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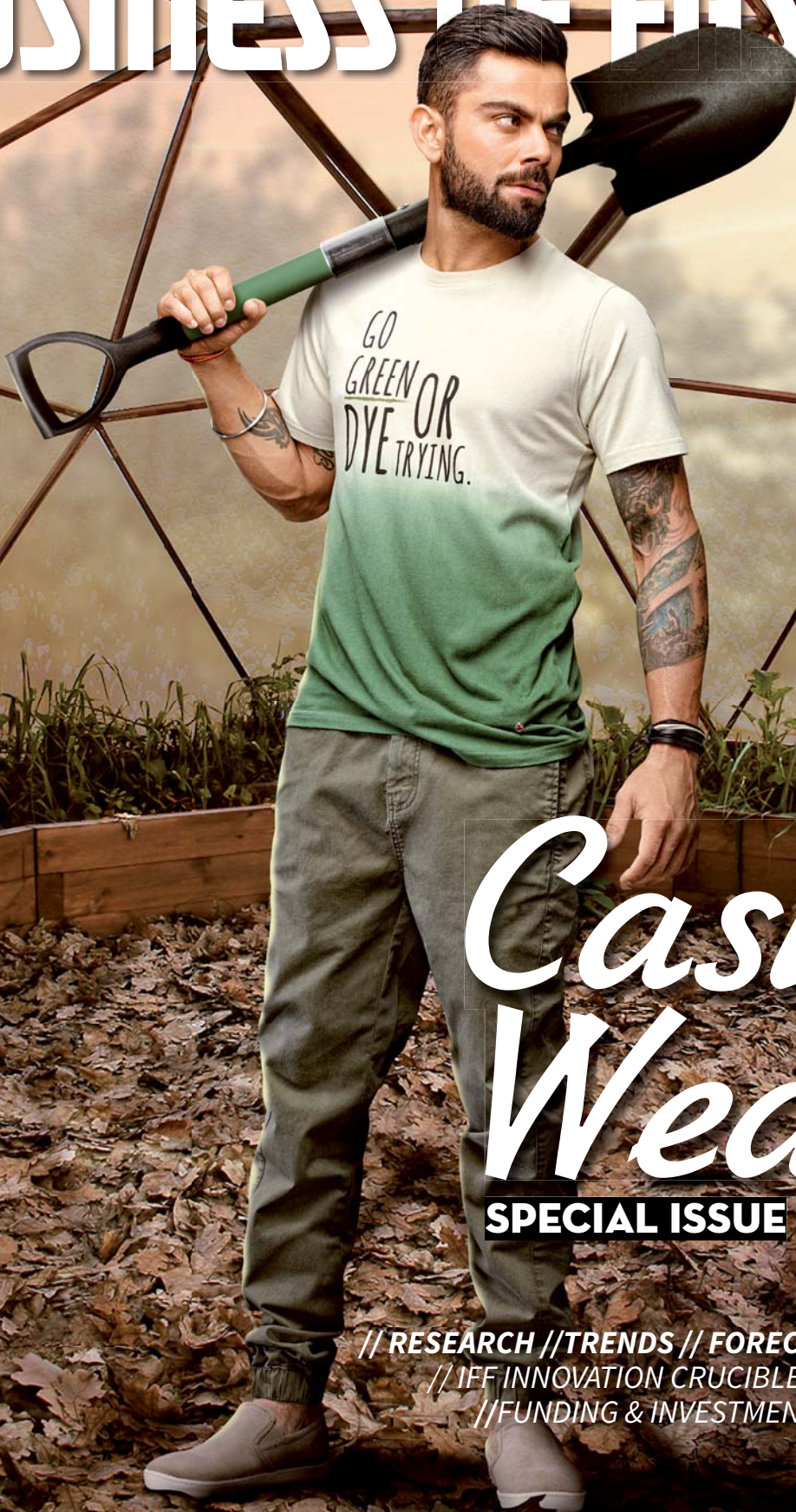
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Issue No.

BUSINESS OF FASHION

June 2017

Volume XVIII // No. 6 // ₹ 100
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Casual Wear 2017

SPECIAL ISSUE

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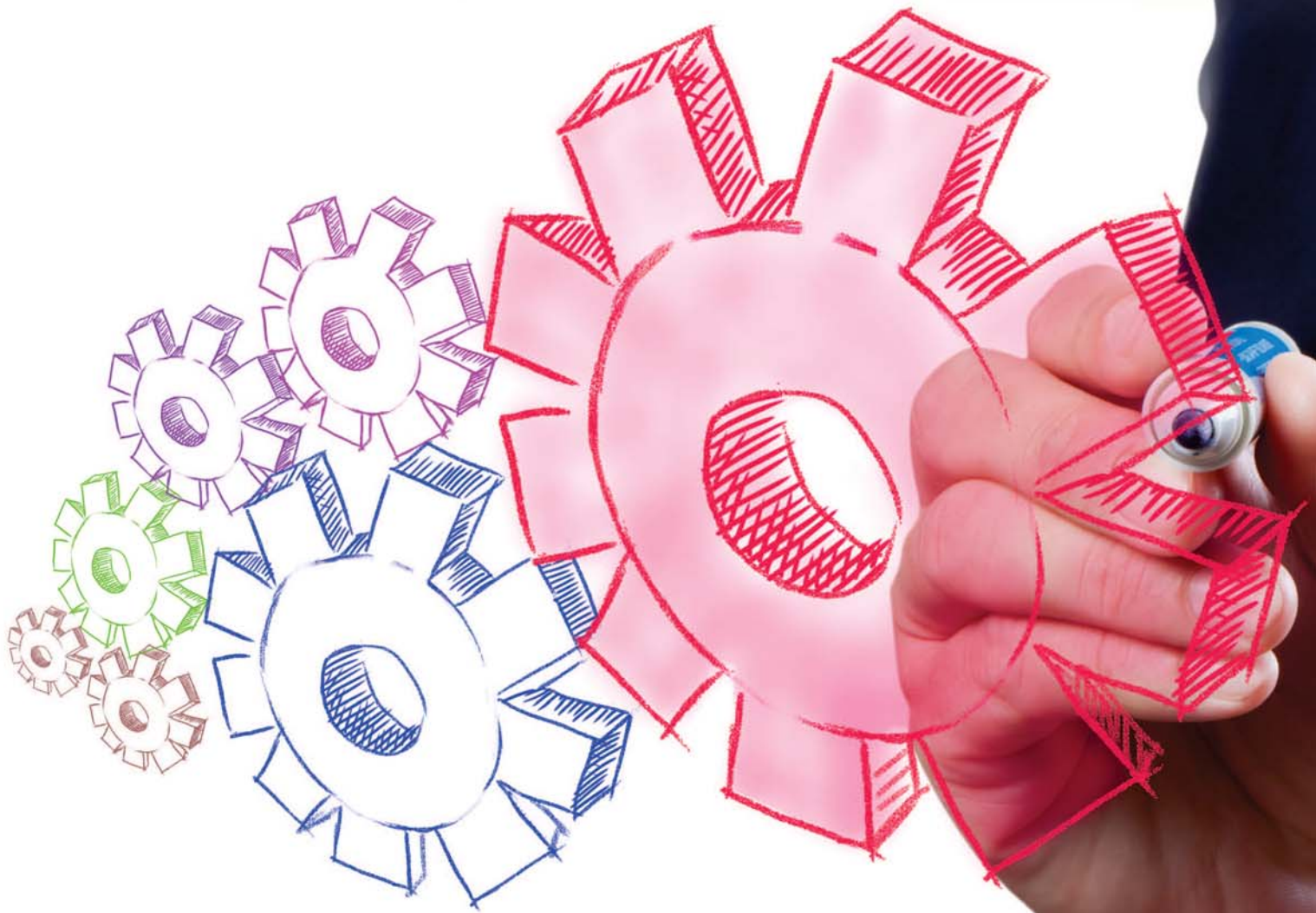
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





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As I write this, wearing my jeans and comfy cotton shirt. I must share that while we at Team IMAGES BoF have never adhered to any strict dressing code ever since we started off in 1992, today almost everyone in our office wears casuals. And, this is definitely not because there is any one particular trend of the moment, but rather because casuals are comfortable, practical and expressive. It's no wonder that casual wear has taken the world by storm and India is no exception. Look around you and there are chances that you will find 8 out of 10 random people dressed in casuals — denims, t-shirts, polos, tops, etc. After all, it's so convenient. The casual wear market in India has exploded in the last few years. Rugged casuals, dressy casuals, business casuals, smart casuals or sporty/active ones—the casualization of apparel is manifest in many ways today.

In this, the casual wear special issue of IMAGES BoF, the lead research by Team Technopak highlights that, as of 2016, the men's segment leads the casual wear market in India with a market at ₹1,24,423 crores and is followed by the women's segment at ₹1,11,467 crores. The women's segment is however expected to grow at an even healthier rate of 9.9 percent in contrast to the men's segment which is expected to grow at a CAGR of 9 percent. By 2026, the men's and women's casual wear segments will reach ₹2,95,705 crores and ₹2,86,456 crores respectively.

