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Issue No.

BUSINESS OF FASHION

February 2017

Volume XVIII // No. 2 // ₹ 100
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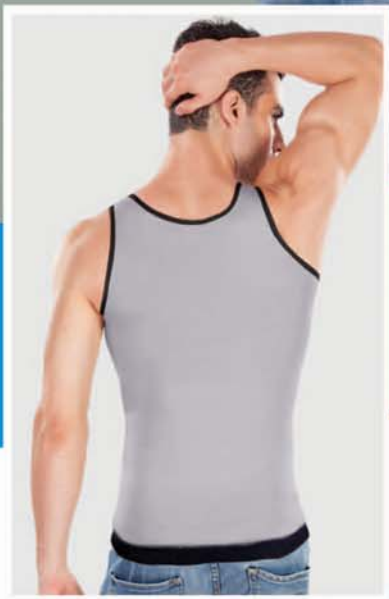
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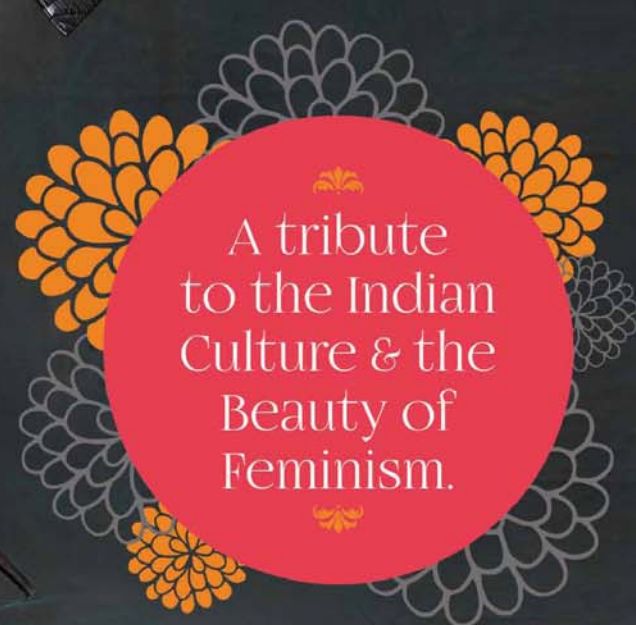
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Dear Friends,

If the likes of Quentin Tarantino were fashion manufacturers instead of cinematic extraordinaires, I bet their preferred domain of choice would have been kidswear; because this is where the action is in India. And while the sector, as within the organized market, was almost non-existent till a few years, it now has embossed itself as the most propitious segment of the Indian fashion industry with dedicated trade meets and fashion weeks and shows to its name.

We all knew that it was inevitable, but if you're wondering when this transition from docile to demanding really happened, it is now amply clear that as financial stability and purchasing power of modern parents grew in the last few years, an inevitable shift from need based to aspirational fashion manifested resulting in a boost hitherto unseen in the Indian kidswear industry. Parents now exhibit considerable brand awareness and inclination towards high quality apparel products for their kids. The kids too have emerged as a fashion conscious, opinionated new independent buyer group altogether. The young generation is no more like their erstwhile peers, they are righteously more demanding and they will no longer take fuddy-duddy outfits or worn out hand-me-downs from elder siblings.

As our research shows, one of the fastest growing segments in its home turf, the Indian kidswear market was worth ₹59,520 crores in 2015 and accounted for 20 percent of the total apparel market of the country. Industry sentinels expect significant future growth and even project predictions of it surpassing men's wear and women's wear in the near future by growing at a CAGR of 10.8 percent to reach ₹1,65,120 crores in 2025. With such

immense market potential, a host of players, both home grown and international, have sprung up to cash in on this gold rush. While domestic brands like Toffee House, Ruff, Bambiola, 612 League, Toons, etc., are aggressively exerting themselves to mark their territories, the segment witnessed the advent of quite a few international brands in the recent past including, Pepe, Claesens, Reebok, Puma, Benetton, etc.; and retailers like Marks & Spencer, Zara, H&M, are also hosting dedicated sections. etc.

Recently global high-end bigwigs like Gucci, Armani, Hugo Boss, Karl Lagerfeld, Carrement Beau Fendi Kids, Versace, D&G and Paul Smith Junior have stepped in to test the Indian waters. This also is a clear indication of the potential of luxury and designer segment in the Indian kidswear market. Our exclusive report featuring veterans Ritu Beri, Archana Kochhar, Jattinn Kochhar and a slew of other designers, perfectly counts the pulse of this segment. In addition, the issue features exclusives on other emerging fragments of this market — kids' denim wear and organic kidswear. Plus, lots more in this issue that I hope you find worthwhile reading.

And finally, let me also take this opportunity to invite you to this year's edition of the India Fashion Forum which will be held at the Renaissance, Mumbai on the 12th and 13th of April 2017. Also, IIF 2017 will have an additional day on 11th April exclusively for fashion influencers. Look forward to meeting all of you there.

Thank you!



Amitabh Taneja

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LETTERS TO THE EDITOR

The “Brands in India” issue was quite enriching. Once again, the Images BoF January issue has covered a set of deserving brands from the fashion and retail industry.

-Arun Trivedi, Businessman, Mumbai

The Images BoF January 2017 issue made for an interesting read. The issue was well put together with brand profiles from the various fashion players from apparel industry. I am looking forward to more of the same.

-Sanifer Dias, Marketing Professional, Mumbai

Once again, the Images BoF January issue has outdone itself and has covered a set of deserving brands from the fashion and retail industry. I would suggest that you should have more small time players, who are to break into the market.

-Rajnish Singh, Businessman, Chennai

The guest article on “Women & Fashion Denims” under My Thoughts section in the January issue was researched well. The article highlighted an overall viewpoint of women consumers controlling denim consumer spending. I look forward to more such stories in the future.

-Poonam Shukla, Fashion Designer, Indore

The Images BoF always carry interesting stories. The USP of the issues are definitely its news-based articles, which are informative and well researched. They are covered from the retail perspective and the various brands preferred by consumers.

-Anupama Sinha, Retailer, New Delhi

Corrigendum

Readers are requested to note the errors in January issue of IMAGES Business of Fashion (Volume XVIII | Issue No. 1). Page 140: Hard Currency's website was incorrectly printed as www.hardcurrency.com instead of www.hardcurrency.in. Page 200: Skechers' turnover CAGR over the last 3-years for FY'16 was mentioned as 11.5 percent whereas in actual, it is a 115 percent. Also, growth in last three quarters of FY'17 over the same quarter in FY'16 was misprinted as 10.5 percent instead of 105 percent. The errors are regretted.

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LAUNCH

Monte Bianco: The New Name of Being Not-So-Formal

Clothing Culture Ltd., the T&A division of the ₹4,500 crores Balkrishna Group, which is also known for its brand Sin Denim, has launched yet another brand called Monte Bianco this February. The launch featured actor Dino Morea.

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INITIATIVE

TOFFYHOUSE'S CREATIVE DISPLAY "WORLD OF WONDERS"

ToffyHouse left its visitors awestruck and amazed at CMAI's National Garment Fair with its seven different collections under the theme, "World of Wonders".

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Fashion Business



CAMPAIGN

Fendi's Spring/Summer 2017 Advertising Campaign

Fendi's Spring/Summer 2017 advertising campaign, called 'Other rooms-Other voices', featured the top sought after models of the moment.

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TIE-UPS

SoFT, Pune joins hands with Accademia De Costume Di Moda, Rome

Pune's School of Fashion Technology signed an MOU on February 17, 2017 with the prestigious Accademia de Costume e di Moda Rome for a series of joint initiatives in India.

Pg No. 48



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AHUJASONS

Collection:

Offering an array of luxurious fabric bases like pashmina and kashmere, the exclusive collection weaves a magical spell showcasing multi-hued beautiful designs that feature graceful elegance and ethnic flair. From gathering the finest quality materials to weaving, designing and surface ornamentation, Ahujasons brings the expertise and artistic excellence of master craftsmen to all its products and conforms to stringent quality parameters.

Store theme:

The Ahujasons Privè store has been beautifully designed and embellished with products that spell luxury, opulence and style. From classic and timeless to contemporary and trendy, the eclectic spread of luxury accessories at the private store offers something special for everyone.

Store interior:

The colour scheme of the store interior displays monotones of beige and ivory. The store showcase clean new dimensions of visual communication of traditional and handloom products with a concept of self-navigation for the discerning modern customer.

Store designer:

The store has been designed by Amit Arora.



BRAND:

Ahujasons Privè Store

PROMOTER:

Ahujasons

LOCATION:

Delhi-NCR (DLF Mall of India)

SIZE OF THE STORE:

2,250 sq.ft.

Lãabha

— CELEBRATING INDIAN ETHNIC —



Celebrating The Women Within

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Crown Plaza,
Faridabad
Habitat Center,
Ghaziabad





LAABHA

Collection:

Laabha offers Indian ethnic, fusion and western wear for the modern women. The product mix consists of kurtis, tunics, tops, dresses, palazzos, leggings, duppattas and jewellery. The brand focuses on celebrating womanhood with print silhouette and embroidery keeping the spirit of 'Made in India' alive.

Store theme:

The newly opened Laabha store is modern, modular yet traditional and exhibits a very classy but vibrant and comfortable experience. The ambience has been designed to suit the needs of the customers with better navigation and display of products. The store promises to offer a shopping experience like never before with a very surreal environment and stylish range exclusively designed to flatter your body with garments and jewellery.

Store interior:

The new Laabha store has been accentuated with the shades and hues of ivory, teak and oak. The store is well-lit making the environment inviting, drawing in potential customers and aiding their movement in the store. The placing of the shelves is simple and effective, while merchandise is displayed colour wise. The main attraction is the jewellery table in the centre to complete the ensemble. The colour wheel inspired legging rack is quite a fantastic idea. Also, the wanderlust island is a very innovative and not so seen concept where the best and a couple of the next collection are displayed.



BRAND:
Laabha

PROMOTER:
Gunno Knits Pvt. Ltd.

LOCATION:
Faridabad (Crown Plaza) and
Ghaziabad (Habitat Centre)

SIZE OF THE STORES:
550 sq.ft.



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MONTE CARLO

Collection:

Monte Carlo's newly launched store is regaling customers with its stylish and interesting winter collection which includes a wide variety of jackets, sweaters, cardigans, sweatshirts, stoles, shawls, mufflers, fashion socks and winter denims. In addition, its also offers tees, shirts, linen shirts, denims, trousers, dresses, shorts, tunics, jackets and sportswear for men, women and tweens (between 6-16 years).

Store theme:

The enthralling ambience of this exclusive store is all set to give customers a comfortable yet fun shopping escapade and is soon expected to become a one-stop platform for the elite shoppers.

Store interior:

The store is done up in soothing shades of white and subtle tones of gold. The wooden panels essay a subtle yet chic ambience. The store is lit up with white LED lights.

Store designer:

The interior of the store has been designed by the in-house team of the brand.



BRAND:
Monte Carlo

PROMOTER:
Oswal Woollen Mills

LOCATION:
Delhi (Karol Bagh)

SIZE OF THE STORE:
2,400 sq.ft.



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MONTE BIANCO

THE NEW NAME OF BEING NOT-SO-FORMAL

By Gurbir Singh Gulati



Clothing Culture Ltd., the textile and apparel division of the ₹4,500 crores Balkrishna Group, popularly known for its brand Sin Denim, has launched yet another sensational brand called Monte Bianco this February. The grand launch in Mumbai marked the unveiling of the logo by Directors Vijaylaxmi Poddar and Pooja Dhoot. The launch was followed by Monte Bianco's fashion showcase featuring veteran actor Dino Morea.

Gracing the occasion Dino Morea said, "Monte Bianco, is here to change the way we look at men's wear. The fitting and the comfort that the brand provides is something to watch out for. It makes me look dapper and stylish and definitely gives me the Hatke look."

The new brand will target young professionals of 25 years and above who have started their career and are looking at semi-formal clothing with value added features and relaxed fits. Monte Bianco symbolizes a collection that is "Not So Formal" which also stands as a brand positioning and statement in the market.



The brand personifies the true essence of Italian clothing and its strong benchmark in fashion and styling. It incorporates a product mix of shirts starting from ₹1,400-₹1,800 and trousers priced from ₹1,800 and going upto ₹2,100. Blazers and jackets are priced over ₹3,000. The brand is positioning itself in the bridge to premium segment in the apparel market.

At the retail level, Monte Bianco will start with the multi brand outlets (MBOs) and selective large format stores (LFS) who stock semi-formal products. Cumulatively, it is looking at starting with 250 outlets. The company will strongly focus in the South and Eastern first and then will shift focus to the Western and Northern markets.

Vijaylaxmi Poddar, M.D., Clothing Culture Ltd adds, "As we are looking at a steady growth for the brand to mature in an organic way. We are aspiring that it will be ₹100 crores plus brand in the next 3 years or so."



TOFFYHOUSE'S

CREATIVE DISPLAY "WORLD OF WONDERS"

TOFFYHOUSE believes in raising its bar every time at trade events. The kidswear brand left its visitors awestruck and amazed with seven different collection under the theme, "World of Wonders".

The renowned kidswear brand from East India, Toffyhouse showcased an innovative and creative design stall at the 64th National Garment Fair organised by the Clothing Manufacturers Association of India at the Bombay Convention & Exhibition Centre in Mumbai (Maharashtra) held on January 30 and 31, 2017.

With an aim to create an impact on the visitors at the trade event, Toffyhouse designed its stall on the theme, "World of Wonders" and showcased seven different collections under it, namely – Whispering Flowers, Dream Catchers, The Ballerina, Take a Bow, Swans and Lotuses, Life is Sweet, Bear and Balloons. Every collection displayed inspirational and spiritual quotes related to the theme. According to the brand, the theme has been inspired from various places across the world such as the city of Paris (France), London (UK), the nautical world, etc.

The brand wanted its visitors at the stall to be mesmerised at the width of their creativity. From its visiting cards to treats at the stall and from posters to the shopping bags every activity at the stall was in sync with the theme and collection.

Furthermore, the brand believes that its creative collection will offer parents more to choose from. At the same time, it also will offer retailers something attractive to display and something that will not only enhance the look of the store but will also push sales.



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**FENDI'S SPRING/SUMMER 2017
ADVERTISING CAMPAIGN**

OTHER ROOMS OTHER VOICES

The Spring/Summer 2017 advertising campaign, called Other rooms-Other voices, featured the top sought after models of the moment – the sisters Bella and Gigi Hadid, and Vittoria Ceretti, shot by Karl Lagerfeld in a dingy-chic French-like apartment. The set was spread across different rooms, embellished by floral wallpapers in an exquisite color palette in the hues of light pink, pickle boiserie and door frames, red marble fireplace, on a wooden floor, all pervaded by an intimate and romantic atmosphere.

This new advertising campaign paid homage to Fendi's DNA and perfectly personified the collection itself, which balances future and traditions in an exceptionally feminine and modern way, for a contemporary Marie Antoinette at the Petit Trianon – where an aristocratic legendary woman moves in her romantic coquette attitude with an edgy sporty twist.

The Fendi iconic bags, Peekaboo and Dotcom, and the Strap You, also in the mini version, followed the movement of the shooting, along with the new Kan I, a very feminine yet structured stud lock bag with a long chain, in different chronicles with dotted candy colored studs, leather, floral ribbons, and rosette embroideries. The Fendi Fruits and Fendi Witches bag charms added a vivacious and fun furry touch.





Fendi's 2017 Spring/Summer advertising campaign, comprised 20 single and double-page visuals, including specific ones for Can Eye sunglasses, the Policromia watch and textiles, which divulged in the February, 2017 issues of worldwide magazines.

CREDITS

Photographer: Karl Lagerfeld | W'S Model: Bella Hadid | W'S Model: Gigi Hadid | W'S Model: Vittoria Ceretti
 Stylist: Charlotte Stockdale | Hair: Sam McKnight

SOFT, PUNE JOINS HANDS WITH ACCADEMIA DE COSTUMEE DI MODA, ROME

By Meher Castelino

Indian fashion institutes are moving into the international fashion scene with foreign collaborations to upgrade the standard of fashion education onto a higher level.

The latest Indian fashion institute to tie-up with a foreign one is the School of Fashion Technology, Pune, India's leading fashion Institute established in 1998 by Maharishi Karve Stree Shikshan Samstha with a mission to identify young women with professional, managerial, technical and entrepreneurial aspirations. The institute signed a MoU in Pune on February 17 2017 with Accademia de Costumee Di Moda Rome. The event was a colourful affair in the presence of eminent personalities like Rahul Mehta, President, Clothing Manufacturers Association of India, Mr Andrea Lupo Lanzara, Managing Director, Accademia de Costume di Moda Rome, Adrien Roberts, Director of Education, Accademia de Costume e di Moda Rome and Dr Mrs Manju Hundekar, Principal, School of Fashion Technology Pune.

SOFT, Pune and ACM, Rome will jointly run undergraduate and post graduate level courses that will contribute in the area of fashion buying, merchandising, brand design and high fashion design. The Accademia Costume & Moda (ACM) was founded in 1964 by Rosana Pistolesse (1925-2008), who previously inaugurated the Chair of Fashion Design at the California State University (Davis Campus) and was visiting lecturer at the Fashion Institute of Technology in New York. Costume and fashion historian, journalist and designer she dedicated a



lifetime to education. ACM established in 1964 is ranked by Business of Fashion as no.1 in Italy, No.5 in Master's Programs in the World and No.11 in Undergraduate Programs in the World.

"SOFT and ACM experienced similarities in terms of strong liaison with craft and culture, which reflects strongly in the students' design interpretation. We also found that both institutions want to incorporate craft/culture and work towards its upliftment at international levels," informs Dr Manju Hundekar on the collaboration.

"ACM is part of the city of Rome and we would like to keep our school as a boutique one. We like our educational process to be assisted by international people from all over the world. With the faculty from SOFT and our international faculty, we will have a collaboration for Indian students to experience something unique and important when they want to target the world or India," declares Andrea Lupo Lanzara, Managing Director, ACM.

"ACM is a creative school for costume and fashion with traditions so our collaborations with SOFT, Pune will be a two-way system of blending courses so that Indian design students can succeed in their own market as well as move globally and be a success in the world markets," adds Adrien Roberts, Director Education, ACM.

The course will be formulated with the help of SOFT and ACM faculty as well as well-known Indian fashion experts who will ensure and monitor the programmes that will help the students to face the Indian as well as foreign markets with unique global advantages.



FASHION

RETAIL

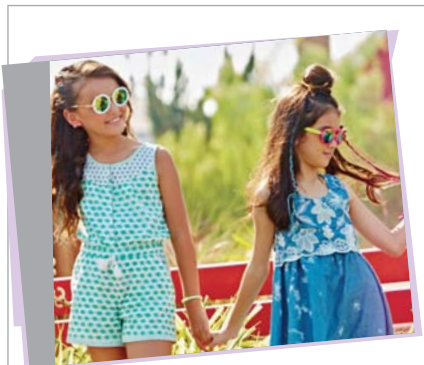
KIDSWEAR MARKET IN INDIA

>> KIDSWEAR
LEADER TALK

>> TOP BRANDS

>> KIDS DENIMS

>> INFANT WEAR



INDUSTRY TALK
No More Kidding With Kidswear
 IMAGES BoF speaks to some key industry players to understand the current and changing dynamics of the kidswear market in India.

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FOCUS FEATURE
EMERGING WORLD OF KIDS DENIM WEAR

Brand heads of renowned denim brands, share the essentials that goes into making a successful kids' denim brand and also elaborate on the opportunities and challenges that exist in this segment.

Pg No. 110

KIDSWEAR BRANDS

IMAGES BoF introduces some of the most vibrant kidswear brands in india today. a dream team for every leading retailer

- 68 612 LEAGUE
- 70 APPLLEEYE
- 72 BAMBIOLA
- 74 BEGONIA
- 76 BIBA GIRLS
- 78 CLAESENS
- 80 CUCUMBER
- 82 ETEENZ
- 83 KRUNCHY
- 84 MASH UP
- 86 MOOZOO & NOTTIE
- 87 MUSTANG SOCKS & ACCESSORIES
- 88 OKS BOYS & OKS MINI
- 90 PEPE JEANS
- 91 RUFF
- 92 SIMPLY
- 94 SMARTY BOYS
- 95 SMARTY GIRLS/TEDDY
- 96 SPARK & BUTTON NOSES
- 98 TANTRA
- 100 TOFFYHOUSE
- 102 TOONZ
- 104 VITAMINS
- 106 UFO
- 108 ZERO



COVER STORY

THE IMMENSE POTENTIAL OF KIDSWEAR MARKET IN INDIA

Factors like growing disposable income, exposure to global fashion trends and entrance of foreign brands in the country have accelerating the growth of the kidswear industry. Team Technopak takes a look at this rapidly emerging segment.

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FOCUS FEATURE

INFINITE OPPORTUNITIES IN INFANT WEAR

Team Images BoF speaks to some stalwarts who share their experiences and thoughts on the fast developing infant wear market in India.

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LUXURY RETAILING

PRIVE LUXURY LTD.
 Pg No. 116

KIDSWEAR RETAILER

LITTLE SHOP
 Pg No. 117

MARKETING & DISTRIBUTION

KIDZANIA - CATALYSING KIDSWEAR BUSINESSES

At the sidelines of his latest fashion event held at Hotel Novotel, Kolkata, Images BoF speaks to Rajeev Harmilapi, Proprietor, Kidzania, to further understand the industry and the value that his organization brings in.

Pg No. 118

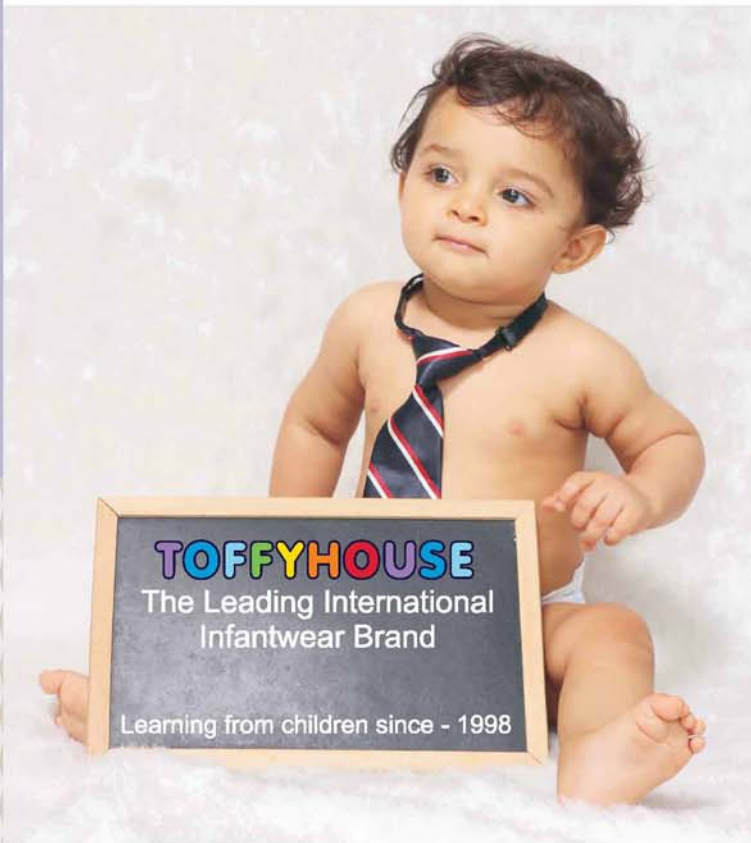
TOFFYHOUSE

*Lets learn how to **love** from children*
*Lets learn how to **play** from children*
*Lets learn how to **enjoy** from children*



Learn laughter

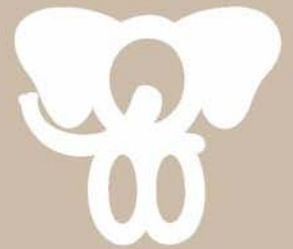
In the eyes of every child there are seven million Wonders of the World.



