion for women and kids as well.

Towns or Cities Targeted in the Next Couple of Years:

The brand will mainly target tier -I and -II cities in Central, North and East India.

BRAND UPDATES

Total no. of MBOs: 2,500

Total no. of SISs: 1,000

Total Space Covered by EBOs & SISs: 20 lakhs sq.ft. (approximately, SIS stores only)

Major E-commerce Portals Present in: The brand has partnered with Amazon, Flipkart, Abof, Myntra, Jabong, Ebay, Limeroad, Voonik, Rediff, Kraftly, Paytm, Shopclues and Snapdeal.

No. of Indian Cities Currently Present in: 100-120

New Territory/ Region Added: Jammu and Kashmir, Madhya Pradesh, parts of Uttar Pradesh and East India.

Brand Turnover (estimated for FY 2015-16): ₹14 crores (approx.)

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 65%



LI'L TOMATOES

Brand: **LI'L TOMATOES** | Company: **GUNNO GROUP OF INDUSTRIES PVT. LTD.**

Launch Year: **1995** | Brand Website: **WWW.LILTOMATOES.COM**

Launched in 1995 by Sanjay Goel, Li'l Tomatoes, from the house of Gunno Group of Industries, is crafted for kids in the age group of 0 to 16 years. The company is a vertically integrated and well-equipped company with major focus on manufacturing quality products through its state-of-the-art infrastructure. Gunno Fashion Pvt. Ltd., with years of valuable experience in manufacturing both fabric and garments for children, are currently producing some of the most impressive range of comfortable wear. With their wide range of clothes, the brand is all set to dress little princes and divas of the 21st century.

Core Product Offering/ Categories:

The brand offers a range of products which includes t-shirts, lowers, capri sets, tops for girls, dungarees, etc.

Target Customers:

Li'l Tomatoes targets kids in the age group of 2-16 years from the upper middle class of the society.

Brand USP:

The brand's USP lies in providing value for money and variety at an affordable price. Li'l Tomatoes also prides in offering garments which are best in quality. The kids' wear brand runs with a mission of providing classic clothing options for the smart champs and pretty little angels.

Future Expansion Plans:

The company has a multipronged growth strategy. It envisions entry into large format stores and more multi brand stores and spread to the markets of Uttar Pradesh, Rajasthan, and to the western and southern regions of the country, through distributors.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target tier-II cities in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 6

Total no. of MBOs: 100+

Major E-commerce Portals Present in:

The brand retails through all the major e-commerce portals including Jabong, Myntra, Snapdeal, Flipkart, Hopscoth, etc.

No. of Indian Cities Currently Present in: 20

New Territory/ Region Added:

North India

Turnover CAGR over last 3 years for FY '16: 27% (approx.)

Growth in first 3 quarters of FY '17 over the same quarters in FY '16: 30% (approx.)

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LONDON BRIDGE

Brand: **LONDON BRIDGE** | Company: **TURTLE LTD.**

Launch Year: **2007** | Brand Website: **WWW.LONDONBRIDGE.IN**

London Bridge is a young fashion brand from the house of Turtle Ltd., for the urban youth of today who live life on their own terms, seizing every moment and enjoying it to the fullest. A brand that is as flamboyant as it is freewheeling, London Bridge is all about bold colours, spirited shades, trendy textures and playful patterns. Ideal for the today's fast-movers and go-getters who like to stand out from the herd and be a part of a cool new tribe. Its unique collection of cool casuals, sporty formals, dapper denims and smart bottoms make for the all-new fab of fashion wear.

Core Product Offering/ Categories:

The brand offers shirts, trousers, t-shirts, denims, suits, jackets, pullovers, wind cheaters, etc. to its consumers.

Target Consumers:

London Bridge targets youth who dare to challenge the norms, break free from regimentation and think out of the box. The brand targets men in the age bracket of 18 to 25 years from SEC A and B in tier -II and -III cities.

Brand USP:

The men's fashion brand prides in providing high-fashion and trendy garments to its discerning customers.

Brand's Mission:

London Bridge runs with a mission to work for its consumers' delight and satisfaction.

Future Expansion Plans:

The brand is planning to expand to eastern regions, specifically to tier -II and -III cities.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target tier -II and -III towns like Hooghly, 24 Parganas, Nadia, Howrah, etc., in the years to come.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 25

Total no. of MBOs: 500

Total no. of SISs: 79

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in Reliance Trends.

Major E-commerce Portals Present in: London Bridge retails through major online stores like Flipkart, Jabong, Myntra, Snapdeal, Amazon, Tata Cliq, and also through its website www.londonbridge.in.

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LUX COZI

Brand: **LUX COZI** | Company: **LUX INDUSTRIES LTD.**

Launch Year: **1995** | Brand Website: **WWW.LUXINNERWEAR.COM**

Lux Cozi is a leading player in the Indian innerwear market with its strong presence in the mid to economy segment. Its a “value for money brand” which offers great comfort and style at a very affordable price. With more than six decades of experience, today Lux Cozi is well known as the people’s brand in the country, satisfying consumers with its uncompromised quality and style.

Core Product Offering/ Categories:

Currently, Lux Cozi proudly boasts of a product portfolio of 100+ products offering men’s and kids’ innerwear, represented by some of the most prominent sub brands such as Lux Cozi Bigshot and Lux Cozi Glo. Lux Cozi Vest is by far one of the largest vest brand in the economy category even for kids. Lux Cozi Bigshot is one of the most favoured consumer products in boxer and briefs. The new range of premium, stylish and ultra-soft innerweares - Lux Cozi Glo collection are also appreciated by the fashion concious youth of the country.

Target Consumers:

Lux Cozi has always been the consumers’ brand. The core consumers of the brand are the discerning value consumers who believe in paying for the quality offered.

Brand USP:

Lux Cozi, from the very beginning, believes in providing the best quality products to its customers without making big holes in their pocket and this makes it the most preferred brand among the consumers.

Brand’s Mission:

The brand’s mission is to be recognised as the best Indian hosiery company globally and to drive the industry towards sustainable growth and development. The brand always ensures to provide complete satisfaction and utmost comfort for every consumer by creating top notch products.

BRAND UPDATES (information as on 31st December 2016)

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in major large format stores like ITC Choupal, Brand Factory and Spencers.

Major E-commerce Portals Present in: Lux Cozi retails through online stores like Amazon, Flipkart, Snapdeal, Jabong and Homeshop 18. It also caters to its consumers through its own e-commerce website www.luxinnerwear.com.

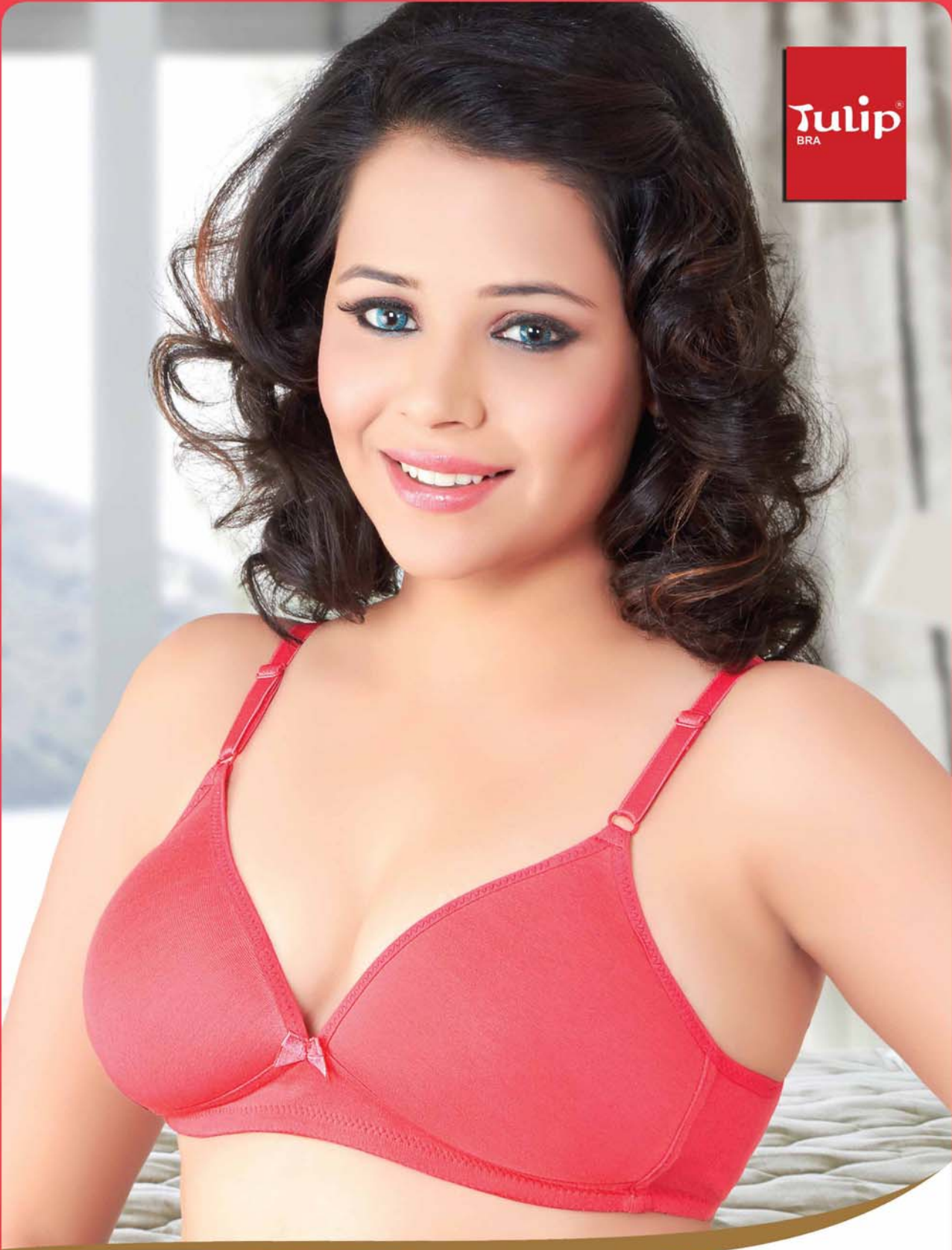
No. of Indian Cities Currently Present in: Pan India

Brand Turnover (estimated for FY 2015-16): ₹876 crores

Turnover CAGR over last 3 years for FY '16: 8.47%

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LYRA

Brand: **LYRA** | Company: **EBELL FASHIONS PVT. LTD.**
 Launch Year: **2012** | Brand Website: **WWW.MYLYRA.COM**

Lyra is a complete women's wear brand from the house of Ebell Fashions, a Lux Group company. Launched in 2012 as Lux Lyra, the brand became the first legging brand in the country. In a short period of time, Lyra has successfully established its foothold in the mid to premium segment and is enjoying a very high level of consumer awareness and consumer loyalty.



Core Product Offering/ Categories:

Lyra offers a wide range of leggings for women comprising churidars, ankle-lengths, capris and also a premium range of leggings named 'Silk'. The brand also offers special winter leggings for women, which keep them warm and comfortable during the chilly winter season. It also introduced casual wear range with stylish trackpants. Along with this, the brand also offers a beautiful range of kids' leggings for little girls in the age group of 5 to 14 years.

Target Consumers:

The target consumers of Lyra are self independent women who prefer to own a good product at a decent and affordable price. Women who like to be in style and are fashion conscious, prefer Lyra products as they bring elegance and comfort to their daily wear.

Brand USP:

The quality of Lyra products is the core USP of the brand. The brand's products are comfortable to wear and easy to carry. The availability of the products at a very economic price is another important factor which attracts consumers to choose Lyra over other brands.

Brand's Mission:

Lyra runs with a mission of being the most desirable and sought after women's wear brand in the country by fulfilling the promise to delight the consumers with their uncompromised quality and style.

Future Expansion Plans:

After successfully launching trackpants, Lyra is ready to extend their loungewear range with more styles of trackpants and other items. Along with this, Lyra is also planning to extend its brand portfolio to intimate wears with a range of lingerie and accomplish its dream of becoming the complete women's wear brand of the country.



BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 3

Major LFS/ MBOs/ Departmental

Stores Present in: The brand is present in Spencers, Brand Factory, ITC Choupal, Walmart and Style Bazar.

Major E-commerce Portals Presence in:

Lyra retails through websites including Amazon, Flipkart, Snapdeal, Jabong and Homeshop 18. The brand also caters to its consumers through its own online store www.mylyra.com.

No. of Indian Cities Currently Present in:

Lyra is currently present across 25 states in the country.

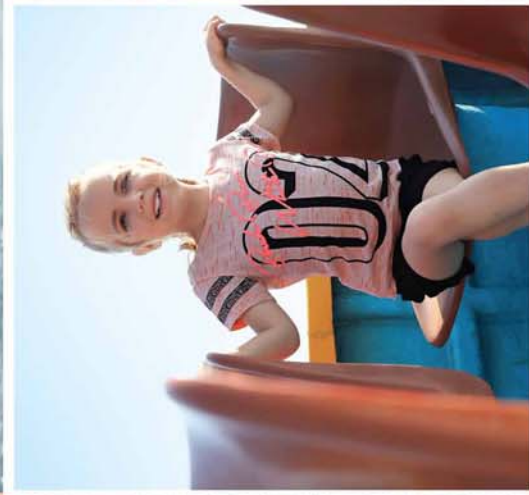
Brand Turnover (estimated for FY 2015-16): ₹160.48 crores

Turnover CAGR over last 3 years for FY '16: 84.31%



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MARSHMALLOWS

Brand: **MARSHMALLOWS** | Company: **ROMANO APPARELS PVT. LTD.**

Launch Year: **2017** | Brand Website: **WWW.LITTLEKANGAROOS.COM**

Marshmallows is a brand from the house of Romano Apparels offering an unmatched collection of babies and infant clothing. True to it's word, the collection comprises products which are soft, pastel and technically sound in every aspect and delicate and safe for babies' skin.

Core Product Offering/ Categories:

The brand offers a wide range of sets, frocks, rompers, A-lines, and jumpsuits for newborns and upto 2 years old babies.

Target Consumers:

The Mrp's of the products are very competitive hence making it affordable to the average Indian consumer.

Brand USP:

Marshmallow aims to provide international fashion at affordable and economical retail prices.

Brand's Mission:

The brand endeavours to make the initial years of parenthood a little more special.

Future Expansion Plans:

The brand has plans to open more exclusive brand outlets in different territories throughout the country. It also aims at strengthening its foothold through presence in more large format stores.

Brand Update:

Total no. of EBOs: 3

Total no. of MBOs: 600+

Total no. of SISs: 8

Total Space Covered by EBOs & SISs: 20,000 sq.ft.

Major LFS/ MBOs/ Departmental Stores Present in: The brand has presence in Globus, Chunmun, Kapsons, Stanmax, RituWears, Bindals, Appeal, etc.

Major E-commerce Portals Present in: The brand has partnered with Firstcry to retail its products.

No. of Indian Cities Currently Present in: Pan India

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MASH UP

Brand: **MASH UP** | Company: **HALF TICKET APPARELS**
 Launch Year: **2014** | Brand Website: **WWW.MASHUP.FASHION**

Mash Up is a young and energetic brand that meets the style and demands of urban Indian boys. Persuading the tween and teen boys to look beyond casual jeans-and-t-shirt look for every occasion, the brand offers choicest selection of casual, designer and party shirts for boys.

Core Product Offering/ Categories:

Mash Up offers casual, formal, designer and party-wear shirts for boys from 6 to 16 years.

Target Consumers:

Fashion conscious young boys and their parents who seek stylish options to dress differently on every occasion.

Brand USP:

Mash Up stands out with its fine tuxedo shirt with bow ties and effortlessly stylish casual shirts.

Brand's Mission:

The brand's mission is to redefine the outlook towards fashion for boys, by offering them with unmatched styles.

Future Expansion Plans:

The brand has plans to setup around 30 shop-in-shops retail concepts in large format stores soon. Also, it has plans to extend its product portfolio to designer t-shirts, blazers and waistcoats later this year.

Towns or Cities Targeted in the Next Couple of Years:

The brand will expand its presence in Chattisgarh, Hyderabad (Andhra Pradesh) and Telangana.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 850

Major LFS/ MBOs/ Departmental Stores Present in: The brand has presence in The Chennai Silks, Pothys, Sri Devi Textiles, etc.

Major E-commerce Portals Present in: Mash Up is also available on Jabong, Amazon, Flipkart, Snapdeal and Paytm.

No. of Indian Cities Currently Present in: 70-80

New Territory/ Region Added: Kolkata (West Bengal) and North-East states

Turnover CAGR over last 3 years for FY '16: 30%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 30%



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MEXICO

Brand: **MEXICO** | Company: **MEXICO CLOTHING CO.**
 Launch Year: **2004** | Brand Website: **WWW.MEXICOJEANS.COM**

Mexico is a family-owned company producing quality denimwear for men for nearly a decade. It started its business when basic jeans were ruling the market and the concept of fashion was just entering denim category. The brand quickly caught on the fashion concept and gave new fits, fabrics and innovative washes to its customers.

Core Product Offering/ Categories:

The brand makes denim for men and women, who are fashion savvy yet cost conscious. In men's category it's range starts from ₹999 upto ₹1,999. In women's its price ranges between ₹999 to ₹1,499.