Interestingly, India is at quite at par with global trends when it comes to casual wear. You will also see in the industry study, that follows the research,

that all the top brand experts that participated unanimously agree to this fact. It's surprising as normally global trends would be seen only after a season or two in India. The featured article on trends will take you on an odyssey of exploration on the opportunities brimming in the casual wear segment in India. In addition, the issue also looks at the moves of major casual wear brands like Being Human, Indigo Nation, Lacoste, Vero Moda, Wrogn, Gap, etc.

In the first of our forthcoming series of studies on innovation and innovators we talk to Thomas Cridland whose eponymous brand Tom Cridland is making waves around the world with its 'Buy Less Buy Better' philosophy. The brand is attracting a legion of fans that include celebrities from Hollywood and music.

We also preview the forthcoming Hong Kong Fashion Week for Spring/Summer, talk exclusively to Nathasha AR Kumar of the vibrant new online brand Vajor, and showcase AstorMueller's decennial celebration in India. Another report looks at attempts to revive Baluchari sarees of Bengal. WGSN's A/W 17 buyers briefing, a report on the IFF'17 exhibition, and much more await you in this issue.

Happy reading!!!



Amitabh Taneja

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Samrat Offset (P) Ltd. B-88, Okhla Industrial Area, Phase-II, New Delhi-110020 and published by S P Taneja from S-21 Okhla Industrial Area Phase - 2, New Delhi.110020 Editor : Amitabh Taneja

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LETTERS TO THE EDITOR

I have been a regular reader of your magazine since few years. Your recent issue which gave a detailed information on all the events and sessions held during the India Fashion Forum 2017, was indeed very informative and inspiring.

Shalini Dubey, Bangalore

The May'17 issue of Images Business of Fashion was packed with lot of knowledge and information on the current strategies and trends. Great opinions and a deeper study of trends and market. Well done!

- Rahul Thakur, Jaipur

The last issue of your magazine featured a detailed summary of the 'India Fashion Forum' which I very much wanted to attend, but couldn't. Thanks for updating us on the latest in the industry and for presenting such a detailed overview of the entire event.

Sona Dewan, Mumbai

It was just great to know about the awardees of the 'Images Fashion Awards 2017'. Congratulations to the winners!

Deepak Manchanda, Delhi

I just loved the write up on technological advancements made in the fashion industry - 'Building a truly Synergistic & Powerful Omnichannel strategy' in your May'17 issue. The entire session seems to have been very informative. It's very well written and a good learning for all of us.

- Radha Goel, Kolkattaw

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>> STORES

FASHION BUSINESS



Cover Picture Courtesy: Wrogn

Stores



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LEAD FEATURE

**FUNDING & INVESTMENTS
IN INDIAN FASHION**

The Indian fashion industry has emerged as an exciting and promising opportunity from an investment point of view. Images BoF identifies the current and finds out about the future perspectives in terms of funding and investments.

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ONLINE

Vajor: A Distinctive Identity

Vajor is a youthful brand created solely to bridge the gap between ready-to-wear and high fashion. Images BoF talks to Nathasha AR Kumar, Founder and CEO, Vajor, about the concept behind the brand, its positioning, commitment to sustainability and more.

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CAMPAIGN

**BIBA LAUNCHES ITS DEBUT TV
CAMPAIGN "WHO'S THAT GIRL"**

Biba simultaneously also introduces the brand's latest Spring/ Summer collection for 2017.

Pg No. 70



CAMPAIGN

**Lyra Ropes
in Parineeti
Chopra as its
New Brand
Ambassador**

Lyra is a brand from the Lux Group, a conglomeration of diverse brand portfolio across multiple product segments.

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TRENDS

**Observations 2017: Online
Shopper Behaviour**

Online retail has come far to a synchronized avatar of a mix of physical shops and mouse-and-webpage. Amit Daga, MD, Deal Kya Hai?, talks about the shopping behaviour of the online consumers.

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PREVIEW

**Hong Kong Fashion Week For
Spring/Summer**

The Hong Kong Fashion Week for Spring/Summer at the Hong Kong Convention and Exhibition Centre will present an array of spring/summer clothing, garment, designer collections, fashion and clothing accessories, fabrics and related professional services.

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DEAL JEANS

Deal Jeans clocked a sale of ₹50 lakh in one day, with an average of ₹7,000 billing every minute during the 12 hours of opening of its store at Ghumar Mandi, Ludhiana. The store launch created a buzz in the city after the inaugural offer - simply by word of mouth amongst the friends and relatives.

The crowd continued coming in till late and eventually, the store staff had to extend their working hours till midnight on Day 1, making it a successful launch day.

A spokesperson from the brand said, “Making the launch a huge success wouldn’t have been possible without our partners who have been a huge support to us. We thank our Deal family members namely the channel partners, associates, vendors and employees who have contributed directly and indirectly, and brought this company to where it stands today.” The brand outlet is positioned in the most notable areas of the main shopping high street of the city.

Collection

The product range at the exclusive store is a blend of fresh pastel hues and trendy patterns crafted in 14 categories ranging from breezy cropped tops to shrugs in top wear and studs embellished denims to ripped shorts in bottom wear. The shop



has separate space intended for the different product lines that Deal Jeans offers to its customers. In each section, the products are placed according to their style, creating a wide spectrum ranging from casual wear to party wear. The outlet also offers premium designer handbags from E2O Accessories, a sister brand of Deal Jeans.

Store theme

Music, screens, projections, modern graphics, fashionable colours, the brand's exclusive store is distinguished by its strategic location and well-detailed architecture. The store is constructed in a manner which is converted into spacious trend-setting showcase with a carefully thoughtout image extending from the window to the arrangement of the merchandise inside. Deal has selected the best commercial sites in Ludhiana which comprises of ground and first floor, offering a mix of apparel and accessories. This store is refurbished and adapted to its brand image and philosophy.

Store interior

Deal's standalone store is conceptualized in shades of grey colour scheme on walls and ceilings, lending a dynamic touch to the store and draws attention to the product. The strategically placed day lights throughout the store redefine the ambience, making a visit to Deal store a spectacular one. The contemporary light and dark grey colour of the flooring compliments well with the concept of the brand towards creating a delightful shopping experience for its young customers. The shelves are designed to give a memorable visual impression. This look is complemented by the music, lighting and furnishings which characterize Deal's Ludhiana outlet, creating a shopping experience in tune with its young customers' interests. The most eye-catching feature of the store's visual merchandising is the window façade, which plays a prominent role towards punctuating the space to highlight the brand's youthful and cutting-edge style.

Store designer:

The store designing team at Deal Jeans has designed the Ludhiana store.



DETAILS ABOUT THE NEWLY LAUNCHED STORE:

BRAND:

Deal Jeans

PROMOTER:

Deal Global Fashion Pvt. Ltd.

LOCATION:

Ludhiana

SIZE OF THE STORE (IN SQ.FT.):

1,600 sq.ft.



PINTOO GARMENTS

Collection

The store offers an exhaustive variety of kidswear range comprising of casual wear, party wear, ethnic wear, lounge wear, swimwear and all accessories for infants and teens in the age group of 0- 14 years. The newly opened store offers something for every occasion and every kid, from a colourful range of favourite characters including Barbie, Mickey, Donald, Princess and many more.

Store theme

The store is one-of-its-kind aesthetically designed, kids friendly outlet which offers the finest merchandise from India and overseas, catering to all tastes.

Store interior

The newly opened store by Pintoo Garments has a comfortable and easy going ambience, ensuring a great shopping experience to its customers. This would prove to be a favourite shopping destination for kids, with its playful fixtures on the ceiling and a few dices placed here and there above the shelves adding fun quotient. The light fixtures are well placed to highlight the merchandise on display. The placement of shelves is effective, while the merchandise are placed carefully according to the different categories.

×

IMAGES Business of Fashion



BRAND:

Pintoo

PROMOTER:

Rajesh Lala

LOCATION:

SG Highway, Ahmedabad

SIZE OF THE STORE (IN SQ.FT.):

3,000 sq.ft.



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DILLANO

Collection

The store offers a wide range of diamond jewellery collections, which are dedicated to cosmopolitan and royal trends. It exudes panache and reflects the intricacies of the royal culture.

Store theme

Dillano is a place where jewellery is scrupulously handcrafted. To showcase such graceful art, the space should be as elegant and subtle at the same time as the diamond articles.

Store interiors

The interior of the newly opened store has shades varying from peach to white, hence complementing the sophistication of the sparkling little trinkets. The fabric clad on the background has small strands of pastel thread matching the intricacy of diamonds. The store is well lit with sheen LED lights. The wooden flooring is made of core hardwood or plywood with a layer of hardwood veneer affixed to the top surface. The placement of glass and marble shelves are effective and the merchandise are placed carefully on them for display. The store exhibits class and its décor is pristine with a touch of the latest trends. It also features french windows with slim lite double glazing.

Store designer

The store has been designed by Siddarth Gaind, Studio 6 Apart., Chandigarh.



BRAND:

Dillano Luxurious Jewels Limited

LOCATION:

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SIZE OF THE STORE (IN SQ.FT.):

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FUNDING AND INVESTMENTS IN INDIAN FASHION

The Indian Fashion industry is moving progressively in size as well as stature. In fact, it is one of the fastest growing sectors today, with huge unlocked potential. From an investment point of view also, it has emerged as an exciting and one promising opportunity. The year 2016 was marked by a decline in overall funding and investments in India. However, long-run prospects for fashion sector remain bright!