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A mother's arms are full of tenderness and a child always relaxes and sleeps soundly in them.



Learn patience



Learn happiness

Let us only learn from the joyful and wonderful ways of children.
Let us stop teaching them.



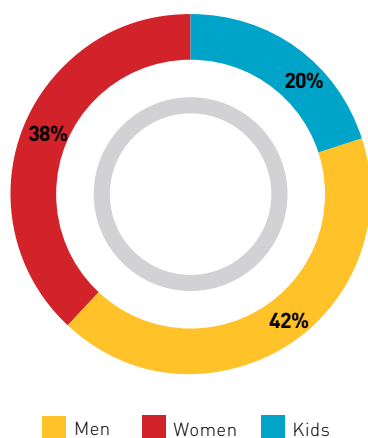


THE IMMENSE POTENTIAL OF KIDSWEAR MARKET IN INDIA

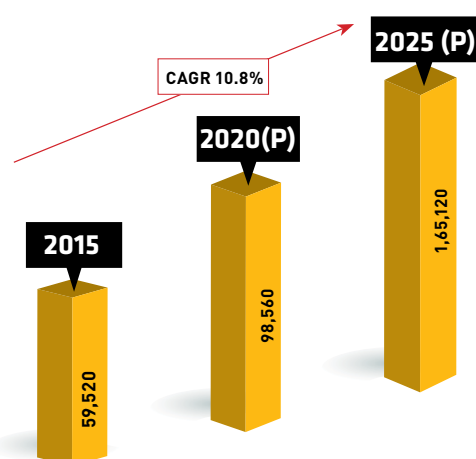
With growing disposable incomes, exposure to global fashion trends and entrance of foreign brands in the country, Indian parents have started spending more on their children, thus accelerating the growth of the kidswear industry. Amit Gugnani, Senior Vice President - Fashion (Textile & Apparel) and Saima Nigar, Associate Consultant - Fashion & Textile Division, Technopak from Technopak takes a look at this rapidly emerging segment.

The kidswear segment is one of the fastest growing segments in the Indian apparel market. The market was worth ₹59,520 crores in 2015 and accounted for 20 percent of the total apparel market of the country. It is expected that kidswear will significantly surpass the growth of men's wear and women's wear by growing at a CAGR of 10.8 percent to reach ₹1,65,120 crores in 2025. With such market potential, this segment has become a hotspot for both national and international players of late. The competition between the new entrants and existing players has ultimately benefited the Indian consumers with improved product quality, trendy designs and cost efficiency.

SEGMENT SPLIT



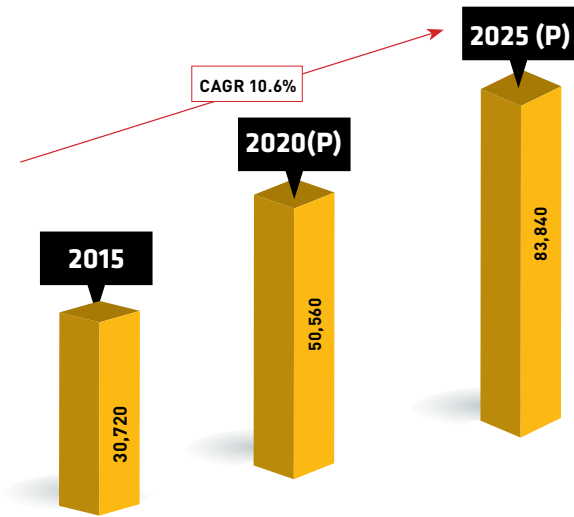
TOTAL KIDSWEAR MARKET SIZE (INR CR)



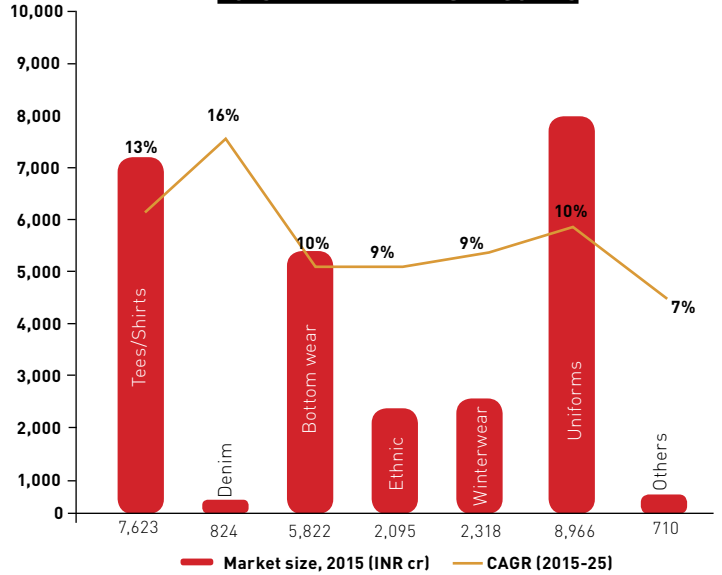
Source: Technopak Analysis

Kidswear 2017 Research Powered By

BOYS WEAR MARKET SIZE (INR CR)



BOYS WEAR MARKET CATEGORIES



Source: Technopak Analysis

Uniforms, tees/shirts and bottom wear are the dominating categories among boys wear. They together contribute around 78 percent of the total boys wear market. T-shirts and denims are considered high growth categories in this segment with a CAGR of 13 percent and 16 percent respectively.

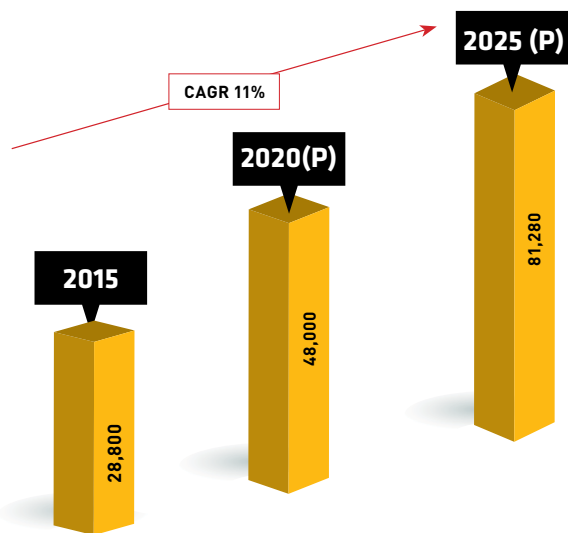
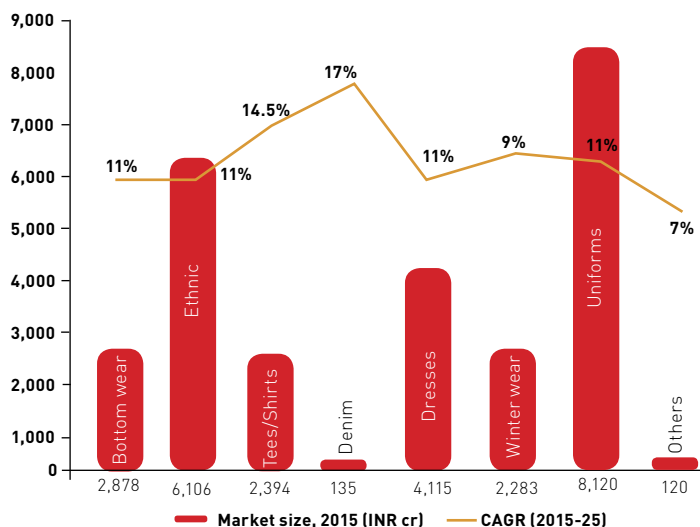


THE KIDSWEAR MARKET CAN BE CATEGORISED INTO BOYS WEAR AND GIRLS WEAR.

BOYS WEAR MARKET

The Indian kidswear market is slightly skewed towards boys wear. This market, worth ₹30,720 crores, comprises 52 percent of the total kidswear market. It is expected that this segment will grow at a CAGR of 10.6 percent to reach ₹83,840 crores in 2025.

Various categories among boys wear are tees/shirts, denims, bottom wear, ethnic, winter wear, uniforms, etc. Uniforms, tees/shirts and bottom wear are the dominating categories among boys wear. They together contribute around 78 percent of the total boys wear market. T-shirts and denims are considered high growth categories in this segment with a CAGR of 13 percent and 16 percent respectively. The increased fashion awareness among kids has made western wear such as denims and t-shirts extremely popular among them. The entrance of international brands in the country has provided access to premium wear to the Indian consumers and has led to higher brand consciousness.

GIRLS WEAR MARKET SIZE (INR CR)

GIRLS WEAR MARKET CATEGORIES


Source: Technopak Analysis

Western wear categories such as denims and t-shirts are growing faster than the traditional categories. These categories are expected to register CAGRs of 17 percent and 14.5 percent respectively.

GIRLS WEAR MARKET

In 2015, the girls wear market was worth ₹28,800 crores and accounted for 48 percent of the kidswear market. It is expected to grow at a CAGR of 11 percent for the next decade to reach to ₹81,280 crores in 2025.

The Indian girls wear market comprises of bottom wear, ethnic, t-shirts, denims, dresses, winter wear, uniforms, etc. Uniforms and ethnic wear are the two largest categories within this segment contributing around 54 percent in the overall girls wear market. The availability of skilled labours and India's strength in embroidery made ethnic wear market huge not only in the domestic market, but also for exports.

But, a major shift in trend has been witnessed in girls wear in the recent years. Western wear categories such as denims and t-shirts are growing faster than the traditional categories. These categories are expected to register CAGRs of 17 percent and 14.5 percent respectively.

NO KIDDING

Today's well informed kids, due to increased penetration of media, have become very demanding. They have increasingly started contributing in purchase decisions. Expenditure on kids clothing is not restricted only to religious festivals or occasions such as birthdays, etc., but has become more frequent. With growing disposable income, exposure to global fashion trends and entrance of foreign brands in the country - the huge middle class of the country has started spending more for their children. This also shows the changing consumer behaviour, with a growing inclination towards branded wear, which in turn, is catalysing the growth of retail in the kidswear category.





In order to capture this market, apparel retailers need to focus on factors such as pricing, quality, supply chain, customisation, etc. Also the retailers have to develop basic and low cost product range to cater the huge rural Indian market in this segment.

DRIVERS OF CHANGE

Over the years, a proliferating number of international players have shown interest in the Indian kidswear market. Today, many key international brands have already established themselves in the Indian kidswear market. A few reasons that make India a hotspot for kidswear are as follows:

- India is one of the youngest nations in the world with 29 percent of its population below 14 years, making it an extremely lucrative market.
- Rising middle class with growing disposable income is another prominent factor driving the growth of this segment.
- Shift in Indian consumer demand from unorganised to organised sector.
- Awareness about latest kidswear trends is not only limited to metro cities but is widespread among tier -II and -III cities also due to increased penetration of mass media.
- Increasing number of modern mothers, mainly working mothers, who are much concerned about their children's appearance, and prefer to buy brands for their kids.
- E-commerce penetration and promotions has resulted in frequent and convenient purchases by the Indian buyers which also include the kidswear segment.

THE ROAD AHEAD

It is quite evident that the kidswear segment has attracted retailers' attention in recent times. However, the key challenge is to understand how to tap this lucrative segment. Despite the recent growth in branded retail, majority of Indian parents prefer to buy children's wear from local shops or street side shops. These international and domestic players are struggling to reach these hyper-local points of sales. Also, existing private labels pose a major threat to the organised retailers as these private labels offer wide spectrum of economical options for different customers.

In order to capture this market, the apparel retailers need to focus on factors such as pricing, quality, supply chain, customisation, etc. Also the retailers have to develop basic and low cost product range to cater the huge rural Indian market in this segment.

A well planned approach is required to understand the nuances of the Indian kidswear market. A right business model backed by a strong supply chain will ensure brands capitalising on the growth of the kidswear market segment.





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Bambiola



Biba Girls

NO MORE KIDDING WITH **KIDSWEAR**

The mere fact that we now have a plethora of trade events and a dedicated fashion week for kidswear accentuates the potential of the category in India. IMAGES BoF spoke with some key industry players to understand the current and changing dynamics of the kidswear market in the country.

By Zainab S Kazi with inputs from Rosy N Sharma

with plenty of parties and outings, is another key drivers to the growth." The trend of posting pictures on Instagram and Facebook has literally changed the way people dress themselves and their children.

Manu Indrayan, Co-Founder and Chief Executive Officer, 612 League shares, "The Indian kidswear market has always had a fragmented arrangement. Only now has it started moving towards an organized structure. Customers' shopping experience has also seen a shift from store purchasing to online shopping. This growth has mainly happened due to changing mindsets and shopping patterns in India." Reflecting upon the changes of the last few decades, Indrayan states, "The kidswear industry in India was not very well categorized even a decade ago. The industry, even today, is majorly dominated either by school uniforms or occasion wear for weddings or parties. Also, children are still not considered as individual buyers or customers. Besides, the market largely is not brand driven. Regarding shopping patterns, parents in India are used to purchasing a size

Like most younger siblings, Batul Roowala grew up wearing clothes that her elder sister had outgrown. Frocks were tailored and bottom wear was shorts and pants meant for boys. That was the normal way of life. Twenty-five years since, Roowala's little daughter has the luxury to shop in a dedicated section meant for girls in any of the MBOs she visits. Online shopping is also hugely convenient with different sub-categories defined under the kidswear section exclusively for girls. Recently, Roowala went ahead to customize mom-and-daughter outfits for her little one's fifth birthday. From shoes and make-up to accessories and of course the dress itself, everything was matching to perfection.

The above is symptomatic of the seismic changes in the category of kidswear in India. Just a few decades ago, the category was virtually non-existent. The handful of brands that existed, were barely surviving.

But, the last couple of years has ushered tremendous change in the kidswear industry. The advent of private pre-schools, the day-care culture, and of course, the huge social media push has led to these changes. Dressing up kids in a smart, happening and cool way is a virtual necessity now.

Aman Motwani, Brand Development Head, Mash Up syas, "The rise in fashion awareness and trend consciousness among parents has played a major role aiding demand for this sector in recent years. Also, the highly-active social lifestyle of young parents,

>



"The rise in fashion awareness and trend consciousness along with the highly-active social lifestyle of young parents have played a major role in aiding demand for this sector in recent years."

-Aman Motwani,
Brand Development Head, Mash Up

Tantra





Ruff Store



Bambiola Store



“We need to forecast and make clothes keeping in mind the choice of the generation today and what they would like to wear. The other things that need to be considered are the fabrics to be used, colours, and designs that would work well.”

-Sohail Patca,
Director, Ruff

larger for their kids to extract the maximum worth out of their purchase as children tend to outgrow their sizes quickly. Breaking these patterns for any kidswear manufacturer or retailer is a huge task. Changing the mindset of people is the main challenge as parents still are the decision makers for kids shopping. However, in the recent years we have seen a positive growth in the industry. People are now more brand and fashion conscious and kids love to participate in the shopping experience along with their parents.”

Indrayan is of the opinion that whiles the increase in purchasing power and the active participation of fashionably aware kids in shopping decisions have been the major growth factors for the kids fashion industry, the increasing visibility of brands today on different media contributes to the collective consciousness.

Overcoming Obstacles

While the challenge a decade ago was to make parents spend on their children when it came to clothing, the test today is centered around beating the ever-increasing competition. The foray of international brands is seen as giving stiff competition to national and domestic brands. Brands like H&M and Zara, with their value for money collections, are preferred by the urban audience. Brands like Maxx have won patronage, too. Besides competition, the other challenges are to do with real estate space rental rates, the huge marketing spends and fast changing fashion. Sohail Patca, Director, Ruff, believes that making certain products in kidswear a challenging task. “We need to keep ourselves abreast on recent trends and fashion that is doing well in the market. We need to forecast and make clothes keeping in mind the choice of the generation today and what they would like to wear. The other things that need to be considered are the fabrics to be used, colours, and designs that would work well,” he shares.

Sharing her views on the roadblocks and challenges facing the industry, Megha Uppal, Creative Director, Bambiola explains, “With an ever-expanding array of brands, both home-grown and international now available to the customer, it is very important to constantly reinvent and stay relevant to the customer from a manufacturing and a retail standpoint. High rentals that escalate on an annual basis are having a direct impact on retail profitability and are also making rapid expansion and roll-out difficult for a retailer. The online boom is also affecting brick and mortar sales as the customer now finds it easier to browse through the web from the comfort of their homes in their own spare time and get a much wider choice of product range. This is typically cutting





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“With the entry of international brands like US Polo, Benetton and Barbie for example, Little Shop’s offering to the customers has become substantially stronger. An EBO caters to one brand, where as an MBO can offer the best of international, national and local products, depending on the customers’ requirements.”

-Shiv Hiro Daswani,
Partner, Little Shop



612 League

into footfalls at the malls and making it quite challenging for retailers to attract customers.”

While there is no doubt that there has been a shift in the market where parents are not conservative when it comes to spending on their children, there is a section of the population that still holds back spending on kidswear due to a variety of reasons. Highlighting this aspect, Siddharth Bindra, Managing Director, Biba states, “Although the kidswear segment has recorded higher growth in recent years, it still remains a largely unbranded market with products sold mostly through unorganized retail channels. The low average lifespan of children’s apparel holds back many value-conscious parents from spending on children’s apparel.”

An interesting perspective on the challenge of designing is shared by Neha Shah, Marketing Head, Pepe Jeans. Designing for kids and adults need different skill sets. Shah believes, “Kids primarily look for style, colour and comfort. Boys and girls of the same age have very different sensibilities. Designing for 4 to 8 year olds is very different from designing for 10 to 12 year-olds.

Kids identify with sportspersons, celebrities and superheroes. So attitude and individualistic style is an essential component of the clothing. Denims, dungarees, shorts and shirts are evergreen fashion trends in boys apparel. Short skirts, lace trims dresses and denims are preferred among girls.”

According to Nayanika Pawar, Country Head, Claesens, sizing and fits in kidswear are a challeng. “On the basis of geographies within countries, race, diets, etc. one has to adapt and constantly be able to address the



change in range. We have regular fit sessions 2 to 3 times a year from toddlers to preteens across Bengaluru, Mumbai, Delhi we follow the same in Holland. A brand constantly needs to go through this exercise in order to stay relevant,” she shares.

Key Influencers

The major influencers that give a push to this category are a rise in disposable income, availability of options, and the undeniable presence of social media in our lives. Uppal states, “Kids’ fashion is influenced by the latest in womens wear and ‘mini me’ is a big trend with urban parents wanting to dress their little ones in co-ordinated clothing. Besides, the latest characters in kids movies, super heroes, princess movies and fairy tales all influence children wanting to dress like their favorite character.” Amit Bhayani, Director, Oks Boys & Oks Mini echoes the views on adult clothing influencing kidswear. He adds, “Kidswear clothing is generally influenced by the trends running in adult clothing. In short, it’s a replica of adult clothing with a certain twist in styling and colors to make it bubbly.” Shah agree and says, “Nowadays kidswear is majorly influenced by the ongoing trends seen in adult wear. You see a lot of jackets, dresses with shoulder details, quotes on tees, etc.”



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Top 5 Fashion Trends Expected to Emerge in the Industry

Siddharth Bindra,
Managing Director,
Biba



Indo-western trends are expected to dominate the kids wear segment. Mixing contemporary with traditional Indian designs will be a popular choice. Dresses with ethnic influences and printed ghaghras are a big hit this season. The use of 3D designs is in vogue. Quirky, whimsical prints against bright solid colors are sure to look great on kids. Comfortable cotton wears with rich brocade accents and intricate thread embroidery in playful and vibrant colors will also be a popular. Floral prints in soft pastel shades on skirts and lehengas will be one of the top trends this season.

Nayanika Pawar,
Country Head,
Claesens



Digital prints and photo real prints are transforming high fashion brands world wide, Claesens lends its strong Dutch design influence to use graphics and digital graphics to tell stories. Secondly, the demand for organic, responsibly sourced and manufactured goods is increasing. Similarly, quality evergreens that is staple is also something people would not mind paying a premium for.

Neha Shah,
Marketing Head,
Pepe Jeans



Layering (with jackets over tees and dresses) and Tropical Prints are upcoming trends. Rainbow coloured palette and bright colors paired aesthetically with each other are also in vogue. Easy to wear summer is about relaxed outfits and free flowing styles. And last but not the least dungarees – these will never go out of style.

Motwani talks about the influence of Bollywood and Hollywood as well. He shares, “Animated Hollywood and Bollywood movies and kids TV shows are, of course, the biggest trendsetters. Apart from these, trends are borrowed from mainstream fashion as all parents naturally like to see the ‘mini-me’ options for their kids.”

Likewise, Shiv Hiro Daswani, Partner, Little Shop sys, “Cartoon characters and young idols etc., play a significant role in the buying decision of kids. For example, till a couple of years ago, Chhota Bheem was a big craze given its strong marketing through merchandise on TV and films. However, such trends are short lived and one needs to constantly innovate to stay on top of the market.”

International Interference?

Each brand – whether national, domestic, or international has its own place in the market. While those who are high on their travel/holidays would be more accustomed to shopping for international brands, a huge set of the population is comfortable with options made available by the local and national brands. Most domestic brands have the advantage of understanding the country’s climatic conditions and an appreciation of regional choices, which are again dominated by climate, colour and style. Uppal says “Surely, there is more competition with international brands penetrating the market as the customer now has a wider variety to choose from. But ultimately what sets us apart is our design strength that provides customers with the latest in international children’s fashion and the high quality standard we maintain.” Talking specifically about her brand Bambiola, she shares, “We do not mass produce our styles; we maintain exclusivity which is very attractive to a discerning customer.” Indrayan talks on behalf of 612

Megha Uppal,
Creative Director,
Bambiola



With the rise of social media especially Instagram, mums are on top of the fashion game like never before and they want their little ones to look like an extension of themselves. This will see a rise in the 'mini-me' trend. The increasing number of children's characters and movies has propelled little ones to want to dress like their favourites and this will see a rise in character dressing. An increasing number of schools are now opting for a no-uniform policy and this is creating a need for children to have a larger wardrobe of comfortable and functional, at-leisure clothing, which is now expected to be a new big category in kidswear. Urbanization is seeing a cultural shift towards neutral fashion. With celebrities leading the way for genderless fashion, this trend is expected to trickle down to children's fashion as well. With a rising interest in the British Royal family across the globe, the fashion conscious are inspired by royal fashion for themselves and their children and this will see a rise in traditional English heritage clothing as seen on Prince George and Princess Charlotte who are steadily becoming children's fashion icons.