Target Consumers:

In men's category, Mexico caters to fashion audience between the age group of 18 to 35 years. Its basic range targets consumers from 35 to 60 years. While, in women's segment the brand targets the age group between 18 to 30 years in the fashion segment and upto the age of 45 years in it's basic range.

Brand USP:

Mexico works on a unique concept where it gives around 100 colour shades in its basic product portfolio. Offering international fashion at affordable prices is its USP.

Brand's Mission:

The brand's mission is to become a complete lifestyle brand for men in the coming years.

Future Expansion Plans:

The brand plans to start manufacturing shirts and t-shirts by 2018. The price band will be positioned between ₹999 to ₹1,499 for a fashion casual shirt. It will also soon start retailing through popular e-commerce channels.

Towns or Cities Targeted in the Next Couple of Years:

Mexico is planning to enter Karnataka, Bihar, Uttar Pradesh and Gujarat.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 800

No. of Indian Cities Currently Present in: The brand is well placed in Tamil Nadu, Delhi, Andhra Pradesh, Haryana, Jammu & Kashmir, Himachal Pradesh, Assam, Nagaland, Manipur, Punjab and Maharashtra. They also export to Dubai, Qatar, Sharjah, Bahrain, Jeddah and Doha.

New Territory/ Region Added: Kerala

Turnover CAGR over last 3 years for FY '16: 33%



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NOVIO

Brand: **NOVIO** | Company: **DENIMATIC INDIA PVT. LTD.**

Launch Year: **2016**

L launched in 2016, Novio uses the most advanced technology Silver Knight Process where all the garments are processed with active silver nano and also provide a 360 degree stretch.

Core Product Offering/ Categories:

Novio's product basket comprises of leggings, jeggings, printed leggings, denim jeggings, tops, kurtis, track pants, etc.

Target Consumers:

The brand's products are for all segments, aged 16 years and above. The price range of the products ranges from ₹199-₹900.

Brand USP:

Novio's USP is its quality products. The brand has been providing international quality at Indian prices,

Brand's Mission:

The brand works to provide quality products to its customers. Novio's mission statement emphasises on providing quality for all at a reasonable price.

Future Expansion Plans:

Novio aspires to expand its range of kurtis and also introduce plus size for its entire product range.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 1,000

No. of Indian Cities Currently Present in: Pan India

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NUTEEZ

Brand: **NUTEEZ** | Company: **NUTEEZ**

Launch Years: **2011** | Brand Website: **WWW.NUTEEZ.COM**

Nuteez is a young online lounge wear brand that offers a range of leisure wear for men, women and children. Launched in 2011 and having entered the market in 2013, the brand lays emphasis on quality and design. The entire collection is made in India and designed by designers based both in India and overseas. From the quality of yarn to the manufacturing process, the brand offers apparel range which is high on quirky designs, vibrant colours and is 100 percent cotton knit. Nuteez already occupies a successful, longstanding partnership with a popular American lounge wear brand, Lazy One, which showcases a range of fun, humorous clothing, and has in turn, expanded the markets of the brand.

Core Product Offering/ Categories:

The Brand offers boxers, pajamas and shorts sets for men; pajama sets, night dresses and night gowns for women and also pajama sets for kids.

Target Consumers:

Nuteez targets male and female consumers in the age group of 18- 35 years, kids in the age bracket of 2 to 10 years and 3 to 18 months old infants.

Brand USP:

The brand's USP lies in offering quirky designs, vibrant colours, comfort fit, super soft hand feel and top quality garments to its consumers.

Brand's Mission:

Nuteez runs with a mission statement of working with 'Made in India' initiative in order to make its customers cozy and happy.

Future Expansion Plans:

Presently, Nuteez operates online through online channels. The brand is looking to expand its presence in MBOs and LFS this year.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target metros and top cities in India in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Major E-commerce Portals Present in: The lounge wear brand retails through e-commerce giants like Amazon, Myntra, Flipkart, Jabong, Snapdeal, Paytm, Shopclues, Voonik and also through its own online store www.nuteez.com.

No. of Indian Cities Currently Present in: The brand currently retails through online channels only.

New Territory/ Region Added: The brand has recently spread out to the markets of USA through Amazon.com.

Brand Turnover (estimated for FY 2015-16): ₹1.25 crores

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 80%



OFFICER

Brand: **OFFICER** | Company: **OFFICER FASHION CRAFT PVT. LTD.**
 Launch Year: **1990** | Brand Website: **WWW.OFFICERFASHION.COM**

Officer is a trusted menswear brand since the past 26 years. It offers trendy collections that are fuss-free and showcases global fashion while focusing on one major aspect – comfort married to versatility.

Core Product Offering/ Categories:

The brand offers formal and casual wear shirts, trousers and denims for men.

Target Consumers:

Officer targets middle and upper segment consumers and at the same time offers value for money range and youthful appeal collection.

Brand USP:

Officer is a trusted brand and enjoys a mass recognition among its customers.

Future Expansion Plans:

The brand has plans to venture deeper in the area where they have not entered before to increase its presence.

Towns or Cities Targeted in the Next Couple of Years:

Officer aims to enter into all the major cities in East India.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 2

Total no. of MBOs: 2,000+

Total no. of SISs: 50

No. of Indian Cities Currently Present in: 500+

New Territory/ Region Added: North-East India

Brand Turnover (estimated for FY 2015-16): ₹80 crores

Turnover CAGR over last 3 years for FY '16: 15%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 10%

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OKS BOYS & OKS MINI

Brand: **OKS BOYS & OKS MINI** | Company: **SEEMA ENTERPRISES**

Launch Year: **2007** | Brand Website: **WWW.OKSSHIRTS.COM**

Oks Boys and Oks Mini were born with the idea of styling little boys. They are leading and the fastest growing fashion brands representing style and quality for boys and infants. With a range in stripes, checks, solids, prints and more, the brands have added variety in kids wear and have given boys another thing to like - style.

Core Product Offering/Categories:

Oks Boys produces a range of shirts, t-shirts and all kinds of tops for boys of 2 to 14 years. While, Oks Mini offers a collection of bottomwear and shirts for infants starting from 3 months to 15 months.

Target Consumers:

Both the brands look at customers who want to dress their kids in style and respect the price and the brand.

Brand USP:

Oks Boys has a fashionable mix and is demarcated as a high-street brand. On the other hand, Oks Mini with its pampering qualities undertands the need of infants.

Brand's Mission:

The brands follow the mantra of being aggressive and keep moving and give innovative products to the market.

Future Expansion Plans:

The brands are planning an expansion in their product category by launching bottomwears in all categories which will give the best of international fashion to their customers in India. This is planned to be introduced by 2019.

Towns or Cities Targeted in the Next Couple of Years:

The brands are looking at expansion and searching for distributors in North East, Jharkhand, Odisha and West Bengal.

Integrating Omni-channel Operations:

The company has professionally defined its omni-channel working wherein it has different teams to handle offline and online retailing and maintains a seamless experience across channels.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 800

Total no. of SISs: 50

Major E-commerce Portals Present in: The brands are present on Amazon, Flipkart, Jabong, Snapdeal, etc.

No. of Indian Cities Currently Present in: 75

Turnover CAGR Over Last 3 Years for FY '16: 40%

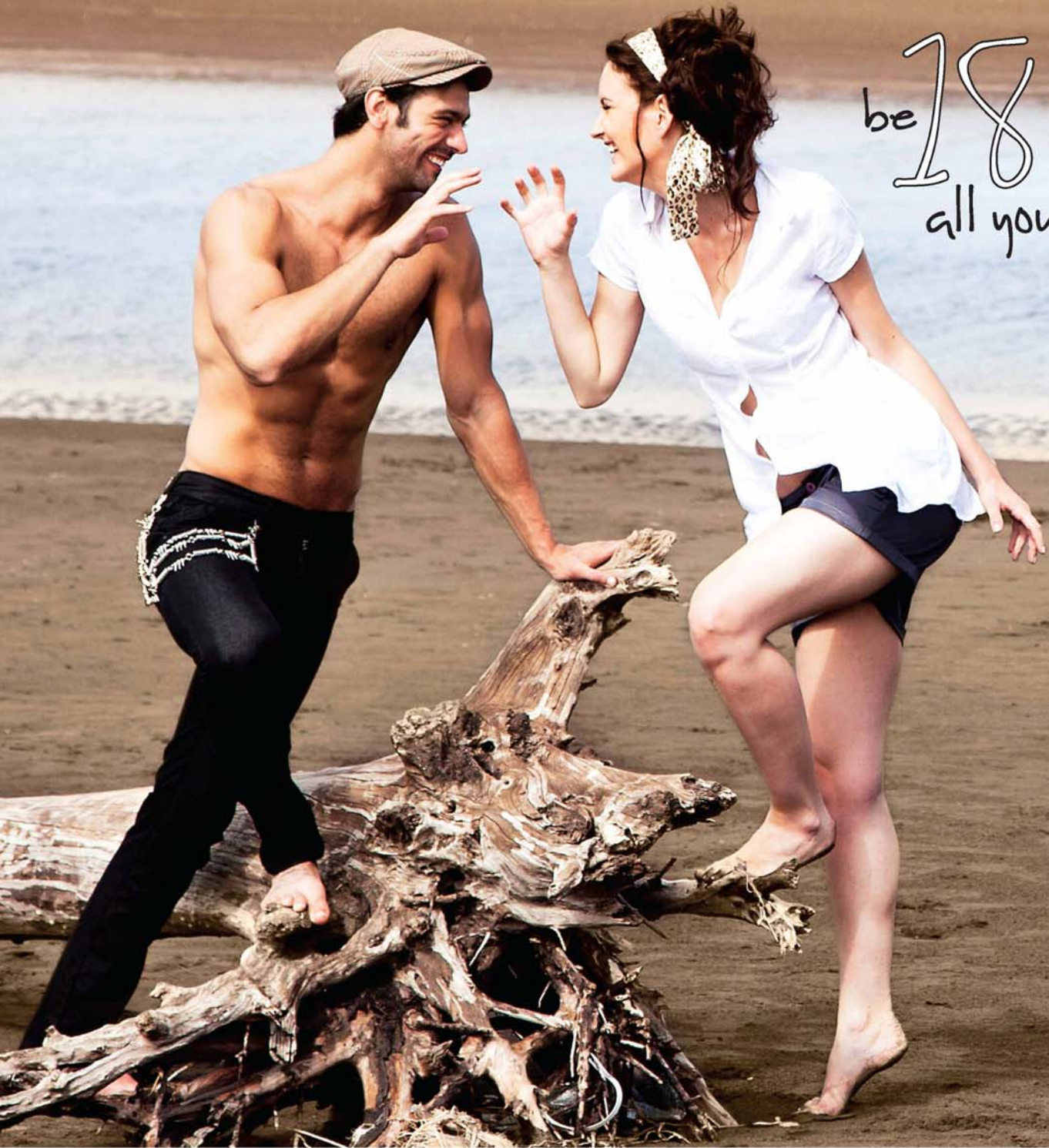
Growth in the first quarter of FY '17 over the same quarter in FY '16: 10%

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Shahibaug Road, Ahmedabad-04. Ph:91-79-25623385 Fax:91-79-25633595

Email:mgpl_puff@hotmail.com Url: www.puffjeans.com

Contact person: Mr Anil Mehta: +91 93270 56614 Mr. Bhavesh Mehta:98250 34501





Brand: **ONN** | Company: **LUX INDUSTRIES LTD.**
 Launch Year: **2010** | Brand Website: **WWW.KEEPITONN.COM**

Onn is the premium men's innerwear and casual wear brand from the house of Lux Industries. Launched in 2010, the brand soon garnered a substantial 20 percent market share in the premium innerwear segment. Crafted with the latest technology, the Onn range of products effectively touches the style nerve of the fashionable Indian male and makes them look cool and comfortable for all day long.



Core Product Offering/ Categories:

The product basket of Onn comprises different ranges of innerwear including Grande, Comfortz, Sportz, Trendz, etc. The brand also offers fashion range in innerwear like Denimz, Premiumz, Bling and Italia which are very popular among the youth. Along with this, it also offers a complete range of leisure wear products comprising three-quarter pants, track pants, shorts and t-shirts under its Casualz range.

Target Consumers:

The brand targets consumer in the age bracket of 21 to 24 years.

Brand USP:

The international styling of the brand products along with perfect fit and comfort is the USP of the brand which force consumers to choose it over other brands. The brand's attractive pricing policy is also an important factor that helps it in setting its foothold in the market.

Brand's Mission:

Onn runs with a mission to provide products which promise of comfort, style and durability.

Future Expansion Plans:

In order to consolidate its market position and to develop a strong relationship with its loyal customer base, Onn premium wear is set to launch some more styles in their Casualz range comprising track pants, shorts and t-shirts. Furthermore, a new range of innerwear with bikini briefs, mini trunks and long boxers are also in pipeline, which will be soon launched.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 10
Total no. of MBOs: 20,000

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in Pantaloons, Hypercity, Brand Factory, Central, etc.



Major E-commerce Portals Present in:

Onn retails through top e-commerce portals like Amazon, Flipkart, Snapdeal, Jabong and Homeshop 18. It also caters to its consumers through the brand's own online store www.keepitonn.com.

No. of Indian Cities Currently Present in:

Pan India

Brand Turnover (estimated for FY 2015-

16): ₹65 crores

Turnover CAGR over last 3 years for FY

'16: 34.02%



PINK 'N' PURPLE

Brand: **PINK 'N' PURPLE** | Company: **DEEPEEJAY TEXTILES (P) LTD.**
Brand Website: WWW.PINKNPURPLE.CO.IN

Deepjeejay Textiles (P) Ltd., was launched in 1986 with a vision to replenish superior quality products. The company initially started with production of vests and briefs and then in 2009 it came up with ladies bottom wear range. The brand Pink 'n' Purple offers products in cotton based fabric and is highly applauded in the Indian market because of its comfortability and durability. The brand introduced Bollywood Actress Soha Ali Khan as its brand ambassador in the year 2014.

Core Product Offering/ Categories:

Pink 'n' Purple's product basket comprises of churidar leggings, ankle lengths, palazzos, printed leggings, striped leggings, kids leggings and capris.

Target Consumers:

The brand targets female consumers in the age group of 15- 45 years.

Brand USP:

Pink 'n' Purple prides in providing the best in quality fabrics with perfect fitting and a wide variety of colour options to choose from, to its consumers.

Brand's Mission:

The brand's mission statement lies in giving its women customers freedom to choose from a wide range of superior quality products.

Future Expansion Plans:

The fashion brand aspires to spread out to new areas like the states of South India. Pink 'n' Purple is also planning to introduce new product lines including camisoles, kurti slips and lounge wear.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to aggressively penetrate into the tier -I and -II cities in the next couple of years.

Integrating Omni-channel Operations:

Pink 'n' Purple uses its portal www.pinknpurple.co.in to cater to consumers and areas where the brand has not reached yet.

BRAND UPDATES (information as on 31st December 2016)

Major E-commerce Portals Present in: The women's leggings brand retails through e-commerce portal like Amazon and also through its own online store www.pinknpurple.co.in.

No. of Indian Cities Currently Present in: 150

New Territory/ Region Added: Andhra Pradesh and Telangana

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 45%



POISON JEANS

Brand: **POISON JEANS** | Company: **VIDHI MOD FASHION**

Launch Year: **1980** | Brand Website: **WWW.POISONJEANS.COM**

Poison Jeans was launched in 1980. The brand is known for its quality craftsmanship and global appeal. Poison introduced highly fashionable designer jeans with ultra flattering fits and authentic stylised belts.

Core Product Offering/ Categories:

The brand offers basic jeans as well as trendy fashionable jeans and the recently launched coloured denims.

Target Consumers:

The brand mainly targets youth and caters to the other age groups as well.

Brand USP:

Poison Jeans has researched and developed a range of coloured denim jeans other than the blues.

Brand's Mission:

The brand's mission is to introduce new innovative products every now and then.

Future Expansion Plans:

The brand is looking forward to venture into international markets.

Towns or Cities Targeted in the Next Couple of Years:

The brand recently entered the markets of North-East India and it wants to explore and penetrate deeper into this region.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 1,000+

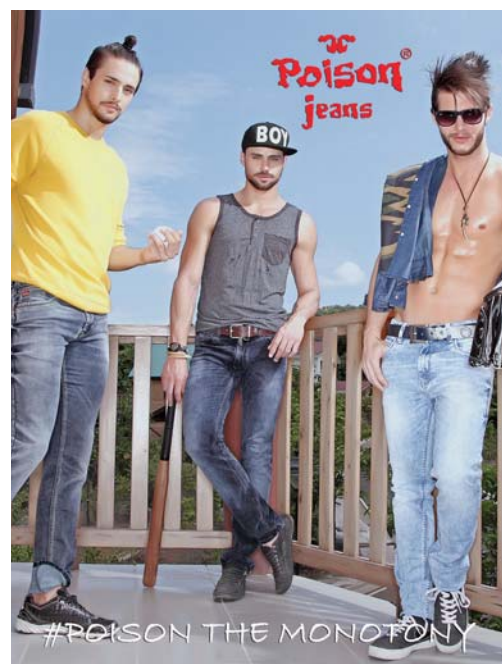
Total no. of SISs: 250+

Major LFS/ MBOs/ Departmental Stores Present in: The brand has presence in Pothys, Jaihind, C' Lai, Cherma's, etc.