By Namita Bhagat

The fashion and lifestyle sector in India has shaped up rather well since the turn of the new millennium. People today are as fashion-conscious as any celeb or a socialite, and this has resulted in increased fashion spending across the consumer segments. Fashion covers a whole range of product segments, viz. textiles, apparel, footwear, jewellery, along with other wearable and carry-on fashion accessories such as timepieces, eyewear, bags and wallets, etc. Since people will continue to consume fashion in some form or the other, there lies a massive, long-tailed opportunity for all kinds of fashion businesses, whether manufacturing, distribution, retail and other fashion-focused companies also. The sector's massive potential has not gone unnoticed in the investors either. The last few years have seen an increased confidence in the Indian fashion sector, and consequently, funding and investments are also rising across the spectrum: Seed and Angel funding, Venture Capital (VC), Private Equity (PE) and even Strategic, or HNI investments.

PE/VC INVESTMENTS IN TEXTILE, APPAREL & FASHION SPACE

Year	No. of Deals	Amount (US\$M)
2017 YTD	1	8
2016	15	383
2015	22	240
2014	25	411

Source: Venture Intelligence

Fashion: A promising investment avenue

Talking about the evolution of the Indian fashion market, Prashant Mehra, Partner, Grant Thornton India, states, "The sector has evolved manifold, traversing the un-fragmented 'mom and pop' store era to reach today's sophisticated large domestic and international brand dominated scenario. The primary driver behind the growth has been the expanding retail footprint of the brands. The entry of fashion brands has ramped up competition in the space. Apart from the increasing competition, a key driver has also been the rise in disposable income of the rapidly growing Indian urban population that is aware, educated and brand-conscious. Basis recent statistics, the Indian urban buyers are shopping for apparel at least 10-12 times in a year, which is much more from what they did 5 years back. India presents a great opportunity for the fashion brands to grow and most fashion companies are looking for ways to enter this high potential market." Regarding the investment scenario, he apprises, "The Indian fashion retail industry has been at the helm of India's growth story with over 500 transactions in the last decade valued at around US\$ 13 billion. Of this, US\$ 1.3 billion has been transacted through Domestic M&A, US\$ 10 billion through PE/VC monies and the balance through inbound investments. These investments are a testament to both the interest and potential in the sector."

"Domestic consumption is a key investment theme for most PE/VC

KEY INVESTOR DECISION ELEMENTS

Investors look for multiple points of validation in a company, including quality of the team, superiority of the business model, evolution of the business demonstrating the business model is essential in all circumstances. To be specific to Fashion retail, investors look at the following elements:

- ▶ Brand Recall (customers should be brand aware and not only buy the products on an impulse)
- ▶ Capital Efficiency (higher return for every rupee invested - lower capex, lower inventory for every Rupee of sale)
- ▶ Omni-channel capabilities
- ▶ Ability to adapt and stay current across multiple seasons

investors operating in India and the fashion sector (broadly defined) fits very well into this. In addition to the sector agnostic funds, there are also specialist funds like L Capital Asia - sponsored by international luxury firm LVMH - that focus specifically in this space," states Arun Natarajan, Founder of Venture Intelligence.

Sharing his overview of the PE/VC landscape in Indian Fashion, IndigoEdge Co-Founder & Director Shivakumar R states, "India is a nascent market when it comes to brands. Apparel is one segment where we have seen brands such as Biba, Anita Dongre (AND) and W break out in the women's ethnic wear segment. We are also seeing the emergence of some interesting brands in western wear (online and offline - Zink London, Stock Buy Love, Faballey, Kaaryah, etc), online jewellery brands (Bluestone, Caratlane). Given that Myntra, Voonik, Limeroad, etc are well-funded, we see more investments into brands over the next few quarters. The next wave of investments will be in brands that can reduce the working capital requirements and yet scale fast."

Noticeably, the fashion-focused startups and entrepreneurs have also been drawing a great deal of interest from Angel/Seed investors. Says Prajakt Raut, Co-Founder at Applyifi and Founder at The Hub for Startups, "As more and more people come into the middle-class segment that has money for discretionary spends, some of that spending will go into the fashion &



"The Indian fashion retail industry saw over 500 transactions in the last decade valued at around US\$ 13 billion."

-Prashant Mehra,
Partner, Grant Thornton India



"Domestic consumption is a key investment theme for most PE/VC investors operating in India and the fashion sector (broadly defined) fits very well into this."

-Arun Natarajan,
Founder, Venture Intelligence.





“Opportunity for PE/VC investors lies in the fact that young brands are provided with a market by online platforms. The perceived risks remain around the sustainability of the offline EBO model.”

-Shivakumar R,
Co-Founder and Director, IndigoEdge



“Some sectors require a lot more capital. For someone starting a manufacturing business, angel investors and VCs may not be the right form of capital.”

-Prajakt Raut,
Co-Founder, Applyifi; and Founder, The Hub for Startups

lifestyle segment. Therefore, the sector represents a large market opportunity, and it represents an opportunity for entrepreneurs to create businesses. However, the sector is fragmented across different price points and value propositions and building a brand in an already cluttered marketplace is hard.”



TOP PE/VC INVESTMENTS IN TEXTILE, APPAREL & FASHION SPACE 2014-2017 YTD

Company	Investors	Amount (US\$M)	Date
Kalyan Jewelers	Warburg Pincus	200	Oct-14
TCNS Clothing Company	TA Associates	140	Aug-16
Arvind Fashions	Multiples PE	110	Oct-16
Fabindia	PremjiInvest, Others	85	Feb-16
Yepme	Khazanah, Helion Ventures, Capricorn, Morpheus Fund	75	Sep-15
Little	SAIF, Tiger Global, Paytm	50	Jul-15
Myntra	Kalaari Capital, Tiger Global, IDG Ventures India, Accel India, PremjiInvest, Sofina	50	Feb-14
PC Jeweller	Creador Capital	33	Feb-15
Jabong	CDC Group	28	Jan-14
Arvind Limited	Multiples PE	26	Jan-14

Source: Venture Intelligence

A glance at the year gone by 2016 was marked by a decline in overall funding and investments in India, compared to 2015, which was particularly a good year. The fashion sector was no exception. However, long-run prospects for fashion remain bright!

According to Venture Intelligence’s Natarajan, “Investments in the sector tend to follow the trend in overall PE/VC investments – for instance, on the back of lower investments in e-commerce, overall PE investments in India cooled off by 12% in 2016. The investments in the fashion sector also fell correspondingly.”

VC and PE investment appetite has been different, underlines Amit Choudhary, Director, Motilal Oswal Private Equity (MOPE). He further says, “With many young startups coming up with a variety of ideas in the broader Fashion business, there has been a lot VC activity. Fashion e-commerce startups seem to stand out, of course. There has been fair activity in the mid-price segment, whereas the length of e-commerce has made it much easier for smaller fashion brands to build their distribution. However, I see the challenge at the PE level i.e. growth capital for more mature companies. There have not been too many good transactions that have come around over the last 12 months.” There has been an





“With many young startups coming up with a variety of ideas in the broader Fashion business, there has been a lot VC activity. However, I see challenge at the PE level. There have not been too many good transactions that have come around over the last 12 months.”

-Amit Choudhary,
Director, Motilal Oswal Private Equity



“Businesses and investors are now looking at ways to start afresh. Soon we’ll have GST implemented. The industry will have to come to terms with the finalised rate structure.”

-Anil Talreja,
Partner, Deloitte India



interest from the investing community per se; however, different sections of the industry are seeing a different kind of traction right now, as per him.

Demonetization (DeMo) and the soon-to-be rolled out Good & Services Tax (GST) are the two main reasons behind the dip in the funding activity in 2016, notes Anil Talreja, Partner, Deloitte India. “A sector normally grows out to be attractive and a lot of investments are made by November-December. However, last year, this period was marked by DeMo. GST was already on cards, but there was a lack of clarity and general apprehension that the rates will be on the higher side. This also made foreign PE/VCS wary.” The aforesaid events have caused some level of disruption or disorientation in the fashion space also, having taken some sheen off the sector at least in the short term. “Consumers as of now don’t want to spend a lot on fashion and luxury because it is not an essential,” he explicates. He also thinks that the proposed GST rates are pretty high, and such scenario is likely to impact the fresh investments also.

Angel and seed stage investment activity has slowed down too, tells Prajakt Raut of Applyifi and The Hub for Startups. The raison d’être, according to him, is that a number of folks who ‘wanted to see what angel investing is’, are now off the table. “There are however a number of individuals who are keen to explore angel investing as an asset class, and that is evident

from the increasing membership of regional angel investor groups in places like Coimbatore, Madurai, Jaipur, Indore, Nagpur, etc. As these forums mature, they will be a very important stakeholder in the startup eco-system, and will be a source of capital for startups,” he affirmed.

The learning curve

PE and VC investing is relatively a new phenomenon in the Indian business environment, and so is Seed/Angel funding – the investors and the investee companies are in the early stages of the learning curve.

According to IvyCap Ventures Advisors Founder & Managing Partner Vikram Gupta, the investments made in the fashion sector so far have been a mixed bag of success and failure. However, the failure in terms of numbers and value is larger than expected. “Many fashion companies that are not doing well are primarily driven by discounts and high customer acquisition cost, and the overall cost of delivery was also more than the expected pricing points. Investors have become more cautious now and will not invest unless they are able to see positive margins and cost efficient business,” he avers. In his words, the last 2-3 years have clearly impacted the overall investment approach. There were cases of large-sized investments at very high valuations, and the subsequent failures affected the other investors’ sentiment.