Manu Indrayan,
Co-Founder and CEO,
612 League



The fashion industry is always evolving and buzzing with new trends. 2016 saw a lot of experimentation in terms of fabrics and design patterns. 612 League believes that 2017 will be all about bold choices in terms of colours, patterns and prints. The top five fashion trends that will dominate the kids fashion industry in 2017 will be pop colors - vibrant shades and hues of orange, yellow, green, blue, pink, etc. These will be perfect for the spring/summer collections, while bold dark colors like dark grey, red and browns will rule the fall/winter collections. In ethnic, the trend will no longer be limited to the festival season. Easy to wear, comfortable fabrics and a variety of colours and designs will be in demand in 2017 for both girls and boys. Fringes will not be limited to bags anymore. Fringes will enter the kids' wardrobe in various apparel and accessory options like leather jackets, skirts, dresses, accessories and even footwear. Dressy headwear right from gladiator style beanies, braided beanies, multi colored caps to kids' favorite cartoon/superhero caps, the variety and colour options are endless in this category. This trend, we believe, will add that little extra cuteness to kids outfit. In shoes cute little comfy shoes for toddlers and footwear innovation in terms of patterns, colours and designs for pre-teens will rock footwear trends in 2017.



Pepe Jeans

League, "The preference of branded apparel is seen as a positive step since it categorizes the kidswear market and helps in increasing the importance of brand value in the customers' mind. With more international brands coming in India, the competition has no doubt increased in the industry. However, we at 612 League believe in keeping Indian sensibilities in mind – right from choosing the fabric to designing the collection, which gives us an edge over other brands. We understand our customers better than any other international brand and we customize our range not only as per seasons but also as per the demographics of India as well as colour and fabric preferences."

Bhayani sees an opportunity for all to co-exist and rightly so. He asserts "The kidswear market still is at a growing stage wherein it can accommodate a lot of new players whether they are national or international. With more international players coming in, the worth of home grown brands has increased. On the other hand it has also helped the domestic players to understand and uplift their product offerings."





Tantra Store

a brand. She explains, “A good manufacturing base, specially in-house production, can be very helpful in building a brand where one is in control of their production. The biggest challenge in kids’ clothing and accessories is the large number of sizing patterns required for every style and this challenge can be overcome by using a specialized and professional manufacturing unit for the range. For a kids’ brand, it is very important to map out what a child would like at every given age and have a good blend of style, functionality as well as maintain age related safety issues in children’s apparel and accessories.”

Road Ahead

Where character based clothing and pictures of cartoon characters is the most sought after when it comes to kidswear, a growing demand for skin friendly/organic clothing has also been witnessed. Uppal shares, “Organic cotton and other skin friendly fibers are becoming increasingly popular with parents wanting the best for their children and also because of growing consciousness of environmental sustainability. Skin friendly fibers such as bamboo, that is naturally anti bacterial and anti fungal, is increasing in popularity amongst the affluent families wanting the best against their babies skin.”

Shah aptly concludes, “No longer is the kid’s wear industry a child’s play. It has come to assume a competitive position among the men’s and women’s apparel industries in India. Denim and casual wear brands have come to realize the opportunity as the market is now ready for premium fashion. Newer styles take no time to rush to the kid customer who is no more influenced by the choices and preferences of their parents while shopping. Children today are more aware of the ongoing trends and the latest fashion.”



Brand Building

Brand building, be it for kidswear or adult clothing, is a challenge in India where fashion sensibilities change every few kilometers. Brands operating in the kidswear space need to keep in mind not just the taste and aspirations of the children but also what would appeal to their parents. Indrayan shares, “Kidswear industry in India was majorly all about occasion based shopping or school uniforms. Parents shopped only for two reasons, a wedding or a party or if the child outgrew his/her size. Building a kidswear brand amidst all these restrictions was a major challenge. Not only the mindset but the shopping patterns also required a huge change. Besides, the kidswear industry is a lot more sensitive as compared to the adult fashion industry as parents are very particular about the colours, designs and fabrics for their kids. In such a scenario, one of the most important factors to build a kidswear brand is keeping in mind the Indian sensibilities as it helps the brand to understand the customer better. Parents take most decisions – from fabric to colour – at least until the age of six. Hence, parents as the key players while purchasing a garment have got to be focused upon.”

According to Uppal, having a strong supply chain is key to building



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>612 LEAGUE<

612 League is a leading kids wear brand focusing on providing quality oriented products for the age groups of 6 months to 12 years. The brand offers a complete range of trendy, high quality, affordable and comfortable apparel for boys and girls in knits and woven, for both summer and winter season.

Product Portfolio:

The brand's current product category is majorly divided into infant, boys and girls. Ripped jeans, track pants and layered shirts have done exceedingly well for boys. Scottish skirts, leggings and shirt dresses are a favourite with pre-teen girls.

Top Innovations:

612 League constantly strives hard to innovate something new for its consumers. Currently, the brand is successfully running the 612 Wonder Store, which is a unique virtual reality shopping platform. It also has invested in digital real estate pioneering with three differentiated features - 612 Genie, 612 Mommy Moments and 612 Icon.

Theme & Core Elements of Spring-Summer'17 Collection:

612 League's Spring-Summer'17 collection brings together the colours of the season in a slew of vibrant avatars. The trends are incorporated in every creation and playfully intermixed with a colour palettes that reflect outdoor and leisure spaces of summers.

Target Audience:

For its infant range, the brand targets parents belonging to middle and upper-middle income households, where as for pre-teen kids its major target audience are the mothers as well as children who are fashion conscious and love to wear smart yet comfy clothes.

Manufacturing Capacity:

The brand has manufacturing capacity of 60,000 sq.ft. in Ludhiana where it produces 1.35 lakhs garments per month. Its total investment to date has been around ₹80 crores.

Design Capabilities:

612 League, makes it a point to bring together the best of talents from across the nation to design the trendiest clothing range for its customers, so that styles have a pan-India flavour. Similarly the brand also observes global, social media trends and international market patterns; and customises them according to suit Indian sensibilities. Its average cycle is of about 6 months for converting products from concept stage till time they reach the stores.

Marketing Strategy:

Being a kidswear brand, 612 League looks for marketing strategies that are both innovative and interactive for the kids. Adapting to the



evolving shopping patterns in India, where even kids are more fashionably aware than one would imagine, the brand tries to connect with the sensibilities of little fashionistas as much as it tries to appeal to their parents. Going further, the brand will add nightwear, inner wear, accessories and shoes by 2018. This would make it an umbrella brand for children in the age group of 6 months to 16 years.

Brand's Presence in Online Retail:

Adapting to the contemporary retail scenario the brand has bolstered its digital presence and today it is available on all leading e-commerce websites like Myntra, Amazon, Snapdeal, etc. Apart from this, it also focuses on expanding its digital reach by collaborating with online wallets like Paytm to make payments easier for the customers.

New Territory/ Region added:

This year, 612 League opened exclusive stores in Vadodara, Ahmedabad, Kurla and Bengaluru. It has also expanded its presence recently in Uttar Pradesh, Karnataka, Tamil Nadu and Rajasthan through Reliance Trends, Central and Shoppers Stop stores.

New Territory/ Region Targeted for Next Few Years:

The brand plans to expand its exclusive store presence in the West and South, in particular.



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>APPLEEYE<

Appleeye offers trendy designs of international standards that the brand shells out at affordable prices. It is the largest manufacturer and retailer of kids apparel in India. Appleeye's collection is aimed at new borns to early teens.

Top Innovations:

Appleeye uses N9 Fabric, the name for silver knight technology, where the cloth is processed with silver which works as a shield for the clothes to prevent it from any bacteria or fungus contaminating the cloth. This in turn helps the cloth to be more fresh as no bacteria sediment forms. It also gets less dirty and remains odourless.

Target Audience:

The brand targets upper-middle class and parents who understand fashion and comfort at the same time.

Manufacturing Capacity:

Appleeye's manufacturing units are located in Kolkata and Tirupur.

Design Capabilities:

The brand's designing head is trained in UK and Spain with technical tie ups from Italian and Turkish giants. The brand takes one week to develop designs and 50 days for a concept to hit the stores.

Marketing Strategy:

Appleeye has introduced B2C along with B2B, social media advertisement with 29k plus likes on Facebook. It looks forward to expand in new areas like party wear, ethnic and matured club wear for kids.

Brand's Presence in Online Retail:

The brand is present on most leading e-commerce sites like Flipkart, Amazon, etc.

New Territory/ Regions Targeted for Next Few Years:

Bengaluru, Hyderabad, Chennai, Pune, Visakhapatnam and Guwahati.



BRAND RETAIL MAPPING

Total no. of EBOs: 7

Total no. of MBOs: 2,000

Total no. of SISs: 100

LFS Stores:
RELIANCE TRENDS,
BRAND FACTORY

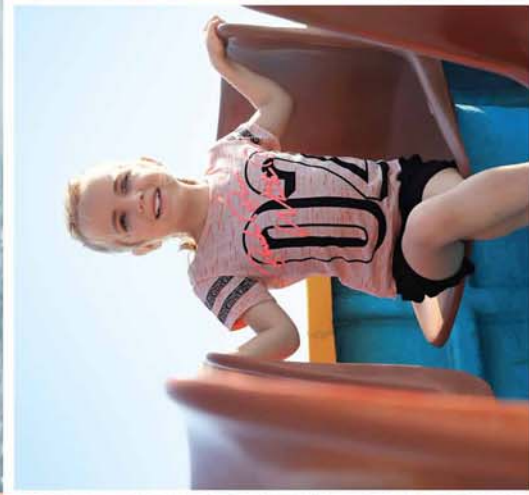


Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	1-16 years	Entire range	₹800-1,700	Shirts, t-shirts	₹400-1,600	Jackets, sweatshirts, wind cheaters, pullovers, entire range	₹1,100-3,000
Girls	1-16 years	Capris, shorts, leggings, pants, etc.	₹600-1,600	Entire range	₹400-1,500	Entire range	₹1,100-3,000
Others (Infants / toddlers, etc)	upto 1 year	Shorts, full pants, denims	₹70-500	Front open, boat neck, envelope neck, etc.	₹400-600	-	-

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>BAMBIOLA<

Bambiola, emphasizes on providing beautifully designed, unique and intricately detailed apparel and accessories of premium quality for girls. The Bambiola Collection is colourful, chic and comfortable.



BRAND RETAIL MAPPING

No. of Indian cities present in:
5

Total no. of EBOs:
4

Total no. of MBOs:
36

Turnover CAGR (last 3 years):
27%

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



Product Portfolio:

The brand's product range includes dresses, occasion wear, skirts, bottoms, jumpsuits, tops and blouses, outer wear and accessories such as hats, bags, hairbands, scarves, baby hangers, gift items, etc. The brand's top selling lines are girls dresses and party wear.

Top Innovations:

Bambiola is constantly creating innovative prints by drawing inspiration from vintage templates like the European countryside and amalgamating it with modern silhouettes. The brand has a range of multi-purpose muslin sheets and is famed for its range of bamboo bathrobes that are inherently anti-bacterial and very soft for young kids.

Theme & Core Elements of Latest Spring-Summer'17 collection:

There are four key themes in Bambiola's Spring-Summer'17 collection. Vintage Tales – which reflects the innocence of childhood; The Modernist – which is an exciting imagery reflecting nautical stripes, botanical prints etc.; Portobello – a high summer theme bursting with colour and fun, and Occasion Wear – inspired by the world of simple dreams in childhood.

Target Audience:

Bambiola is an affordable luxury brand and it caters to young girls from new born to 8 years of age. The brand creates a unique sense of style for little girls.



Manufacturing Capacity:

The brand's manufacturing unit, known as Global Exchange RNS, measures 5,50,00 sq.ft. and is located in Gurgaon. It produces 1.5 million units annually.

Design Capabilities:

Bambiola is designed in the fashion capital of London. The brand's designers travel across the globe to draw inspiration from top Runaway and Trade Shows. Typically, the brand takes two months from concept to consumer. However, with the advantage of their own manufacturing unit, it is able to respond within 10 days.

Marketing Strategy:

Bambiola takes pride in its high quality & design standards and relies purely on word of mouth as promotion. It also organises Pop Up events and Trunk Shows often. The brand looks forward to introduce new categories like sleepwear and also expand its organic range by adding luxurious baby products using soy and milk products.

Brand's Presence in Online Retail:

Bambiola has its own e-commerce sales portal www.bambiola.com. In the near future it will expand to market places like Amazon internationally.

New Territory/ Regions added:

Bambiola has expanded to Bangalore and has a flagship store at DLF Mall of India, Noida. It is also available in Jaipur.

New Territory/ Regions Targeted for Next Few Years:

Currently, the brand is scouting Mumbai as an immediate next. It is also planning to expand across India, especially in Ludhiana, Chandigarh, Indore, Pune, Hyderabad, and Chennai.

Brand's Presence in International Markets:

Bambiola was launched in the USA, and is now available in approximately 30 boutique stores across America. It has presence in UK and is looking to expand into Canada, Bahrain, Singapore and Paris shortly.



Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range
Girls	New born-2 years	Skirts and Shorts	₹900-1,500	Dresses	₹1,100-2,500
				Party Wear	₹2,500-6,000
		Leggings	₹600-800	Shirts, Tops, t-shirts, blouses	₹800-1,500
Infants	New born-2 years	Bloomers	₹250-500		

>BEGONIA<

Begonia is a new brand which is looking forward to position itself in the premium segment of kids garment with international standards.

Product Portfolio:

The brand provides products like body suits, rompers, sleep suits, baby suits, frocks etc.

Target Audience:

The brand targets parents who give priority to their kids' safety.

Manufacturing Capacity:

The brand's manufacturing unit is of 5,000 sq.ft. located in Paridhan Garment Park, Kolkata and produces 6 lakh pcs every year.

Design Capabilities:

Begonia has an in-house team of five designers, who are trained professionals. The brand's average cycle in terms of converting products from concept till reaching the stores is 60 days.

Marketing Strategy:

The brand believes in word of mouth publicity and promotes through social and online media as well.

Brand's Presence in Online Retail:

The brand retails through Amazon, Flipkart and Snapdeal.

New Territory/ Region Targeted for Next Few Years:

Delhi, Punjab, Bengaluru, Chennai and Kerala

×

Brands	Targetted Age Group	Bottom Wear Products	Price Range
Infants & Toddlers	0-12 months	Pajamas, suits, frocks, rompers, etc.	₹240-900



BRAND RETAIL MAPPING

No. of Indian cities present in:

8

Total no. of MBOs:

100



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>BIBA GIRLS<

Biba, the leading ethnic wear brand symbolizes the strength and spirit of today's women. The brand's prime objective is to provide trendy and fashionable Indian attire at an affordable price.

Product Portfolio:

Biba Girls is a dedicated range from Biba catering to young girls aged between 2 to 15 years. The range comprises of party gowns, dresses, lehengas, anarkalis, patiala sets, kurtas, palazzos and skirts. The core top selling lines are the lehenga sets and the suits.

Top Innovations:

Biba Girls, the dedicated range from Biba initially used to cater to young girls aged between 2 to 12 years. After experiencing increase in demand, the brand has decided to cater to slightly older girls as well. Now the Biba Girls range caters to young girls aged between 2-15 years.

Theme & Core Elements of Latest

Spring-Summer'17 collection:

The Biba Girls' latest Spring Summer '17 collection exhibits a garden of floral prints in peppy colours blended with shimmery tones which move into the organic palette of colours and prints through the Gypsy and Vintage organic range. The collection is designed using fabrics such as chanderis, nets, gold dobby, silks and brocades. The range comprises of lehengas, jackets, anarkalis, asymmetrical kurtas, palazzos, jumpsuits, shorts, dresses and gowns.

Target Audience:

The brand targets young girls aged between 2 to 15 years old and offers stylish and gorgeous outfits at affordable pricing. Since the range is priced affordably, parents across all social economic class can afford Biba products.

Design Capabilities:

Biba has an extremely talented in-house team of designers who closely follow feedback from the customers and try to adopt them. The designers also do a lot of research on trends and fashion forecasts before they start designing for the next collection. The brand also takes customer feedback and constantly keeps evolving.

Marketing Strategy:

Biba rigorously advertises about the brand and its new collections. It frequently does brand promotion across social media platforms and participate in kids' fashion shows. The brand has been participating in the India Kids Fashion Week with fabulous response each time. With the increasing demand for Biba Girls because of the great designs and price, the brand launched two stand alone Biba Girls stores at Mumbai and Bengaluru. The team is confident that the brand will continue to grow and one can expect many more Biba Girls outlets in the near future.

Retail Presence:

Biba currently has 223 flagship stores in 103 cities, apart from presence in all the major retail chains in the country like Shopper's Stop, Lifestyle, Pantaloons and Central. The brand has received favourable response in both metros and tier -II and -III cities alike.

Brand's Presence in Online Retail:

Biba has its own e-commerce site www.biba.in and is present on Jabong, Myntra, Abof, Amazon, Flipkart, etc.

Brand's Presence in International Markets:

Biba's online delivery to few international markets has already begun.

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Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range
Girls	2-15 years	Skirts, lehengas, palazzos, jumpsuits	₹599 onwards	Anarkalis, asymmetrical kurtas, dresses, gowns, jumpsuits	₹499-5,499



BRAND RETAIL MAPPING

No. of Indian cities present in:	103
Total no. of EBOs:	223
Total no. of MBOs:	400
Turnover CAGR (last 3 years):	30-35%

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>CLAESENS<

Claesens is a Dutch luxury brand that has specialised in innerwear since 1993. It manufactures premium innerwear and apparel for men, women and kids. The brand's primary focus is on kids innerwear and funwear that it promotes in over 20 countries and across 1,500 retailers. Claesens is the first international kidswear brand in India to have brought focus to quality innerwear needs of the market, and has a presence in over 250 points-of-sale spread across 45 cities, through key retail partners such as Lifestyle, Central, More, Hypercity, and online partner channels like Amazon, Myntra, etc.

Top Innovations:

Cut of the garment is the greatest craft for an innerwear brand. The brand has its own unique Claesens fits and styles lend to the way the garment shapes and hugs the body.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The brand's spring summer collection '17 is fresh and evokes fun as they experimented with digital prints this time.

Target Audience:

The brand targets boys and girls from 2 to 14 years, and parents who understand that innerwear is the most important garments for a child as it worn all day long. It serves the most crucial requirement for a child's well-being.

Manufacturing Capacity:

Claesens has its own exclusive

manufacturing partner in India for the past 15 years and it produces a million garments annually.

Design Capabilities:

The design team of the brand is based out of its head office in Haarlem, in the Netherlands where it focuses to gain knowledge about upcoming trends by attending design shows and forecasting events.

Marketing Strategy:

Claesens' promotional activities happen at the points-of-sale. The brand looks forward to expand its loungewear and funwear product range in its Claesens kids portfolio.

Brand's Presence in Online Retail:

The brand is available at Amazon, Myntra, Flipkart, etc.

New Territory/ Region added:

The brand added North and East regions this financial year.

New Territory/ Regions Targeted for Next Few Years:

The brand's prime focus for the coming year will be strengthening its online and modern trade distribution in South and West India.

Brand's Presence in International Markets:

Claesens is currently present in 20 countries. Europe is its biggest market followed by Australia and now India and China are the emerging markets.

BRAND RETAIL MAPPING

No. of Indian cities currently present in: 45

Total no. of MBOs: 100

Total no. of SISs: 150

Total no. of LFS stores: 150

Turnover FY '2016-17: 50%

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



Brands	Targeted age group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	2-14 years	Innerwear (briefs & boxers)	₹269-799	Vests/Singlets	₹399-599	Loungewear set of top & bottom	₹899-1,899
Girls	2-14 years	Innerwear (panties & shorties)	₹269-799	Vests/Singlets	₹399-599	Loungewear set of top & bottom	₹899-1,899
Others (Infants / toddlers, etc.)	Swimwear & infant range	-	-	-	-	Rompers & pajamas sets	₹599-1,299

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>CUCUMBER<

Kolkata based kidswear brand Cucumber is a mother's first choice of brand for their bundle of joy. The brand targets toddlers and kids of ages 2 to 8 years.

Theme & Core Elements of Latest Spring-Summer'17

Collection:

The brand's theme and core elements for the latest Spring-Summer'17 collection will be joyful prints, innovative designs and new colours.

Manufacturing Capacity:

The brand's manufacturing unit spans 1 lakh sq.ft., and is situated at the bank of river Hoogly and production capacity is 1 lakh pcs per month.

Design Capabilities:

Cucumber has well trained designers who are following the trends from the world and make the best collection according to the latest concepts, colors and designs. The brand's average fashion cycle in terms of converting products from concept till time they reach the stores is 90-120 days.

Marketing Strategy:

The brand has an online interacting forum with Mothers. According to the brand the designer kids wear market is growing with a speed of 12 to 15 percent on an average and the factors propelling the growth are basically upcoming fashion trends. Cucumber plans to expand the newly launched Cucumber Club range for 2 to 5 years of age.

Brand's Presence in International Markets

Middle East, Sri Lanka and African countries

New Territory/ Region Targeted for Next Few Years:

European countries



BRAND RETAIL MAPPING

Total no. of MBOs:
25,000-30,000

Estimated Growth percentage in last Two Years:
30%

First 3 quarters growth FY '17 over the same
quarters in FY '16: 15%

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	2-16 years	Shorts, track pants	₹150-400	T-shirt, shirts	₹249-400	Jacket	₹500-600
Girls	2-16 years	Leggings, skirts	₹200-300	Tops, frocks	₹249-400	Jacket	₹500-600
Others (Infants / toddlers, etc)	0-24 months	Dungarees	₹250-450	-	-	-	-



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> ETEENZ <

Eteenz is a value for money brand for kids aged between 0 to 14 years. The brand is one of the pioneers and a major players in the licensing business. It is present in all channels of sales.

Product Portfolio:

Eteenz offers apparels, footwear and accessories for kids. Its top selling range comprises t-shirts, track pants and coordinates for both boys and girls.

Top Innovations:

Eteenz is one of the first brands in kidswear to launch character merchandise in the value segment. It has been the leader in this segment for the past one decade.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

Digital prints on garments either through HD printing technology or other machines.

Target Audience:

Eteenz is a value for money brand that targets all sections of society. While the price points attract the economically weaker section, the quality lures in the affluent class.

Manufacturing Capacity:

The brand's manufacturing unit is located at Howrah and produces 30,000 pieces in a day and approximately 10 million pieces in a year.