No. of Indian Cities Currently Present in: 300+

New Territory/ Region Added: North-East India

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PUFF

Brand: **PUFF** | Company: **MEHTA GARMENTS PVT. LTD.**
Launch Year: **1989** | Brand Website: **WWW.PUFFJEANS.COM**

Mehta Garments launched Puff, a pioneer in men's denim wear in 1989. Today, Puff is one of the most successful and widely recognised brands in the Indian apparel industry. The brand's R&D team along with the designers continually create an electrifying array of products in a variety of fabrics, washes and cuts, using the latest technology and processes.

Core Product Offering/Categories:

It manufactures formal, casual and denim wear for men and specialises in bottom-wear range such as capris, cargos, cotton and non-cotton trousers.

Target Consumers:

The brand's apparel range targets at men between the age group of 18 to 35 years.

Brand USP:

Fashion with excellence is the cornerstone of the collection introduced by them. The brand's strong fashion forecasting and trendsetting abilities have created a product range that is vibrant and trendy.

Brand's Mission:

Puff's mission is to exceed its customers' expectations in quality, delivery and cost through continuous improvement and customer interaction.

Future Expansion Plans:

Its main target is to expand their presence throughout the country, specially in Bihar, Uttarakhand, Punjab and Assam where it has not entered yet. Further, it will start exporting to the US markets as well.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 700+

Major LFS/ MBOs/ Departmental Stores Present in: The brand has presence in Pothys, Charmas, etc.

No. of Indian Cities Currently Present in: It is present in nearly 135 cities across tier -I, -II and -III cities in the country.

New Territory/ Region Added: Punjab, Haryana and Guwahati (Assam)

Turnover CAGR over last 3 years for FY '16: 20%



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RAJSHAHI POSHAK

Brand: **RAJSHAHI POSHAK** | Company: **RATHI FASHION**

Launch Year: **2011** | Brand Website: **WWW.RAJSHAHIPOSHAK.COM**

Rajshahi Poshak, from the house of Rathi Fashion, offers a wide range of stylish and traditional men's ethnic wear. The product range includes kurta-pyjamas, dhotis, sherwanis, jackets and Indo-westerns including coat suits and trousers. The brand offers collections for all occasions such as festivals, weddings, social celebrations and other functions.

Core Product Offering/ Categories:

The brand offers kurta-pyjamas, dhotis, sherwanis, jackets and Indo-westerns.

Target Consumers:

Rajshahi Poshak targets men from the mid segment families.

Brand USP:

The brand's USP lies in offering quality products at competitive price.

Brand's Mission:

Rajshahi Poshak aims to be the prime choice of a consumer when it comes to daily wear as well as occasional ethnic wear.

Future Expansion Plans:

Rajshahi Poshak is looking forward to expand through franchise stores. The brand is also planning to penetrate in to the markets of Assam and Jharkhand.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to target Ranchi, Patna, Tinsukia, Jorhat and Nagpur.

like Ebay, Snapdeal, Flipkart, Amazon, Paytm and Voonik.

No. of Indian Cities Currently Present in:

25

New Territory/ Region Added: Madhya Pradesh and Gujarat

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 5%

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BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 1

Total no. of MBOs: 125

Total no. of SISs: 2

Total Space Covered by EBOs & SISs: 3,800 sq.ft.

Major E-commerce Portals Present in: The brand retails through e-commerce websites



RANGRITI

Brand: **RANGRITI** | Company: **BIBA APPARELS PVT. LTD.**
 Launch Year: **2014** | Brand Website: **WWW.RANGRITI.COM**

Rangriti is a range of bright and happy women's wear. With a unique fusion of 'rang' colour and 'riti' fashion, Rangriti brings out a line that is a fine blend of feminine cuts and beautiful shades in sync with the latest fashion trends. The brand provides high-end fashion at very attractive prices. With a wide range of beautiful kurtas, anarkalis, churidars, dupattas, leggings and kurtis in pleasing prints, colours and patterns, the brand aims at bringing freshness, variety and style to every woman's closet.



Core Product Offering/ Categories:

The brand offers a wide range of products for women. In top wear, the product basket comprises kurtas and anarkalis and in bottom wear, it offers churidars, skirts and palazzos in pleasing prints, colours and patterns.

Target Consumers:

Rangriti caters to women in the age group of 20 to 30 years.

Brand USP:

The women's brand's USP lies in being a women's wear fashion brand in the value segment.

Brand's Mission:

Rangriti runs with a mission to be a ₹500 crores brand in the next 5 years.

Future Expansion Plans:

Rangriti has plans to expand and spread its operation in the tier -II and -III cities of the country.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 17

Total no. of MBOs: 167

Total no. of SISs: 8

Total Space Covered by EBOs & SISs: 16,514 sq.ft.

Major LFS/ MBOs/ Departmental Stores Present in:

The brand is present in major large format stores like Reliance Trends, Shoppers Stop, Central, Megamart, More, etc.

Major E-commerce Portals Present in:

The brand is available on Amazon, Myntra, Jabong, Limeroad, Voonik, Flipkart, Reliance Ajo and Snapdeal. Rangriti also retails through its own online store www.rangriti.com.

No. of Indian Cities Currently Present in:

124

New Territory/ Region Added:

Delhi-NCR, Bengaluru, Mumbai and Jharkhand



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RED RIDING

Brand: **RED RIDING** | Company: **HARSH INTERNATIONAL IMPO EXPO**

Launch Year: **2016** | Brand website: **WWW.REDRIDING.IN**

Red Riding is a part of the Mahak Group, established in 1994. Today, it is one of the leading business house with a turnover of over ₹5,000 crores through tobacco products like Chaini Khaini and Mahak Pan Masala; chaini bidi, confectioneries like ChocOn and Jelly Belly; fashion accessory brand, Red Riding and, the recently launched detergent brand, Woosh.

Core Product Offering/ Categories:

Red Riding is known for its range of classy yet elegant scarves that are perfect for every occasion.

Target Consumers:

Young females that are price conscious but are highly sensitive to the latest fashion trends.

Brand USP:

Perfect combination of premium range of 1500 designs in 20 fabrics at an affordable price.

Brand's Mission:

The brand aims to offer fashion and quality at the best price and expand on a continuing basis.

BRAND UPDATES

Total no. of EBOs: 45

Total no. of MBOs: 100+

Total no. of SISs: 1,000

No. of Indian Cities Currently Present in: 200

New Territory/ Region Added: Nashik, Muradabad, Greater Noida, Agra, Guwahati, Hyderabad, Vijaywada, Chennai, Indore, Bhopal, Patna, Ranchi, Ahmedabad, Surat, Lucknow, Dehradun and Goa.

Total Space Covered by EBOs & SISs: 10,000 sq.ft. (approx)

Major LFS/ MBOs/ Departmental Stores Present in: The brand is available at RituWears and Suvidha.

Major E-commerce Portals Present in: Red Riding has presence at Amazon, Snapdeal, Limeroad and its online store www.redriding.in.

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RICADO DENIMS

Brand: **RICADO DENIMS** | Company: **GEESON'S INDUSTRIES PVT. LTD.**

Launch Year: **1974**

Geeson's Industries has been manufacturing men's denim wear under its brand, Ricardo, since more than three decades. Through creativity and innovation, Ricardo has always focused on the youth and their aspirations and built up their product portfolio accordingly. The brand is sold in Indian markets as well as exported to the western and the Middle East countries.

Core Product Offering/ Categories:

The brand offers cotton casuals and denim collections under its men's wear range. It also fabricates garments as per clients specification.

Target Consumers:

The brand targets men from middle-income class across the country.

Brand USP:

Providing quality products and services that exceeds the expectations of its customers keeps them above competition.

Brand's Mission:

It's mission is to build a long term relationship with the customers and provide exceptional and consistent quality products by pursuing business through innovation and advanced technology.

Future Expansion Plans:

The brand has plans to tie-up with major e-commerce portals to increase its reach among its customers. It also plans to export to American and European countries.

Towns or Cities Targeted in the Next

Couple of Years:

The brand has plans to enter the markets of North-East India.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 250 (approximately)

Major LFS/ MBOs/ Departmental Stores

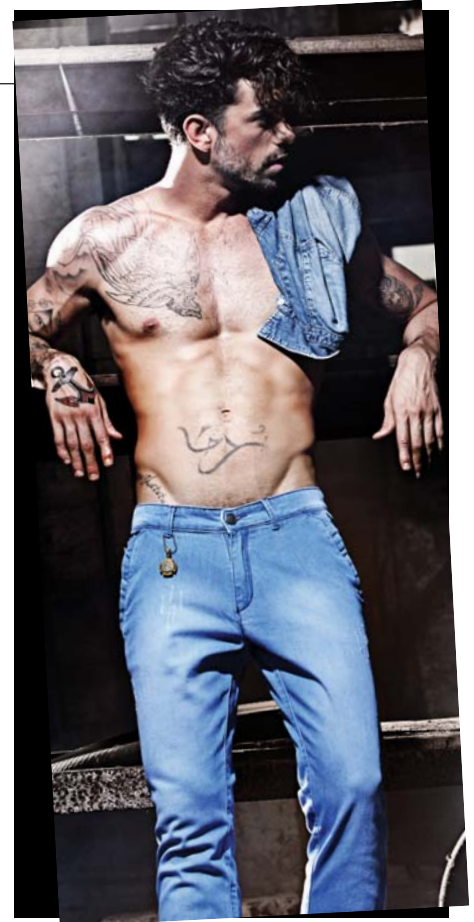
Present in: Ricardo Denims is available at The Chennai Silks, Pothys, Kalyan Silk, V-Mart, Vishal Megamart, Metro Bazaar, Bazaar Kolkata, etc.

No. of Indian Cities Currently Present

in: The brand has presence in the cities of Jammu & Kashmir, Haryana, Delhi, Madhya Pradesh, Chattisgarh, Maharashtra, Gujarat, Kerala, Tamil Nadu, Andhra Pradesh, Telangana and West Bengal.

New Territory/ Region Added: Kerala, Uttarakhand, Himachal Pradesh and Guwahati (Assam)

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ROCKSTAR JEANS

Brand: **ROCKSTAR JEANS** | Company: **ROCKSTAR FASHIONS INDIA PVT. LTD.**

Brand Website: **WWW.ROCKSTARJEANS.COM**

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

Core Product Offering/ Categories:

The brand offers denims, trousers, shirts, linen and t-shirts.

Target Consumers:

Rockstar Jeans targets men in the age bracket of 16 to 35 years.

Brand USP:

The brand's USP lies in consistently managing to shelf the most recent fashion trends and ensuring the consumers have first hand access to the latest in fashion at affordable prices.

Future Expansion Plans:

Rockstar Jeans is planning to acquire better market share from the existing territories, while adding new geographies, thus further extending its portfolio and product.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the areas of Kerala, Jharkhand and Bihar in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 4

Total no. of MBOs: 1,500

No. of Indian Cities Currently Present in: 15

New Territory/ Region Added: Chhattisgarh, Vidarbha and the North-East

Turnover CAGR over last 3 years for FY '16: 25%



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SABHYATA

Brand: **SABHYATA** | Company: **SABHYATA**

Launch Year: **2003** | Website: **WWW.SABHYATACLOTHING.COM**

Established in 2003 with an initial investment of ₹10 lakhs, Sabhyata, is the brain child of two brothers Pankaj and Anil, who look after the complete functioning of the brand. The brand was bought as a premium Indian Ethnic brand which caters to women from all walks of life. What sets the brand apart is the prominent use of indigenous techniques such as Dabu prints, vegetable dyes, indigo, etc.

Core Product Offering/ Categories:

A mix of ethnic and Indo-western with a mix of casual wear which caters to working women as well as homemakers. The product basket includes kurtas, shirts, tops, tunics, churidaar, palazzos, leggings, etc.

Target Consumers:

Women from middle and upper middle class in the age bracket of 20 to 50 years from metros, tier- II and -III cities are the brand's customers.

Brand USP:

Sabhyata's USP lies in offering high quality products at affordable prices.

Brand's Mission:

"Ethnicity redefined", is the mission of the brand.

Future Expansion Plans:

As of now, the brand is expanding aggressively and is planning to take the store count to 100 by end of 2017, along with ramping up e-commerce sales and exports. It is also vying to expand its retail footprint outside India.

Towns or Cities Targeted for the Next Couple of Years:

The brand is targeting the South and East parts of the country particularly Kerala, Goa, Chennai (Tamil Nadu) and Guwahati (Assam).

BRAND UPDATES

Total no. of EBOs: 41

Total no. of MBOs: 85

Major E-commerce Portals Present in: The brand is available at Myntra, Ajio, Jabong, Nnnow.

No. of Indian Cities currently present in: 20+

Brand Turnover (estimated for FY 2015-16): ₹75 crores

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SCOTLANE

Brand: **SCOTLANE** | Company: **SCOT APPARELS**
Launch Year: **1996** | Brand Website: **WWW.SCOTLANEJEANS.COM**

Established in 1996, the denim wear brand Scotlane stands for offering new fits, cuts, washes and styles in a variety of fabrics using the latest technology and processes. Such trend-setting innovations, along with the company's ability to make accurate fashion forecasts has led to the creation of a brand that reflects the desire and attitudes of its customers.

Core Product Offering/ Categories:

Scotlane offers basic denim, cord-super denim, 4-way stretch, corduroy, cotton trousers, yarn dyed and fancy bottom-wear for men.

Target Consumers:

The brand targets men from 18 to 50 years old.

Brand USP:

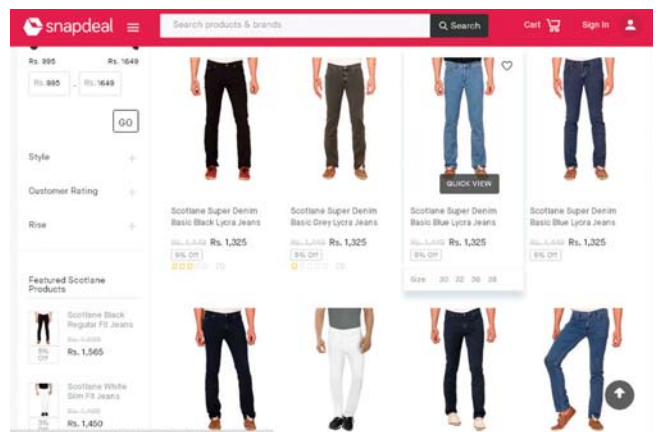
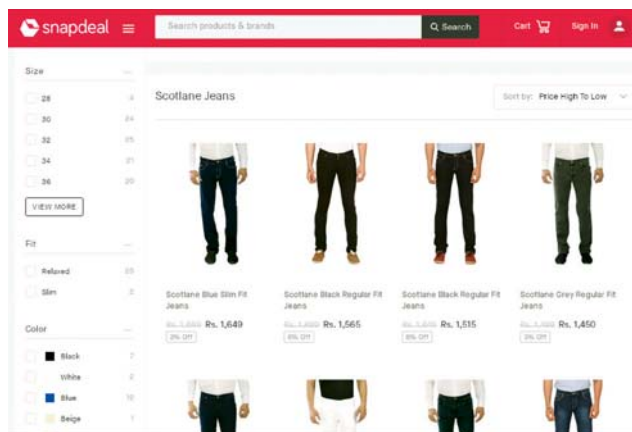
Known for its innovative jeans and trousers, Scotlane has been manufacturing men's garment for more than two decades offering the latest innovation in fabric variations at the most affordable price range.

BRAND UPDATES (information as on 31st December 2016)

Major E-commerce Portals Present in: The brand is available on Amazon, Snapdeal, Paytm, Flipkart, etc.



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SHERIFF

Brand: **SHERIFF** | Company: **C K INTERNATIONAL**
Launch Year: **1985** | Brand Website: **WWW.SHERIFF.CO.IN**

Sheriff started with manufacturing shirts, then added t-shirts to its portfolio and now, its a complete men's wear brand. By using the best fabrics and offering the finest cuts and style, it has made a strong hold in the north-east terrain. Priced reasonably, the brand is within the reach of many and providing them with contemporary fashion.

Core Product Offering/ Categories:

The brand offers shirts, trousers, denims, t-shirts, blazers and accessories to its consumers.

Target Consumers:

Sheriff caters to young aspiring males in the age group of 22 to 45 years.

Brand USP:

The men's wear fashion brand prides in providing contemporary fashioned, high-value garments at affordable prices.

Future Expansion Plans:

Sheriff is planning to launch its range of women's wear in the times to come.

Targeted Towns or Cities in the Next Couple of Years:

The brand has plans to target the markets of Uttar Pradesh, Maharashtra and Bengaluru (Karnataka) in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 14

Total no. of MBOs: 500

Total Space Covered by EBOs & SISs: 7,600 sq.ft.

Major E-commerce Portals Present in: The brand is available on Amazon, Flipkart and Snapdeal.

No. of Indian Cities Currently Present in: 40

New Territory/ Region Added: Bihar

Turnover CAGR over last 3 years for FY '16: 25%



SKECHERS

Brand: **SKECHERS** | Company: **SKECHERS SOUTH ASIA PVT. LTD. & SKECHERS RETAIL INDIA PVT. LTD.**

Launch Year: **2012 (ENTRY IN INDIA)** | Brand Website: **WWW.SKECHERS.IN**

Founded in 1992, Skechers USA Inc., is one of the fastest-growing footwear companies in the United States and globally as well. With sales surpassing over USD 3 billion Skechers designs, develops and markets more than 3,000 styles. Globally Skechers has more than 1,100 company-owned retail stores across 120 countries. In India, Skechers has forayed into 100 cities. They are currently present across 1,000-plus doors with 65 exclusive brand outlets.