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-Vikram Gupta,
Founder and Managing Partner,
IvyCap Ventures Advisors



MOPE's Amit Choudhary recounts that a lot of companies/startups mushroomed in the early 2012 and through 2013 and 2014. People got a little carried away on how much growth is possible in a short period of time by any company with seemingly infinite resources. Secondly, valuation expectations of some of the companies had also gone through the roof, as to what they expected out of a good idea/plan. He now sees a bit of semblance coming back on table – people understand what it needs to be successful as a startup in these spaces or even at a late stage. Moreover, what he calls a “brand premium” has also started drying up. He describes, “For a buyout fund or if a separate company is buying out another

company, there is potentially a merit for paying a huge brand premium. For an investor, there is a little value attached to intangible assets especially at inception stage of companies unless there is a huge conviction that the idea/brand will scale up dramatically. Now both investor and investee companies have realised it is very difficult to quantify and value this “brand premium” – especially for mid-sized companies. However, measuring the genuine brand value is still an under-appreciated art.”

Fashion is a very glamorous and flamboyant industry and is doing well also; however, I would advise a bit of caution in the current scenario, says Anil Talreja of Deloitte, adding “DeMo and GST have created a sought of speed breaker. I don't think one can go back to 2015 days very soon and need to look at how the factors are going to turn after the most of the after effects of DeMo are done with. Businesses and investors are now looking at ways to start afresh. Soon we'll have GST implemented and the industry will have to come to terms with the finalised rate structure.”

Online/offline conundrum

With e-commerce gaining more depth and width in India, the online fashion startups have emerged as an investor

KEY INVESTMENT TRENDS

- ▶ Investors have shown strong interest in fashion companies positioned in premium and mid-premium categories. Apparel is the most favored segment. Specialty segments like children's, teenage fashion, western-styled women's wear, etc., are also popular. In recent years, there has been growing interest in jewellery and footwear segments.
- ▶ First wave of investing in online fashion was in marketplaces, community based fashion platforms and e-commerce ventures. Once the investors gain enough confidence, the next wave of investments will be into brands.
- ▶ Men's formal wear has been a highly competitive segment as the complexity is relatively lower. Trends suggest that investments in online brands will be in women's wear, kidswear and lingerie for the most part.
- ▶ Luxury is yet to take off, although some PEs have tested waters in this space.
- ▶ Contract manufacturing is unlikely to see a revival in investments any time soon.
- ▶ Established players are looking for consolidation, as a result, some M&A activity is also being registered lately.



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For offline businesses, angel and early stage investments are unlikely. Applify and The Hub for Startups' Prajakt Raut clarifies, "Some sectors require a lot more capital than that can be provided by angel investors and seed stage investors. For instance, for someone starting a manufacturing business, angel investors and VCs may not be the right form of capital."

IvyCap Ventures' Vikram Gupta asserts, "Offline and online will now need to move together. Of course, online growth happens much faster once a minimum threshold level is achieved. Further investment is needed to fortify its foundation. In offline, the investment requirement depends on the business model, whether it's company-owned stores, franchised stores, or store-in-store model. Accordingly, the investment terms may also be different." He also feels that moving from online to offline is fairly easy than doing the other way, "Online business typically requires the owners with technology mindset. New age entrepreneurs mostly prefer online ventures, whereas offline businesses are generally run by old mindset people who are necessarily not that tech-savvy, therefore, the transition becomes a bit difficult."

PE/VC INVESTMENTS IN TEXTILE, APPAREL & FASHION SPACE (OFFLINE VS ONLINE)

Year	Online		Offline**	
	No. of Deals	Amount (US\$M)	No. of Deals	Amount (US\$M)
2017 YTD	1	8	-	-
2016	11	33	4	350
2015	18	195	4	46
2014	12	104	13	306

**Other than E-Commerce Companies are classified as Offline

Source: Venture Intelligence

favourite. Offline businesses, however, are a bit laggard on this front, especially at the early stage.

IndigoEdge's Shivakumar says, "We are at a very early stage when it comes to online brands. However, the early signs are very promising. Some of the leading online brands are able to get to a base scale very quickly which is very exciting to investors. Online brands also have some of the inherent characteristics with regards to capital efficiency that excites investors."

is where many fashion brands in India sometimes lose track, especially when they scale up their business. The biggest trick is to remain capital-efficient while scaling up. Not many businesses are able to pull this off. However, we have some companies that are doing well but are less capital-efficient. A capital-efficient company may also have to struggle sometimes. So, the idea is to find that sweet spot. For us as investors, it's important that a company is capital-efficient and can sustain the same over a period of time."

The course correction

There have been numerous success stories, yet the learnings gleaned from the past experiences call for revisiting and refining the investment approach. This will also help align with changing

Fashion manufacturing and retail businesses are capital-intensive. Can this be a plausible deterrent for investors? Not really, tells Amit Choudhary (MOPE), and goes on to explain, "Regardless of the sector, I think for us and probably most of the investors, the focus and the efficient use of capital are the key questions. There is nothing wrong with a capital-intensive business, as long as one can derive value out of the capital deployed and get good returns. In our experience, this





Forever 21 Store

and market strategies. A fundamental reason has been that while these brands devised their strategies with only cities like Delhi and Mumbai in mind, their forecasts were using the national macro-economic data and soon they realised that doing business with India is much different from doing business in Hindustan.”

investment landscape. “Investors would now look for multiple points of validation in any company, including quality of the team, superiority of the business model, evolution of the business demonstrating the business model would all be essential in all circumstances,” underlines Shivakumar (IndigoEdge)

The investors have become more disciplined and organised in terms of what to expect out of an investment idea, says Amit Choudhary (MOPE). In a complicated environment, not all problems can be solved by throwing more money – “there are things that take time”, such as building up distribution and brand. In the fashion industry, “many of the things are very intangible”; therefore, creating something from thin air by putting in more money will not work most of the time. This realisation has started coming back to both the investors and investees, and they are recalibrating both expectations and delivery potential. About high cash burn rates, he affirms “As a fund house, we do not invest in such ventures.” However, on a broader point, he thinks that till the time the idea is brilliantly executed, some degree of cash burn at the initial stage is fine. The key is to know how the business will make money at some point in time (nearer the better).

Gross Merchandise Value or GMV being a key parameter for fund-raising and sky-high valuations are passé. Vikram Gupta (IvyCap) emphasises that investors are no more interested in the top line or GMV numbers. They want to

look at the bottom line value addition in a business. The horizontal story has already played out in the fashion sector, whereas vertically, there is an opportunity on a case by case basis. He further adds that there is now also an opportunity to build brands, which requires substantial capital/investment. If a brand is being created from scratch, it’s important to create enough brand awareness, or else further investment (VC/PE) becomes difficult. A fashion business with a gross margin of more than 50 percent will have a better chance of fund-raising.

Evolving business landscape

India will be an interesting arena in the next few years for fashion retailers, and they will be fighting for consumer footfalls and conversion of potential customers, feels Prashant Mehra from Grant Thornton. However, he also adds, “Besides the success and failure of fashion brands, what will remain to be seen is the patience and endurance of these brands because shopping in India is still viewed as a means of entertainment and not a lifestyle. In the last decade, a number of brands in India have either packed their bags for exit or have restructured their partnership

The evolving business scenario throws both opportunity and risk for investors. According to Shivakumar (IndigoEdge), the opportunity for PE/VC investors lies in the fact that young brands are provided with a market by online platforms. The perceived risks remain around the sustainability of the offline EBO model where the companies take on a high-cost real estate in order to gather eyeballs and the risk of obsolete inventory in traditional models. “Anyone who can increase the Inventory turnover to > 5X will be very interesting for investors,” he says. Many international brands have 3rd party manufacturing in India. Shivakumar foresees that contract manufacturing is unlikely to see a revival in investments any time soon. Any downturn in the consumption markets affects the local manufacturers considerably. The overall global retail outlook has not been very positive and therefore status quo is likely.

Omnichannel the way to go: While the online vs offline debate continues, the omnichannel model has emerged as a real winner, where in the companies are able to leverage the best of both worlds.

MERGERS & ACQUISITIONS IN TEXTILE, APPAREL & FASHION SPACE

Year	Total No. of Deals	No. of Deals with Disclosed Value	Amount (US\$M)
2017 YTD	1	-	-
2016	16	5	169
2015	13	7	87
2014	11	3	351

Source: Venture Intelligence



Recent years have seen increasing number of fashion retailers entering the e-commerce realm. Even the leading, long-established companies have launched their online operations. Whether Aditya Birla Group, Arvind Limited, Future Group, Landmark Group, Reliance Industries, Tata Group, or Shoppers Stop Limited, they all are tapping the Indian fashion e-commerce space also to supplement their physical presence. At the same time, likes of Yepme, Lenskart, Pretty Secrets and Myntra, who started as online ventures, have expanded their offline presence as well.