Design Capabilities:

Eteenz has an in-house designing team comprising seven creative designers who design based on international trends and fashion forecasting sites. The brand takes approximately three-months to convert products from concept till the time they reach the stores.

Marketing Strategy:

The brand is present across all the major channels of sale such as distributorship, large format retailers, multi-brand stores, exclusive outlets, private labels, e-commerce, export businesses.

Future Plans:

Eteenz does a lot of B2B and B2C advertisements. It continuously adds product categories to its range. It plans to launch an infant wear and a sportswear brand soon.

Brand's Presence in Online Retail:

Close to 30 percent of the business comes from online sales. The brand is present in almost all the online market places like Amazon, Flipkart, Snapdeal, Firstcry, Hopscotch, Paytm, Homeshop18, etc. It has forged a strong partnership with Amazon, where it has listed about 3,500 products..

Brand's Presence in International Markets:

The brand recently entered the markets of the middle East, Sri Lanka and Mauritius.



BRAND RETAIL MAPPING

No. of Indian cities present in:
PAN INDIA

Total no. of EBOs:
22

Total no. of MBOs:
6,000 (APPROX.)

Total no. SISs:
15

Presence in LFS:
PANTALOONS, RELIANCE,
WALMART, MORE, ETC.



Brands	Targetted Age Group	Bottom Wear Products	Price Range	Upper Wear Products	Price Range	Outer Wear Products	Price Range
Boys	2-12 years	Track pants, joggers	₹199-499	T-Shirts	₹199-399	Co-sets	₹299-499
Girls	2-12 years	Leggings, shorts and track pants	₹149-399	Tops	₹199-399	-	-
Others (Infants/toddlers, etc.)	0-2 years	-	-	T-Shirts	₹199-299	Co-sets	₹249-299

>KRUNCHY<

Krunchy was incepted with the vision to enrich the lives of children with happiness and comfort and it strives to provide value for money products to its customers.



BRAND RETAIL MAPPING

No. of Indian cities present in: 100

Total no. of EBOs: 9

Total no. of MBOs: 50

Brand Turnover in FY' 16-17: 6 CRORES

Turnover CAGR (last 3 years) 100%

Growth in first 3 quarters of FY'17 over the same quarters in FY '16: 100%

Product Portfolio:

The brand's current product categories include infant wear and kidswear in hosiery fabric, catering to the age groups from 0-10 years. Its top selling lines have round neck suits for infants and capris, half pants, etc., for kids.

Theme & Core Elements of Latest Spring-Summer '17 collection:

Krunchy's theme for latest Spring-Summer '17 collection is casual wear with innovative and value-added designing.

Target Audience

The brand targets people from tier-I and -II cities in India and parents who wish to buy comfortable and well-designed garments for their kids at a reasonable price.

Manufacturing Capacity:

The brand's manufacturing unit which sprawls across an area of 6,000 sq.ft., is located at Paridhan Garment Park, Kolkata and it produces 24 lakh pieces every year.

Design Capabilities:

Krunchy's designing and sampling team is focused on development and creation of new designs and procurement of latest fabrics. The brand forecasts trends by conducting informal market surveys on a monthly basis and discussing with retailers and consumers. The average cycle time from product conceptualization to reaching the store takes approximately 3-4 months.



Marketing Strategy:

Krunchy promotes its brand by participating in garment fairs at the national level and print advertisements. It is planning to introduce value added fabrics in garments in the near future and also plans to introduce new products such as gift sets.

Brand's Presence in Online Retail:

The brand is planning to start online retailing soon.

New Territory/ Regions added:

Maharashtra and Gujarat.

New Territory/ Regions Targeted for Next Few Years:

South India and North East India

Brand's Presence in International Markets:

Krunchy looks forward to create supply in the international markets in the near future.

×

Brands	Targeted age group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	2-10 years	Half pants, capris, full pants	₹140-350	T-shirts, sweatshirts	₹250-450	-	-
Girls	2-10 years	Hot pants, capris, full pants	₹140-350	T-shirts, sweatshirts	₹250-450	-	-
Others (Infants/toddlers, etc)	0-2 years	Leggings	₹100-150	-	-	Round neck suits	₹190-220

>MASH UP<

Mash Up is a young and energetic brand that meets the style demands of Urban Indian boys by offering them the choicest selection of casual, designer and party shirts.

Product Portfolio:

Mash Up comprises casual, designer and party shirts, t-shirts, waistcoats and blazers for boys of 6-16 years age group.

Top Innovations:

Mash Up has come up with formal tuxedo shirts and matching bow ties, digital-print casual shirts, over dyed t-shirts for young boys.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

For Spring-Summer'17 collection, the brand has played with prints, denims and dyed fabrics to give kids a lively summer wardrobe. The highlight of its collection is wooden bows and ties paired with cool party shirts.

Target Audience:

Mash Up primarily caters to the fashion-conscious parents of young boys between 6-16 years of age, who seek versatile options to dress their kids stylishly for every occasion.

Manufacturing Capacity:

The brand has a quality focused design and production unit located at the Readymade Garments Complex in Indore. Spread over 40,000 sq.ft. carpet area, everything from design to production happens in-house under direct supervision. MashUp has a production capacity of around 6 lakhs pieces annually. The brand's capacity expansion is in line and it is aiming to add one more unit and double its production capacity in the coming years.

Design Capabilities:

Mash Up's design and development team is a mix of industry veterans

and young blood. This diversity enables it to create new-age fashion without compromising on finish and quality. The brand refers to international forecasts and trend studies, as well as predict trends by traveling to fashion capitals of the world. Its efficient team can deliver a product from the concept stage to the stores in about 20 days.

Marketing Strategy:

The brand focuses mainly on in-store and point of sale promotions, and extensively on social media and digital marketing. Mash Up has garnered more than 10K followers on leading social media platforms. For the retail trade partners Mash Up participates at all the major garment fair in the country. As of now it is preparing for the CMAI 65th National Garment Fair to be held later this year in June. It also plans to introduce bottom wear products in the coming season and foray into young men's category in the coming years.

Brand's Presence in Online Retail:

Some of the brand's collections are exclusively available on CrazyLa.com. The products are also widely available on other leading online portals like Amazon, Jabong, Flipkart, Snapdeal, Paytm, etc.

New Territory/ Region added:

West Bengal and North Eastern states

New Territory/ Regions Targeted for Next Few Years:

Hyderabad, Andhra Pradesh and Telangana.

Brand's Presence in International Markets:

The brand looks forward to establish distribution channels in UAE, Oman, Sri Lanka and Singapore.



BRAND RETAIL MAPPING

No. of Indian cities present in: 82

Total no. of MBOs: 850

Turnover CAGR (last 3 years): 30%

Presence in LFS Stores:

THE CHENNAI SILKS, POTHYS, SRI DEVI TEXTILES, ETC.

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

Brands	Targeted Age Group	Upper Wear	Price Range	Outer Wear	Price Range
Boys	6-16 years	Casual and party wear shirts, t-shirts	₹599-1,499	Waistcoats & blazers	₹899-1,999

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>MOOZOO & NOTTIE<

Moozoo and Nottie are brands launched by Moozoo International. The company manufactures affordable yet fashionable kidswear products like lounge wear, frock sets, etc., for kids aged upto 14 years. It is famed for its baby suits made from 100 percent cotton for new borns and infants.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The Spring-Summer' 17 collection is going to have lot of pastels and nauticals.

Target Audience:

The brands Moozoo and Nottie target upper middle class and middle class and kids from 0-14 years of age who are inclined towards dressing in style.

Brand's Presence in Online Retail:

As of now, the brands are present only in Amazon.

New Territory/ Regions added:

Organically growing, the brand has added Andhra Pradesh to its roster this year.

New Territory/ Regions Targeted for Next Few Years:

Moozoo International plans to expand into the North-Eastern states soon.



BRAND RETAIL MAPPING

No. of Indian cities present in: 90

Total no. of MBOs: 300

Turnover CAGR (last 3 years): 25%

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

>MUSTANG SOCKS & ACCESSORIES<

Mustang Socks & Accessories aspires to consistently understand the current consumer trends and tastes to provide the best quality socks and accessories for all age groups.

Product Portfolio:

The brand's current product categories range from socks and accessories for all age groups. Mustang's kids product line consists of briefs, vests, caps, mittens, handkerchiefs, and socks

Top Innovations:

As a brand, Mustang strives for continuous innovating at all aspects of the production process. While its diabetic and trekker socks are a few of its stand-out innovations in the adult range, in the kids range, a key innovation has been its process of manufacturing caps and mittens.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

Mustang's Spring-Summer 2017 collection is bright and beautiful and it will have innovative styles, novel design concepts, vibrant colours and shades with perfect cotton quality and latest technology.

Target Audience:

The brand has been able to deliver innovative products for specific target audience needs such as booty socks for kids, etc.

Manufacturing Capacity:

The company's manufacturing unit is located at Palghar with a staff strength of more than 550 employees and its production capacity is more than a million pieces per month.

Design Capabilities:

Mustang has an in-house team regularly working on new designs and concepts. The brand consistently uses consumer insights to define trends and align its product range to the same. From concept to store, it has an average cycle of 3 weeks to 2 months based on the concept.

Marketing Strategy:

The brand's marketing strategy consists of creating conversations around socks and accessories to change its perceptions from a commodity to a fashion statement. It uses public relations and social media to build brand awareness and preference for its product range. The brand's future plans include a continued effort on developing and conceptualizing new designs and creating partnerships with designers for special edition socks collections. It also looks forward to expand its range of fashionable products.

Brand's Presence in Online Retail:

The brand's products are available both on its own online store mustangsocks.com,

and other leading e-commerce sites like Amazon, Flipkart, Hopscotch, etc.

New Territory/ Regions Targeted for Next Few Years:

The brand targets to expand throughout India.

Brand's Presence in International Markets

Mustang is currently present in UAE, Lebanon, Italy, Saudi Arabia, Egypt, and England and aims to expand its presence to the USA.



BRAND RETAIL MAPPING

No. of Indian cities present in: 100

Total no. of MBOs: 8,000

Total no. of LFS Stores: 1

Turnover FY' 16-17: 75 CRORES

Turnover CAGR (last 3 years): 30%

First 3 quarters growth FY'17 over the same quarters in FY '16: 25%

Brands	Targeted age group?	Bottom Wear	Price Range	Outer Wear
Boys	3 to 13 years	Briefs	₹250-280	Socks & accessories, caps and mittens, booties, handkerchieves
Girls	3 to 13 years	Leggings	₹230-520	Socks & accessories, caps and mittens, booties, handkerchieves
Others (Infants / toddlers, etc)	0 - 3		₹100 onwards	Socks & accessories, caps and mittens, booties, handkerchieves



>OKS BOYS & OKS MINI<

OKS Boys & OKS Mini are brands which have grown with the credentials of passion behind its successful journey. Started by Jayprakash Bhayani in 1989, rooting out of a group called Origin, it manufactured men's wear. Later it was joined by Amit Bhyani who led the business expansion on a branded level. He started the product expansion with children's tracksuits and lounge wear in 2003 under the brand name 'O' Kids. In 2004, the company started manufacturing t-shirts under the brand name 'OKS Tee Factory'; and in 2006, it began manufacturing shirts as 'OKS Boys'. In 2007 the company started experimenting with shirts with just four fabrics. These fabrics were very innovative and the brand became a nickname for kid's exclusive shirts.



BRAND RETAIL MAPPING

No. of Indian cities present in: 75

Total no. of MBOs: 800

Total no. of SISs: 50

Turnover CAGR (last 3 years) 40%

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

Product Portfolio:

OKS Boys produces a range of shirts and jackets for boys of 2-14 years. Offering a vast range from retro checks to funky stripes to a range of solids and striking prints, the brand became synonymous for its identity cuddle with colours, authentic fashion, and passion for its work.

OKS Mini offers a collection of shirts and jackets for infants starting from 3 months to 15 months.

Top Innovations:

The brand was amongst the first ones to introduce hardcore fashion products in the market. Standing true to its image, it bench-marked the segment of fashion shirts not only with its styling but also with its price points.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The brand's play this time is focused on denims, digital prints and linen stories. Cotton, prints and checks also form a major part of their shirt collection. It has conceptualized its collection on nautical themes going back to the British era. Designs feature a lot of accessories like the badges, flags, flaps, etc., on the shirt.

Target Audience:

Both the brands target customers who want to dress up their kids with passion and respect the price and the brand they are paying for.

Manufacturing Capacity:

The company has its main unit in Gujarat which is of 21,000 sq.ft. Major production for the brand takes place in this unit. Other than this, the brand has 3 units in

Mumbai and the company is planning to set up one more unit of 20,000 sq.ft. in Vasai. The total capacity of the units is 40,000 pieces per month.

Design Capabilities:

OKS follows true international trends. The forecasting is done keeping in mind the Indian sensibilities and the preference of the market. The brand has specialized designers who have deep understanding of kidswear trends. The printing and embroidery set-up is totally in-house.

Marketing Strategy:

The brand always showcases at the India Kids Fashion Week. Apart from this, the brand promotes its imagery through major B2B channels of publicity and also through e-commerce. OKS is planning to expand its product category by launching of bottom wear in all categories by 2019.

Brand's Presence in Online Retail:

The brand has its presence on Amazon, First Cry, Flipkart, Jabong, Snapdeal and all other major e-commerce portals.

New Territory/ Regions added:

The Eastern part of India

New Territory/ Regions Targeted for Next Few Years:

The company is looking forward to expand and search for distributors in Jharkhand and Orissa.

Brands	Targeted Age Group	Upper Wear	Price Range	Outer Wear	Price Range
Boys	2-14 years	Shirts	₹695-1,495	Jackets	₹1,999-3,999
Others (Infants/toddlers, etc)	3-15 months	Shirts	₹395-995	Jackets	₹995-1,695

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›PEPE JEANS‹

Pepe Jeans London launched its kids wear range in India in 2015. The brand is for the young at heart and it caters to the fashion forward, who wants stylish and trendy denims that fits well at an affordable price.



Product Portfolio:

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

Top Innovations:

Sustainability is the need of the hour. Pepe Jeans has introduced two new elements, True Fresh and True Blue in its denim line.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The Pepe Jeans Spring-Summer' 17 kids' collection is underpinned by the idea of the journey as an experience through life. The collection consists of fun and fresh indigo and denim pieces. The core theme inspiration comes from an adventure. It's about easy-to-wear garments, feeling free and liberated! It's contemporary, streetwear-orientated and showcases a variety of washes.

Target Audience:

The brand's target audience are the fashion conscious kids and parents who are not afraid to loosen their purse strings for quality products in the latest trends. The Kids' Collection caters to children from 4 to 12 years of age; as well as teens (14 to 16 years of age) and consists of classic casuals and fashion denims.



Design Capabilities:

Pepe Jeans has its own in-house design team working with its global team. The brand keeps in mind buying patterns and street style and its supply chain cycle takes about 90 days.

Marketing Strategy:

Pepe Jeans recently partnered with the Kala Ghoda arts festival 2017. The curation of workshops at the kids vertical has been done with an intention to encourage young curious minds with interesting activities. The brand launched kids wear in the year 2015, as an extension of casual wear offering. Through its association with Kala Ghoda this year, Pepe Jeans aims to share its cool and iconic DNA with a wider audience.

New Territory/ Region added:

Chennai

New Territory/Region Targeted for Next Few Years:

In 2017, Pepe Jeans is looking forward to launch in the following cities- Coimbatore, Saket and Bangalore.



BRAND RETAIL MAPPING

Total no of EBOs:
219

Total no. of MBOs:
1012

Total no. of SISs:
229

Total no. of SSSs:
229

Total no. of LFS Stores:
332

Brands	Targetted age group?	Bottom wear products	Price Range	Upper Wear Products	Price Range	Outer Wear Products	Price Range
Boys	X years to Y years	4 years to 12 years	MRP ₹899-1,299	4 years to 12 years	MRP- ₹899-1,799	4 years to 12 years	MRP ₹1999-4,499
Girls	X years to Y years	4 years to 12 years	MRP ₹899-1,299	4 years to 12 years	MRP ₹799-1,999	4 years to 12 years	MRP ₹1799-4,099



>RUFF<

Ruff manufactures a fashionable and trendy product line. The brand has always nurtured futuristic outlook by maintaining constant innovations like designers crew neck tees, Jamaicans, designer denims, cotton pants, designer shirts, etc.

Top Innovations:

For the first time the brand has manufactured kids' leather jackets in different colours and have received a very good response. Also printed t-shirts with different themes like bikes, etc., trendy blazers and fancy denim jackets have been Ruff's top innovations.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

For Spring-Summer'17 collection the brand has used knitted fabric, jogged denims and more of fabric oriented items for kids to play outdoors.

Target Audience:

Ruff targets section A and A+ consumers and from the age group of 6 months to 16 years. The brand has constantly reinvented and contemporized itself successfully addressing the needs of the customers.

Design Capabilities:

Ruff believes in providing high quality garments with latest international styles, eye catching patterns in innovative fabrics and trendy colors. The brand's average cycle in terms of converting products from concept till the time they reach the stores is 90 days.

Marketing Strategy:

Ruff promotes the brand through online contests, print advertisements, hoardings, events & promotions and various other platforms. The brand has major expansion plans both in India and overseas. It is planning to open more EBOs and spread its reach through more shop-in-shops and MBO's.

Brand's Presence in Online Retail:

The brand is present in Myntra, Jabong and is in talks with Ajio.

New Territory/ Regions Targeted for Next Few Years:

The brand is planning to penetrate into more international markets.

Brand's Presence in International Markets:

The Gulf countries and Africa.

BRAND RETAIL MAPPING

Total no. of EBOs:
22

Total no. of MBOs:
500

Total no. of SiSs:
160

LFS Stores:
SHOPPERS STOP, CENTRAL,
GLOBUS, ETC.

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range
Boys	6 months-16 years	Pants, etc.	₹795-1,895	Blazers, jackets, etc.	₹695-1,495

>SIMPLY<

Simply, as the brand name suggests, manufactures simple basic products for infants to four year old kids. The company was launched in 1998 and has been manufacturing products like slips, vests, panties, briefs, shorts, tops, frocks, baby suits, mittens, booties, caps, towels, napkins and gift boxes which are 100 percent cotton and designed especially for the comfort of babies.

Target Audience:

Any income group can opt for the products as they are basic and provide value for money.

Manufacturing Capacity:

The brand's manufacturing capacity in Paridhan Garment Park, Howrah sprawls across 10,000 sq.ft. and produces 15 lakh pieces. per year.

Design Capabilities:

The brand produces basic and full range items and also works with 10 types of fabrics. The brand's R&D team ensures that products are soft, smooth and look pleasantly colourful. Contrary to

other brands, the brand strives to provide different and new products every season.

Marketing Strategy:

The brand believes in word of mouth publicity. It sells products which are value for money and reaches customers through retail marketing such as departmental stores, online marketing, etc. A peculiar trait of the brand is its willingness to frequently add products to its portfolis whenever needed.

Brand's Presence in Online Retail:

The brand is associated with online sites like First Cry, Babyoye and Snapdeal.

New Territory/ Regions

added: Delhi, Chattisgarh, Gujarat and Madhya Pradesh.

New Territory/ Region

Targeted for Next Few Years: Punjab, Bihar and Orissa.



BRAND RETAIL MAPPING

No. of Indian cities present in:

35

Total no. of EBOs:

5

Total no. of MBOs:

2,500

Presence in LFS Stores:
BIG BAZAAR AND PANTALOONS



YoY	FY-2015	FY-2014	FY-2013
Total no. of EBOs	5	5	2
Total no. of MBOs	2,500	2,000	1,500

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	New born to 4 years	Briefs, shorts & track pants	₹60 -120	Vests, t-shirts, front opens	₹75 -150	Sets	₹200 - 225
Girls	New born to 4 years	Panties, shorts, skirts, capris, leggings etc.	₹60 -120	Tops, slips	₹75 -150	Frocks	₹125 - 175
Others (Infants / toddlers, etc)	-	-	-	-	-	Rompers	₹125 - 175
						Gift sets	₹450 - 600



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>SMARTY BOYS<

Smarty is an amalgamation of comfort and style with a global feel. All products are made with 100 percent cotton yarn. The brand was launched in the year 1992. Initially, it catered to both domestic and international clients but, with the demand growing multifold domestically, it started concentrating in this segment.

Target Audience:

Parents, family and well wishers act as primary product purchasers of the brand. Value for money and global feel are what attracts customers to its products.

Manufacturing Capacity:

The brand's manufacturing capacity located in Howrah sprawls over 3,000 sq.ft. and produces 3.50 lakh pieces. per year.

Design Capabilities:

Smarty Boys offers products which are designed to have both, a universal feel and as well as a comfortable appeal. The brand's average fashion cycle in terms of converting products from concept till they reach the stores is around 30-40 days, depending on the type of

value added on the products. The season specific colors, themes and designs are made for every item. For the upcoming summer season, beach prints and a new parity of summer shades has been an instant hit for Smarty Boys.

Marketing Strategy:

Delivering a good product to the end user is the best marketing strategy as per the brand. Smarty Boys ensures that the customers are satisfied which in return creates a good demand for the brand.

Brand's Presence in Online Retail:

Flipkart and Snapdeal

New Territory/ Region added:

Uttarakhand and Chattisgarh.

New Territory/ Region Targeted for Next Few Years:

Haryana, Jammu & Kashmir, Himachal Pradesh and in depth access to the Coastal Belt.

Estimated Growth in the Last Two Years: 90%



BRAND RETAIL MAPPING

Total no. of EBOs:

2

Total no. of MBOs:

1,000

Presence in LFS Stores:

BIG BAZAAR AND PANTALOONS



YoY	FY-2015	FY-2014	FY-2013
Total no. of EBOs	2	2	2
Total no. of MBOs	1,000	600	400

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	2 years to 14 years	Shorts, bermudas, pyjamas	₹199 - 350	T-shirts, shirts	₹140 - 550	Night suits, lounge wear	₹300 - 550

>SMARTY GIRLS<

Smarty Girls specializes in girls' clothing for kids and produces a full range of items for the age bracket of 4 to 14 years. Launched in 1996, the brand initially manufactured t-shirts for girls and then gradually started making capri sets, leggings, lounge wear, night suits, etc.

Manufacturing Capacity: The brand's manufacturing unit located at Girish Park measures 3,000 sq.ft. and produces 2 lakh pieces per year.

Brand's Presence in Online Retail: The brand is present only in Snapdeal

New Territory/ Regions added: Andhra Pradesh, Assam, Gujrat, Maharashtra, Nagaland, Rajasthan, etc.

New Territory/ Regions Targeted for Next Few Years: Delhi, Chattisgarh, Punjab, Orissa and Bihar.