Core Product Offering/ Categories:

The brand offers performance shoes for running, walking and training which are in trend and fashionable.

Target Consumers:

Skechers targets males and females from 16 to 40 years old in SEC A segments.

Brand USP:

Skechers's products are known for providing comfort that performs.

Brand's Mission:

The brand strives to create a unique partnership between the athletes (its consumers) and products.

Future Expansion Plans:

This year, Skechers will add three new categories under shoes for training, soccer and apparels.

Towns or Cities Targeted in the Next Couple of Years:

Tier-II and -III cities will be the targeted cities for this year.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 66 (including franchisee stores)

Total no. of MBOs: 650

Total Space Covered by EBOs & SISs: 1,00,000 sq.ft. (only EBOs)

Major LFS/ MBOs/ Departmental Stores

Present in: The brand has presence in Lifestyle, Shoppers Stop, Metro, Reliance Retail, etc.

Major E-commerce Portals Present in:

Skechers is also available on Flipkart, Amazon, Myntra and Jabong.

No. of Indian Cities Currently Present in: 150+

Turnover CAGR over last 3 years for FY '16: 11.5%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 10.5%





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SOCH

Brand: **SOCH** | Company: **M D RETAIL INDIA PVT. LTD.**

Launch Year: **2005** | Brand Website: **WWW.SOCH.IN**

A powerhouse of exquisiteness, Soch began its journey as an in-house brand at MD Retail owned Favourite Shop in Bengaluru. From designer apparel to elegant fashion wear brand, Soch has travelled a long journey to become a one-stop retail brand for all the ethnic needs. The brand celebrates the global Indian woman with a contemporary lifestyle, who flaunts her ethnicity as she sets trends and breaks barriers, every day.



Core Product Offering/ Categories:

The brand's product basket comprises sarees, salwar suits, kurtis, kurti sets, ready-to-stitch, tunics, bottoms and cocktail blouses.

Target Consumers:

The ethnic women's wear brand caters to urban Indian women from middle to upper income groups in SEC A of the society.

Brand USP:

The brand's USP lies in being the only one-stop Indian fashion wear destination for the fashion conscious women.

Brand's Mission:

Soch runs with a mission to make Indian fashion wear the most desirable yet affordable for the discerning women.

Future Expansion Plans:

Soch is planning to open 40-45 stores in different cities. It has plans to open these stores both in the existing as well as new cities across the country. It is also looking at opening its first few international outlets in FY 2018.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target pan India market, rest of Indian sub-continent and the Middle East in order to expand its business, in the next couple of years.

Integrating Omni-channel Operations:

Soch does real time integration of inventories across all the three channels – retail, warehouse and e-commerce, through a built-in software.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 81

Total no. of MBOs: 2

Total no. of SISs: 26



Total space covered by EBOs & SISs:

1,50,000 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in Central, Shoppers Stop, etc.

Major E-commerce Portals Present in:

Soch is available on Myntra, Flipkart, Voonik, Limeroad, Abof, Ajo and Vilara. The brand also reaches out to its consumers through its own online store www.soch.in.

No. of Indian Cities Currently Present in:

36

New Territory/ Region Added: Goa, Jharkhand, West Bengal, Odisha, Bihar, Delhi-NCR and Gujarat.

Brand Turnover (estimated for FY 2015-16): ₹260 crores

Turnover CAGR over last 3 years for FY '16: 46%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 23%





Juelle

JUELLE RETAIL PRIVATE LIMITED (Formerly Known as Turbo Retail Pvt. Ltd.)
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   juelle.in
Toll Free No: 1800 137 7000

SPRINGFIELD

Brand: **SPRINGFIELD** | Company: **SPRINGFIELD FASHIONS**
Launch Year: **1986** | Brand Website: **WWW.SPRINGFIELD-ESTORE.COM**

Established in 1986, Springfield has been offering clothing and accessories in tune with the latest international trends. The brand started with manufacturing of top quality formal mens wear and with time entered into casual wear range. Besides Springfield, its other fashion labels include Dark Slates, YSF (Yogi Shetty Fashions) and SGK (Suave Guru King of Style).

Core Product Offering/ Categories:

Springfield offers formal trousers, suits, jackets, casual cotton trousers, shirts, t-shirts and jeans.

Target Consumers:

The brand targets men in the age between 21-50 years.

Brand USP:

Springfield's USP lies in offering fashionable products in tune with international style.

Future Expansion Plans:

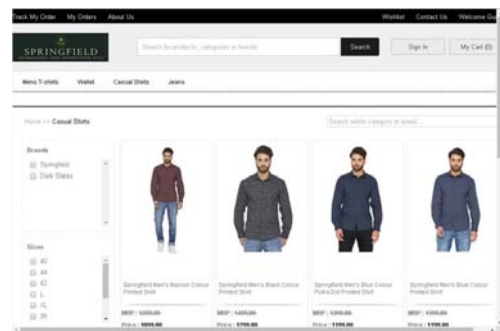
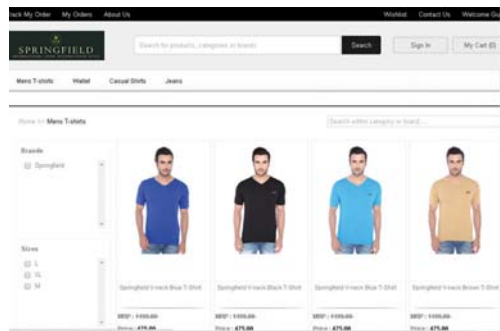
The brand is expanding its online retail presence and also plans to expand through licensing route, which is by offering licenses to top retailers and large brand marketeers.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 1

Major E-commerce Portals Present in: Springfield is presently being sold through Amazon, Flipkart, Myntra, Paytm, Shopclues, Snapdeal, etc.

No. of Indian Cities Currently Present in: Pan India



STATUS QUO

Brand: **STATUS QUO** | Company: **CRAVE CLOTHING CO. PVT. LTD.**
Launch Year: **1998** | Brand Website: **WWW.STATUSQUO.IN**

Status Quo is a well known brand of choice of trendy self-directed youngsters. Offering a complete range of fashion wear, the youth oriented brand appeals to their dynamism, style and outlook. Complimenting their beliefs with modish designs, the brand aims to help them stand apart from the teeming millions with its unique and exciting designs along with consistent quality.

Core Product Offering/ Categories:

Status Quo's product assortment comprises shirts, t-shirts, jogger pants, shorts, sweat shirts, pullovers, jackets, denims, trousers, etc.

Target Consumers:

The brand's target consumers include people who are young at heart and in between the age group of 16 to 35 years.

Brand USP:

Status Quo's classic style with continuous innovation gives them an added advantage over others.

Brand's Mission:

The brand visions to create an aspirational global fashion brand in India.

Future Expansion Plans:

Status Quo is working to launch Status Quo women's collection and plans to continue expanding its kids wear market.

Towns or Cities Targeted in the Next Couple of Years:

In the next two years, the brand will target cities like Coimbatore, Pondicherry, Thrissur, Calicut, Patna and Gangtok.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 4

Total no. of MBOs: 1,250+

Total no. of SISs: 75

Major LFS/ MBOs/ Departmental Stores Present in: Status Quo has presence in Shoppers Stop, Lifestyle, Central, etc.

Major E-commerce Portals Present in: Apart from its web store, www.store.statusquo.in, it is also available at Amazon, Flipkart, Myntra, Jabong, Abof, Snapdeal, Tata Cliq, etc.

No. of Indian Cities Currently Present in: 310

New Territory/ Region Added: East and North-East regions

Brand Turnover (estimated for FY 2015-16): ₹110 crores

Turnover CAGR over last 3 years for FY '16: 25%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 7%



SUCCESS

Brand: **SUCCESS** | Company: **AGWANI FASHIONS PVT. LTD.**
 Launch Year: **1996** | Brand Website: **WWW.SUCCESSONLINE.CO.IN**

Established in 1996 by Agwani Fashions, Success is a contemporary men's wear brand. Headquartered in Kolkata, the brand started out as a trouser manufacturer, and today it offers a complete wardrobe for men. The brand presents its clients with a fusion between the global fashion trends and the ever-evolving taste of the customers, also keeping the proverbial Indian climate in mind. As a brand that promptly adapts to fashion, Success has stood its ground firmly and has also evolved with each passing milestone.

Core Product Offering/ Categories:

Success is evolving to be a men's lifestyle brand, offering them a one-stop-shop for all their lifestyle needs. At presently, the brand's core items comprise suits, blazers, waistcoats, casual jackets, trousers, denims, shirts, t-shirts and accessories.

Target Consumers:

Success believes that "male wardrobe preferences change with age". The brand offers trendy merchandise for men from the age of 20 years and upwards.

Brand USP:

The brand boasts of being fast adaptor of the changing trends in men's fashion and also in putting forth the finished products, intantaneously. This keeps Success at par with the global trends whilst ensuring the trendiest collections to its customers.

Brand's Mission:

The brand strives to provide consumers with the latest trends in superior quality men's wear at affordable prices.

Future Expansion Plans:

With the opening of two more stores in 2016,



in Dhanbad and Delhi (at Aerocity Central Mall), the brand is planning to open 7-8 new stores this year. It is also looking forward to expand its visibility in tier -I and -II cities.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 24

Total no. of MBOs: 353

Total no. of SISs: 42

Major E-commerce Portals Present in:

Success retails through Flipkart and Myntra and also through its own online store www.successonline.co.in.

No. of Indian Cities Currently Present

in: 40

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KIVON  SHIRTS

SUNNEX JEANS

Brand: **SUNNEX JEANS** | Company: **ANNAPURNA APPARELS LTD.**
 Launch Year: **1980** | Brand Website: **WWW.SUNNEXJEANS.COM**

Established in 1980, Sunnex Jeans is one of the pioneer brands in the denim industry. The brand has grown steadily over the years, and today it is one of the strong domestic players in the South and West markets. Internationally, Sunnex Jeans has a dominant presence in the gulf regions with consumer loyalty leadership in countries like UAE, Oman, Qatar, Bahrain, Saudi Arabia, etc.

Core Product Offering/ Categories:

The brand offers a wide array of men's fashion such as jeans, basic denims, cotton trousers and shirts.

Target Consumers:

The brand targets men in the age group of 20 to 35 years.

Brand USP:

Its USP lies in providing international fashion trends to the consumer at friendly prices.

Future Expansion Plans:

The brand is actively involved in increasing its reach geographically in the North as well as the East of India. In the next three years, it plans to focus aggressively on reaching territories that it has not been catering to. It is also planning to upgrade its business to the modern trade formats.

Towns or Cities Targeted in the Next Couple of Years:

Sunnex Jeans will explore the markets of Bhubaneshwar, Chandigarh, Cuttack, Delhi, Guwahati, Kolkata, Lucknow, Ludhiana, Patna, Raipur, etc., in the next couple of years.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 2

Total no. of MBOs: 800+

Major E-commerce Portals Present in: Sunnex Jeans has presence in Myntra, Jabong and Flipkart.

No. of Indian Cities Currently Present in: 150+

Turnover CAGR over last 3 years for FY '16: 15%



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TAANZ

Brand: **TAANZ** | Company: **MAURIA UDYOG LTD.**

Launch Year: **2007** | Brand Website: **WWW.TAANZFASHIONS.COM**

Taanz is a casual wear brand, launched by Mauria Udyog Ltd., in 2007. The brand is known for giving customers the best of design and is proud to be recognised as a customer friendly brand. Today, the brand is known among the youth and elite for its distinctive and stylish range with an urban elegance. With its presence in various multi brand stores and large format stores in many cities across the nation, Taanz aims to further expand its operations by opening selective exclusive stores and through various other channels.

Core Product Offering/ Categories:

The brand specializes in western wear for women, providing them with a vast range of tops, tunics, maxi dresses, palazzos, culottes, skirts, capes and jackets. In men's wear, the brand offers shirts, t-shirts, trousers and leisure wear along with a complete winter line.

Target Consumers:

Taanz is for people who are adventurous, urban and young and fall in the age group of 18 to 30 years. Ones who are aware of the latest trends and seek freedom in fashion.

Brand USP:

Taanz prides in being a fashion forward brand offering international trends in smart casual wear at affordable prices.

Brand's Mission:

The fashion brand aims to update its design and stay ahead in the current and international trends giving the customer value for money.

Future Expansion Plans:

The brand is looking forward to open multiple retail outlets through the franchise model and also plans to add few more large formats stores and large retail outlets for business expansion.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the markets of Chandigarh, Bengaluru, Mumbai, Ludhiana and Delhi-NCR.

BRAND UPDATES (information as on 31st December 2016)

Major E-commerce Portals Present in: Taanz retails through major e-commerce websites like Myntra, Limeroad, Amazon, Ebay, Jabong, Voonik and Paytm.



TANTRA

Brand: **TANTRA** | Company: **TANTRA**

Launch Year: **1997** | Brand Website: **WWW.TANTRATSHIRTS.COM**



Tantra is India's pioneering content-driven t-shirt brand. With 't-shirt art' and 't-shirt communication' being the core of its existence, it is retailed across India and abroad. The creative-led Mumbai-based company comprises award winning design team. Having started with a single flagship store now the brand has over 30 exclusive brand outlets across the country.

Core Product Offering/Categories:

Tantra offers t-shirts and accessories for unisex, women, kids and infants.

Target Consumers:

Tantra targets the youth and the young at heart population. It caters to different personalities via different labels.

Brand USP:

Tantra's USP lies in being, "The Original". It is always qualitatively ahead of its competitors.

Brand's Mission:

Tantra believes in promoting, "India Cool!"

Future Expansion Plans:

As Tantra is a popular online and offline brand, its objective is to focus on these two expansion avenues, alongwith a host of marketing activities, to keep the brand's top-of-mind recall.

Towns or Cities Targeted in the Next Couple of Years:

Tantra is looking at plugging the empty blanks, in terms of states, cities, distributors, etc. Hence, their first objective is to take the above steps, to expose a greater percentage of youth to the Tantra experience.

Integrating Omni-channel Operations:

Currently, the company is running the diverse channels individually, with limited offline to online synergy.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 30+ (including EBOs overseas)

Total no. of MBOs: 500+

Total no. of SISs: 40+

Total space covered by EBOs & SISs: 4,500 sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: Tantra is retailed through Central, Shoppers Stop, Lifestyle and Reliance Stores.

Major E-commerce Portals Present in:

Tantra has partnered with portals like Amazon, Flipkart, Jabong and Voonik.

No. of Indian Cities Currently Present in: 40



TEXAS JEANS

Brand: **TEXAS JEANS** | Company: **DETAIL CLOTHING LTD.**
Launch Year: **1992** | Brand Website: **WWW.TEXASCASUALS.IN**

Detail Clothing Ltd., popularly known for its brand, 'Texas Jeans' was established in 1992. The company offers the best in lifestyle fashion, with products ranging from jeans, trousers, shorts and casual shirts. Its brand, Texas Jeans, in short span of time, has made its product available in 18 states with more than 900 multi-brand outlets across India.

Core Product Offering/ Categories:

Texas Jeans offers mens wear range like jeans, trousers, shorts and casual shirts.

Target Consumers:

The company exhibits a wide plethora of fits in bottom-wear that can be worn by an 18 year old college student and to a 60 year old man.

Brand USP:

Texas Jeans believes in meeting customer expectations by delivering right product at right time with acceptable quality and it also acts as their USP.

Brand's Mission:

The company's mission is to provide quality product that meets the change in fashion at an affordable price.

Towns or Cities Targeted in the Next Couple of Years:

They intend to expand their footprints in the overseas market. They also plan to enter the markets of North-East India.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 5

Total no. of MBOs: 900

Total Space Covered by EBOs & SISs: 4,500 sq.ft.

No. of Indian Cities Currently Present in: 70-80 (approx.)

New Territory/ Region Added: Kolkata (West Bengal)

Brand Turnover (estimated for FY 2015-16): ₹16 crores

Turnover CAGR over last 3 years for FY '16: 5%

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TOONZ

Brand: **TOONZ** | Company: **TOONZ RETAIL INDIA PVT. LTD.**

Launch Year: **2010** | Brand Website: **WWW.TOONZ.IN**

Lunched in 2010, Toonz is one of the first players in the kids' retail market. The brand is a one-stop-shop for all kinds of needs of the kids from 0 to 12 years and showcases a wide range of qualitative offerings at affordable price range. At present, it is successfully operating around 100-plus stores across India and various other countries like Fiji, Papua New Guinea, Mauritius, Nepal and the gulf countries.

Core Product Offering/ Categories:

Toonz offer apparel, baby basics, toys and nursery items.

Target Consumers:

The brand's primary customers are children between 0 to 12 years. Its secondary consumers are the parents who look for the best products at affordable price range.

Brand USP:

The brand's USP lies in offering quality and affordable products for kids from 0 to 12 years.

Brand's Mission:

It is a one-stop-shop for all kinds of kids' need.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 75

Total no. of MBOs: 10

Total no. of SISs: 25

Total Space Covered by EBOs & SISs: 2 lakhs sq.ft. (approx.)

Major LFS/ MBOs/ Departmental Stores Present in: Toonz has presence in Hypercity, Heritage, etc.

Major E-commerce Portals Present in: The brand is available on Amazon, Flipkart, Snapdeal, Jabong, Hopscotch and Paytm.