Luxury market still nascent: The super premium and luxury fashion in India is yet to take off, although the segment has registered some PE activity. Amit Choudhary from MOPE says, “There are few ideas in place, but in India, luxury play, especially in fashion, has not really scaled up very well. There is a challenge for an investor as to how to find value here. There are only a handful of international luxury fashion brands in India, that too with limited presence and still trying to figure out a way of marketing their brands in India. Shivakumar of IndigoEdge agrees that Indian luxury goods retail market is still a very small market. As per him, “The consumption of high-end luxury has



been limited to top 2-3 cities. Luxury retail will remain subdued till our per capita GDP increase 3X. We see the majority of the growth coming from the mid premium segment with a lot of the global brands trying to attack the segment. We have seen early success for the likes of Zara, Gap and H&M while established players like UCB, Levi’s also continue to expand.”

“We have seen PE/VC investment happening in beauty, jewellery and lingerie brands. However, the challenge in the online luxury fashion retail is the big ticket size. Consumers want to touch and feel the product before buying even more as the ticket size of the product increases. It will take a little longer for online businesses, as far as the high-priced items are concerned,” opines Vikram Gupta (IvyCap). Of late, luxury fashion startups, namely Exclusive and Envoged, received Angel and Seed investment respectively. “Angel investors will invest in any venture where they believe that their capital will be sufficient to take the

venture into a different orbit, where the next round of investors will find it interesting to provide follow-on capital,” explains Prajakt Raut (Applyifi and The Hub for Startups).

Emerging regulatory environment:

The present regulatory/tax environment in India is fairly conducive for PE/VC, according to Deloitte’s Anil Talreja. “However, we will have to see the impact on the profit margins and EBITDA post-GST. Once GST is implemented, in a couple of months thereafter, we’ll know how it will have played out. I think, by the next financial year, we’ll see things settling down”, he tells. Amit Choudhary (MOPE) is positive about GST. Things will become much more organised and the companies will go through more cost efficiency because of supply chain efficiencies coming in. We might see a lot of activity on the investment side once things become clearer on timelines, etc, says he. About GST, Prajakt Raut (Applyifi and The Hub for Startups) says, “The government’s intent is good. Progress is slow but on the right track. It’s good that the government is also engaging with industry stakeholders. Any policy and infrastructure that makes it easier for entrepreneurs to operate and succeed will be welcomed by angel investors.

Shivakumar (IndigoEdge) notes that India has a complex policy and legislative structure as regards investing in multi-brand retail including e-commerce. As per him, the new Companies Act has actually made it more complex for young companies to operate. A single window approval process across legislations and few compliance requirements are needed. GST is a step in the right direction for the economy at large. However, independent licenses in every state and filing of multiple returns will remain a problem for companies that choose to expand fast.



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FDI in fashion on rise: FDI landscape for retail has evolved since 1997. The key factor has been the opening up of foreign direct investment in single-brand retail and cash-and-carry formats. Many single-brand fashion retailers like Louis Vuitton and Tommy Hilfiger were the first to take advantage of this opportunity. Recent brands to join the market have been Zara (2009), H&M (2015) and Gap (2016), apprised Prashant Mehra (Grant Thornton). According to Anil Talreja (Deloitte), the foreign investors would like to see the kind of valuations they get pursuant to GST and EBITDA. They might prefer the franchise route as against absolute investment.

Changing investment dynamics

Investing is becoming more realistic in terms of valuations, etc. There is a little bit of stress when it comes to later stage investments. After Series B, finding investors who can support the next round is a challenge, shares Vikram Gupta of IvyCap. He also highlights that domestic fund raising is very less as compared to foreign sourcing. Unlike Indian investors, who want quick results, foreign investors have a long-term horizon, and that is why we see more dollar money coming in as an investment. Moreover, of the 10 billion dollar PE/VC investments so far, there has been hardly any good return. Until some good examples are set, investors will observe caution.

Valuations cannot be high for some time now. The industry will need time to recover from DeMo and GST impact; though former is not much worry now. Investments will take some time. Fashion is always an underdog - the differentiation lies in the fact that it is not an essential, but more of desire, or aspiration. One always has an option of putting a desire on halt. In short term, we won't see much movement investment wise, feels Anil Talreja of Deloitte.



MERGERS & ACQUISITIONS IN TEXTILE, APPAREL & FASHION SPACE (OFFLINE VS ONLINE)

Year	Online			Offline**		
	Total No. of Deals	No. of Deals with Disclosed Value	Amount (US\$M)	Total No. of Deals	No. of Deals with Disclosed Value	Amount (US\$M)
2017 YTD	1	-	-	-	-	-
2016	12	4	164	4	1	5
2015	4	1	3	9	6	84
2014	4	1	300	7	2	51

**Other than E-Commerce Companies are classified as Offline

Source: Venture Intelligence

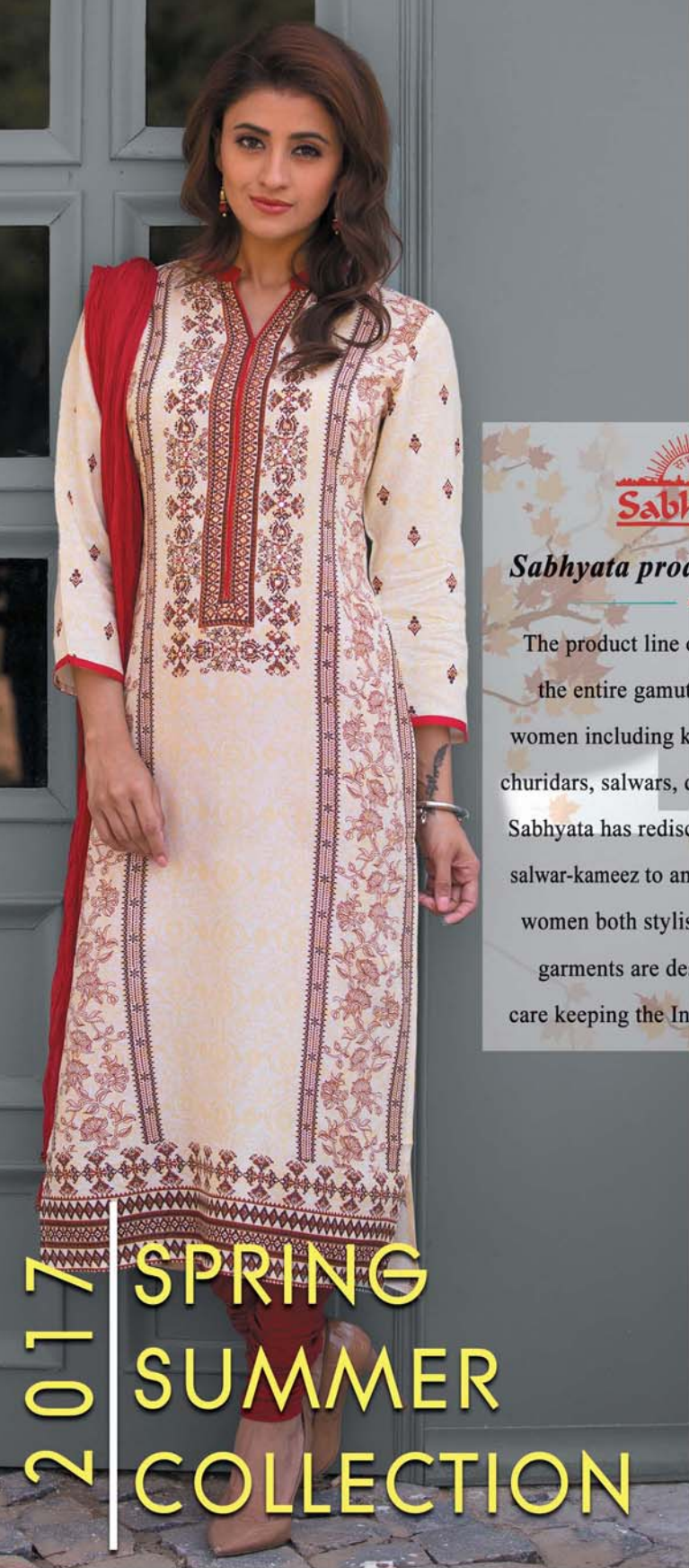
As per Applyifi and The Hub for Startups' Prajakt Raut, angel investors do not take sectoral bets or positions. Angels typically invest in ventures across sectors, and where they believe that the founders have a clear plan and a reasonable chance of becoming a dominant player in a large market. Valuation has always been a tricky aspect. Entrepreneurs nowadays should expect to dilute 10-30% in early rounds.

According to Prashant Mehra (Grant Thornton), the current and expected real estate correction along with economic reforms such as GST and infrastructure development schemes will also offer the brands and investors an added incentive to stay invested in India. Investors want good returns and profitable exits. "Exists are always challenging and very few and far between. For angel investors, it does not matter where they get an exit from. However, with VCs now going back to Series A and above investments (and not seed stage investments that they had started dabbling in), exit

opportunities for successful ventures should increase," opines Prajakt Raut (Applyifi and The Hub for Startups).

About the fashion companies taking the IPO-route, Amit Choudhary (MOPE) says that the public market is now fairly receptive to these [fashion] ideas. However, he also thinks that an IPO doesn't make sense for a company with less than ₹1,500- ₹2,000 crore valuation, i.e. primarily for a mid-sized company but it comes with the legal requirements as well."