Estimated Growth in the Last Two Years: 80%



YoY	FY-2015	FY-2014
Total no. of EBOs	2	2
Total no. of MBOs	750	500

BRAND RETAIL MAPPING

Total no. of EBOs: 2
 Total no. of MBOs: 750
 LFS Stores: BIG BAZAAR AND PANTALOONS

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range
Boys	4 years to 14 years	Capris, leggings, shorts	₹165 - 240	Tops	₹220 - 280



>TEDDY>

Established in 1993, Teddy originally manufactured baby suits for 1 to 6 year old kids. However, the brand gradually expanded and started manufacturing a full range of products for kids including capri sets, frocks, night suits, leggings, half pants, t-shirts, etc.

Manufacturing Capacity: The brand's manufacturing unit located in Paridhan Garment Park is about 10,000 sq.ft. and produces 10 lakh pieces per year.

Top Innovations: The brand introduced an innovative range of capri sets, cotton stripe t-shirts, frock sets, etc.

Brand's Presence in Online Retail: The brand retails online through First Cry.

New Territory/ Regions added: Telangana, Assam, Tamilnadu, Punjab, Karnataka, etc.

New Territory/ Regions Targeted for Next Few Years: Delhi, Chattisgarh, Orissa and Bihar.

Estimated Growth in the Last Two Years: 25%



YoY	FY-2015	FY-2014
Total no. of EBOs	2	2
Total no. of MBOs	3,000	2,500

BRAND RETAIL MAPPING

Total no. of EBOs: 2
 Total no. of MBOs: 3,000
 LFS Stores: BIG BAZAAR AND PANTALOONS

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range
Boys	1 to 6 years	Half pants	₹110 - 150	T-shirts, baby suits, night suits	₹230 - 480
Girls	1 to 6 years	Leggings	₹150 - 230	Capri sets, night suits, frocks	₹230 - 480

>SPARK & BUTTON NOSES<

Spark is a leading manufacturer and exporter of kidswear. The brand believes that its job doesn't end by just making garments that look good, but continues until the garments feel good. On the other hand, Button Noses specialises exclusively in an entire range of girls clothing.

The company has a highly efficient and trained team of technicians ensure that not even a single millimeter of thread is out of place and the garment is exact to specifications. It has in-house screen and computer embroidery facilities, which assist in keeping high quality control and also cut down costs and minimise supply time. These facilitate the brand in experimenting on new styles, thereby making it the very first to get the new trends to its customers. With a passion for denims and appreciation for new fashion, the brands aim at bringing international trends in the Indian markets.

Product Portfolio:

The brand offers the widest range of clothing for boys and girls such as t-shirts, shirts, shorts, denims, chinos, boys sets, dangrees, tops, hot shorts, capris, dresses, pinafores, girls sets, frocks, leggings and jeggings.

Target Audience:

The brand caters to children in the age group of 6 months to 14 years.

Top Innovations:

Sparks innovations can be seen in its creativity on the fancy t-shirts, premium denims, girls' leggings and tops.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The brand focuses on bringing premium quality knitting fabric for summers which is extremely soft and comfortable. At the same time, the international look of the garments make the collection a winner amongst kids.



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> TANTRA <

Tantra encapsulates the life and times of our subcontinent – its past, present and future.

BRAND RETAIL MAPPING

- No. of Indian cities present in: 30
- Total no. of EBOs: 30
- Total no. of MBOs: 300
- Total no. of SiSs: 15
- Presence in LFS Stores: CENTRAL, ETC.

Top Innovations:

The brand creates fresh and original quality t-shirt art for kids. It is Tantra's biggest and most challenging innovation.

Theme & Core Elements of Latest

Spring-Summer'17 Collection: Tantra maintains a steady t-shirt style, every year. What changes season to season is the creativity along with seasonal colours.

Target Audience:

Target audience ranges from 0-12 years old kids. The brand employs different sets of creativity for each age group.

Manufacturing Capacity:

Tantra's manufacturing unit is in Tirupur. The brand does not outsource, it rather pick up its own quality-specified yarn, and take the process forward, via its southern based office. It produces 2.05 lakh pieces annually.

Design Capabilities:

Tantra has two offices located at Nariman Point, Mumbai, out of which, one is based entirely for creative design and development. The creative cell collates and curates t-shirt art from established graphic artists, visualisers, copywriters and cartoonists. The brand's average cycle in terms of converting products from concept till time they reach the stores is 30-40 days.

Marketing Strategy:

The brand's marketing strategy is largely online advertising, in EBOs and it also follows word-of-mouth publicity.

New Territory/ Regions added:

Rajasthan and Chattisgarh.

New Territory/ Regions Targeted for Next Few Years:

Tantra looks forward to expand all over India as well as re-look at its existing markets.

Brand's Presence in International Markets:

The brand has an EBO at 101 mall, Kuala Lumpur.



Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range
Boys	0-12 years	Shorts	₹349-399	T-shirts	₹329-349
Girls	0-12 years			T-shirts	₹329-349
Others (Infants / toddlers, etc)	0-18 months	Knitted shorts & pants	₹149-199	Rompers, t-shirts, vest	₹275-299

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SIZE : 6x16

■ **3785**
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> TOFFYHOUSE <

Toffyhouse believes in maintaining the highest quality standards in terms of fabric, stitching, designing, colour combinations, styling and most importantly, the quickest availability across retail counters.

Product Portfolio:

The brand manufacture sets, rompers, dungarees, nightwear, receiving blankets, bibs, mittens and booties, and separates for both boys and girls. It also offers jumpsuits and dresses for girls.

Top Innovations:

Every piece of Toffyhouse is produced after a lot of brainstorming. Therefore, although the brand considers its entire range to be highly innovative, its new range of digital prints on denim stands out.

Target Audience:

Toffyhouse targets well-traveled, smart parents with exposure to international trends and ideas.

Design Capabilities:

Forecasting comes naturally and effortlessly to the brand.

Market Strategy:

Generally, Toffyhouse expands its range, by adding few categories every season. But now, due to increase in demand, the brand wants to double its production to cater to the existing range and add another 100 percent capacity to introduce a complete range for 3 to 6 year olds.

BRAND RETAIL MAPPING

Total no. of EBOs:
2

Total no. of MBOs:
1,000

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

Brand's Presence in Online Retail:

Toffyhouse is present across all major online retailers.

Brand's Presence in International Markets:

The brand's range is present in the UAE, Nigeria, Iran, Oman, Saudi Arabia, Seychelles, Mauritius, Pakistan and Bangladesh.





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>TOONZ<

Toonz Retail India is a one-stop shop for all the needs of kids from 0-12 years of age. With skin safety and quality being the top priority, Toonz Retail provides the best in apparels and other kids' merchandise. It boasts of two core brands Wowmom and Superyoung followed by the brand extension Superyoung Celebration. While Wowmom aims to provide fashion solutions for new born to 3 years, Superyoung is for kids aged from 3 to 12 years. The company has also introduced Super Young Celebration for the age group of 1-8 years. This brand includes party wear, fancy dresses, ethnic outfits and a casual range. Currently, Toonz has a PAN India presence with 106 stores. Internationally Toonz' Brands are available in countries like Nepal, Mauritius, GCC, Fiji, and Papua New Guinea. The brand also has a strong online presence with its own e-commerce portal www.toonz.in.



Product Portfolio:

Toonz stores comprise exhaustive kid's apparel collection, toys, strollers, walkers, car seats, baby care products, feeding accessories, nursery furniture, bedroom furniture, party wear, ethnic wear, casual wear, footwear and accessories. Toonz have associations with some of the world's best brands across categories giving Indian mothers and their kids an exclusive, international and innovative choice. In terms of kids' apparel collection, Toonz is very much in line with the latest fashion, through their own apparel brands Wowmom and Superyoung. Right from the colour texture to the comfort, feel and styling, Toonz's apparel range feature the best of all. Wowmom includes everything from small booties, to cutie onsies, dresses, shorts, tracks and t-shirts. Superyoung comprises of denims and shorts, graphic t-shirts, shirts for boys and pretty dresses, skirts, shorts, crop tops, dungarees, jumpsuits, etc., for girls. The Super Young Celebration range includes ethnic party wear, western party dresses, kurtas and dhotis for boys and even 3 piece. suits.

Top Innovations:

Keeping in sync with the latest trends the brand has designed beautiful Indian churidar anarkalis for girls and straight kurtas for boys in the ethnic range. It has also introduced glow in the dark range of t-shirts for kids. In the sports category the company has launched a new tennis ball which plays better and lasts longer.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The brand's collection is based upon three themes — Ocean

Wonders, Spring Garden and Digital Wave.

Target Audience:

Toonz aims to provide happy parenting solutions to all who want to provide the best to their kids. They target parents who are quality conscious while buying kidswear. The products are not too highly priced and ensure the latest in trend and best quality.

Manufacturing Capacity:

Toonz works with a set of manufacturers who are certified by the company itself, for quality production and who manufacture as per designs and quality defined by them. The manufacturers are spread across the country for various product categories. They produce about 10 lakh pieces per year with a mix of 32 percent bottom wear and 68 percent top wear.

Design Capabilities:

The company has an internal team of designers and researchers who work on the latest trends in terms of look, design, style, fabrics, and colour. Internal surveys for feedback on existing range helps to forecast for the next seasons. Apart from styling and comfort, key factors like fabric, quality of dye and accessories being used for kids are selectively calculated. The team works nearly eight months prior to a particular season launch. Seeing the latest digital revolution amongst kids, they have introduced a special collection of Digital Wave, a collection that encompasses

t-shirts with themes of games, pixels and also new attractive night stripes.

Marketing Strategy:

Toonz is looking at over all collection launch with a mix of ATL and BTL activities. Interesting window displays, few theme elements as giveaway are some of the core initiatives along with innovative customer engagement programs. Higher disposable income, with and the newly acquired quality consciousness are driving the major growth. The company also plans to venture into the sports category which includes equipment and apparels.

Brand's Presence in Online Retail:

The company markets its products through their own website **Toonz.in** and also through key online retailers like Jabong, etc.

New Territory/ Regions added:

Gujarat and Arunachal Pradesh.

New Territory/ Regions Targeted for Next Few Years:

Toonz plans to penetrate the markets of South and East in the next 12 months

Brand's Presence in International Markets:

The brand's products are available in KSA (Saudi Arabia), Fiji, P&G, Nepal and Mauritius.



BRAND RETAIL MAPPING

No. of Indian cities present in: 50

Total no. of EBOs: 100

Total no. of MBOs: 2

Total no. of SISs: 20

Presence in LFS Stores: HYPERCITY AND HERITAGE

Estimated Growth in the last Two Years: 25%

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	3-12 years	Denims, shorts, track pants, joggers, basic trousers	₹499 onwards	Shirts, t-shirts, polos,	₹199 onwards	Jackets, vest coats	₹599 onwards
Girls	3-12 years	Capries, skirts, leggings, denims, shorts, track pants	₹499 onwards	Frocks, tops, tees	₹199 onwards	Shrugs, jackets	₹599 onwards
Others (infants/toddlers etc.)	0-3 years	Kit sets, shorts, pajamas, denims etc.	₹299 onwards	Tees, tops, frocks	₹199 onwards	Pull overs, jackets	₹99 onwards

> VITAMINS <

Vitamins is a lifestyle clothing brand, which caters to the fashion requirements of kids aged 1 to 16 years. The brand today stands strong and continues to add hues and elegance to the garment of those cute little kids!

Product Portfolio:

The current product category of Vitamins Girls is knit tops, woven tops, frocks, jumpsuits, dungarees, pants, capris, shorts, jeggings, joggers, pack of two, socks, etc. and Vitamins Boys offers knit t-shirts, shirts, shorts, denims, joggers, pack of two, socks, etc.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The brand's core element for Spring-Summer'17 collection is triangle and beach theme which includes geometric figures with bright colours, embellished on the garments and also have beach themed prints on the apparel.

Target Audience:

The brand's target audience are kids aging from 4 to 16 years.

Manufacturing Capacity:

The brand's factory unit is of 5,000 sq.ft., located in Dadar West. The brand's production capacity is 7.10 lakh pcs per year. The brand's average cycle of converting products from concept till reaching the stores is 40 days.

Marketing Strategy:

Vitamins promotes via social and print media.

Brand's Presence in Online Retail:

Vitamins is available on all major market place and the brand's future plans are to expand more into online retail via different medium.

New Territory/Region Targeted for Next Few Years:

The brand targets to expand in the southern area of the country.

Brand's Presence in International Markets:

Vitamins has its presence in the UAE, countries in Africa, etc.



IMAGES Business of Fashion



BRAND RETAIL MAPPING

No. of Indian cities present in:	280
Total no. of EBOs:	1
Total no. of MBOs:	450
Total no. of SISs:	53

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>UFO<

UFO which stands for Under Fourteen Only, caters to fashion casual wear for kids. UFO is a creative group venture by Creative Kids Wear (India) Pvt. Ltd., it 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.

Product Portfolio:

The brand offers shirts, tees, jeans, dresses, cargos, jackets, sweaters, non-denim bottoms, chinos, etc.

Top Innovation:

UFO has tried its best to get creative and innovative in the kids wear segment. This time, the brand has tried a lot of innovative such as in fabric, colours and style. This summer season, the brand has tried to be innovative by using technical textile in kids apparel like seamless wear, anti-spill, anti-odour, etc.

Theme & Core Elements of Latest Spring-Summer'17 Collection:

The theme for the collection can be summarised as “the world is my play ground”. The collection showcase a very imaginative and magical designs that depicts that there are no rules to be followed. The collection displays unicorns princess, fishes flying, birds swimming, etc. The mood is to go wild and let the imagination of a child take shape in whatever it manifest itself into.

Target Audience:

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.

Manufacturing Capacity:

The brand has 22 factories across the country and a state-of-the-art manufacturing facility which is fully complaint to industry and factories act. It produces approximately 3 million pieces per annum.

Marketing Strategy:

UFO is planning to use a combination of marketing tools to promote itself through some innovative medium, which was never used by the company before.

Brand's Presence in Online Retail:

The brand retails through e-commerce websites like Myntra, Amazon, Jabong, Flipkart, Hopscotch and Snapdeal.

New Territory/ Region added:

The brand has recently spread out to the markets of four new regions.

New Territory/ Regions Targeted for Next Few Years:

The brand has plans to target top 100 towns of India in years to come.

Future Expansion Plans:

UFO is planning to expand its presence through multi channel retail in order to cover different geographies of India.



BRAND RETAIL MAPPING

No. of Indian cities currently present in:	75
Total no. of EBOs:	3
Total no. of MBOs:	150
Total no. of SISs:	100

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>ZERO<

The brand Zero was established in 1990 with a motive to offer 100 percent cotton products and provide a full range of basics for new borns to 2 year old kids.

New Territory/ Regions added:

Telangana, Assam, Tamilnadu, Punjab, Karnataka, etc.

New Territory/ Regions Targeted for Next Few Years:

Delhi, Chattisgarh, Odisha and Bihar

Estimated Growth in the Last Two

Years: 25%



Target Audience:

Zero feels that any wise person will opt for the brand because of its high quality and high fashion. However, the quantity of products bought entirely depends on the income of the person.

Manufacturing Capacity:

The brand has a manufacturing capacity of 50,000 sq.ft. in Paridhan Garment Park, Howrah and it produces 10 lakhs pieces every year.

Design Capabilities:

The brand works with 35 types of fabrics and produces soft, colourful and visually appealing products. Though baby products do not differ much apart from new prints, design and new color shades, Zero ensures that it shells out unique products every season. At times the designs are color specific.

Brand's Presence in Online Retail:

Flipkart, Snapdeal, Firstcry, Babyoye, Ebay, etc.

YoY	FY-2015	FY-2014	FY-2013
Total no. of EBOs	2	2	2
Total no. of MBOs	6,000	5,000	4,000
Total sales	₹54 crores	₹47crores	₹39 crores

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	0-2 years	Shorts, panties, drawers, track pants, briefs	₹50-120	T-shirts, baby suits, vests	₹50-300	Towels, napkins, mitten booties, hood towels	₹35-240
Girls	0-2 years	Panties, drawers, leggings	₹50-120	Frocks, tops, baby suits, slips	₹50-300	-	-

BRAND RETAIL MAPPING

Total no. of EBOs: 2

Total no. of MBOs: 6,000

Presence in LFS Stores: BIG BAZAAR AND PANTALOONS





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EMERGING WORLD OF KIDS DENIM WEAR

Neha Shah, Marketing Head, Pepe Jeans, and Sohail Patra, Director, D S Corporation (Ruff), both renowned denim brands, share the essentials that goes into making a successful kids' denim brand. They further elaborate on the opportunities and challenges that exist in this segment.

With 29 percent of the country's 1.2 billion population under the age of 14, India is potentially a massive market for children's clothing. Neha Shah, Marketing Head, Pepe Jeans, shares, "This is due to the increasing awareness, growing brand consciousness and rise in disposable income." And as India's purchasing power grows, its image-conscious parents want to dress even their children as per their definitions of fashion. "Kidswear is now taking cues from adults' wear as both parents and kids base their buying choices with ongoing trends. Branded kidswear is one of the most propitious markets in India, today," she adds. Thus parents living their childhood dreams through their kids is creating a huge demand for kidswear especially in the denimwear segment. "The denim wear segment in kidswear is witnessing a good market and is expanding day-by-day," said Sohail Patra, Director, D S Corporation (Ruff).





The Growing Opportunity in Kids Denims

As a result, a number of denim wear brands launched their kidswear range in the recent past. For example, Pepe Jeans expanded its product portfolio into kidswear, in India, in 2016. Allen Solly Junior, a sub-brand of Allen Solly was launched in 2010. Gap, known for its denim wear, entered India in 2015 with its full range of apparel for men and women, including Gap Kids and Baby Gap. Also, brands like United Colors of Benetton Kids and U S Polo Kids are already thriving in the market. The demand in this sector has also been catalyzed by the shift towards an organised market. The kidswear segment, according to industry reports from last year, grew at a very healthy 13 percent. And branded kids denims are in vogue in not just the larger cities. “Today, tier -II and -III markets are emerging as important markets. One cannot treat these markets as an extension of tier-I markets anymore,” Neha Shah explains.

“To understand the market, one has to keep in mind the evolving consumer landscape of the Indian kidswear market. Earlier, the kidswear market was unorganised. The apparels were purchased from local shops and were just functional in nature,” shares Neha Shah. Sohail Patca further elaborates by sharing that, “There is a lot of requirement in this sector, then again the requirements vary across different tastes to financial status of the customers. As a result, each brand as well as local players in kids denim wear segment enjoy their own space of goodwill in the market.”

Challenges in Creating Kids Denim Brands

No longer is the kidswear segment a child’s play. It has come to assume a competitive position among the apparel industries in India. While the growing popularity of denims is undebatable, its application into kidswear also comes with its set of challenges. “One of the major issues in the denim ecosystem is the way denims are made. Pepe Jeans believes in sustainability; and our Spring/Summer 2017 collection is a reflection of the same,” says Neha Shah. As per Sohail Patca, kid’s denim wear is an entirely different concept. “We are looking at a market where the economics play a major role. The price tag is important for many. So, many may be attracted to local players who have less liabilities and it reflects on the price of the products. Many of them play with average quality product which again influences the prices, whereas branded denim kidswear follow a particular standard of coming up with new fashion, new fabrics and new concepts to maintain their goodwill and stability in the market,” he adds. He further maintains that creating a brand in denim is little difficult as denim is not like any usual fabric. “Different denim fabrics have different uniqueness and quality of its own. The processes of the washes are to be carefully experimented

and carried out with,” shares Sohail Patca.

New Trends and Innovations

Neha Shah believes that it is the target consumers i.e., the kids who are of utmost importance. It is keeping them in mind that the colour play and comfort of the denim wear are designed.

“Few trends that are incorporated in our Spring/Summer 2017 kidswear collection, are tropical prints, and rainbow coloured palette (bright colours paired aesthetically with each other), in easy to wear-summer relaxed outfits,” shares Shah. Sohail Patca shares that, “Our new collection, the Spring/Summer 2017 is ready to strike. The whole concept of design and pattern is towards a lighter tone. The colours are bright and beautiful. This season, we also see a major change in the mindset of the kids and young teenagers. The fashion trend will reflect that shift. There is a mature trend which is catching up with this restless group which will be in vogue.”

Pepe Jeans was the first brand in India to introduce a denim customisation service, called the ‘Custom Studio’. Pepe Jeans Custom Studio allows customers to step into the design seat and customise denim in a few easy steps. This is a fun and creative way for kids too, to engage in creative thinking and creating designs on their denims. They can draw and write, and even pick laser prints that can be tattooed on the denims. Pepe Jeans’s customisation service empowers the customer with the opportunity for personalisation; and therein lays a powerful tool that will revolutionise denim fashion in India. This service is available at the large format stores in metros, and creative kids are one of the focus categories.

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INFINITE OPPORTUNITIES IN INFANT WEAR

East India is emerging as an important cradle for some of the best infant wear brands. Team Images BoF speaks to Amit Goenka, Partner, Moozoo International (Moozoo & Nottie); Vidhan Chabra, Business and Development Head, Toffy House; and Pramod Modi, Director, Rahul Computex Pvt. Ltd. (Begonia), who shares their experiences and thoughts on the infant wear market in India.

There is definitely an increasing preference for branded infant wear in India. A clear sign is that earlier this year, Atlanta-based children's clothing company Carter's Inc., announced that it will sell in 15 cities in India through BabyOye stores, which are owned by domestic retail group Mahindra Retail. Shoppers Stop, which runs nearly 38 shops of MotherCare, a British retailer of products for expecting mothers and newborns, have seen great growth in sales over the past few years. As per Amit Goenka, Partner, Moozoo International (brands Moozoo & Nottie), the awareness of brands, availability of quality products and increase in disposable income have been the key drivers in this growth of branded infant wear.

Although the category requires a special set of skills in its product planning and retail and huge opportunities await players that chose to venture into the sector. Vidhan Chabra, Business and Development Head, ToffyHouse, believes that, "India is the fastest growing economy in the world, and when all other economies are going through their worst phases, it is a shining star in the world today. And therefore, this is the time when responsible



corporates in India must take advantage of and create specialized brands." Indeed, gone are the days of basic infant drapes laundered in boiled water and good old Dettol. Parents are today seeking much more. "With more awareness and education, especially among women, they now want to use safe garments and articles for their babies, and which also give them a sense of pride in using trustworthy brands. Since core features, hygiene and quality are maintained by branded clothes, hence the demand for them is on a rise," Shares Pramod Modi, Director, Rahul Computex Pvt. Ltd. (Begonia).

Challenges Facing Infant Wear Brands

However, infant wear being a nascent category, the industry faces several challenges. A fundamental consumer behaviour issue is that since kids are expected to outgrow the clothes in less

than a year, parents expect their prices to be relatively cheap. Accentuated by an overall propensity to pay less is the fact that the brands have few specialist retailers for infant wear.

"Lack of efficient distribution and apparel retail being season specific makes infant wear brands stock-up, which the manufacturers have to, in order to supply during different season and time periods," explains Amit Goenka. In totality, this creates funds flow issues and this is further compounded by lack of investor interest in the category. Vidhan Chabra shares that the main challenge that Indian brands face is of finance. "Investors in India are more keen on funding international brands compared to the home-grown kidswear brands. Today, India is a strong and independent country, capable of anything, so the investors should support the kidswear market especially the infant segment," he adds.