No. of Indian Cities Currently Present in: 56

New Territory/ Region Added: Nashik, Bhavnagar, Hubli and Davanagere

Brand Turnover (estimated for FY 2015-16): ₹35 crores

Turnover CAGR over last 3 years for FY '16: 30%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 25%



TULIP

Brand: **TULIP** | Company: **AARKAY ENTERPRISE**

Launch Year: **1982**

Tulip is a renowned innerwear brand formed in 1982 by Aarkay Enterprise. The brand started with a humble beginning with just two machines. Today, it has come a long way. Its manufacturing capacity is 2,400 pieces in a day and enjoys a strong brand image. Currently the brand has three manufacturing units in Mumbai and nearby areas.

Core Product Offering/ Categories:

Tulip manufactures hosiery products and cotton bras. It also makes coordinated sets. The price range of the innerwear brand starts from ₹120 and goes upto ₹500.

Target Consumers:

The brand caters to females from the age group of 14 years to 50 years. It also offers product range for females demanding C and D cup-sized bras.

Brand USP:

The brand is well known for its cotton bras and the perfect fit it offers.

Future Expansion Plans:

The brand plans to extend its product portfolio. It plans to add slips, camisoles and panties in the near future.

Towns or Cities Targeted in the Next Couple of Years:

Tulip wants to venture into places like Kerala and Kolkata (West Bengal) in the coming years. The brand is also looking at export markets of Dubai and the Gulf countries. Meanwhile, it is currently exporting to Saudi Arabia.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 300

No. of Indian Cities Currently Present in: 30

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FASHION PASSION

13TH GARMENT FAIR | THE SUMMER EDITION

16th & 17th, February 2017

13TH GARMENT FAIR

16th & 17th, February 2017

THE SUMMER
EDITION

TURTLE

Brand: **TURTLE** | Company: **TURTLE LTD.**

Launch Year: **1993** | Brand Website: **WWW.TURTLELIMITED.COM**

From a company primarily into men's readymade shirts, to a leading brand in men's wear fashion, Turtle has indeed, come a long way. It was a modest beginning with a manufacturing capacity of just 20 shirts per day for supplies to an in-house retail store. Today, the brand incorporates international style with great value in its design ethos, sensibility and pricing. In the arena of men's fashion, Turtle stands for style that's focused, sophisticated yet fun-loving, exuding confidence and brimming with enthusiasm.

Core Product Offering/ Categories:

The brand offers complete men's wear range including shirts, trousers, t-shirts, denims, suits, blazers, jackets, pullovers, wind-cheaters, accessories, etc.

Target Consumers:

Turtle's core consumer is the successful man who loves to step aside from the mad race and charts out an unknown path. The fashion brand caters to men in the age group of 25 to 45 years in SEC A+, A and B from tier -I, -II and -III cities of the country.

Brand USP:

At Turtle, the core philosophy is to provide trendy fashion to its consumers.

Brand's Mission:

The men's brand works with a mission to provide the best in fashion for its consumers' delight.

Future Expansion Plans:

Turtle is planning to expand within East India and specifically to tier -II and -III cities.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 97

Total no. of MBOs: 1,400

Total no. of SISs: 200

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in major large format stores like Central, Reliance Trendz, Shoppers Stop, Pantaloons and Brand Factory.

Major E-commerce Portals Present in:

Turtle retails through major e-commerce portals like Flipkart, Jabong, Myntra, Snapdeal, Amazon, Tata Cliq and also through its own online store www.turtleonline.in.

No. of Indian Cities Currently Present in: 400





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TWILLS

Brand: **TWILLS** | Company: **TWILLS CLOTHING PVT. LTD.**

Brand Website: **WWW.TWILLS.IN**

Twills is not just another fashion brand, but a lifestyle brand that has been redefining style for men since its inception in 2000. Twills is driven by a passionate team of in-house trend setting designers who are known for their exclusivity. Designing, value addition and the aspect of exclusivity in styling are believed to be the driving force for Twills. Envisioned and nurtured in Andhra Pradesh, the brand opened its first flagship store in Vijayawada in 2008 followed by another store in Mumbai in 2015. Today, it has become one of the most sought after brands in India.

Core Product Offering/ Categories:

The product basket of the brand comprises shirts, denims, trousers and t-shirts. Twills has also added its new collection of 'yoga shirts' this season. The brand's new product shows its commitment towards better health.

Target Consumers:

Though target consumers for Twills depend on different mentalities and personalities, 70 percent of the target consumers are youth and the remaining 30 percent comprise the working class (office goers) category.

Brand USP:

The USP of Twills lies in being a value for money, fashionable brand for both youngsters and the working class.

Brand's Mission:

Twills functions with a mission to launch a new sustainable concept every season. For S/S '17, the brand has come up with a concept called 'Yoga'.

Future Expansion Plans:

The brand is planning to spread its wings and ensure its presence in all district headquarters across India in the next couple of years. It has plans to majorly target the states of Maharashtra and Punjab.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 92

Total no. of MBOs: 3,000+

Total no. of SISs: 200

Total Space Covered by EBOs & SISs: 1.70 lakh sq.ft.

Major LFS/ MBOs/ Departmental Stores

Present in: The brand is present in major large format stores like Reliance, Pantaloons, Central and other major family stores across India.

Major E-commerce Portals Present

in: Twills retails through major online retail stores like Flipkart, Snapdeal, Jabong, Myntra and also through its own e-commerce portal www.twillsonline.in.

No. of Indian Cities Currently Present in:

Pan India

Brand Turnover (estimated for FY 2015-16): ₹170 crores



UFO

Brand: **UFO** | Company: **CREATIVE KIDS WEAR INDIAN PVT. LTD.**
Launch Year: **2012**

UFO is a creative group venture by Creative Kids Wear (India) Pvt. Ltd., one of the largest manufactureres in India for apparel. The group boasts of brands like Portico, 109F and Fusion Beats in Indian markets in a short span of time. UFO has been able to penetrate the market to gain consumer confidence and aspires to clothe the children of India in the best casual fashion wear.

Core Product Offering/ Categories:

The brand's product basket comprises shirts, tees, jeans, dresses, cargos, jackets, sweaters, non-denim bottoms, chinos, etc.

Target Consumers:

UFO targets kids in the age group of 2 to 14 years. The brand caters to those little champions who are fashion centric, stylish and modern.

Brand USP:

The kids wear brand's USP lies in offering international fashion adapted to Indian tastes at a very competitive rate and great quality.

Brand's Mission:

UFO's mission statement is "The world is our playground" and the brand functions around the same thought, offering the best fashion to the kids.

Future Expansion Plans:

UFO is planning to expand its presence through multi channel retail in order to cover different geographies of India.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target top 100 towns of India in years to come.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 3

Total no. of MBOs: 150

Total no. of SISs: 100

Total Space Covered by EBOs & SISs: ~700 sq.ft. (EBOs), 1,000 sq.ft. (flagship stores)

Major E-commerce Portals Present in: The brand retails through e-commerce websites like Myntra, Amazon, Jabong, Flipkart, Hopschotch and Snapdeal.

No. of Indian Cities Currently Present in: 75

New Territory/ Region Added:

The brand has recently spread out to the markets of four new regions.

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VALA'S

Brand: **VALA'S** | Company: **M G SONS PVT. LTD.**

Launch Year: **2011** | Brand Website: **WWW.VALAS.IN**

Vala's is a leading women's wear apparel brand launched in 2011. The brand enjoys a prominent share in the women's market with its state-of-art brilliance, fineness and excellence in quality. In a short span of time, the brand has expanded its reach to more than 1,800 retail stores and also exports to countries such as Sri Lanka, Nepal, Mauritius, Malaysia, Fiji and UAE.

Core Product Offering/ Categories:

Vala's offer exclusive women ready-to-wear garments. Its product-line comprises casual wear, office wear and party wear.

Target Consumers:

The brand targets females from 16 years and above with its innovative collection of kurtis and tops.

Brand USP:

Competition makes the brand to work harder, bringing out new collections every now and then at competitive rates is their USP.

Brand's Mission:

The brand's mantra is to "feel the comfort" when wearing their collections.

Future Expansion Plans:

The company has plans to launch a new range of western wear under a new brand name. The new range will include tops and trousers.

Towns or Cities Targeted in the Next Couple of Years:

It will target customers in North-East Indian cities in the coming times.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 1,800

No. of Indian Cities Currently Present in: 100+

New Territory/ Region Added: North-East India

Turnover CAGR over last 3 years for FY '16: 27%

Growth in the first 3 quarters of FY '17 over the same quarters in FY '16: 30% (approx.)



LIVE THE SPORT

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MENS / LADIES / JUNIORS

TOTAL SPORTSWEAR SOLUTIONS
APPAREL / ACCESSORIES / SWIMWEAR

SPORT TEES / SHORTS / CAPRIS / TRACK BOTTOMS / TRACK SUITS / SINGLETs /
GYM TEES / COMPRESSION CLOTHING / CRICKET CLOTHING / SWIMWEAR

**BE
FAST
OR
BE
LAST**



WORK / SWEAT / ACHIEVE



MENS / LADIES / JUNIORS

TOTAL SPORTSWEAR SOLUTIONS
APPAREL / ACCESSORIES / SWIMWEAR

SPORT TEES / SHORTS / CAPRIS / TRACK BOTTOMS / TRACK SUITS / SINGLETs /
GYM TEES / COMPRESSION CLOTHING / CRICKET CLOTHING / SWIMWEAR



SWEAT
IS JUST FAT
CRYING



WORK / SWEAT / ACHIEVE



MENS / LADIES / JUNIORS

TOTAL SPORTSWEAR SOLUTIONS
APPAREL / ACCESSORIES / SWIMWEAR



SPORT TEES / SHORTS / CAPRIS / TRACK BOTTOMS / TRACK SUITS / SINGLETs /
GYM TEES / COMPRESSION CLOTHING / CRICKET CLOTHING / SWIMWEAR



WORK / SWEAT / ACHIEVE

VAMI

Brand: **VAMI** | Company: **SOGO FASHIONS PVT. LTD.**

Launch Year: **2014**

Vami was launched under Sogo Fashions Pvt. Ltd. in 2014 and has now developed a network of over 80 distributors, mainly in North India. The brand, with a capacity of producing 3,000 leggings per day, has 3 variations of churidars, ankle lengths and capris in over 90 shades to choose from.

Target Customers:

Vami caters to fashionistas in the age group of 15- 60 years.

Brand USP:

The brand's USP lies in its quality and is distinguished by its great shades.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to expand its foothold pan India in the years to come.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 15

Total no. of MBOs: 3,000

No. of Indian Cities Currently Present in: 80

Turnover CAGR over last 3 years for FY '16: 25%

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Interested Distributors, Please Call Our Regional Manager: **West:** Nirlesh: 9004430987

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W2FBrand: **W2F** | Company: **WINGS 2 FASHION**Launch Year: **2013** | Website: **WWW.WINGS2FASHION.COM, WWW.WINGS2FASHION.IN**

W2F is a leading lifestyle fashion brand and the retail venture of Wings2fashion, a renowned export house in India. The brand is known for offering high quality and innovative garments at affordable price. The company believes in empowering every man's or woman's personality with its clothing to help them stand out amongst the crowd. W2F aims to express an innate desire of every boy and girl to be trendy, and making his style sense speak his mind out.

Core Product Offering/ Categories:

The company provides a wide range of everyday clothing for both men and women including jeans, tops, shirts, dresses, and skirts.

Target Consumers:

The brand targets mainly middle and upper middle class consumers between the age of 15-30 years who are cautious about being trendy and has an individual style quotient.

Brand USP:

Fashion for everyone at affordable prices.

Brand's Mission:

Smart clothing for everyday.

Future Expansion Plans:

The brand is vying for rigorous expansion through distributors, franchise model agents and retailers especially in the North, West and South.

Towns or Cities Targeted for the Next Couple of Years:

As of now the brand is present in 8 cities and is doing exponentially well. In the near future, W2F plans to tap the markets of Goa, Mumbai, Chennai, Bengaluru, Ahmedabad and Dehradun.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 70+

Major E-commerce Portals Present in: The brand is available at Flipkart, Snapdeal, Shopclues and Paytm.

No. of Indian Cities Currently Present in: 8

Turnover CAGR over last 3 years for FY '16: 50%

✕



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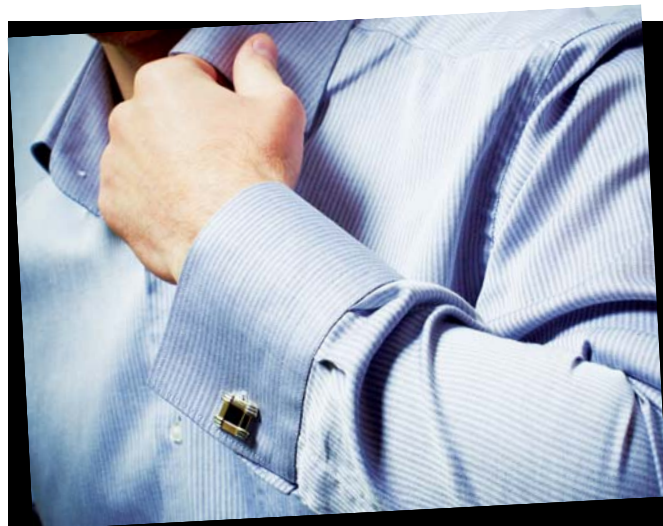
25, Dr Baba Saheb Ambedkar Road, Parel East, Krishna Nagar, Parel, Mumbai, Maharashtra 400012
Tel: 022 2470 3671, Email: info@scanlingerie.com, Contact: Siddharth 9833242810

WENDLER

Wendler is a world leader in shirt interlining. Wendler specialises in top quality woven interlining for non-iron cotton shirt fabrics. Wendler's quality assurance ensures the best quality of all products at all stages of production. All products go through a series of quality control checks to provide matchless quality, environment friendly products that are Oeko - Tex Standard 100 certified. Wendler offers interlinings with the highest standards to its quality products, e.g., good bonding, low shrinkage, high and stable whiteness and consistent quality parameters.

Network: Wendler's presence spans across the globe in more than 70 countries. The network also constitutes consistent global monitoring, local warehousing, global distribution and intensive coverage. In India, Wendler products are marketed by Welco Agencies Pvt. Ltd. through customer care centers at Delhi (head office), Gurgaon, Mumbai, Bengaluru, Chennai and Ahmedabad.

Usage: The vast array of Wendler interlining covers all the fashion needs such as, wrinkle-free shirts, dress shirts, formal shirts, semi-formal shirts, button down shirts, casual shirts, enzyme wash shirts, ladies shirts, top and blouses, trousers waist bands, etc. Wendler armhole interlining (AH025/AHF) can be used for armhole, side seams to give complete pucker free shirts.



Wendler Interlining Cover

Over 100 types of fusible Interlinings in 100 per cent cotton.

Range varying from 50 to 375 GSM.

Raised Interlinings for high volume and soft feel.

Both side fusible interlinings, temporary fuse interlinings, stretch interlining.

Arm hole interlinings.

Slitted interlinings and tapes cut to size.

Soil release interlinings.

Wendler Customer Services

Lab testing

Design studio

Latest collar and cuff designs

Fashion forecast and trends

Interlining suggestions for specific requirement

Customer support

R&D and technical backup

Fast and prompt deliveries




A woman with long dark hair is the central figure, wearing a vibrant orange and red saree with a repeating leaf-like pattern. She is draped in a white and grey patterned dupatta. She stands in a warm, dimly lit room decorated with strings of warm white lights and small photos pinned to the wall. A white birdcage is visible in the background. The overall mood is intimate and festive.

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WILLIAM HAZLITT

Brand: **WILLIAM HAZLITT** | Company: **HINDUSTAN GARMENTS**

Launch Year: **1998** | Brand Website: **WWW.WILLIAMHAZLITT.IN**

Lunched in 1998, William Hazlitt is a men's premium formal and casual lifestyle brand. Offering formals, casuals and party wear collections, the brand caters to the needs of consumers who are looking for dressing up for best value in clothing. The brand reflects the pulse of the new generation, which looks at clothing as a reflection of their attitude and vibrancy.

Core Product Offering/ Categories:

The brand offers cotton structured trousers, silky denim jeans, formal pants and designer party wear pants.

Target Consumers:

The core customers of William Hazlitt are 30-plus year old males in SEC A and B categories in metros and tier -I and -II cities.

Brand USP:

William Hazlitt reflects the persona of young and old, energetic, aggressive, outgoing and dynamic men who live their life to the fullest.

Future Expansion Plans:

The brand had undertaken strong territory expansion until 2011 and its future endeavour is to strengthen its position in those areas.

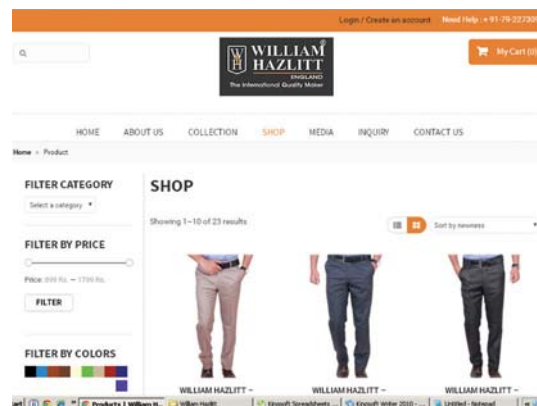
BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 14

Total no. of MBOs: 800+

Major E-commerce Portals Present in: The brand has presence at Amazon, Snapdeal, Paytm, etc.