As per Shivakumar (IndigoEdge), any late stage investor would love an IPO as an exit option subject to the investee company having an adequate float, liquidity and volumes, and market capitalization. Any IPO below an ₹1,200- ₹1,500 crores market capitalization with < 40 percent float would make it difficult for an investor to get an exit. Most of the successful exits in the Fashion space have been to PE funds with TA acquiring Matrix's stake in W, >



Sabhyata products at a glance

The product line of Sabhyata includes the entire gamut of ethnic wear for women including kurtas, kurtis, patialas, churidars, salwars, dupattas & much more. Sabhyata has rediscovered the traditional salwar-kameez to an outfit which makes a women both stylist and confident. Our garments are designed with utmost care keeping the Indian Women In Mind.



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General Atlantic buying out Kishore Biyani's stake in AND. Barring Tanishq's acquisition of Caratlane, we are yet to see any major buy outs in this sector, he notifies.

Vikram Gupta (IvyCap) anticipates there will be more cases for fashion company IPOs in the coming future. PEs are also looking at merger and acquisition (M&A) as a potential exit, however, at VC level, one wants more options and more comfort, he tells. According to Anil Talreja (Deloitte), secondary sales are largely popular among PE, while there are very few IPOs in the fashion industry. As of now, valuations seem quite uncertain, and IPOs will not take off so soon. We may see some M&A activity in this sector. Over the years, the Indian fashion sector has experienced some M&A

activity as well. A few recent M&A deals in fashion include: Aditya Birla Group merged its apparel business units to create India's largest branded clothing company, ABFRL; German sportswear giant Puma acquired the entire stake of its local partner from their joint venture, making Puma India Retail its fully-owned subsidiary; ABFRL acquired the Indian business of fashion chain Forever 21 from the US-based company's local franchise partner; Tata Group-owned Titan Co Ltd, bought a majority stake in India's largest jewellery e-tailer Caratlane.com; Flipkart-owned Myntra acquired Jabong to create India's biggest fashion e-tailer.

The way forward

So what is the outlook for funding and investments in the Indian fashion sector in 2017 and beyond?

"Entrepreneurs who innovate to create share-of-mind for their brands will have a good run, and will also be able to get investor interest. Just any business with a traditional marketing and brand building approach of outshouting competition is not going to be of interest to investors, even if the product is great," feels Prajakt Raut (Applyifi). "Any fashion brand which can offer fashion and variety at an affordable price and sees itself as more of a national brand rather than only a metro city brand will perhaps take the lead. Such brands/companies will attract investor interest also," states Grant Thornton's Prashant Mehra.

"The Fashion sector seems promising for the long term. We'll also have to see whether there is any counter [government] announcement to

Notable investments (2011 onwards)

- ▶ Over the last few years, Future Group has picked up stakes in Indian footwear companies, Tresmode and Famozi, along with clothing brand Mineral.
- ▶ Franklin Templeton Private Equity acquired a 13.51 per cent stake in Kimaya Fashions Ltd. (2011)
- ▶ Mile Group Venture and Goldsquare Sales India (Owners of fashionandyou.com) raised funding of roughly USD 40 million from new and current investors. Led by Norwest Venture Partners and Intel Capital, Sequoia Capital India and Nokia Growth Partners also participated in the round. (2011)
- ▶ L Capital, the PE arm of Louis Vuitton Moët Hennessy (LVMH), invested in Fab India. L Capital bought the stake from Wolfensohn Capital Partners for ₹150 crores, at the time valuing the company at ₹1,875 crores. (2012)
- ▶ Smile Group's online shoe store Bestylish.com received an undisclosed amount in funding from ru-Net Holdings, one of the largest internet and technology investors in Russia. (2012)
- ▶ Chennai based Cbazaar, an Indian ethnic wear and accessories e-commerce outfit, raised Series A funding of USD 3.5 million from Inventus Capital Partners a US-India venture capital and Ojas Venture Partners, an early stage technology based investing firm. (2012)
- ▶ Zovi.com a private label e-tailer dealing in apparel and accessories for men and women raised USD 10 million in series B round of funding from Tiger Global along with existing investor SAIF Partners. (2012)
- ▶ Footwear manufacturer and retailer Khadim India raised ₹90 crore from private equity (PE) firm Reliance Equity Advisors. (2013)
- ▶ Ratan Tata made a personal strategic investment in online jewellery retailer Bluestone. (2014)
- ▶ American PE firm Warburg Pincus picked up a minority stake in Kerala-based jewellery retailing firm Kalyan Jewellers. (2014)
- ▶ South- and Southeast Asia-focused PE firm Creador invested over \$30 million to buy a 4.4 per cent stake in Mumbai-listed PC Jewellers through secondary market share purchases. (2015)
- ▶ Jewellery company Senco Gold and Diamonds announced plans to raise capital through an Initial Public Offering by 2017-18. (2015)
- ▶ Caratlane.com raised ₹192 crore in Series D round of funding from existing investor Tiger Global. (2015)
- ▶ Sequoia Capital picked up 30 percent stake in Chennai based women apparel retailer, Go Fashion India, for ₹45-₹60 crores (2015). Sequoia had previously invested in Lovable Lingerie through ₹20 crores pre-IPO deal (exited with 2x returns), led ₹110 crores investment in Genesis Colors, backed Freecult with USD 4 million and most recently participated in USD 10 million Series D round of Fashionandyou.
- ▶ eShakti raised funding from IvyCap Ventures and existing investor, IDG Ventures. (2015)
- ▶ Limeroad, online social platform for women raised USD 15 million in Series B round from Tiger Global Management. (2015)
- ▶ A group of 10 international investors invested an undisclosed amount in Delhi-based Stalkbuylove, an online fast-fashion private label company. (2015)
- ▶ Future Lifestyle, the fashion arm of Future Group, hiked its stake in Bengaluru-based ethnic wear brand, Mother Earth, to 72.16% (2015). Thereafter, it increased its stake from 22.7% to 37% in Mineral Fashions, manufacturer and retailer of clothing and fashion accessories under the brand name 'Mineral'.
- ▶ Delhi-based Purple Panda Fashions Pvt Ltd, which runs online-first lingerie and sleepwear brand Clovia, raised an undisclosed amount in Series A funding from IvyCap Ventures. (2015)
- ▶ Business leader Ratan Tata acquired a stake in Kaaryah, an online women's wear brand.
- ▶ IndianRoots.com raised USD 5 million (around ₹31.84 cr) in its Series B round of funding led by KJS Group at valuation of USD 85 million (2015). Previously, the firm had raised a USD 3 million from NDTV Lifestyle Holdings Pvt. Ltd. It had also raised ₹10 crores from Rathi Strategic Ventures.
- ▶ Online lingerie retailer Zivame raised 2.5 billion in Series C funding round from Malaysian government investment fund Khazanah Nasional. IDG Ventures and Kalaari Capital also took part in the round, as did Zodiak Technology Fund and Unilazer. (2015)
- ▶ Aditya Birla Private Equity picked up a minority stake in Creative Lifestyles, the flagship company of the Mumbai-based Creative Garments group. Creative Lifestyle is the owner of women's apparel brands, 109F, Fusion Beats and O2xygen. (2015)
- ▶ Online jewellery brand Melorra.com raised USD 5 million from Lightbox Ventures. (2016)
- ▶ Mumbai-based online geolocated fashion directory and marketplace, Fashionablyin, raised an undisclosed amount of angel round funding led by Ranjan Mahtani, Chairman of Epic Group. (2016)
- ▶ PC Jeweller Ltd, a listed jewellery firm, acquired bridal jewellery brand Azva from the World Gold Council (WGC) for an undisclosed amount. The acquisition was routed through one of its wholly-owned subsidiaries. (2016)
- ▶ Women's footwear maker Catwalk Worldwide roped in larger industry peer, Bangalore's Sara Suole Pvt Ltd, as strategic investor to raise ₹100 crore (\$15 million).
- ▶ Public markets-focused PE firm WestBridge Capital Partners picked ~1.5 percent stake in the listed footwear maker, Relaxo Footweares Ltd, for close to ₹80 crores (\$12 million) via a secondary market transaction. (2016)
- ▶ Future Group-owned Future Lifestyle Fashions Ltd increased its stake in apparel and accessories

TOP M&A'S IN TEXTILE, APPAREL & FASHION SPACE 2014-2017 YTD

Target Company	Acquirer	Amount (US\$M)	Deal Date
Myntra	Flipkart	300	May-14
Jabong	Myntra	70	Jul-16
CaratLane	Titan Industries	53	May-16
Spykar Lifestyle	Metmin Investments	50	Aug-14
(Birla Textile Mills)	Sutlej Textiles & Industries	38	Mar-15

*Target in () indicates Asset Sale

Source: Venture Intelligence

balance out the downside of DeMo and GST and if there are some more announcements in the future that can give a boost to the sector," emphasises Deloitte's Anil Talreja. Shivakumar of IndigoEdge maintains, "There will always be waves of investing at the early stage, driven by successes of similar ventures. The Indian fashion

sector will always see interest if the brands demonstrate omnichannel capabilities (Large format/ Multi-Brand Outlets/ Exclusive Brand Outlets and Online)."

IvyCap Ventures' Vikram Gupta affirms, "Offline and online will now need to move together. The stage is

set for the omnichannel models. The investors will be more interested in the omnichannel models, or the business that has plans to go the omnichannel way eventually."