On the other side, the product-mix spans several sizes as infants grow rapidly. So, the other challenge for brands (and retailers) is that they have to handle 8-9 different sizes, nearly double the number of different fits for adults, putting constant pressure on the supply side.

The right way ahead, and within it the protection for responsible infant wear

players, lies perhaps a lot in the hands of the government. Pramod Modi clarifies when he shares that there are almost no safety regulations from the government for manufacturing infant wear in India, thereby enabling low cost- low quality players to operate. On the other side, he observes that when the players export infantwear, they are handed a list of safety features to be maintained while manufacturing infant wear, such as guidelines on the usage of buttons that have to be both secure and harmless, fabrics that are duly tested for freedom from harmful chemicals, fabrics that should not be flammable, length of ribbons



"Lack of efficient distribution and apparel retail being season specific makes infant wear brands stock-up, which the manufacturers have to, in order to supply during different season and time periods."

-Amit Goenka,
Partner, Moozoo International
(Moozoo & Nottie)



“Many international brands in the Indian infant wear market have not been able to bring in profits into the pockets of the Indian partners since they are unable to deliver as per the demands of the market.”

-Vidhan Chabra,
Business and Development Head,
Toffy House



“There is competition from international brands in the Indian market as the people are more aware of the international brands coming in rather than the local products of the same quality available in the market.”

-Pramod Modi,
Director, Rahul Computex Pvt. Ltd.
(Begonia)



used, etc. Similar guidelines should be prescribed by the Indian government as well to maintain high standards in the products entering the Indian infant kids wear market as well as being manufactured in India.

Foreign brands versus Indian Brands. Who are making more babies happy?

With the entry of international brands one would wonder about its impact on Indian brands in the already challenging scenario. Pramod Modi says, “There is competition from international brands in the Indian market as the people are more aware of the international brands coming in rather than the local products of the same quality available in the market. This awareness is due to the marketing activities that these brands follow. On the other side, there has been little investment at the consumer level for branding of kids’ garment in India by domestic players.” He further adds that, “The pricing of local good quality products in the market is quite high due to the huge margins at different levels in the supply chain. This leaves a huge price gap for the international products to exploit as they can still compete at those price levels after producing in some other country and even after paying off the taxes and other duties involved in export.” Vidhan Chabra however expresses that this does not necessarily mean that the international brands have won the

day. “Many international brands that entered the Indian infant wear market have not been able to bring in profits into the pockets of the Indian partners since they are unable to understand the demand and even after research, they are not able to deliver as per the demands of the market,” he shares. Clearly, the knowledge of local markets is an advantage for domestic brands. Additionally, domestic brands feel at home with their ability to churn out fast fashion for infant wear. “All our designing is done in-house and in sync with international trends and sometimes even ahead of international brands because of our quick delivery of current trends. We believe that fast fashion is in, in all sectors of garment, so why should infant wear be left out,” says Vidhan Chabra. On current trends and mix strategy, Pramod Modi shares, “The demand is high for bright and colourful products but production is more of the light shaded clothes due to low production cost and the need to balance the offering.” As regard his current plans for ToffyHouse, Vidhan Chabra shares, “The theme this year is life at the beach, sporty world, garden of daisies. We always plan to do things which no one has tried before us.”

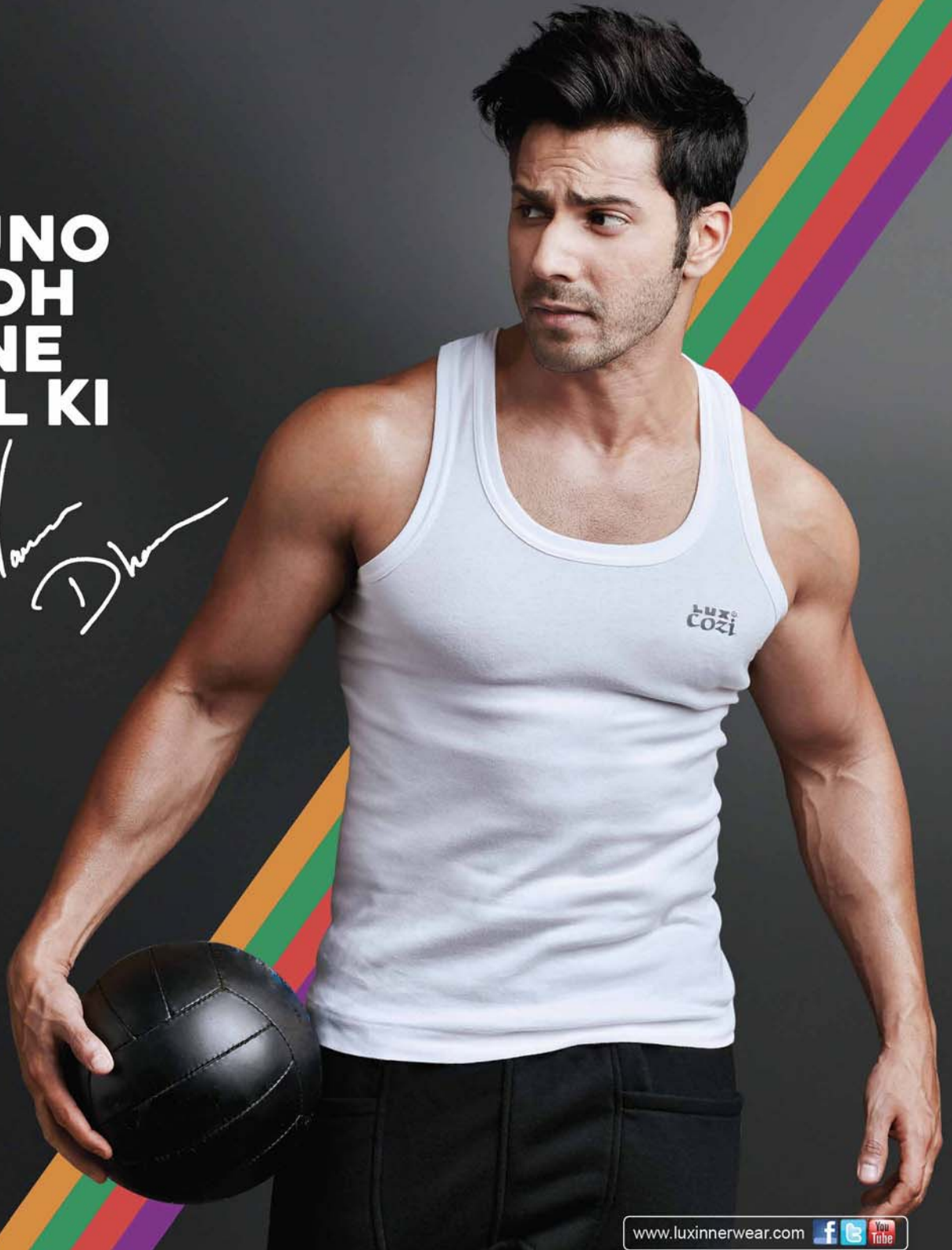
Indeed, gone are the days of whites and soft pastels and the little bundles of joy are mumbling their sweet nothings in approval.



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>PRIVE LUXURY LTD.<

Prive Luxury offers multiple kids luxury brands to cater to age group from new borns to 12 years old boys and girls. The brands functional under Prive Luxury Ltd. are Les Petits and Cherubs.

Product Categories:

Prive Luxury covers almost all categories from tops, bottoms, accessories, footwear, prams and strollers to beds. Their top selling products are- dresses, rompers, prams and t-shirts.

Target Audience:

Prive Luxury caters to new borns to 12 years old boys and girls.

Online Presence:

The brand has ventured into online retail.

New Territory/ Regions added this year:

Mumbai.

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BRAND RETAIL MAPPING

Cities/towns are you present in across India?

2

Total no. of EBOs:

2



Brands	Targetted age group?	Bottom Wear Products	Price Range	Upper Wear Products	Price Range	Outer Wear Products	Price Range
Boys	New born to 12 yrs.	Denims, pants, shorts	₹10,000-15,000	T-shirts, shirts, polo necks	₹8,000-10,000	Jackets, blazers, sweatshirts	₹18,000-22,000
Girls	New born to 12 yrs.	Denims, trousers, leggings	₹8,000-12,000	T-shirts, polo necks, tops	₹8,000-10,000	Jackets, cardigans, sweaters	₹15,000-20,000
Others (Infants / toddlers, etc)	0-2 yrs	Jeans, pants	70,00-11,000	T-shirts, polo necks, tops	₹5,000-8,000	Jackets, blazers, sweatshirts	₹11,000-16,000

>LITTLE SHOP<

Little Shop stands for a one stop solution for parents looking to shop for their kids in an international environment with down to earth prices.

Top Innovations:

The brand introduces two new broad collections every year, i.e., Spring/Summer and Autumn/ Winter.

Theme and Core Elements for latest Spring-Summer'17 collection :

The brand's new concepts for girls are asymmetrical cuts which is a new element in girls tops and dresses and for boys, colourful linen shirts and denim-wash jamaicans with ripped effect is going to be the trend this summer.

Target Audience:

Little Shop targets kids from new born to 14 years of age. It is a department store that caters to parents who belong to affluent families.

Manufacturing Capacity:

Little Shop sources products from the finest factories located in India and abroad. There are 12 stores currently in the best locations of Kolkata and Howrah and the average size of each unit is about 4,000 sq.ft.

Design Capabilities:

International trend and fashion play a big role in the season merchandise available at Little Shop.



Marketing Strategy:

Little Shop has carefully mapped their locations in the city to ensure there is a Little Shop store within 10 minutes drive for most densely populated areas in the city. Besides that, there are number of promotions like gifts, gift voucher schemes, twice a year discount sales, etc.

Online Retail:

Little Shop retails all its products through its online site www.littleshop.in

Brand's Presence in International Markets:

Little Shop has a sister concern which is a Govt. of India recognized export house. All the popular LFS stores in the UAE sell the same products available at Little Shop simultaneously.



BRAND RETAIL MAPPING
No. of Indian cities present in: 2

Total no. of MBOs: 12

First 3 quarters of growth FY '17 over the same quarters in FY '16?: 15%

Brands	Targeted Age Group	Bottom Wear	Price Range	Upper Wear	Price Range	Outer Wear	Price Range
Boys	0-14 years	Shorts, jamaicans, full pants	₹495-1,495	T-shirts, shirts, innerwear, night wear	₹295-995	Waist coats, sherwanis	₹795-2,495
Girls	0-14 years	Hot shorts, capris, full pants, jeggings, leggings	₹195-1,495	Tops, frocks, innerwear, night wear	₹195-995	Dresses, gowns	₹795-2,995
Others (Infants / toddlers, etc)	Newborns	Shorts, leggings, pants	₹295-795	T-shirts, shirts, tops	₹ 95-795	Baby suits, frocks	₹195-995



KIDZANIA CATALYSING KIDSWEAR BUSINESSES

Several categories of fashion in India are still largely unorganized. There is much to improve in the infrastructure and work culture get the industry organised. In such an overall scenario several players in the kids wear industry depend a lot Kidzania, a marketing company, that markets kidswear products all across India and fosters promotions and knowledge sharing.

Kidzania organized industry meets that bring together several kidswear brands and distributors from across the country on a common platform to discuss multiple industry-related topics and devise new business strategies, keeping with the latest design and buying trends. At the sidelines of its fashion show at Hotel Novotel, Kolkata, held from 7th January to 10th January, Images BoF speaks to *Rajeev Harmilapi, Proprietor, Kidzania*, to further understand the industry and the value that his organization brings in.

Tell us a bit about the core of your business.

We are a marketing agency who is currently working with 21 brands and have over 150 distributors pan India. As per the brand specific term of agreement we either take care of the total sales for the brand or a particular segment of their total sales; like distribution channel, online sales, etc.

What is the potential of kidswear in East India and how do you think it has changed over the years?

East is the largest manufacturer of kidswear in India. The potential is backed by the availability of cheap labour and raw material. The major change in the last few years has been the change in mindset wherein the labels now want to be brands and want their market to expand out of their previously defined closets. Brands converting themselves and entering organized retail has been another major success.





– Rajeev Harmilapi,
Proprietor, Kidzania

What are the strengths required to become a great distribution business?

Basically, I think the organization needs to have a very strong presence pan India via great retail connect, and this has to be maintained and developed by continuous door-to-door marketing to build the distribution channel. On the other side, one of course needs to have good brands in the portfolio.

And, what do brands expect from you?

Brands expect us to have a strong network, they also need good collection support and honest, proper marketing.

What do the retailers expect from you?

Retailers expect us to present to them good brands with latest designs and best quality foremost. Timely delivery of orders and backend support in case of disputes are two other issues which are important to them.

And, exactly how do you decide to be a distributor for a particular brand?

The brand must have unique products which are not already there in my portfolio. For example, we are strong in the infant section and are looking to strengthen the segment of 2 - 4 years and 4 - 12 years. Then of course within this broad unique positioning, we narrow down onto brands based on designs and product quality.

Is design all that you look for in a brand?

No. Beyond innovative designs, product quality and fair pricing are also critical.

And with so many brands we are sure some overlaps would exist. In such situations how do you avoid brand cannibalising other brands within your own portfolio?

Firstly, we do try to keep brands who have different product range to avoid conflicts. Yet there are few where the products are same at times, but then they do have some or the other uniqueness; if not in the target groups then maybe in terms of design or pricing. To avoid conflicts in future and to loop in more brands we are looking to filter few brands that are not up to the mark as per our market standards.

Are you also involved in e-commerce operations? If yes, do you do it directly or just support the e-retailer network of the brands?

We have tied up with few market places like First-cry, Amazon, etc., and promote all our brands through them. We are also planning to launch our own e-commerce portal to promote our brands more aggressively.

Tell us more about your other innovations and your future plans for the growth of your business?

We had launched the Kidzania mobile app during our event in Goa last July. We have all our brands showcasing their products through the app to all our distributors, who can place orders from there and get real time status of their delivery. We are planning to more innovations to keep supporting the brands.

To increase our reach in the market, we are continuously into the market doing door-to-door marketing to pool in more distributors mainly for the areas where we are weak. We are looking forward to holding regional events in those areas to attract more distributors.

How successful was the fashion show part of the event and what was its purpose and final impact?

This was the first time we had done a fashion show during our event which has been highly appreciated by the brands as well as the distributors. We wanted the distributors to get a feel of how the garments would look on the end users to give them more confidence in selling a product. The turnaround for the fashion show was great and in fact distributors who were not eager to book products of a particular brand have done volume booking from those brands after watching the fashion show.

Brand Owners Opinion on Kidzania:

Since all the brand owners were aware of the distributors coming in for the event from all across India, they had done excellent home-work and presented new collections and designs. We spoke to some of the owners of the participating brands and came across some common feedback on the benefits of the Kidzania event and fashion show that they unanimously agreed upon. The fact that brands could showcase their entire range of products to so many distributors together was a great advantage both-ways. The fashion show added to the overall positivity and glamour; and also helped build confidence in the distributors about the brands. The organizers shared that the bookings increased by as much as 50 percent as compared to previous few bookings. Brands like Eteenz, Simply, Teddy, Smarty and Toys R Us who have recently joined hands are very happy to be a part of Kidzania and they find other manufacturers to be very open minded and are glad to work parallelly with them. At the same time brands who have been with Kidzania for long like Olio Kids, Point, Johny Johny Yes Papa, Angel, RITUALS, Little Darling, etc., agree that the environment is very co-operative and they enjoy working together.



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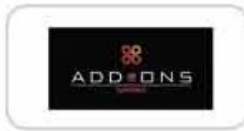


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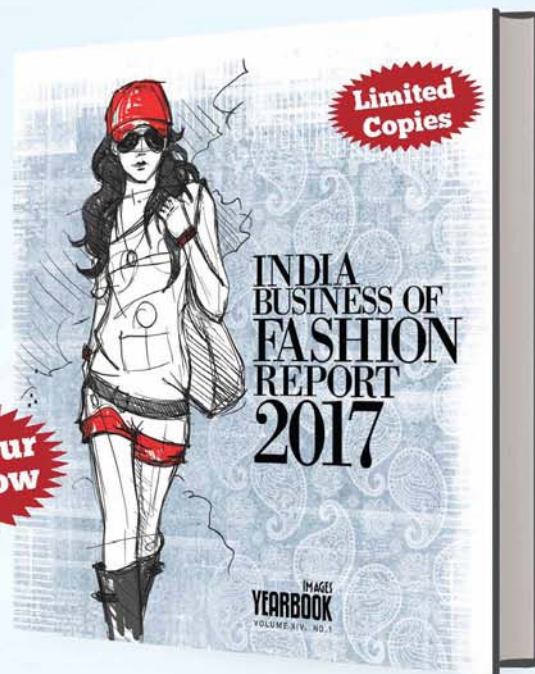
FASHION CREATION

- » CREATING ORGANIC
KIDSWEAR
- » DESIGNER & PREMIUM
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PREVIOUS EDITIONS





Premium & Designer Kidswear

PREMIUM & DESIGNER KIDSWEAR IN INDIA

What used to be simplistic and basic outfits a few years ago, now flaunt the formidable traits of premium luxury – modish cuts, styles and designer tags. The upper-end market for kids wear in India has plenty to offer and we talk to some star designers and retailers in the segment.

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Designer Watch

- 131 ARCHANA KOCHHAR
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- 135 NEEDYBEE



Standards

GOTS THE HALLMARK OF ORGANIC ASSURANCE

The Global Organic Textile Standard (GOTS) is the worldwide leading textile processing standard for organic fibres, including ecological and social criteria. IMAGES BoF talks to Sumit Gupta, their representative on his work and core values of GOTS, especially as applied in kidswear.

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Fashion Creation

Q&A

BETTING ON KIDSWEAR GOING ORGANIC

Neha Garodia, Founder and Creative Director, Mi Dulce An'ya speaks to IMAGES BoF about the current status and future prospects of organic kidswear in India.

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Profile

MI DULCE AN'YA - A BRIEF PROFILE

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Collection

ANNOUNCING SWITCHERS BY UNDERCOVER THE FIRST MIX AND MATCH BRA

With roots in Mumbai, the brand Undercover offers a luxury, fashionable and innovative line of intimate wear that gives women the freedom to pick comfort and style, at the same time.

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PREMIUM & DESIGNER KIDSWEAR IN INDIA

Over the last two decades, kids' dressing habits in India have witnessed quite a facelift. What used to be regular, similar and basic outfits a few years ago, now flaunt the formidable traits of premium luxury – modish cuts, styles and designer tags. The upper-end market for kidswear in India has plenty to offer and we talk to some star designers and retailers in the segment.

By Bharti sood



“While designing for kids, it is very important that the design is stylish and aligns to their taste. Designs including the silhouettes, colour palette have to be unique and appealing to the kids.”

-Archana Kochhar,
Designer



“We really need to look into fabrics and yarns we use for the kids in India. Whether designer wear or not, kidswear has to be very comfortable and the fabrics used should be just cotton.”

-Jattinn Kochhar,
Designer



“While designing kidswear, one really needs to think about the comfort of the child. The first priority is to make clothes that are wearable and easy. Also important is the fit.”

-Ritu Beri,
Designer

With increasing preference for branded apparel, rise in the disposable income, increasing influence of foreign culture and emergence of kids as a serious and often independent buyer group, the designer and luxury kidswear segments are flourishing in India.

Traditionally, the trend was basic functional life-style kids’ apparel dominated by the unorganised sector, but today, the Indian kidswear market is rife with an endless list of mega brands offering dedicated kids lines which include the likes of Allen Solly, Arrow, Reebok, Puma, Woodland, Marks & Spencer, Benetton, etc. Simultaneously, as per an ASSOCHAM report, the propensity for brands in kidswear has transcended the boundaries of the metros and tier-I cities and have now percolated deep into tier-II and tier-III cities like Dehradun, Ludhiana, Pune, Nasik, Indore, Varanasi, etc., as well.

While branded wear has already become a staple trait of this segment,

an increasing number of parents are now opting for luxury and designer tags. Armani Junior, the designer wear kids’ brand from the eponymous designer whose average transactions hover around ₹15,000, grew by 15-19 percent over the last financial year in India. “We have a lot of interest for the brand in Mumbai and Kolkata, so we are reviewing our expansion plans in line with the market sentiment,” Sudeep Chhabra, Business Head of Unique Eye Luxury Apparels, which is the franchisee partner for Armani Junior in India, was quoted to have said to the ET. The same story had also revealed that Amazon’s sales for its kidswear category, which includes brands like French Connection Kids, Disney and US Polo, have grown 1,000 percent since 2014. Amazon Fashion is fast emerging as a hot spot for kids fashion in India. It boasts of a comprehensive fashion selection for kids with the largest and the most organized selection of apparels. It recently has even launched exclusives like Bubblegummers and British Knights as well as exclusive lines from Barbie and Spiderman. The opportunities in the Indian kidswear industry has also attracted a long list of international



A creation by Jattinn Kochhar



“Modern kidswear borrows inspiration from 70s retro, creating a fresh take on boho aesthetics. Must-have styles emerge in the form of buttoned suede skirts, soft long-sleeve cotton dresses and cosy shearing-lined booties.”

-Sakshi Arora,
Director and CEO, Kids Around.

bigwigs, all who have rushed in for their share of the market. Singapore based FOX Kids and Pumpkin Patch, which is a New Zealand brand, have seen huge customer interest in their product lines. Fashion portal Rock N Shop, which retails brands like Alexander McQueen and Bally in India, forayed into kidswear recently targeting boys and girls in the age group of 1- 10 years. While brands such as Kidology and Kukoon are already available on the platform, Milk Teeth has been added recently. Other noteworthy brands that have established their stronghold in the country are Poney, Fendi Kids, Versace, D&G and Paul Smith Junior.

It has gained such traction in the recent past that even Indian designers are eyeing the premium space. Ace designer Masaba Gupta, who launched an exclusive kidswear range recently, revealed that the step was a result of the “constant requests from clients to design something exclusive” for their kids and that she intends to explore the space more. “It’s an extension of our label and we want to build this further,” she had told the ET. In an attempt to map the burgeoning luxury kidswear market, IMAGES BoF talked

with a few of the most influential designers who expressed their respective views on the characteristics of the market, its growth drivers and key trends.

Core Necessities

“Patience, love for kids and of course hardwork is what is required to build a kids-centric brand,” said Sakshi Arora, Director and CEO, Kids Around. It is pivotal to understand pulse of the segment and the sensibilities of the target audience to create designs. Also topping the priority list is fabrics. Kids’ skins are very sensitive and parents are conscious about it too. Kids’ comfort, quality of the fabric and clothes in this segment also differentiates kids fashion from adult fashion. The well renowned designer Jattinn Kochhar shares, “We really need to look into fabrics and yarns we use for the kids in India. The materials used should be non-allergic. Whether designer wear or not, kidswear has to be very comfortable and the fabrics used should be just cotton.” According to him, the kidswear industry in India largely uses cheap fabrics and sells them premium. Even the undergarments that kids tend to wear throughout the day, lack innovation.