No. of Indian Cities Currently Present in: 40+





Brand: **YKK** | Company: **YKK INDIA PVT. LTD.**
Launch Year: **1995**

YKK India Pvt. Ltd. was incorporated in September 1995, as a subsidiary of YKK Corporation for the manufacture of metallic and non-metallic zippers. YKK's quality products have earned the brand a reputation of global leader in fastening solutions. The brand caters to the entire spread of the Indian market through its network of 14 branches across the country and 1 branch in Nepal.

Core Product Offering/ Categories:

YKK offers variety of zippers, snaps and buttons.

Target Customers:

The brand caters to garment exporters, domestic customers, export buyers, domestic brands, buying agents and importers.

Brand USP:

The brand's USP lies in its high quality products and new developments like customized rubber/ die casted pullers.

Brand's Mission:

YKK works with an aim to serve better with a belief that, "No one prospers without rendering benefits to others".

BRAND UPDATES (INFORMATION AS ON 31ST DECEMBER 2016)

New Territory/ Region Added: Noida, Kanpur, Jaipur, Kochi, Ludhiana, Ahmedabad, Tirupur in India and Kathmandu in Nepal.

No. of Indian Cities Currently Present in: Pan India (YKK has 14 branches all across the country)

×



ZERO

Brand: **ZERO** | Company: **COTTON CASUALS (INDIA) PVT. LTD.**
Launch Year: **1990**

Launched in 1990 by Cotton Casuals (India) Pvt. Ltd., Zero is a kids wear brand that specialises in infant wear. Today, it is a leading player in the kids wear section and offers a unique range of products in 100 percent cotton fabric. Soft fabric, soft colours, patterns, cute designs, all together make Zero products comfortable to wear and soothing for a baby.

Core Product Offering/ Categories:

The brand offers anything and everything in garments for babies.

Target Consumers:

The brand's primary customers are infants (0- 24 months). It's secondary customers are parents, family members and friends, who do the shopping for the young ones.

Brand USP:

Made from 100 percent cotton, the brand uses quality yarn for its products. It also follows stringent measures for knitting, processing, designing, stitching, etc. for its discerning customers and make it available at a reasonable price.

Future Expansion Plans:

Zero is planning for major expansion in order to increase its production.

Towns or Cities Targeted in the Next Couple of Years:

The brand has plans to target the markets of Bihar and Odisha.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 3,000

Major LFS/ MBOs/ Departmental Stores Present in: The brand is present in large format stores like Big Bazaar, Pantaloons, etc.

Major E-commerce Portals Present in: Zero retails through e-commerce websites like Flipkart, Babyoye, Snapdeal, Firstcry, etc.

No. of Indian Cities Currently Present in: 100

New Territory/ Region Added: Nagaland and Manipur

×





Brand: **ZOLA** | Company: **PRAGATI FASHIONS PVT. LTD.**
Launch Year: **1991** | Brand Website: **WWW.ZOLA.IN**

Zola is an Indian fashion brand that represents style and quality since 1991. When they started, there were hardly any brands catering to the category they were into. Zola set its products apart from the other non-branded products available in the market and soon became a renowned name in the retail circle.

Core Product Offering/ Categories:

The brand offers women's wear range like kurtis, skirts, midis, gowns, frocks, tops, tunics, jeans, capris, shorts, leggings, jeggings, salwar-suits, etc., for ladies and girls.

Target Consumers:

Zola caters to the age group from 2 years onwards upto 50 years old women.

Brand USP:

Offering trendy and quality products at affordable price is their USP for years.

Future Expansion Plans:

Zola is working on a plan to venture into international markets.

BRAND UPDATES (information as on 31st December 2016)

Total no. of MBOs: 6,000+

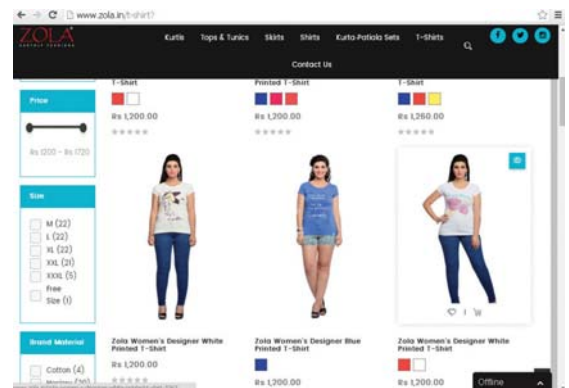
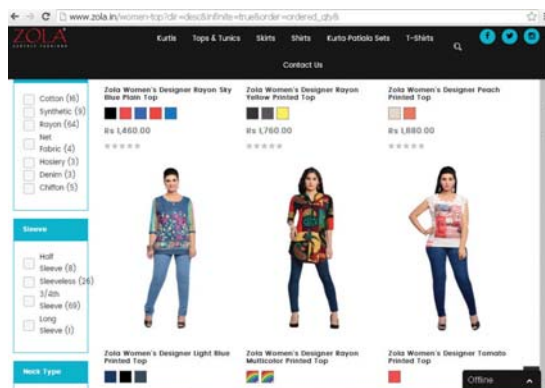
Major LFS/ MBOs/ Departmental Stores Present in: Zola is retailed through major stores like Sheetal, Pothy's, The Chennai Silks, Saravanas, Seemati, Parthas, J C Brothers, R S Retails, Kalyan Silks, Kalyan Sarees, etc.

Major E-commerce Portals Present in: The brand has presence in Myntra, Jabong, Limeroad, Amazon, Flipkart, Paytm, Snapdeal, Voonik, Shopclues, Craftvilla and Tata Cliq.

No. of Indian Cities Currently Present in: Pan India



×



ZORRO

Brand: **ZORRO** | Company: **DFRNT CLOTHING PVT. LTD.**
Launch Year: **1975** | Brand Website: **WWW.ZORRO.CO.IN**

Started three decades ago Zorro has established itself as a preferred menswear brand in the mid-segment lifestyle category offering young urban fashion at value-for-money prices. The brand has strongly entrenched itself in the South India markets as well as the Middle East countries.

Core Product Offering/ Categories:

Zorro offers men's formal wear, casual wear and ethnic wear range.

Target Consumers:

The brand targets urban and semi-urban men in the age group of 25 to 55 years.

Brand USP:

Contemporary cuts and trendy styles at value-for-money pricing is the USP of the brand.

Brand's Mission:

Zorro's mission is to be a trendy and valued brand in the mid-segment lifestyle category.

Future Expansion Plans:

The brand has plans to explore markets beyond South India.

Towns or Cities Targeted in the Next Couple of Years:

The brand is targeting and has plans to enter the markets of tier-II cities in North and West India.

BRAND UPDATES (information as on 31st December 2016)

Total no. of EBOs: 1

Total no. of MBOs: 500+

Major LFS/ MBOs/ Departmental Stores Present in:

The brand is being retailed through Kalyan Silks, Parthas and Kans Wedding in India; and Al Manama Group (UAE), Regal Group (Saudi Arabia), Mall 360 (Kuwait) and many more abroad.

No. of Indian Cities Currently Present in: 100+

New Territory/ Region Added: Middle East Countries and South America



KAZO

Brand: **KAZO** | Company: **KAZO FASHION PVT LTD**
 Launch Year: **2007** | Brand website **WWW.KAZO.COM**

KAZO is a young international brand that has made its way into the centre of the fashion industry within a short span of time. KAZO launched its first showroom in Delhi on 07.07.07 under the directorship of Deepak Aggarwal. The idea of KAZO came into being with the aim of amalgamating international trends and fashion at a value that would be affordable for the woman of today.

Core Product Offering:

Women's western wear — tops, dresses, bottoms, outerwear, bags and accessories.

Target Consumers:

20-34 years old female, from section A, who is fashion conscious, trendy, a global shopper, and is active on the internet.

Brand USP:

Affordable high street fashion brand with an acute focus on dressing up the women of today.

Brand Mantra:

To become the most admirable women western wear brand in the country

Future expansion plans:

The brand aims to expand pan India very soon and increase its number of EBOs and SISs to 50 and 150 respectively.

Towns or cities targeted in the next couple of years:

The brand is targeting Chennai, Hyderabad and a few more cities in UP.

BRAND UPDATES

Total no of EBOs: 32

Total no of Shop-in-Shops: 100

Total space covered by EBOs & SISs (in sq.ft.): 41,288 sq. ft

Major LFS, MBOs/ Departmental stores present in:

Central, Kapsons, All that Jazz, Sohumi, etc.

Major E-commerce portals present in: Amazon, Jabong, Myntra, Nnnow, Snapdeal, Flipkart, Limeroad, and Paytm.

Number of Indian cities currently present in: 28

New territory/ Region added: UP, East & North East

Brand turnover (estimated for FY 2015-16): ₹70 crores.

Turnover CAGR over last 3 years for FY '16 : 40%

Growth in the first 3 quarters of FY '17, over the same quarters in FY '16?: 30%



Delhi the Fashion Capital of India





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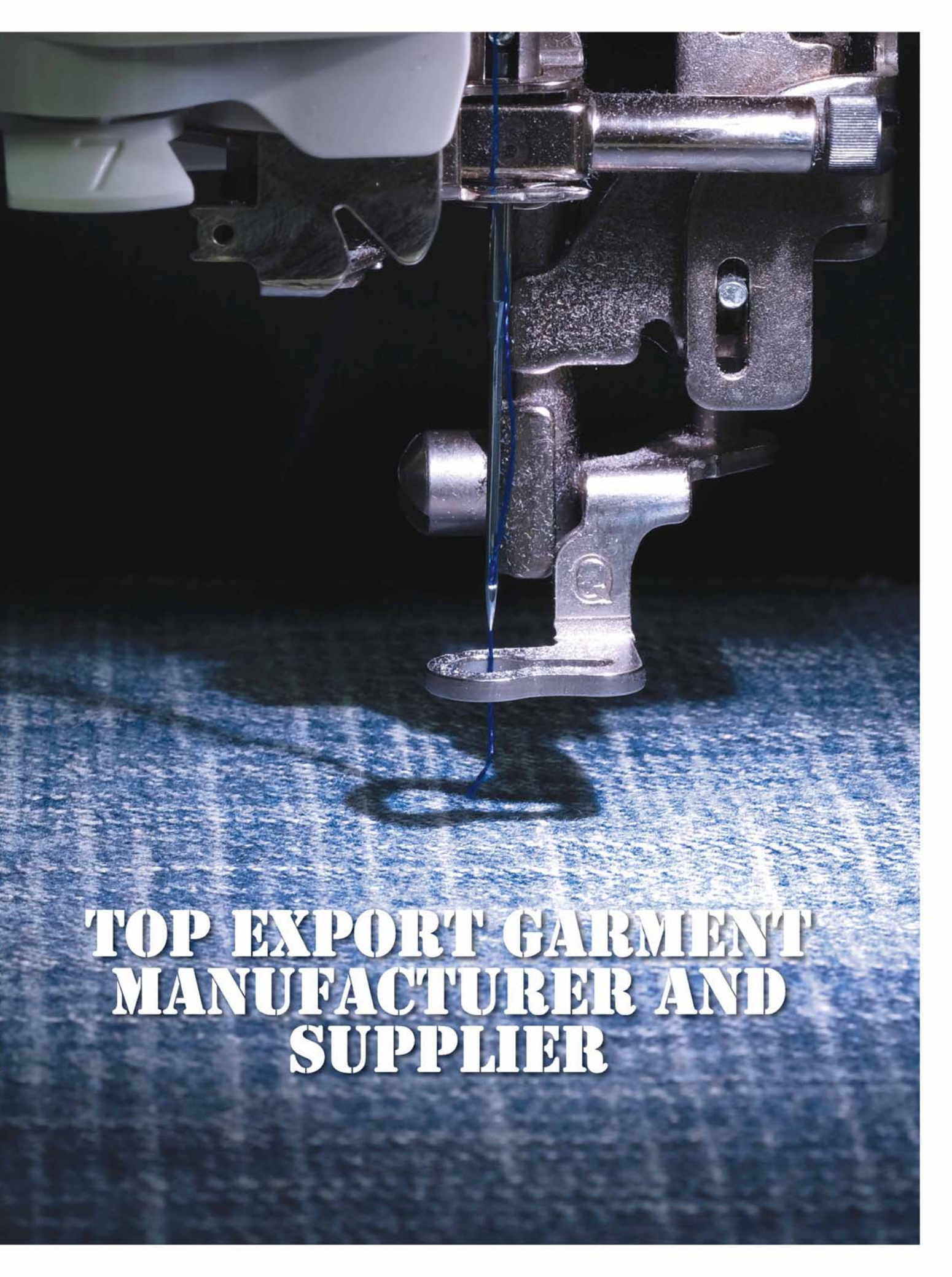
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Delhi

The Fashion Capital of India

The Delhi NCR has long been considered a key fashion centre of India, mostly because of the affluence and sense of flair of its denizens, who have always enjoyed a reputation for their obsession for looking good. But now, the animated national capital has officially bagged the crown of the numero uno fashion city in India.

Shivam Gautam with inputs from Knight Frank.

The Global Language Monitor in its “The Top Global Fashion Capital Ranking” has captured the rise of Delhi to the top of the fashion charts in India. In fact, if we average the last two rankings for 2014 and 2015, Delhi will stand at 31st rank while Mumbai lags quite a bit behind at 41st. The ranking is based upon GLM’s Narrative Tracking technology which analyses the internet, blogosphere, the top 2,50,000 print and electronic news media, as well as new social media sources such as Twitter as they emerge. The words, phrases and concepts are tracked in relation to their frequency, contextual usage and appearance in global media outlets.

While Mumbai was perceived as the fashion leader due to the existence of Bollywood, it is the Delhi NCR’s business hustle and gargantuan fashion appetite that has taken over. It is also clearly emerging that while Mumbai has a subtler style to fashion, Delhi consumers are more adaptive and experimenting when it comes to showcasing fashion.



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The region's hunger for fashion and retail advantages can clearly be grasped by the mere fact that most international brands chose Delhi as their port of arrival in India. And most also find this route successful. In fact, H&M clocked over ₹1.75 crores sales on the day of its premier at Select City Walk Mall, New Delhi. In the last few years, retail space has further grown 103 percent and reached over 3.6 million sq.ft. in the Delhi NCR.

Comparatively, Delhi is larger than the other Indian metros, and is inhabited by a profusion of people from diverse backgrounds who tend to mingle into the city scape. Also, as the political and educational hub of the nation, it has ridden the diversity in its young demographics, as well as its two-season advantage to embellish the city with unique fashion sensibilities and demand.

Delhi is home to not only the premier fashion institutes of the country but also a venerable army of bigwig designers. So, today, with six fashion weeks every year, the largest legion of leading fashion designers and a definite obsession for looking good, it is Delhi, that has emerged as the undisputed fashion capital of India.

BOTH INTERNATIONAL AND INDIAN BRANDS BET BIG ON DELHI NCR

Fashion consciousness, higher spending power or better retail spaces — whatever be the reason, when it comes to making a foray in India, Delhi seems to be the chart topper for brands. As per a report on the organised retail market in India in 2015, nearly 85 percent of the international brands that launched operations in India in the last 5 years preferred Delhi as their entry option and not Mumbai or Bengaluru, or any other metro. A look at leading fashions brands like H&M, Zara and Gap, who all chose Delhi over any other part of the country to debut in India, establishes this fact clearly. According to the Business Insider, Delhi excels in the priority list of not only the new players that are looking to enter India but also for established players like Arvind Lifestyle Brands that sells premium brands such as Calvin Klein, US Polo and Nautica products in India, the Delhi outlets earn 20 percent more revenue than its counterpart elsewhere in the country.

According to real-estate advisory firm JLL India, as of 2015, the Delhi NCR region had 15 successful malls as compared to Mumbai, which had 10 successful malls in its kitty. "The availability of quality space in premium locations in the NCR is more," said Pankaj Renjhen, MD for retail services at consultancy firm JLL India in the report. He had further shared that

MAJOR INTERNATIONAL BRANDS THAT DEBUTED IN INDIA THROUGH DELHI NCR

Brand	Year
Zara	2010
H&M	2015
Gap	2015
Aeropostale	2015
Juicy Couture	2015
Hunkemoller	2015
Next Gen Central Store	2016
Long Champ	2016
Kate Spade	2016
Iconic	2016
Nau!	2015
Poney	2016
Massimo Dutti	2016
DC Shoes	2016
Heat Wave	2016
G Star Raw	2016
BCB Generation	2016
Armani Exchange	2016
Cath Kidston	2016
Kiko Milano	2016



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brands usually want to launch from a top market. That iconic market in Mumbai is South Mumbai, which only has one good mall. In comparison, NCR's most happening zone—South Delhi has 5 good, performing malls. A clear advantage. When comparing with the Bengaluru market, brands feel that in terms of size, the Bengaluru market is shallower than Delhi and does not provide sizeable opportunity. The markets of Kolkata and Chennai are considered by brands as a bit regional.

The fashion market in the NCR region not only cater to the consumers in the city but attract tourists and buyers from its affluent neighbours like Jaipur, Lucknow, Chandigarh, Ludhiana, among others.