MOPE's Amit Choudhary concluded by saying, "The whole game around fundraising for scale (GMV) and that the scale will get more money is probably over. The companies must have tightened their belt, figured out their business model and the execution strategies. There is money to be raised, and I don't think there will be a situation for the right company to not be able to raise capital in 2017, or afterwards!"



- maker Mineral Fashions to 52.44 percent by converting debentures into shares. Mineral Fashions is now a subsidiary of Future Lifestyle. (2016)
- ▶ Fashlot, an O2O (online-to-offline) location-based fashion and store discovery mobile platform, raised an undisclosed amount of funding in pre-Series A round. (2016)
- ▶ Titan Co Ltd, Tata Group's watch and jewellery retailing firm, struck a deal to buy a majority stake in India's largest jewellery e-tailer Caratlane.com. (2016)
- ▶ Fashion e-commerce aggregator Voonik acquired Zohraa, a marketplace for designers and boutiques, to build its e-commerce platform for premium boutiques and independent designers Vilara. The firm also has acquired Styl, a salon and spa booking app, and Picksilk, an online silk store. (2016)
- ▶ ABFRL acquired the Indian business of fashion chain Forever 21 from Diana Retail, the US-based company's local franchise partner, for \$26 million (₹175 crore). (2016)
- ▶ Flipkart-owned Myntra agreed to acquire main competitor Jabong from Global Fashion Group for \$70 million (₹470 crores) in cash to create India's biggest fashion e-tailer. (2016)
- ▶ PE firm WestBridge Capital Partners increased its stake in the listed footwear maker Relaxo Footwears Ltd. The PE firm picked up 0.5% percent stake during the transaction. (2016)
- ▶ PE firm Blackstone sold another large chunk of shares in garment exporter Gokaldas Exports as it looked to gradually liquidate one of its loss-making investments in India. The PE firm sold 7.4% stake in the company for ₹29.2 crores (\$4.4 million). Weeks before this, Blackstone had sold just under 10% stake in the firm. (2016)
- ▶ US-based PE investor TA Associates invested \$140 million (₹937 crores) in Delhi's TCNS Clothing Co Pvt. Ltd to buy out shares from existing shareholders. (2016)
- ▶ Coimbatore's SP Apparels launched an IPO to raise ₹215 crores (fresh issue). The firm makes and exports knitted garments for infants and children. It also manufactures and retails menswear in India under the brand 'Crocodile'. (2016)
- ▶ Flipkart-backed Myntra acquired a majority stake in fitness and sportswear brand HRX, co-owned by Bollywood actor Hrithik Roshan and Exceed Entertainment. (2016)
- ▶ German sportswear giant Puma acquired the entire stake of its local partner from their joint venture, making Puma India Retail its fully owned subsidiary. Puma has also received government approval for a wholly owned single-brand entity in India. (2016)
- ▶ Fashion e-tailer Voonik acquired styling and personalisation app Dekkoh. This was the firm's sixth acquisition with in a year's time. (2016)
- ▶ Chennai-based eShakti Pvt. Ltd, operator of an online women's apparel retailer, raised fresh funding of ₹9 crores (\$1.34 million) through a preferential allotment of shares. (2016)
- ▶ Textile company Arvind Ltd. announced that Multiples Alternate Asset Management Pvt. Ltd will buy a 10% stake in its brand business arm for ₹740 crores (\$110 million). (2016)
- ▶ ASK Pravi Capital Advisors-backed kids apparel company Indian Clothing League announced that it is initiating a second round of fundraise. (2016)
- ▶ London Stock Exchange-listed Koovs plc, the parent of online fashion marketplace Koovs, secured \$13.52 million from a clutch of investors. (2016)
- ▶ L Capital, a LVMH group-backed PE firm, exited its investment in ethnic retailer Fabindia. The firm sold its 16 percent stake to Hasham Investment and Trading Co. Pvt. Ltd, an affiliate of Wipro chairman Azim Premji's private investment arm PremjiInvest, and two unnamed individuals. (2016)
- ▶ Fashion e-tailer StalkBuyLove raised - ₹41 crores (\$6 million) in Series A funding round led by Kalaari Capital. (2016)
- ▶ Ace investor Rakesh Jhunjhunwala acquired a 12.74 percent stake in Mumbai-based apparel maker Mandhana Retail Ventures Ltd, which got listed after its demerger from Mandhana Industries. (2016)
- ▶ Mumbai's MJVS Fashion Services, which operates used-apparel reselling platform CoutLoot, acquired Bengaluru's Stororo Services, for an undisclosed amount. Stororo runs fashion and apparel portal for sellers Once Again Store. (2017)
- ▶ Jewellery e-commerce marketplace Johari Shop raised \$94,000 (₹62.5 lakh) from three angel investors to power its omni-channel efforts. (2017)
- ▶ Fashion search platform, SeenIt raised an undisclosed amount in pre-Series A funding. (2017)
- ▶ Fashion and lifestyle discovery platform SummerLabel raised ₹1 crore (\$150,000) in seed funding from a clutch of high net worth individuals. (2017)
- ▶ Online fashion marketplace Fynd raised \$500,000 (₹3.3 crores) in its Series A round of investment. (2017)
- ▶ Thrissur-based Kalyan Jewellers raised ₹500 crores (around \$77 million) from PE firm Warburg Pincus. With this investment, the PE firm has put in ₹ 1,700 crore in the company so far. (2017)
- ▶ Reportedly, PE firm Blackstone is exiting its decade-old investment in textiles firm Gokaldas Exports by selling its entire remaining stake to a group of investors. (2017)

*Info till 1st week of April 2017



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VAJOR

A DISTINCTIVE IDENTITY



– Nathasha Kumar,
Founder & CEO, Vajor.com

Vajor is a refreshing break from the monotony of this industry. A youthful brand created solely to bridge the gap between run of the mill ready-to-wear and high fashion, the brand aims to build a community of independent, mature and free spirited people who are non-conformists and driven individuals. In an exclusive interview with IMAGES BoF, Founder and CEO Nathasha AR Kumar speaks about the concept behind the brand, its positioning, commitment to sustainability and more.



IBOF: Tell us in short about Vajor — the concept behind it, its genesis and core strength:

Nathasha Kumar (NK): “A brand for the independent minds, the kind hearts and the nomadic souls.” We live and breath this very motto. Vajor came into being in 2014 with a very clear concept in mind. Observations revealed how the market is filled with either off-the-rack clothing or luxury couture. And there is a wide valley in between these two. It was high time somebody built a bridge!

As an e-commerce women’s wear fashion and lifestyle brand, we have a very specific goal. We deliver sustainable fashion and decor to consumers with an assurance of unmatched quality, fair price, comfort, modesty, international appeal and superior aesthetics.

IBoF: Tell us about the V-Blog and the concept behind it. What percentage of consumers that come to the site navigate to the blog? And had there been



times when people have navigated from the blog to a specific product? Are the bloggers in-house?

NK: Content is the new social currency and thus, an extreme amount of creativity and technicality goes into developing a visual picture that does justice to the brand and its commodities. Everything that goes onto the blog is governed by a unified language and every written word, image or video we create embodies that language. We believe our community is about people who are doing immensely more than just fashion. And so, the stories we narrate on the blog all talk about various aspects of our consumer's lifestyle. We often tell stories of a muse on the blog. This muse is not only a true Vajor consumer in her personality but she is also a medium through which we can connect to our target market.

An average of 20 percent website visitors navigate to the blog. Our blog has a "Shop The Look" segment with every post that guides our readers to particular products featured on the blog as well as related products. We have a dedicated content team that builds strategies and creates blog posts. These blog posts talk about the latest collections, fashion and decor trends, travel and lifestyle, etc.

IBoF: What is your brand USP and its target audience. How do you differentially position your brand

vis-a-vis others that serve the same consumer segment?

NK: Our USP is that we launch a new collection every month, keeping with the fast pace of this industry and eliminating the barriers of seasonal fashion. The online fashion market is growing with every passing day and what sets us apart is our ability to deliver an experience along with an impressive product.

Our target audience comprises of modern, independent, mature and confident cosmopolitan individuals in the age group of 25-40 who fall into the SEC-A group.

The brand has its own identity which is about being organic and rooted in its approach. We are aware of the concerns of our consumers and are providing them fashion that is body friendly and a platform which is trustworthy. Our monthly collections set us apart from other brands who are mostly doing 3-4 collections in a year. This way, we give our consumers the best of their fashion demands without being monotonous.

IBoF: Tell us about your product basket and about latest collection in women's wear.

NK: Vajor.com has everything the consumer needs in the fashion and lifestyle segment right from clothing, shoes, accessories, to decor. Our latest





collection is the June collection called Summer Vibes. The collection arrives as a soothing drizzle of freshness. The key features of the collection are comfort and balance. The collection features a soothing colour palette of whites and pastels with beautiful, bright floral embroidery. The idea behind this collection is to give versatility to one's wardrobe by creating pieces that are effortless everyday styles and double up as comfortable breezy vacation outfits! The collection also brings lovely jewellery, scarfs, sunglasses and beach cover-ups to help complete the looks.