They are simply designed with some cartoons and after only two washes, the patch fades away. Even the socks have nylon content in them, which does not keep the kids warm in winters and are also sweaty in summers.

“I have been doing lot of school uniforms. But I feel that after we have done the design, the production team — in order to save money — uses low quality fabrics, which have a synthetic mix. The schools really need to take care in this regard. A lot of kids might be allergic to synthetic fabrics. At least the layer that touches the body should be cotton,” he adds. Emphasizing on

the importance of the fabrics used, star designer Ritu Beri said, “While designing kidswear, one really needs to think about the comfort of the child. The first priority is to make clothes that are wearable and easy. Also important is the fit.”

The buzzword in the kidswear luxury segment now is organic clothing. Eco-friendly fabrics, including organic cotton, soy, hemp and those that have been certified as chemical-free, have emerged as a new hot favourite owing to its skin friendly nature. Shares Alop Mehta, Co-Founder & CMD, NeedyBee, “We believe that it’s our

moral responsibility as a brand to provide skin friendly, non-allergic and pure clothing for kids. Kids have sensitive skin and more so now with the increased pollution levels, skin irritants abound in plenty. It becomes all the more important to be careful of what’s going on your child’s skin. Clothing is in direct contact with their skin so picking the right clothing is very important.” Agrees Jattinn Kochhar, “I highly recommend use of organic fabrics for kids. I have been working with organic fabrics since past five years but very rarely do people ask for it. Though there are some brands in the market, but the major problem we are facing is that they are slightly expensive. This trend needs to pick up. I’m of an opinion that one can feel the difference in fabric, only after having used it. Once the parents start using organic fabrics, kids will automatically be interested.”

Design Essentials

Childhood is way too short to waste in dull and drab clothes. As a thumb rule, bright and vibrant is the core template of kidswear, yet at the same time, it has to be timeless and elegant.

Ritu Beri feels, “One can design fun collections for occasion wear for the kids, which can be extremely colourful, carefree and crazy. Designs that have vibrant colours, personality and style, are very simple, easy to wear and cool. The simple and generous cuts of the dresses carry over the excitement and thrill for the look.” Contemporary kids are very well aware and are in sync with the latest fashion trends. This makes them as demanding as an adult client. “Modern kids are very different. They have their own demands and know exactly what will look good on them. Hence while designing for kids, it is very important that the design is stylish and aligns to their taste.



Baby Beri



Kids Around





Baby Beri



"We believe that it's our moral responsibility as a brand to provide skin friendly, non-allergic and pure clothing for kids. Clothing is in direct contact with their skin so picking the right clothing is very important."

-Alop Mehta,
Co-Founder & CMD, NeedyBee

Designs including the silhouettes, colour palette have to be unique and appealing to the kids," reveals designer Archana Kochhar.

Jattinn Kochhar feels functionality and practicality are some of the most important aspects while designing kidswear. He adds, "Fabrics and colours also play a very important role. Using technical fabrics is important as kids can do just anything. They jump, run, fall and at times, do things which you cannot even think of. While designing uniforms, I keep lot of aspects in mind. The sizes increase and so there must be good enough scope in the garment for them to grow. We can't be restricting. Nowadays, the kids no longer want baby clothes. They want to dress up like adults. We no more see 'pretty little things' being sold for them in the market. They want what their parents wear. Till the child is not deciding his own clothes, the parents have a free hand. But nowadays, the kids are aware even at the age of two."

Ritu Beri adds, "In today's era, I have seen strong impact of media on kids buying behaviour. I enjoy making kids clothes according to the mood and taste they are comfortable with. It's always been fun to style them differently or to introduce them to their super heroes with a different look. >

Well, kids do enjoy the new ideas and kids today are more particular about what they wear also."

Cartoon characters and sports and young stars play a huge role as influencers after the age of five. Children want to wear, use, play and live their favourite cartoon characters. "It's sort of an obsessive phase which stays for a certain period and wears out. But it does create the buying pattern for parents and influences the purchase," reveals Alop Mehta.

"Even if the fabric of the garment with the character is not of good quality, you have no control as your child wants it. It is, in fact, very fascinating to see how the kids' mind works," says Jattinn Kochhar.

Growth Drivers

Kids are today very aware of their surroundings due to the early introduction of technology in their lives. Archana Kochhar says, "They know exactly what looks good on them. Parents want to ensure that their kids have the best and prefer designer wear to labels when it comes to special occasions."

Disposable income of parents, double income households and the one child syndrome – all create a focal point around the child and so the child is showered with an expensive and vast wardrobe. "Anything that catches the fancy of the parent for their child is bought without a second thought. In fact, spending on designer wear is a sense of pride and joy that your child has the best and you could provide it for them," remarks Alop Mehta.

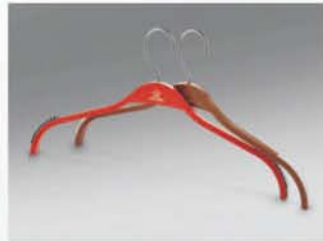


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Parents love to dress up their babies and cherish what they wear. “And when they need something special, they seek professional help and so designer wear is a preferred choice today. Since kids want to dress up like their moms and dads, the designers can make a huge impact,” Jatin Kochhar apprises. “Kids today belong to the screenage and thus are more aware of the latest trends and fashion. These factors are the major drivers in the growth of the kidswear segment, be it in India, or abroad,” says Ritu Beri.

Kids today also have a strong individual personality and can be very particular and demanding about what they wear.

The Market Potential of Luxury Kidswear in India

Designer clothing for children has been around globally since Christian Dior started making it in the 60s. However, in India, luxury kids lines have surged only in the recent years. The market for children’s fashion and luxury is fast becoming one of the most profitable retail segments in India. As per Ritu Beri, it also is the only segment which has not been impacted by the economic slowdown and is poised for significant growth.”

“Many global brands are exploring growth opportunities in emerging markets as economic growth and birth rates slow in the western markets, and India is seen as a high-potential market. The fact that India is one of the youngest nations in the world (29 percent of its 1.2 billion population is under 14 years) makes it an attractive market for brands. For the US, Europe and Japan, the share of children in their population are only 19 percent, 16 percent and 13 percent, respectively,” says Sakshi Arora.



A Les Petits store



Creation by Jattinn Kochhar

“We see India as a potential market, because consumers here seek for quality and style. With an increase in the disposable income of the consumers; we are particularly eyeing at Strata A and B segment of our target audience, as they seem to appreciate the quality and styling sensibilities of Poney,” Albert Tan, founder of Poney, told the ET.

As per Sakshi Arora, the interest of global bigwigs like Gucci, Burberry, Armani, Little Marc Jacobs and premium brands like Hugo Boss, Karl Lagerfeld, Carrement Beau among others speaks volumes about the teeming potential of this segment.

The Size of the Premium Kidswear Market in India

“The market for kids’ apparel in India exceeds ₹13,000 crores, of which around ₹3,000 crores is constituted

by branded kidswear. The kidswear market is growing at the rate of 10 percent per annum, which makes it one of the fastest growing markets,” shares Sakshi Arora. She revealed that as in adult clothing, the kidswear market too is experiencing a level of polarisation that favours both value and designer wear clothes. If Alop Mehta is to be believed, the size of the designer branded kidswear market in India is ₹3,000 crores and he feels this will grow further. Jattinn Kochhar feels that about 20 percent of the apparel market consists of designer kidswear. “I think this is really huge. In the current scenario, it constitutes USD 14 billion and is expected to grow up to USD 18 billion by the year 2020. It is expanding rapidly, specially the kids t-shirt segment,” he adds.

Top Fashion Trends Expected to Emerge in Kidswear

Alop Mehta of NeedyBee predicts the advent of geometrical prints, loud colours, skirts with leggings and waist coats, Hawaiian printed shirts for boys and floral patterns. Jattinn Kochhar feels that denim jackets, knitted items, stripes and patterns will be in vogue. “I also see lot of fringes, white laces, trimmings, bright happy prints and neon colours in trend. In terms of fabrics, I would recommend cotton, silk and linen for summers; and denims, corduroys, velor and cashmere for the winters,” he adds.

Sakshi Gupta shares, “Modern kidswear borrows inspiration from 70s retro, creating a fresh take on boho aesthetics. Must-have styles emerge in the form of buttoned suede skirts, soft long-sleeve cotton dresses and cosy shearling-lined booties. Classic 70s shades look new with bold colour pops, while prints take the form of ditsy florals.”



Archana Kochhar

Archana Kochhar has been a name to reckon with in the fashion industry for the last two decades. From Shahrukh Khan, Kareena Kapoor to Kangana Ranaut, her clothes have been adorned by several Bollywood celebs. After carving a niche for herself in the bridal wear segment, Archana Kochhar recently launched her kidswear line at the India



-Archana Kochhar,
Designer

Kids Fashion Week. She has been a pioneer in the world of digital prints, showcasing them at various fashion events across the globe, like New York Fashion Week and India Fashion Week, Dubai. She is also known for lending her support for social causes like girl child education and women empowerment.

Product Portfolio

Archana Kochhar is a designer label and they design clothes as per the need of the occasion. The label enjoys high demand during festivals and weddings and most of the outfits created are either ethnic or Indo-Western. Archana Kochhar offers a complete range for kids from dhoti saris, to beautiful lehanga cholis for girls and sherwanis for boys.

Theme and core elements of Spring-Summer'17 collection

For kidswear, comfort is the most important aspect. The brand creates special designs as per requests from its clients based on different occasions. Their kidswear line includes beautiful dresses, dhoti saris and anarkalis. For boys they have shirts and shorts, pants, smart waist coats and jackets.

Target audience

The brand targets parents who like to dress their kids in comfortable yet stylish clothes. Being a designer label, they do not mass produce. Each outfit is customised and is a single piece. They design for kids from as young as few days old to any age.



Baby Beri



-Ritu Beri,
Designer

Ritu Beri, the famous Delhi-based designer launched Baby Beri, her line for the kids, in 2009. Her journey as a mother made her realize the need for designer wear for children, something that was exclusive and yet easygoing. Her collection features both Indian and Western wear in high-style, colourful ensembles.

Target Audience:

The Baby Beri line caters to kids in the age bracket of 2 - 12 years.

The Collection:

Each Baby Beri collection has been designed with elan and is very close to her heart. Her lehngas and sherwanis for girls and boys are certainly a sight to behold. She has even introduced khadi to her kids line.

Design Capabilities:

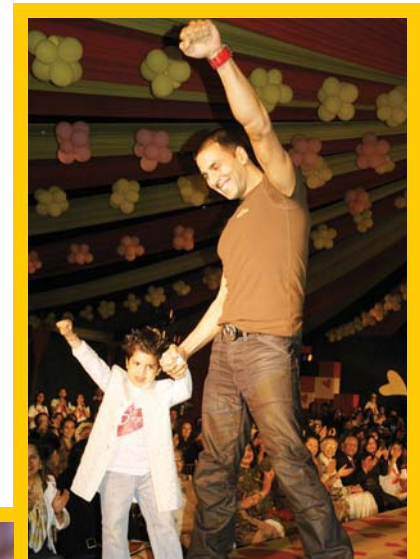
For Ritu Beri designing kid's clothing is a playful and joyful experience. Her endeavor is to create designs that are stylish, trendy and comfortable. The idea is to bring out the youthfulness and cheerfulness of kids.

Retail Presence

Baby Beri is retailed through the Ritu Beri store at Sainik Farms, Delhi.

Presence in international markets:

Ritu customizes for her clients globally. She feels style is an important aspect in kidswear as children nowadays are aware of what is in vogue and what is not.



Jatinn Kochhar

Designer Jatinn Kochhar feels that kids usually like to dress up the way their parents do. He is mostly into evening and occasion-wear for the little ones. His mother-daughter line is a miniature of what he creates for the adults.

The kidswear collection:

Jatinn does not do kidswear regularly. He designs for kids only during festivals or when there is a demand.

Kidswear Theme and Core Elements

Jatinn basically works with hosiery fabric. The whole idea is to do what is done for the grown ups; whatever is done for the grown-ups, is done for the kids too. The Princess theme is a major element of most of his designs.

Product portfolio:

Jatinn Kochhar's range comprises dresses, gowns, tunics and saris. Saris is rare but with an elastic waist. Considering little girls penchant for dressing up, he also has dressy gowns for them. They love to twirl around and feel good.

Since little girls love to wear what their mom wears, Jatinn has created all kinds of looks for little girls right from swimwear, loungewear, georgette kaftans to beach wear.

Ethnic influence:

Though ethnic influence is visible in his designs, but his main emphasis is on creating something wearable and comfortable for the little ones.

Target audience:

Jatinn Kochhar's collection caters largely to girls of all age groups - from toddlers to 16 years old girls. For boys they do not do much.

Future plans:

Jatinn is looking at an opportunity where he can get investors for this segment. He is looking for a right partner.



-Jatinn Kochhar,
Designer



Kids Around

Kids Around is a minimalist space that serves as a home to a range of brands where items can be mixed & matched – an innovative, creative concept dedicated to high-end children's fashion. The company harbours the best of luxury brands including Hugo Boss, Marc Jacobs, DKNY, Karl Lagerfeld, etc.

Product categories and core top selling lines:

Kids Around has 7 international labels under one roof, offering kids apparel and accessories for the new borns to 16 years age group.

Theme and core elements of latest Spring-Summer'17 collection:

Kids Around has focussed on soft colours like pink, peach, mint and mustard.

Target audience:

Kids Around targets customers of medium to high income group. It offers kids apparel and accessories for new borns to 16 years age.

Manufacturing facility:

The manufacturing unit of Kids Around is in Paris.

Design capabilities:

Kids Around's design team is based at their head office in Paris.

Marketing Strategy:

The marketing approach of Kids Around has always been customer oriented. They are present at various social media networking sites like Facebook, Instagram, where they keep updating the customers about the offers, and various activities being done at the store.

Retail presence:

In India, there is only one Kids Around store in the Ambience Mall, Vasant Kunj, Delhi.

Online retail presence:

Kids Around is retailing through the shop pages of Facebook and has yet to enter into e-commerce business.

Future Plans:

Kids Around plans to open more stores in the metropolitan cities.

Presence in the international markets:

There are ten Kids Around brand outlets in ten countries.



NeedyBee

NeedyBee is a 'Made in India' kids brand providing apparel and accessories for newborns to 5 year olds. The brand offers a Head2Toe dressing collection made with the finest, natural, breathable fabrics to suit children's sensitive skin. Their high quality infant and kidswear range is stylish, and comes in contemporary designs, patterns and color palettes that have timeless appeal. NeedyBee clothes are simple yet classic, easy to wear and wash, and are beautifully handcrafted. They are finished with traditional embroideries, chikankari and smocking.



NeedyBee uses swadeshi (Indian) fabrics like cotton, linen, muslin, lawn, long cloth and mulmul fabrics which are lightweight, breathable and non-irritable. They are ideal for kids clothing as they absorb moisture and keep the child's skin cool. They can be dyed easily and get softer with every wash.

Target Audience:

NeedyBee targets newborns to 5 year old kids.

Product Portfolio:

The Company's product range encompasses all stages of a child's growth - from baby to toddler, Baby to five years - including clothing, nightwear, accessories and footwear. NeedyBee is an affordable range of fun. Offering every day kids clothing & accessories for babies, girls and boys. The price range starts at ₹79.

Latest Collection:

Needybee's latest nursery collection entails a beautiful range of crib linens and beddings. Their premium couture section sells very premium hand block printed, pure cotton, hand sewn and handcrafted items.

Design Capabilities:

In order to keep abreast of the emerging fashion trends, the brand's design team spends considerable time researching the market and absorbing

and interpreting international artistic and fashion trends. This enables them to produce kids collections that appeal to a wide socio-economic and demographic ranges of customers.

Manufacturing capabilities:

The brand focuses largely on design, colors, style creation, product sourcing and control of quality during product development. All designs are developed in-house. NeedyBee is a part of the 'Make in India' initiative. Their manufacturers are largely based locally and countrywide in India. Vendors are selected based on their skills, product quality, timeliness and cost. Many of the vendors have been working with the brand since their foundation and understands the company's quality aspirations. The company has developed software and information systems that track products from origination through to sale. They use historic data to predict sales trends which enables them to develop future ranges with increased confidence.

Marketing Strategy:

Since the last three years, the brand has expanded both through online and off-line

brick and mortar channels. However, their e-tail business remains a key focus for continued growth. NeedyBee brand can be found throughout all the portals in India and chain stores like Shoppers Stop, FirstCry, KoochieKoo, Just Moms, and more.

Online Retail:

NeedyBee markets through their own website called www.needybee.com. Over the years, NeedyBee has built up a significant database of customers which is regularly updated, analysed and complies with the best-practice principles of permission based direct marketing. About 90% of the products on NeedyBee are their own branded products. They have also tied up with a few selected merchants from the kids' space who are featured on their website.

Future Plans:

The brand is plans to launch their infant "Puja" ethnic wear collection for 3 months onwards babies. NeedyBee plans to participate in various international exhibitions this year to create more trade prospects for their products. They also plan to have their own standalone store in the near future to showcase their entire product range.

Social Responsibility:

NeedyBee works with various women empowerment organizations and designers who work with women at the grass root level to teach them embroidery techniques and other stitching skills.



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GOTS

THE HALLMARK OF ORGANIC ASSURANCE

The Global Organic Textile Standard (GOTS) is the worldwide leading textile processing standard for organic fibres, including ecological and social criteria. It is backed up by independent certification of the entire textile supply chain. Since its introduction in 2006, the aim of the standard has been to define world-wide recognized requirements that ensure organic status of textiles, from harvesting of the raw materials, through environmentally and socially responsible manufacturing up to labelling in order to provide a credible assurance to the end consumer.



“As a manufacturer, one must use GOTS certified raw materials (like yarn, fabric, etc.), dyes and chemicals, and use accessories like sewing thread and labels that meet the requirements put forward by GOTS for accessories.”

– Sumit Gupta,
Representative in India and Bangladesh, GOTS

IMAGES BoF talks to Sumit Gupta, the GOTS representative in India and Bangladesh, about broadening and implementing the core values of GOTS in India, especially in kidswear.

According to you, what is the status of organic textile in India, especially in the kidswear segment?

Honestly, organic textile in Indian retail is in a nascent stage. There are only a handful, say 10-12 brands, in India selling GOTS certified home textiles and garments (mainly casual wear).

As for kidswear, I can't think of a brand particularly selling GOTS certified products in India. There is a second category that includes businesses selling organic textiles with self-claims. They make organic claims because their supplier 'said' the fabric was organic. GOTS strongly discourages this kind of practices for lack of credibility and verifiability of such claims.

Have you encouraged brands to increase their share of GOTS certified textiles especially in kidswear in India?

The GOTS team actively engages with international brands and encourages them to increase the share of certified organic textile products in their portfolio. There are already several international brands that sell only GOTS certified products. Kidswear is an important section that makes a quick connect with the ethos of GOTS, which includes chemical and social compliances along with use of organic fibres.

How does GOTS stresses on the need to create more awareness and understanding regarding sustainability and organic textile among brands and manufacturers?

GOTS ran a consumer focused campaign 'Have you cottoned on yet?' in partnership with Soil Association, UK, wherein brands selling organic textiles were listed in the section 'Where to Buy'. We also created consumer oriented educational material like



short videos, flyers, comparison sheets, etc., which can be used by brands at respective points of sale.

We are also present in major tradeshows and conferences to interact with business leaders from both brands and manufacturers.

How can a brand or a manufacturer earn a GOTS certification on its products?

As a manufacturer, one must use GOTS certified raw materials (like yarn, fabric, etc), dyes and chemicals, and use accessories like sewing thread and labels that meet the requirements put forward by GOTS for accessories. Besides, the mandatory environment and social compliance criteria as listed in GOTS standard must be followed. These details are verified during inspection.

It is important to note that a brand can be selling both GOTS certified organic and conventional products. Therefore, the consumer/ buyer must look for the GOTS label before purchasing.

Do you think the demand for more sustainable and eco-friendly clothing will rise in India in the coming years ?

Definitely! A 2014 survey by Green Purchase Network of India has shown that more than 21 percent of Indian consumers are aware of terms

like recycled, organic, sustainable, etc. With a new initiatives of sustainability coming up almost every month, the level of consumer awareness is consistently growing and there is a huge scope for organic clothing, specially in the kidswear section as parents are more conscious than ever for their kids' health.

Who are the best GOTS certified mills or brands in India ?

GOTS maintains a policy of strict neutrality towards all certified entities and certification bodies. Therefore, I can't say who the best is. All GOTS certified manufacturers and traders are listed on 'Public Database' of the GOTS website and can be contacted as per need.

Some of the brands selling GOTS certified products in India are Back To Basics from Morarka , Do U Speak Green, Bhu:sattva, Moriko Organics, No Nasties, etc. As already stated, the same brand can be selling both certified and conventional products, therefore the consumer must always check the garment for GOTS label before buying the product.

“Some of the brands selling GOTS certified products in India are Back To Basics from Morarka , Do U Speak Green, Bhu:sattva, Moriko Organics, No Nasties, etc. The same brand can be selling both certified and conventional products, therefore the consumer must always check the garment for the GOTS label before buying the product.”





Team IBoF: What is the present status of the awareness and penetration of organic apparels in India, especially the kids wear segment?

Neha Garodia (N.G.): At present, the awareness of organic in India is very low, more so in the case of organic cotton fabrics. Recently, there has been an increase in the interest in hand woven, organic and natural fabrics for women's fashion wear with players such as Raw Mango and Pero emphasizing the importance, and so hopefully, this will trickle down to kidswear soon too.

BETTING ON KIDSWEAR GOING ORGANIC

While we hear that the demand for organic clothing made from eco-friendly and certified organic cotton for children is on a rise, it was important to hear it from one of the key players. Neha Garodia, Founder and Creative Director, Mi Dulce An'ya speaks to IMAGES BoF about the current status and future prospects of organic kidswear in India.





– Neha Goradia,
Mi Dulce Anya

IBoF: Apart from the lack of awareness, do you also think that higher pricing and low distribution avenues are some of the factors posing a challenge for organic kidswear in India? How does your brand cope with these challenges?

N.G.: We do indeed struggle with all these issues. But when we started, we were very clear that first and foremost, we wanted to be a socially conscious enterprise, promoting organic fabrics and hand crafted products that conformed with global standards.

Awareness building has been a priority from day-one. Our clients all come to us with this expectation, and with time, we have built a loyal base.

Regarding distribution, it is quite clear that organic cotton products will not currently reach a mass level in India since there are many other priorities that parents need to fulfill within their budget before children's apparel. Hence, we do not even consider lack of access to tier-III cities, towns and villages as a major challenge, since the metros cities are all well served. Therefore, on this count, for us, the major challenge is leveraging on e-commerce and pop-ups to reach potential clients in tier-II cities.