EVERY SEASON IS A GOOD REASON

Another interesting reason for brands preferring Delhi is that it is a multiple-season city offering strong summer, festive and winter seasons. “Delhi records higher productivity for any fashion stores as Delhi is an all-season market, where you not only sell summer but also winter clothing,” J Suresh, CEO of Arvind Brands was quoted telling the Economic Times. Being a tropical country, Indian consumers also have a

natural affinity towards winters and have traditionally been enthusiastic about winter fashion. Evidently, it becomes a more bankable market for fashion brands. In contrast, most parts of the country south of Gujarat enjoy only two fashion seasons - Summer and Festive. The season that starts by November and lasts till February in the Delhi NCR witnesses unsurpassed fervor among consumers. Clubbed with the festive and the wedding season, the Autumn/ Winter season is of outmost importance to retailers. As per Arpit Bindal, Director of the renowned Delhi based retailer Bindal Apparels Pvt. Ltd., the season lasts till February especially so in the Delhi NCR. “After the festivities of Diwali and the wedding season comes the winter season which continues till February. These are the three important seasons when the sales can really pick up, and the shops have to retail at the right time and the right way,” he said.

A HUB FOR GREAT FASHION CONSCIOUSNESS

The year 1986 witnessed the establishment of the celebrated National Institute of Fashion Technology in Delhi, that helped drive the city's transformation from a manufacturing and exporting center to a center for

creativity and design. Today, the capital region is synonymous as the epicenter of fashion learning in the country with about 25 plus recognized institutes. Delhi NCR is either home or alma mater to a large majority of the bigwig fashion creators of the country --Ritu Beri, Rohit Bal, Tarun Tahiliani, JJ Valaya, Raghavendra Rathore, Suneet Varma, Rina Dhaka, Malini Ramani, Varun Bahl, Rajesh Pratap Singh, Payal Pratap, Ashish Soni, Manish Arora, Gitanjali Kashyap and Namrata Joshipura, and Sabyasachi Mukherjee, and so many others. A significant thrust to the fashion business, the Fashion Design Council of India (FDCI), a non-profit independent association of fashion designers was formed in the year 1998. With the capital teeming with fashion innovators, it had its first India Fashion Week, the Lakme India Fashion Week (LIFW) in 2000 whereas Mumbai's first event of this stature followed much later. In fact, leading fashion designer and mentor Narendra Kumar feels that there are more buyers at Delhi fashion weeks, and it has a more international feel.

In the following pages, we look at the growth drivers and current size and future potential of the Delhi NCR fashion market.



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OVERVIEW OF THE DELHI NCR RETAIL MARKET

MODERN RETAIL & ITS POTENTIAL

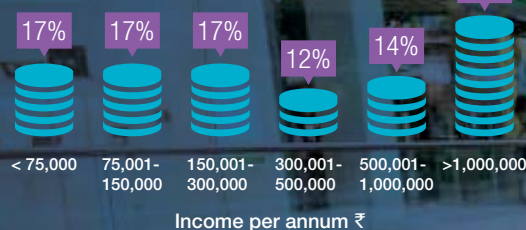
NCR is one of the major retail hubs in the country. The market's prominence emerges from its diversity in demography and lifestyle, which has had a huge impact on shaping its retail business. NCR's growth was fuelled majorly by the growth in the service industry, which opened up vast job opportunities in the region, leading to huge immigration from its neighbouring states. As published in the report named **Think India Think Retail - 2016** by **Knight Frank**, among the top three cities (Mumbai and Bengaluru being the other two), Delhi NCR has experienced the highest decadal growth of 47 percentage between 2001 and 2011, and is estimated to have a population of 24 million as of 2015. A substantial 48 percentage of the city's population comprises households earning above ₹3,00,000 per annum, therefore an estimated 11.4 million people make the maximum contribution to NCR's modern retail market, the report revealed.

Propelled by surging household incomes and other socioeconomic factors, consumer spending is increasing at a faster pace. While, NCR is a close second to Mumbai in the total retail expenditure, and together both cities account for more than 59 percentage of the retail consumption pie of the top seven cities, however, NCR clearly surpasses both Mumbai and Bengaluru in total modern retail expenditure.

According to the same Knight Frank report, on which the figures of this entire article are based on, NCR's modern retail market size stood at ₹269 billion in 2015, which means that of the total ₹801 billion modern retail expenditure of the top seven cities, an approximate 34 percentage share is taken up by Delhi NCR alone.

NCR's total population stands at 24 mn as of 2015 (E)

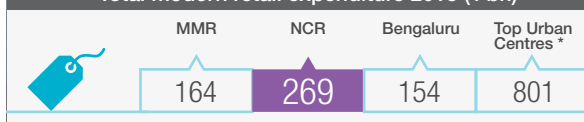
% share of total population



48% of NCR's population earns more than ₹300,000 per annum. 11.4 mn people have made the maximum contribution to NCR's modern retail market

Source: Knight Frank Research, Indicus Analytics

Total modern retail expenditure 2015 (₹ bn)



Fashion Apparel Category Analysis

MARKET SIZE AND MODERN RETAIL POTENTIAL ACROSS ZONES

ETHNIC											
2015	Central Delhi	East Delhi	North Delhi	South Delhi	West Delhi	Faridabad	Ghaziabad	Greater Noida	Gurgaon	Noida	NCR
Retail Market Size	3	7	10	10	7	3	2	0.3	4	1	48
Modern Retail Market Size	11.1	1	4.9	15.1	4.8	0.8	1.7	0.1	4	1.2	45.1
Modern Retail Potential	****	6.1	5.5	****	1.8	2.4	0.5	0.2	****	0	2.6
NON-ETHNIC											
Retail Market size	4.4	11.5	16.9	15.5	10.9	5.3	3.7	0.6	6.6	2.1	77.9
Modern Retail Market Size	12.1	1.5	6.1	16.4	6.3	2.1	3.6	0.6	10	2.9	61.9
Modern Retail Potential	****	10	10.8	****	4.5	3.1	0.05	0.03	****	****	15.9
Overall Apparel Modern Retail Potential	****	16.1	16.3	****	6.4	5.6	0.6	0.2	****	****	18.6

Source: Knight Frank Research, Indicus Analytics, NSSO

**** implies that the modern retail space in these zones has been generating more business than the total retail spending of the catchment population in this product category

Defining modern retail has always been ambiguous, and, for the purpose of this study, all stores in a mall have been considered as modern retail constituents. In the case of retail stores on shopping streets, stores that provide a purchase invoice and have a basic structure and air conditioning have been considered as modern retail.

However, to understand the magnitude of the potential let us understand that the total consumption expenditure (which includes rent, transportation, utilities, education, medical and insurance) in NCR stands at ₹3,494 billion, of which ₹1,047 billion comprises the total retail expenditure. Within this, the market size of modern retail stands at ₹269 billion presently. Since the penetration of modern retail in NCR is substantially low (26 percentage) as compared to many cities in emerging economies, NCR has a huge potential to increase its share of modern retail in the total retail market of the city. As of 2015, the potential of modern retail in NCR stood at ₹779 billion.

About 65 percent of the expenditure on modern retail is contributed by fashion, F&B, entertainment and daily needs. Of the total modern retail size of ₹269 billion, the share of fashion retail was ₹126 billion in 2015, and of this, ₹107 billion was modern fashion retail. Thus, fashion is one of the most modernized sectors of retail and is expected to reap the maximum rewards of future growth.

Going ahead, between 2015 and 2019, the modern retail market size in NCR is expected to grow at a CAGR of 24 percentage, from ₹269 billion in 2015 to more than ₹630 billion in 2019. The growth in the macroeconomic parameters, a fast-growing middle class with increasing disposable income and a population that is steadily moving into the peripheral markets of Gurugram, Noida, Ghaziabad and Faridabad are expected to enhance the share of NCR's modern retail.

Approximately, 59 percentage of the modern retail stores in NCR are on shopping streets and the rest, in malls. However, due to restrictions on high

streets, the space occupied by modern retail stores in malls is much more. The South and West Delhi zones show a better balance between shopping streets and malls. Around 48-49 percentage of modern retail space in South and West Delhi is concentrated in shopping streets like South Extension, Greater Kailash, Shahpur Jat, Sarojini Nagar Market, Defence Colony, Hauz Khas Village, Rajouri Garden Market and Janakpuri.

The service industry and growth in income have attracted brands and retailers that have set up modern stores in the region, which explains the high penetration of modern retail in this product category. In addition to its own population base, Central Delhi, which mainly comprises Connaught Place, Janpath, Chandni Chowk and Karol Bagh, cater to consumers from NCR's other zones in terms of fashion purchase. Fashion retail dominates 48 percent of Central Delhi's modern retail space — the highest among all the zones



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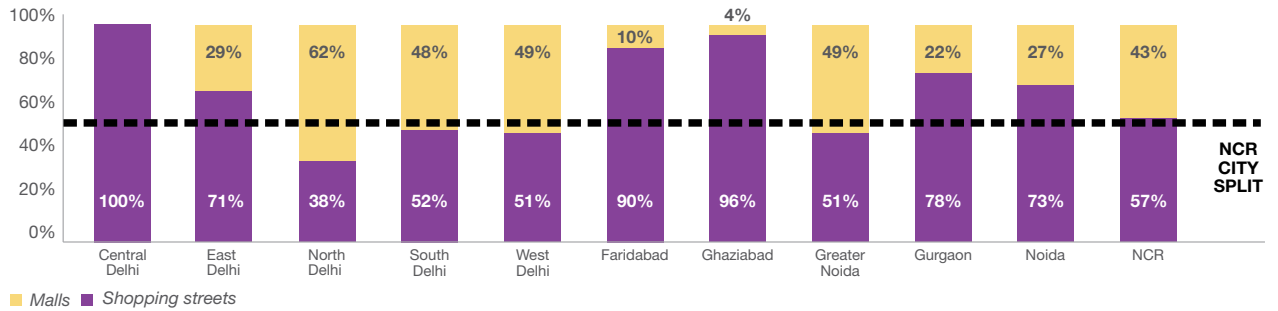
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SPLIT OF OCCUPIED MODERN RETAIL SPACE INTO MALLS AND SHOPPING STREETS



MODERN RETAIL SPACE SCENARIO IN MALLS



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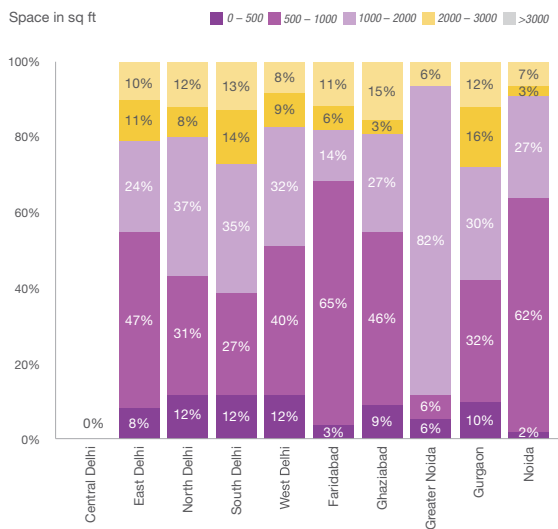
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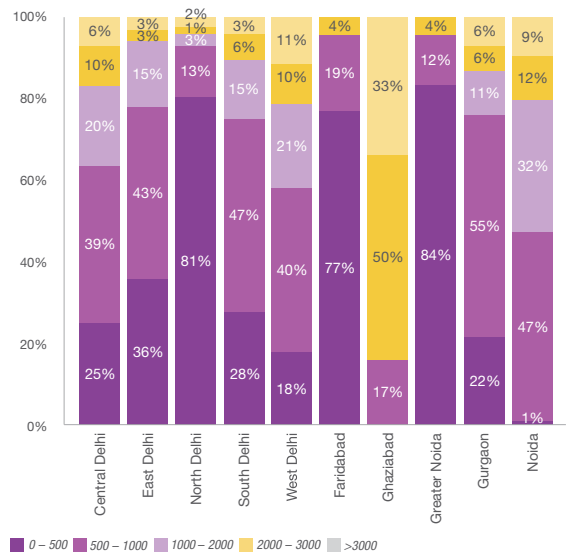
Distribution Redefined

SIZE-WISE SPLIT OF OCCUPIED MODERN RETAIL STORES IN MALLS



Note: Central Delhi is not represented in the chart above, as there are no major malls in this zone

SIZE-WISE SPLIT OF OCCUPIED MODERN RETAIL STORES IN SHOPPING STREETS



Note: Central Delhi is not represented in the chart above, as there are no major shopping streets in this zone

in NCR, followed by North Delhi at 40 percent, South Delhi at 31 percent, West Delhi at 23 percent and Noida at 22 percent. Gurugram ranks the lowest in the fashion category across all the zones, comprising only 17 percent of its total modern retail space. On the other hand, there is a high growth potential for the fashion category in North and East Delhi. Together, these zones have an annual potential of ₹32 billion. In general, the modern retail potential is higher in the non-ethnic category than the ethnic category.

MODERN RETAIL SPACE SCENARIO IN MALLS

NCR could be called the 'Mall Capital of India, as it houses 69 operational large malls across its six zones - Delhi, Gurugram, Noida, Ghaziabad and Faridabad. The agglomeration of NCR outshines other Indian cities in the available modern retail space per thousand of the area's population. The occupied mall space per thousand of its population in NCR stands at 601 sq.ft.

Gurugram outdoes the other regions of the NCR as well as other Indian cities, with 3,775 sq.ft of modern retail space per 1,000 population. Being a relatively

young city compared to other cities like Delhi, Mumbai and Hyderabad, most of Gurugram's retail is in the modern format, and a striking 78 percentage is concentrated in malls. The Millennium City, as Gurugram is called, also leads in the modern retail space for households earning more than ₹300,000 per year, closely followed by Central Delhi, Noida and South Delhi. The concept of mixed-use spaces has contributed to the ample modern retail space in Gurugram, and owing to the corporate character of the city, ground floor retail spaces in office buildings add to its modern retail footprint. North Delhi has the least occupied mall space per thousand of its population. This can be attributed to the fact that retail in this zone largely comprises traditional retail, with modern retail penetration only at 7 percentage of the ₹228 billion total retail expenditure in the zone. In Greater Noida, the per capita mall space per thousand of the population is also quite low. This can be explained by the fact that total modern retail expenditure in Greater Noida is very limited. From the ₹8 billion total retail expenditure, only ₹1 billion goes towards modern retail. Malls in Faridabad are concentrated on Mathura Road, and its occupied mall space is concentrated mainly in three malls.

SIZE-WISE SPLIT OF OCCUPIED MODERN RETAIL STORES IN MALLS

A prominent 68 percentage of the stores in NCR malls are in the range of 500-2,000 sq.ft, while only 10 percentage of the stores are less than 500 sq.ft in size. Size-wise split of occupied modern retail stores in shopping streets can be organic, like Khan Market, or planned, like Connaught Place, and their store sizes are smaller than those of malls. Markets like South Extension and Greater Kailash have buildings with fixed floor plates that are small in size. The retailer either takes up a single shop or combines two or more shops to create a store. This is evident from the fact that 75 percentage of the total stores in NCR's shopping streets are less than 1,000 sq.ft in size.

Stores that are larger than 3,000 sq.ft in size on the shopping streets of NCR are either stand-alone buildings or a combination of small stores for a single brand. Only 5 percentage of the stores on shopping streets in NCR are above 3,000 sq.ft in size.

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ZONE ANALYSIS

>>> CENTRAL DELHI

Status: Central Delhi does not have malls, but consists of shopping streets like Chandni Chowk, Connaught Place, Janpath, Khan Market and Karol Bagh. Apparel dominates 48 percent of Central Delhi's modern retail space - the highest among all the zones in Delhi/NCR.

This zone also has the most modern retail space for women's non-ethnic wear. Another striking feature of the zone is the dominance of local and national brand; while national brands dominate men's non-ethnic wear, both locals and national brands have a stronghold over the retail space in the women's non-ethnic wear category. Even in the fashion accessories category, National accessory brands like Esbeda, Hidesign and Da Milano occupy 77 percentage of the modern retail space in Central Delhi.

Projections: Growing annually at 22 percentage, spending on modern retail in Central Delhi is expected to increase from ₹30 billion in 2014 to ₹80 billion by 2019. By 2019, 74 percentage of the total retail spending will be on modern retail, comprising both brick and mortar, and E-tail, respectively. E-tail will form a major component of total retail spending in 2019, while the spending on brick and mortar retail is expected to decline gradually to 41 percentage from the current 52 percentage. But, since Central Delhi is an administrative zone, modern brick and mortar retail will continue to flourish on the shopping streets of Connaught Place, Khan Market and Karol Bagh. Apparel and F&B dominate Central Delhi's modern retail space currently and this is likely to continue over the next five years.

>>> EAST DELHI

Status: The actual available modern retail space in East Delhi is 169 sq.ft per 1,000 population, which increases significantly if the modern retail space of Ghaziabad is added to it. Since East Delhi's population shops in malls that adjoin both zones, such as East Delhi (EDM) Mall, Shipra Mall and Pacific Mall, the share of its modern retail space is significantly low across the product categories.