IBoF: What efforts are you making to educate and create more awareness amongst the parents, about the benefits of organic clothing?

N.G.: India, as a country, is very scam wary. With the number of incidents that have questioned people's trust, it is only natural that they feel everything is a money-making fad or gimmick. Hence, most of our energy is spent satisfying people's curiosity about why they should care. For example, at all our pop-up events, we continuously emphasise on the benefits of using organic fabric as much for the child's skin and health, as much for the well-being of the planet we leave behind for them. Further, with every purchase, we share a small write

up about the benefits of going organic. And, our website has an entire segment devoted to this topic.

IBoF: Are you hopeful that the demand for more sustainable and eco-friendly clothing will rise in coming years?

N.G.: Absolutely! If you look at the socio-economic indicators of any developing and developed country, it is evident that only after a certain level of education and income did people begin spending on things like organic food and clothing, etc. Our time will definitely come!





MI DULCE AN'YA

Let's look a bit deeper at Mi Dulce An'ya which manufactures handcrafted clothing for babies and children made from the softest and finest certified organic cotton. Launched in 2013, Mi Dulce An'ya is an organic clothing brand which manufactures handcrafted clothing for babies and children. The kidswear brand makes essentials and layette and luxe gift boxes for infants, formal wear for boys and girls aged 0 to 12, along with accessories and nursery items. As consumers in India are becoming more aware of health and environmental issues Mi Dulce An'ya innovates upon GOTS certified organic cotton with dedication, and focuses upon creating unique pieces rather than mass produced clothes.

Product Portfolio:

The brand does essentials and layette for infants, luxe gift boxes for infants, formal wear for boys and girls aged from 0 to 12 years, accessories and nursery items. Currently, the brand's best sellers are the layette and nursery items.

Top Innovations:

Mi Dulce An'ya believes in being socially responsible. The brand uses only the finest organic cotton and every piece is designed keeping convenience, comfort and international aesthetics in mind.

Theme and Core Elements for latest Spring-Summer'17 collection:

The collection has been inspired by Japanese origami this season.

Target Audience:

The brand targets all people who love their children and want the best for them. Mi Dulce An'ya is a diverse brand and from different geographies, united in the belief that thoughtfully designed, lovingly manufactured pieces are always better than mass produced generic ones.

Manufacturing Capacity:

The company's manufacturing and production unit is in Kolkata.

Marketing Strategy:

The brand indulges in both online and offline promotional activities and it plans to open a standalone boutique, which is scheduled for Diwali this year.



LUTHAI INDIA

Luthai India is a leading exporter, supplier and trader of ultra premium cotton and blended fabrics for shirtings. Their fabrics are all about creation and innovation. The brand offers a collection of luxurious fabrics made from the finest yarns counts. Their fabrics are super smooth and blend in style with comfort. The yarns are woven to be ultra light and thin. All fabrics produced by the brand are cool and breathable..



Core Elements:

All products of Luthai India are famous for their excellent quality and variety with a high degree of technology involvement. The fabrics are highly fashionable and healthy, ensuring supreme comfort to the end user.

Product portfolio:

The brand offers a vast range starting from 60's to 3/300's count in twill, satin, dobby and jacquard fabrics in white, pearl and black colours.

Target Audience:

Luthai India targets the younger generation who are quality conscious and like to go for style and comfort.

Core Product Offering:

The brand specialises in Supima Cotton fabrics, which are known for their strength, softness and colour.

Brand's Mantra:

Luthai India is the world's leading dyed-yarn fabric weaver and is one of the largest manufacturers of shirting fabrics in the world.

Future Plans:

The brand aims to soon start retailing its products through leading e-commerce portals. They are also planning to venture into exports. They aim to focus more on tier-III cities in the near future.



No. of MBOs:
2,000 OTC

Major department stores present in:
THECHENNAISILK, POTHYS, AKBARALI,
PRESTIGE, GABABNA, J.S. MHD. ALI

No. of Indian cities present in:
150 (TIER 2 AND 3 CITIES)

Brand turnover (estimated for FY 2015-16):
₹100 CRORES RETAIL VALUE

Territory Share of Total Sales Turnover:
100%





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colorful accessories to up the fashion quotient on your attire. They are stylish, fashionable, out of the ordinary yet extremely comfortable and supportive. Ladies desiring lesser struggle or having second thoughts while picking out their favourite tube dress, off-shoulder, backless or racer back tops, can pick from Switchers line of Shoulder Straps and Backs to perfect their look.

Monica Anand, the Founder of Switchers (also creator of the lingerie brand “Undercover”) said, “It all began with a question. Why can’t a comfortable, everyday bra also be high fashion and complement every occasion? Different days, or even different times of the day aren’t the same. Why can’t a bra keep up? Most outfit changes call for a bra change. That’s expensive and painful to maintain. Plus your sexiest bra, in all likelihood, won’t be the most comfortable or supportive one. It was time to go back to the drawing board.”

Each Switcher Accessory can be paired with different types of outfits. Diamond studded straps can be paired with a traditional outfit or one can also opt for hand embroidered straps for a classic evening look. Switchers also offers quirky prints and bright pop-colored straps to add more character to casual wear. Not only this, a customer can style one bra and wear different straps with it in many of ways. Just by buying one single bra along with unique styles of shoulder straps and backs and you are all set to style any outfit with it.

The gorgeous range of lingerie is available to shop online on www.switcherbras.com and the collection is also accessible through leading fashion and e-commerce portals in India. One can also buy different accessories as needed to style the original bra. The Switchers Bra and all its accessories are priced within the range of ₹199 to ₹1,999. Prices may also vary as per the design and preference.



Everyone struggles once in while balancing that ideal outfit and a matching bra. Most of the time, each look calls for a different bra, which is expensive and has high maintenance. But no more!

With roots in Mumbai, the brand Undercover offers a luxury, fashionable and innovative line of intimate wear that gives women the freedom to pick comfort and style, at the same time. Switchers by Undercover – an all-new innovation in the lingerie segment has brought to India an exclusive range of detachable, mix-and-match bras. The customer can completely take apart the bra by removing the Back portion and Shoulder Straps, then rebuild it with the brand’s fun,



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Chairman, IFF 2017
Managing Director & CEO
Arvind Lifestyle Brands Limited

“ We are on the supply side of the enormous opening that modern India today presents. It’s time to make it count. ”

FUTURE OF FASHION

ANALYTICAL FASHION **A**

B **BUY NOW, SELL NOW**

COMPLIANT TRADE **C**

D **DIGITAL RETAIL**

- CONFERENCE • EXHIBITION • AWARDS
- KNOWLEDGE SERIES • NETWORKING
- TEXTILE TRENDS • INDIA BRAND SHOW

IFF INDIA
FASHION
FORUM
2017



// 11-13 APRIL, 2017 | RENAISSANCE HOTEL, MUMBAI, INDIA



YOUR ACCESS

TO THE



FROM INGREDIENTS TO INTELLIGENCE, WE COVER THE ENTIRE FASHION CREATION VALUE CHAIN

INDIA BRAND SHOW

THE FASHION EXHIBITION & RAMP LAUNCHPAD



India Brand Show (IBS) provides a stylistic way of conducting business via an unmatched B2B access environment for brands and retailers – both brick-and-mortar and online. Fashion designers who want to display their creative output and merchandisers in constant search to add value to their fashion offerings for shoppers – in both physical and online stores – cannot afford to miss the buzz here. IBS will feature master-classes with experts from global consulting firms on fashion branding and marketing, a parallel exhibition zone and a LIVE Brand launchpad showcasing brand collections on the catwalk.



// Who Should Participate?

New-age Consumer Brands in:

- | | | | |
|------------------------|------------------------|-----------------------|----------------------|
| // Menwear | // Eyewear | // Lifestyle products | // Concept fashion |
| // Womenswear | // Footwear | // Sportswear | // Textile companies |
| // Kidswear | // Jewellery & watches | // Ethnic wear | // Yarn companies |
| // Fashion accessories | // Home fashion | // Fusion wear | // Fibre companies |

CUSTOMISED CONFERENCE TOPICS FOR FASHION SUPPLIERS & CREATORS

FASHION FORWARD: Founded on education, innovation and leadership, Fashion Forward is one of the “it” gatherings for thought provoking industry leaders.

TRADITION AND INNOVATION: CHALLENGES FOR FASHION IN THE 21ST CENTURY: Fashion and lifestyle in the 21st century are facing new challenges and opportunities bringing together tradition and innovation.

WE'VE GOT THE ENTIRE RED



trendview

THE DESIGN,
TRENDS,
SOURCING SHOW

TRENDVIEW

THE DESIGN, TRENDS, SOURCING SHOW

Creating great fashion is a dynamic intersection among the three key components of Design, Trends, and Sourcing. At TrendView 2017, expect a wide-angled view of great fashion ingredients and next-generation concepts by fashion thinkers, trend agencies, design experts and the masters of sourcing.



- // Trims and embellishment suppliers
- // Saree & dress material manufacturers
- // A wide range of services and job workers

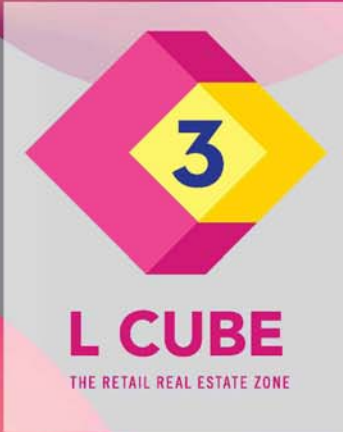
- // Fashion CAD/CAM professionals
- // Fashion institutes, trade publications
- // Packaging and presentation services

BUY NOW, SELL NOW: How to develop speed in the fashion creation supply chain to cater to fast-moving millennials.

LUXURY AND FASHION: Luxury as craftsmanship and tradition, as cultural production.

FASHION AND SUSTAINABILITY: Designers and Brands: Advances on sustainable fashion | Craftsmanship, tradition and sustainability | Combining sustainability and growth for fashion businesses

ALSO AT IFF 2017...



L CUBE

THE RETAIL REAL ESTATE ZONE

Physical locations that reflect demographics' aspirations and lifestyle choices are as important as brand ideology. As India's evolves into a technology-influenced, hybrid consumer landscape, the country's shopping centres are now showcases of both modern consumer aspirations and the ongoing retailing revolution. At IFF 2017, use the L-Cube launch pad to flaunt India's most exciting, individualistic shopping centres and retail spaces.

Fashion chain stores scouting for appropriate locations in existing/new territories, business development and location planning heads looking to negotiate shopping centre spaces, retail design specialists and architects scouting for insights/ assignments on planning, zoning and designing modern shopping spaces will comprise the L CUBE attendees' list.



CUSTOMER EXPERIENCE FORUM (CX FORUM)

RE-INVENTING THE FUTURE OF FASHION IN A CUSTOMER-CENTRIC ERA

Be it apparel, textiles or lifestyle products (such as sports goods, accessories, bags, sunglasses), fashion brands and retailers need to understand the customer preferences, shopping behaviour, purchase trigger points and brand experiences across all points of contact with their brand. Comprising two distinct exhibition platforms – Asia Shop and Future Shop -- CX Forum will display a 360-degree of the latest in customer experience enablers – both physical and digital.

If you are looking at fresh ideas or suppliers, to benchmark your existing practices, to learn from our in-depth conference sessions and Thought Leadership Conclaves, or to network with leading trendsetters, brands and retailers in fashion domain, CX Forum will be the most sought after platform to attend, bringing in solution providers from technology, marketing, shopfitting, store design, VM, lighting, mannequins and more.





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BEFORE THEY SHOP
ONLINE OR OFFLINE



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NEXT ISSUE:

IMAGES MARCH 2017

BUSINESS OF FASHION

Trouser Special



Trousers are a huge category in India. The nation has always been more of a trouser's nation than denims. As per estimates, the overall **trousers market** was ₹23,290 crores in 2013 and is anticipated to grow to ₹50,730 crores in 2023. In the March issue of Images BoF, we map and size this blooming industry and study the latest dynamics in:

- Trouser Consumption Trends
- Retailing Trends
- Top Growth Drivers
- The Changing Dynamics across Comfort, Fit and Fashion
- Premium Made-to-Measure Trousers
- Regional Variations in Trouser Preferences
- Top Brand, their Trouser Collections & Top Innovations
- The impact of Functionality and Sportswear on Trousers
- Latest Innovations in Trouser Textile Blends, Weaves, Colours and Finishing
- India's Top Trouser Fabric Manufacturers
- Innovative Trouser Trims & Accessories

As the financial year ends, this issue of Images BoF will also showcase..

The **Biggest New Brand Launches** and the new **Brand Extensions** of FY'16-17.

It will also present the **Global Brands that Entered India** in FY'16-17

March 8th being the International Women's Day, we will also talk to and present the journeys of some **Women Entrepreneurs** who have made a huge mark in the fashion business.

Finally, the issue will present a curtain raiser on the upcoming **India Fashion Forum 2017**.



TO PARTICIPATE PLEASE TALK TO OUR BUSINESS DEVELOPMENT ADVISORS:

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★★★★★★
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 ★★★★★★

MEMBERSHIP FORM

The Indian fashion industry is today a very fast-moving, challenging category. Technology and consumer behaviour are forcing fashion retailers to constantly evolve and adapt to these changes.

And that is where India Fashion Forum (IFF) comes in. It is India's largest fashion market intelligence hub, and its members have unparalleled access to every connection, information and research that they need to ensure informed and profitable growth of their businesses.

Membership of India Fashion Forum Privilege Club – India's largest fashion retail network – offers:

- Pan-India networking and business development openings for top leaders and industry influencers.
- Multiple routes to optimise brand visibility and marketing reach.
- Instant access to IFF's multiple knowledge platforms and a broad network of top-level decision makers and business owners.
- Connecting them to the entire value chain (designing, buying & sourcing to manufacturing, merchandising, branding, marketing & retailing) round the year.
- Privilege access to **India Fashion Forum** annual fashion retail intelligence event, including an exciting blend of Conference sessions, CEOs Roundtables, workshops and masterclasses, zoned exhibitions and industry awards.

HOW TO ENROLL?

Choose your category/ies from below:

- Fashion Retailers
- Fashion Brands, Exporters & Manufacturers
- Suppliers to Fashion Brands, Retailers, Exporters & Manufacturers

A group operating in more than one category may enroll its different companies in their respective categories. To know the applicable fee and entitlements please refer to the table IFF Annual Membership Fee & deliverables. Service tax will be levied as applicable which at present is 15%. A proforma invoice can be mailed on request.

IFF Annual Membership Fee may be paid by draft/ cheque payable to Images Multimedia Pvt. Ltd. or bank transfer (details below).

Current Account No: 02482000004779 | **Account Title:** Images Multimedia Pvt. Ltd. | **Bank:** HDFC Bank Ltd.
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MEMBER INFORMATION

Company Name	
Category	
Address for communication	
Name of the person responsible for IFF communication and coordination	
Designation:	
Ph:	
Cell:	
Email Id:	

OTHER REQUIREMENTS:

- Please send brand / organization logo along with high resolution pictures of key people, products & services. The pictures can be sent through yousendit or wetransfer. All visuals should be of 300 dpi.
- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

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Name:	Designation:	Phone:	Mobile:	E-Mail:

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Signed by CEO / Director / Owner
 Name:
 Designation:

Company stamp/ seal



**YOUR
ACCESS
TO THE
FUTURE OF
FASHION**

IFF ANNUAL MEMBERSHIP & DELIVERABLES*

Membership Categories	For Fashion Retailers:					For Textile Buyers = Fashion Brands, Exporters & Manufacturers:		For Vendors = Suppliers to Fashion Brands, Retailers, Exporters & Manufacturers:	
Category Code:	A1: Fashion Retailers with less than 5000 sq ft. retail space	A2: Fashion MBOs/ Independent Retailers	A3: Regional Chains – 3 or more stores. A4: Brands with Owned Brand Outlets/ Shop-in-shops)	A5: National Department Stores/ Large Format Fashion Stores A6: Online Retailers	A7: Groups with Multiple Retail Formats + Franchise/ Distribution/ Licensing/ Own Brand operations	B1: Fashion & Lifestyle Brands (without own stores/ SIS)	B2: Exporters, Manufacturers & Buying Houses of Fashion & Lifestyle Products	C1: Fibres, Fabrics & Finishes	C2: Trims & Embellishments C3: Fashion Franchisees & Distributors
All Inclusive Annual Fee (Service tax extra)	Rs. 5,000	Rs. 25,000	Rs. 50,000	Rs. 1,00,000	Rs. 1,50,000	Rs. 50,000	Rs. 15,000	Rs. 50,000	Rs. 30,000

DELIVERABLES

1	Feature/s, Editorial coverage subject to Editorial guidelines in relevant Images publications/Research Books/coffee table books print/ online (Data & information to be provided by members)	1 Page	1 Page	2 Pages	4 Pages	6 Pages	2 Pages	1 Page	2 Pages	1 Page
2	FOC promo banners in Indiaretailing.com portal/EDM (applicable as per category)	FOC up to Rs.5,000	FOC up to Rs.25,000	FOC up to Rs.50,000	FOC up to Rs.1,00,000	FOC up to Rs.1,50,000	FOC up to Rs.50,000	FOC up to Rs.15,000	FOC up to Rs.50,000	FOC up to Rs.30,000
3	Entry Pass for IFF/ Trendview Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Shows	1 Pass	2 Passes	2 Passes	4 Passes	6 Passes	2 Passes	1 Pass	2 Passes	2 Passes
4	Special Invite for IFF Power Breakfasts, Networking Lunches, Awards & Gala Dinners	NA	2 Invites	2 Invites	4 Invites	6 Invites	2 Invites	1 Invite	2 Invites	2 Invites
5	Lounge Access at India Fashion Forum for B2B Meetings	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
6	Research Reports & Publications (Print/ Online)	FOC up to Rs.2,000	FOC up to Rs.5,000	FOC up to Rs.10,000	FOC up to Rs.20,000	FOC up to Rs.30,000	FOC up to Rs.10,000	FOC up to Rs.3,000	FOC up to Rs.10,000	FOC up to Rs.5,000
7	Images Fashion Awards	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee	2/3rd waiver on awards nomination fee (in applicable category)	2/3rd waiver on awards nomination fee (in applicable category)	2/3rd waiver on awards nomination fee (in applicable category)	2/3rd waiver on awards nomination fee (in applicable category)
8	Presence on India Fashion Forum Website	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link	URL Link

*Deliverables are subject to submission of inputs/ confirmations/ approvals/ additional charges wherever applicable by specific dates/ deadlines as communicated to members. Deliverables are subject to change without notice.

Additional Benefits:

- ▶ Special Packages to join IFF delegations for national & international retail trade shows.
- ▶ Special packages for members for Print Ads in relevant magazines.
- ▶ Speaker/Panel discussion opportunities subject to availability of slots
- ▶ Priority in processing of your application for 'TRUSTED MARK' Certification.
- ▶ CEO's picture & profile in 'Who's Who' page on indiaretailing.com website
- ▶ Support & connect with potential partners.

INSIGHTS TO EMPOWER YOUR BUSINESS

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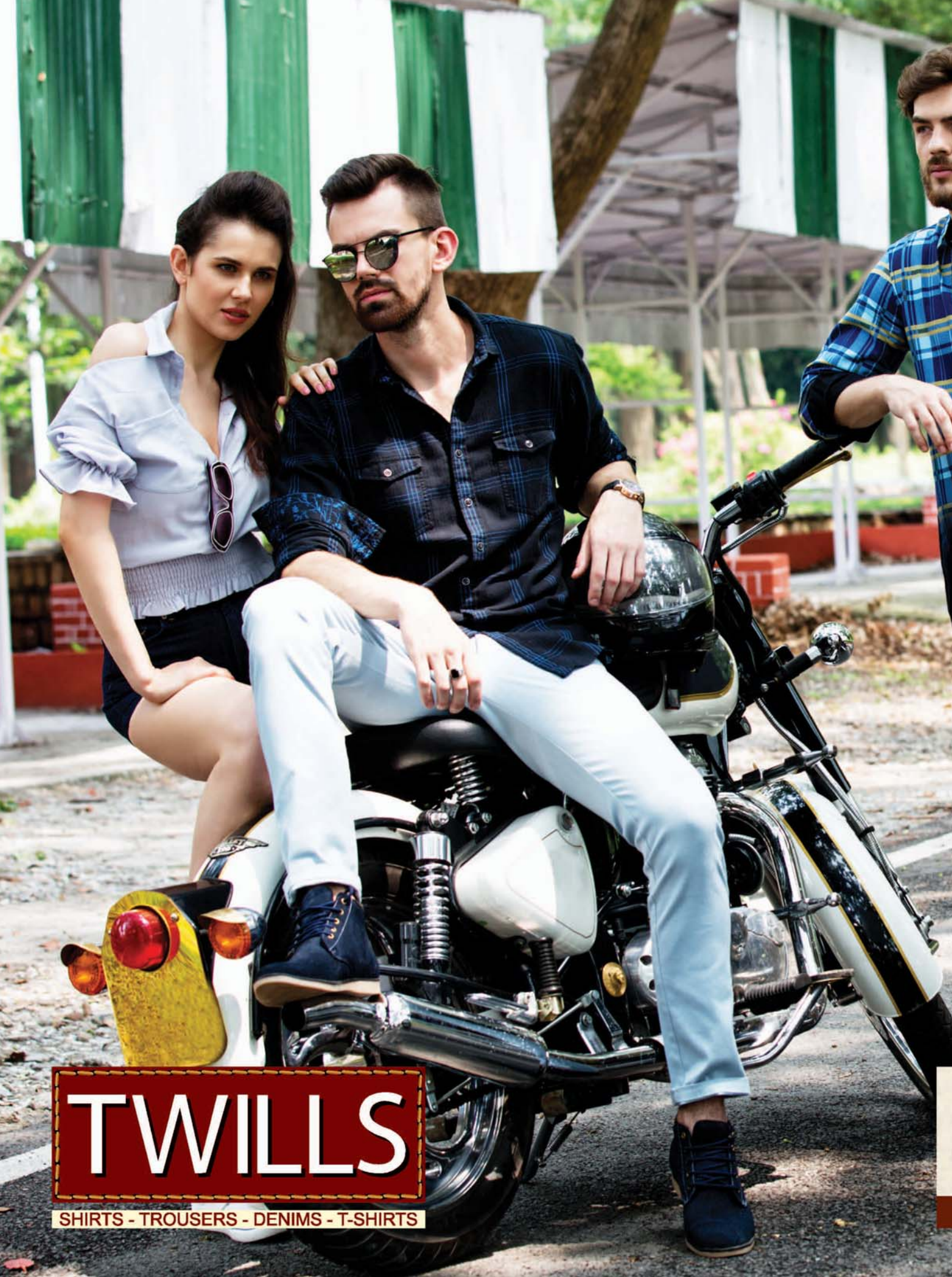
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