Projections: Currently, 94 percentage of East Delhi's retail spending is on non-modern retail, and this pattern is likely to continue in the next five year. At the same time, it shows the potential of modern retail in East Delhi. The East Delhi market is dominated by apparel and electronics.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



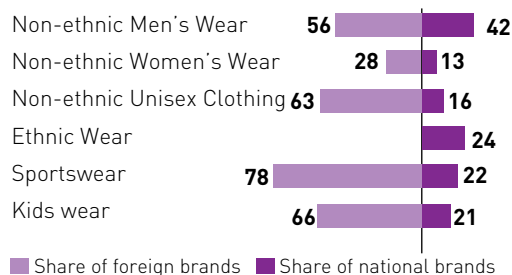
SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



>>> SOUTH DELHI

Status: South Delhi is one of the most important shopping zones of the entire Delhi NCR. Department stores here take up 168 sq.ft of the modern retail space per 1,000 population. These stores are concentrated in the mall format, with 79 percentage of them based in the malls of Saket and Vasant Kunj. Department store space in South Delhi is controlled by national brands, with Pantaloons, Westside and Shoppers Stop leading the pack. The modern retail distribution of ethnic wear stores in South Delhi indicates a preference for shopping streets, with 80 percentage of the stores located on streets like Shahpur Jat and Mehar Chand Market, which house a mix of designers. On the other hand, national designers targeting the luxury segment have conglomerated at DLF Emporio in Vasant Kunj. Modern retail space in the men's nonethnic wear category is represented equally by foreign and national brands in South Delhi. Unisex non-ethnic wear is dominated by foreign brands like United Colors of Benetton, Calvin Klein and Levi's.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



Projections: South Delhi's non-modern retail spending is much lower than other parts of Delhi, and this percentage is expected to go down even further to 57 percentage in 2019 from the current 66 percent. It is estimated that 43 percentage of South Delhi's retail spending will be on modern retail by 2019, increasing from the current share of 34 percent.

>>> WEST DELHI

Status: Department stores in West Delhi's modern retail space are fairly distributed across malls and shopping streets. The modern retail space distribution of ethnic wear is concentrated more on the shopping streets of Rajouri Garden Market in West Delhi. West Delhi has the highest percentage share of space taken up by foreign brand department stores like Marks & Spencer and Lifestyle, as compared to the other zones of NCR. Around 55 percentage of the non-ethnic unisex clothing space in West Delhi is dominated by foreign labels like United Colors of Benetton, Van Heusen and Levi's.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



Projections: About 22 percentage of West Delhi retail spending in 2014 is on modern retail, of which the majority is on brick and mortar formats. This pattern is likely to change moderately by 2019, with the share of modern retail spending increasing to 28 percentage. With its proximity to South Delhi, modern retail penetration in West Delhi is seen to increase over the next five years. Rajouri Garden will continue to dominate the modern retail of West Delhi, with more concentration on the women's ethnic wear and footwear categories.

>>> NORTH DELHI

Status: With very little space per 1,000 population, hypermarkets/ supermarkets are concentrated only in malls. Around 16 percentage of North Delhi's modern retail space is concentrated in department stores, of which 75 percentage are located on shopping streets. These include brands like Bindals, Stanmax, Pantaloons and C&M. National brand stores, such as Peter England, John Players and Raymond, dominate the men's non-ethnic wear space in North Delhi. Even the overall fashion segment is served by local brands.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



Projections: With an increase in retail spending from `196 billion to `414 billion in 2019, the share of modern retail spending only sees a marginal increase, from 7 percent in 2014 to 9 percent in 2019. It is to be noted that in the coming five years, non-modern retail will continue to dominate the North Delhi zone.



>>> GURUGRAM

Status: Gurugram ranks the highest among all the zones, with 3,775 sq.ft of modern retail space per 1,000 population. About 57 percent of the unisex non ethnic wear space in Gurugram is dominated by brands like United Colors of Benetton, Levi's, Van Heusen, Lee, Allen Solly and Wills lifestyle. Interestingly, large hypermarkets like More, Spencer's and Spar, etc, alone account for the 580 sq.ft of hypermarket space per 1,000 population in Gurugram.

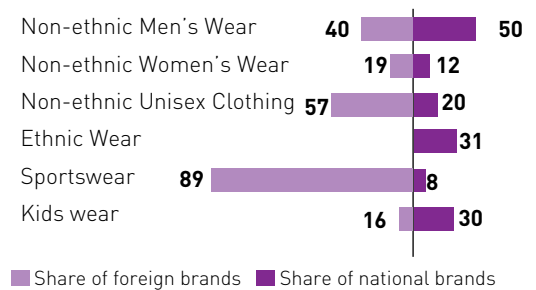
Projections: By the year 2019, 84 percentage of the total retail spending in Gurugram will be on modern retail, comprising both brick and mortar and e-tail formats - the highest among all the zones. Brick and mortar retail in Gurugram is projected to grow by 13 percentage annually, while the format will also see a decline in the overall retail spending pie. Currently, 60 percentage of Gurugram's retail spending is served by brick and mortar formats, and the share is expected to decrease to 48 percent by 2019.

>>> GHAZIABAD

Status: Ghaziabad has a negligible distribution of modern retail space on its shopping streets. Most of its retail is concentrated in its malls. Ghaziabad ranks second, after Gurugram, with 344 sq.ft of modern retail space per 1,000 population in the department store category. Ghaziabad's modern retail footprint across all the product categories is more than East Delhi. This is attributed to the distribution of retail space in Ghaziabad - where Ghaziabad has nine malls, East Delhi has only three. Local retailers cater to 85 percentage of the women's non-ethnic wear modern retail space in Ghaziabad, while only 4 percentage of the space is taken up by foreign labels. National brands like Globus, Fashion @ Big Bazaar, Pantaloons, Shoppers Stop and Reliance Trends dominate 42 percent of the department store space in Ghaziabad.

Projections: The total retail spending in Ghaziabad is projected to increase from ₹43 billion in 2014 to ₹96 billion in 2019, resulting in an annual growth rate of 18 percent. Although, the share of modern retail is expected to increase from 41 percentage in 2014 to 50 percentage in 2019, it is to be noted that though the share of modern retail registers a growth, the non-modern retail will take up 50 percentage of the total retail spending in this zone. Currently, department stores dominate the modern retail space of Ghaziabad, with limited scope for single-brand stores, and this trend is expected to be maintained in the next five years as well.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



>>> NOIDA

Status: Ranking third, after Gurugram and Ghaziabad, Noida has 230 sq.ft of department store space per 1,000 population. a total of 93 percent of the modern retail space in Noida is concentrated in malls. Unlike the other zones in NCR, the modern retail space occupied by the men's non-ethnic wear category is the highest here, with 89 sq.ft per 1,000 population. National brands like Cantabil, Octave, John Players, Cobb and Colour Plus dominate the men's non-ethnic wear category in Noida. Kids' wear in Noida is driven by national brands, which take up a significant 75 percent share of the overall kids wear space.

Projections: Growing at 23 percent, modern retail spending in Noida is projected to increase from ₹13 billion in 2014 to ₹37 billion by 2019. In line with the current retail scenario, retail spending in the brick and mortar format is seen to decline from 48 percent in 2014 to 38 percent in 2019.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



>>> FARIDABAD

Status: The modern retail space in Faridabad is the lowest in the Delhi NCR region. Faridabad is seen as an industrial hub, with many small scale industries and auto showrooms. Owing to this character, this zone does not have defined or continuous stretches of shopping streets, and most of its modern retail is concentrated in malls. Currently, all the malls in this zone are located along Mathura Road, and due to the lack of infrastructure and the on-going construction, vacancy levels in Faridabad have been increasing. Faridabad has a negligible presence of foreign brands in the women's nonethnic wear category, while 8 percentage of this category's space is taken up by national brands like Peter England, John Players, Mufti and Cantabil.

Projections: The total retail spending in Faridabad is projected to increase from ₹61 billion in 2014 to ₹129 billion in 2019. Unlike other zones in NCR, the share of modern retail in Faridabad will increase to just 15 percentage by the end of 2019, and non-modern retail will continue to dominate the retail market in this zone over the next five years.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



>>> GREATER NOIDA

Status: The available square feet for department stores is the lowest in greater Noida, at only 16 sq.ft per 1,000 population. The available square feet for department stores is the lowest in Greater Noida, at only 16 sq.ft per 1,000 population. Greater Noida is dominated by local brand stores across the product categories. The men's non-ethnic wear category is distributed across shopping streets and malls, while women's non-ethnic wear is concentrated only in malls. National brand stores with men's nonethnic wear take up 65 percentage of the market space, while local brand stores occupy the remaining 35 percent. The sportswear category is dominated entirely by foreign brands in this zone. Kids' wear and accessories, have a negligible presence in Greater Noida.

Projections: Growing annually at a healthy 20 percentage, the total retail spending in Greater Noida is projected to increase from ₹7 billion in 2014 to ₹17 billion in 2019. Greater Noida is still in the development stage, with many under-construction and undelivered residential projects. While the zones' basic retail needs are met by the local sector retail, most of its residential catchment is dependent on the Noida market for variety and options across product categories. With only a few upcoming retail projects, the next five years will not bring any significant change in the modern retail landscape of this zone.

SHARE OF FOREIGN AND NATIONAL BRAND STORES IN THE OVERALL MODERN RETAIL SPACE



*Note: Balance percentage in all the product categories denotes the share of regional and local brand stores



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NEXT ISSUE:



kidswear

special issue



Perhaps the least evolved and most challenging sector of the apparel business is kidswear. Kidswear in India is now a huge market. It is also rife with immense opportunities. It is not just consumers in top metros who are willing to splurge on kidswear, tier-II and III have also become big markets for branded clothes for children.

The **February issue of IMAGES Business of Fashion is a Kidswear Special.** In addition to **mapping** and **sizing** the segment, we highlight the **biggest opportunities** in this potential market. The issue will also answer a very relevant question—What is so demanding about creating a kidswear brand in India?

The special **Sportswear International Section** will present the best in style, merchandising and retail concepts from **across the world.**

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HIGHLIGHTS:

- Kidswear market in India – Size, Segments and Trends.
- Challenges in creating the great Kidswear Brands.
- In-depth interviews with kids wear retailers, distributors and brands.
- Kids luxury market in India.



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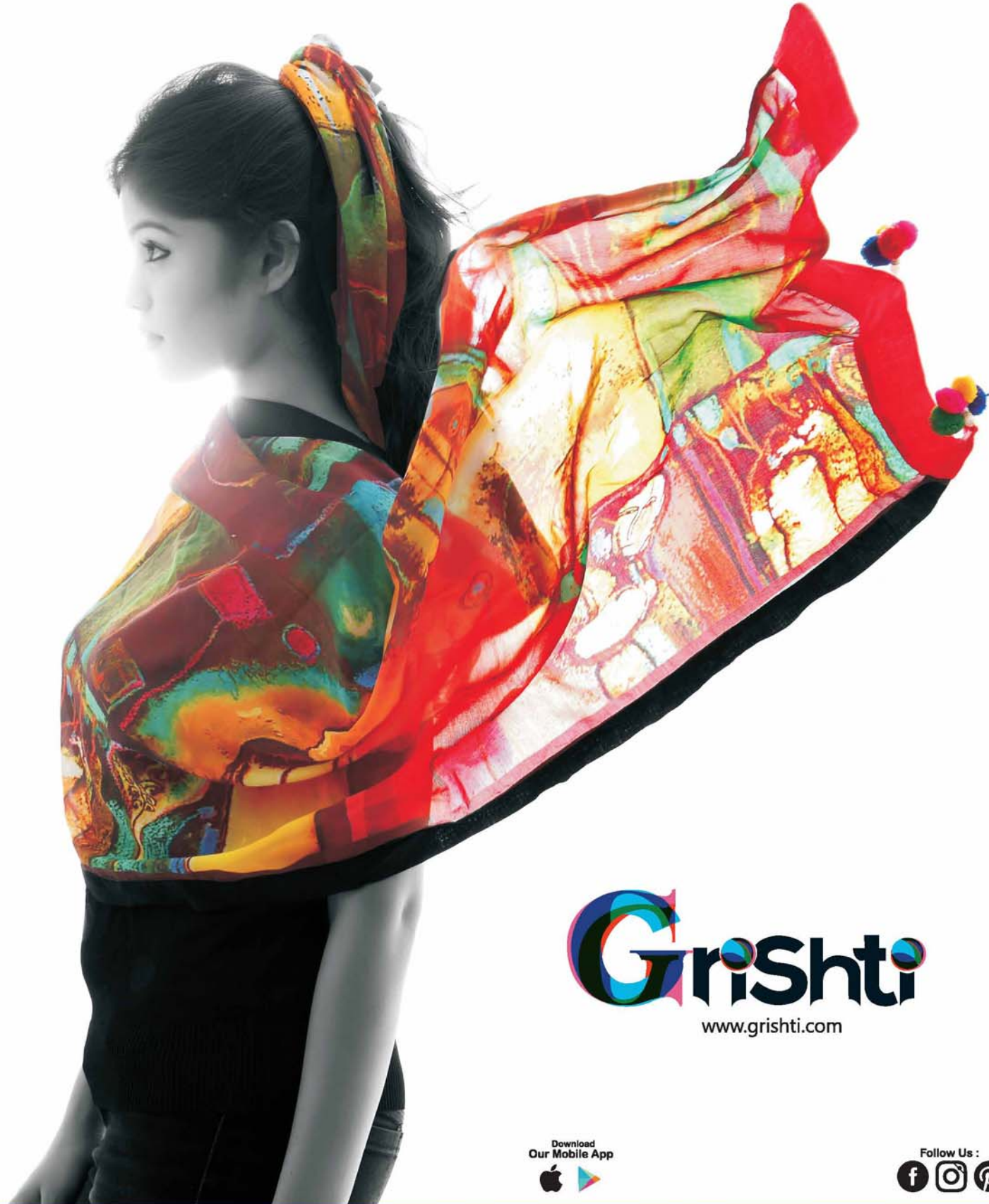
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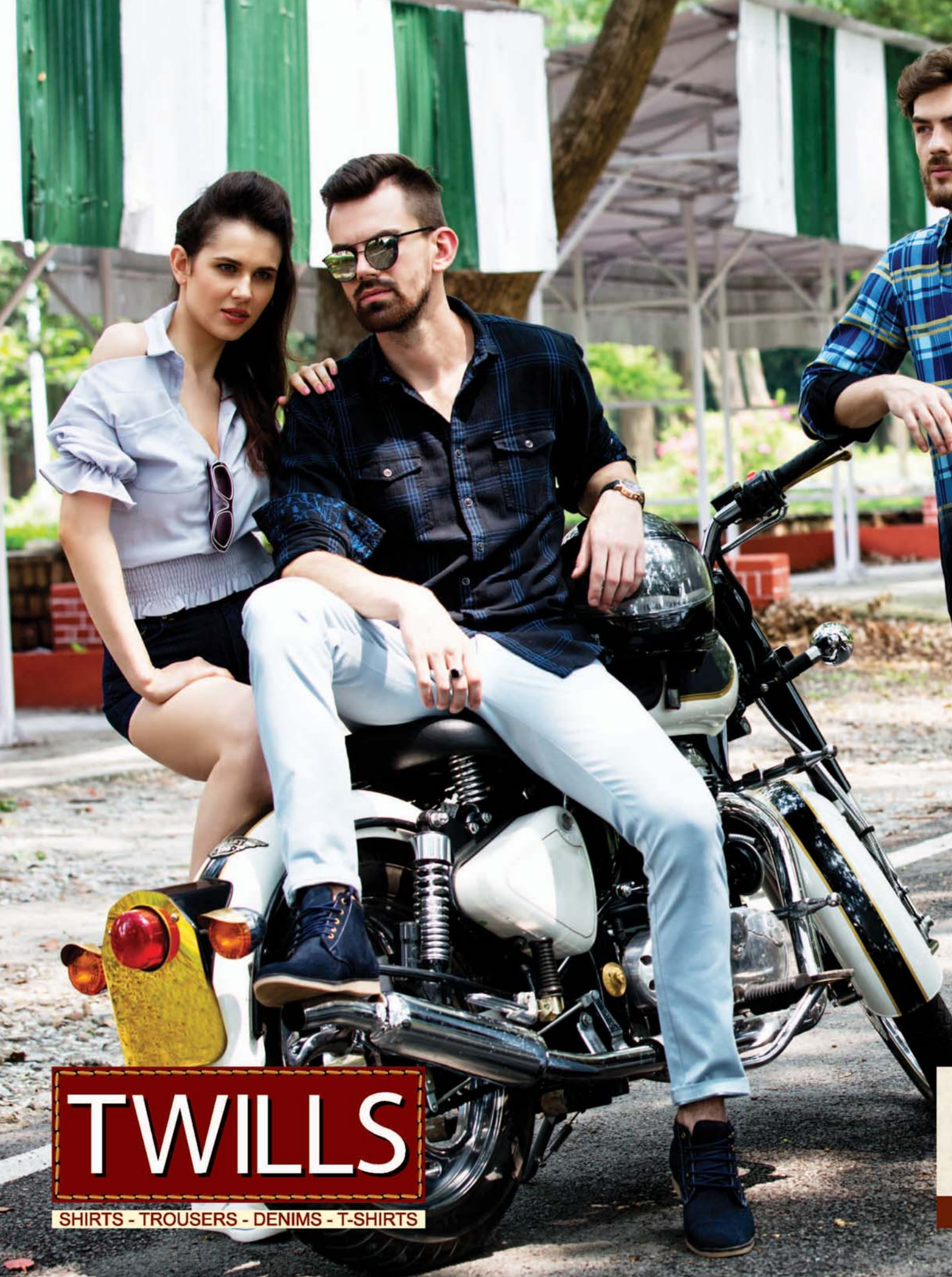
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