Featuring a colour palette full of cool blues, washed out greys and blacks, earthy reds, greens and browns, as well as vivid pinks and rich yellows with a pop of neon, the hues revolve around a simplistic nature with little bursts of quirk. The collection features a soothing appeal characterised by the serene whites that dominate the overall colour scheme. With intricate embroideries surfacing the clothing in floral patterns, a smidge of summer is added to the vibe of the collection. The prints too are a tessellation of tiny, elegant motifs that fill up the garments, giving them a minimal chic look. We've combined geometric designs like lines, polka dots, pinstripes and zig-zags with traditional styles like Ajrakh, Ikat, and a few other tribal styles to deliver fashion that is not just contemporary but also versatile.

IBoF: Your website states that sustainability is a core strand of your brand. How all do you support sustainability?

NK: Absolutely!! The April collection, *Elements*, comprised largely of apparel that was made with 100 percent natural and eco-friendly fabrics from Liva (Aditya Birla Group). We ensure that in our manufacturing processes, harmful chemicals are not being used in dyeing processes.

Wastage of fabric is controlled and minimized. The left-over scrap is recycled and reused. A hygienic and safe environment is maintained for all the workers in the manufacturing unit. During April 2017, Vajor.com donated 5 percent of the amount of each order received to an organization called Grow-trees.com that will plant 1000 trees on behalf of the brand. The brand is working on a documentary revolving around "Bee Harvesting" and its significance towards a greener Earth.

Apart from this, we change our packaging to minimize the use of plastic as much as possible, hand out plants and seeds instead of the usual gifts, maintain a green office space, and routinely share updates across Vajor.com's social media handles to encourage and inspire a green lifestyle.

IBoF: How would you compare metros and tier -I and -II cities vis-a-vis sales? Could you specify the regions that are your strongest markets?

NK: We are now strong in the metros. Say about 85 percent of interaction happens from Delhi NCR, Mumbai, and Bengaluru. Sales are eventually also catching up in Kolkata and other tier -I cities like Hyderabad, Pune, Chandigarh, Jaipur, etc.

IBoF: How much cross buying do you see in your website in general — people coming for fashion going to the lifestyle to shoes and accessories or decor and vice versa. Is cross buying a strong pull?

NK: Vajor has invested around 1.5 years in understanding the need gap in the Indian scenario. This allowed us in understanding our consumers and their needs well. Infact launching the new vertical- *Décor*, was a natural progression in this manner. So far, we have seen very encouraging response from our existing customers. Infact 30 percent of our customers are buying décor and accessories as well. The topical nature of our goods makes sure

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that it addresses their current need, which works out well for both the brand and the consumer.

Our main focus and core product line is clothing, which brings in around 80 percent of our revenue. In the future, we see apparel to be dominant with décor doing marginally better.

IBoF: You launch a new collection every month. Tell us about the design merchandise team that makes this possible. Also, tell us about the cycle — how long back do you start the whole process?

NK: We start with year long roadmap and derive quarter based plans from there. Launching a new collection every month remains our success mantra. This involves working on tight timelines. Basis the selected theme, the designing of the whole collection needs to wrap up 30-45 days in advance, which is done in-house. Post this, the shoot and the production is carried out. Interim 10 days are taken to have the brand and product communication and the monthly plan ready. The whole system is a clock work and all teams — design, merchandise, content, marketing and technology, have to be in complete sync to meet the deadlines.

IBoF: You shared in IFF 2017 that the right styling, right colours and the right background is very important to attract the right customer while selling online. Kindly elaborate.

NK: The digital world is lacking in just one sense right now — the touch and feel (this too we are sure will be taken care of in time). The visual impact, whether it's the styling part or the colour palettes, needs to be enticing for a person to know more about it. Internally we strongly feel its not a product image but a lifestyle that we are promoting. Hence we spend lot of time on the whole set up and making sure on the final outcome as this forms the basis of all of our communication — both online and offline.

IBoF: It is also heard that you engage in a lot of events and activities. Could you tell us about 3 initiatives that rendered the maximum response for you.

NK: Events is an important part of brand building for us and we take care of it through 3Cs – Communities, Content and Collaborations. We try our best to engage with people from different walks of life and create relevant experiences. We recently held our first offline event *Summer Affaire*, to introduce Vajor and the

product line to bloggers and media professionals and it was received very well. Also, we do collaborations with other communities, like the one we did with Gurgaon Moms. We went beyond just placing a stall and created a topical content (a mother's day video in this case), which again rendered good views on social platforms. On the B2B front, we have collaborated with TIE and SheThePeople.TV as corporate sponsors in the past.

IBoF: Tell us about your expansion plans. Can we expect physical stores in the near future? If yes, which city would be your first choice?

NK: Yes, Vajor has always believed in an omni-channel way of running the brand. Hence, we will be expanding in the domestic as well as international markets this year. Under domestic expansion, Vajor is getting into retail from September 2017 onwards. The first two stores are both going to be in Delhi NCR region and we will be expanding to more metros in the next 6-9 months. Vajor is moving ahead with a geo expansion plan wherein, we will be looking at various channels and ensure our presence internationally in around 3-4 countries by the end of this financial year. This will be made possible through few collaborations, international marketplaces and local vendors.

IBoF: Tell us about your milestones in the last two and a half years.

NK: Over the past two and a half years, we have had an organic growth of 200 percent YOY. We've had a positively strong quantitative growth, wherein, 45 percent of the existing customers are frequent and loyal shoppers. Qualitatively, we have been able to expand from apparel to décor as well. This increases our reach into the consumer and has opened a whole new segment. We have stayed true to our product quality and its pricing and have maintained the customer satisfaction without any compromises.





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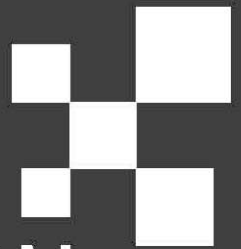
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BIBA LAUNCHES ITS DEBUT TV CAMPAIGN “WHO’S THAT GIRL”

By Tanya Krishna



“Biba believes that there is a lot more to a woman’s personality than just her beauty, and that’s what inspires conversations about her. It’s this thought that propels the brand’s Spring/ Summer 2017 collection.”

—Siddharth Bindra,
Managing Director, Biba

Biba, an ethnic wear brand, has once again swept everyone off their feet with its new television commercial and campaign, ‘Who’s That Girl’. The TV commercial brings to life Biba’s new philosophy across popular television channels and will be supported extensively through other media like print, outdoor and digital.

Launched in 1988, Biba is one of the iconic ethnic wear brands in the huge and gigantic share that ethnic wear possesses in the Indian fashion market. Now, to mark the celebration of its presence in over 100 cities, the brand has revealed its first ever television campaign which also introduces the brand’s latest Spring/ Summer Collection – 2017.

Commenting on the new campaign conceptualized by Lowe Lintas, Siddharth Bindra, Managing Director, Biba, said, “Biba as a brand has really evolved over the years, both in terms of size of business and reach. Today, Biba has stores in more than 100 cities. We feel that television, as a medium, will not only help us reach out to women but also connect with them. We have been engaging with our customers through a lot of print, digital, outdoor campaigns but television allows us to tell a brand story in a more effective way.” Talking about the different elements required for a TVC, Bindra apprised, “The concept and art of storytelling are the two most important elements of a TVC since the entire story needs to be shown within few minutes. The concept of the TVC should be unique and must be conveyed in such a manner that it attracts the audiences’ attention immediately. To make the ad campaigns successful, one must also keep in mind that the messaging should be simple and audience can relate to it.” The new ad campaign by the brand is totally relatable. The 45-second video opens in the set-up of a wedding where the bride-to-be is asking her grandmother to dance with her. Her

grandmother, also adorned in a Biba dress, feels shy and refuses. Then enters the protagonist, a young confident girl dressed in Biba's orange Anarkali dress, who plays granny's favourite songs, makes her dance, and leaves everyone wondering "Who's that girl".

Explaining the concept behind the campaign, Bindra maintained, "Biba believes that there is a lot more to a woman's personality than just her beauty, and that's what inspires conversations about her. It's this thought that propels the brand's Spring/ Summer 2017 collection. The ad showcases how certain women – by the way they look, dress and carry themselves – sparkle

with an enchanting magnetism, such that the world around them feels compelled to unravel more about their story." The new collection is crafted out of comfortable fabrics exemplifying modern silhouettes, experimental prints and whimsical patterns in a rich and fresh colour palette. Biba's latest collection is a unique combination of contemporary yet traditional designs which are bold and graceful, casual and classic at the same time. The collection comprises of SKD (salwar kameez dupatta), ethnic mix n match kurtas, palazzos, leggings, skirts, unstitched pieces and Biba Girls – the much loved kids' collection. Biba had rolled its first ad campaign "Be Yourself" exclusively on digital platforms and have moved from that to "Who's That Girl" for

television and other platforms. On being asked about the reason for this change, Bindra added, "Be yourself encourages modern woman to be herself which means confident, beautiful and stylish and expressive, whereas the current campaign "Who's that girl" is the extension of the same thought."

The campaign has helped the brand create awareness about Biba and attract potential buyers. It is something that every woman can relate to and appreciate. After its current campaign getting a great response, it is only a matter of time when Biba will again come up with another campaign with such a thoughtful and appealing approach.

>



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BIBA'S NEW SPRING/ SUMMER 2017 COLLECTION:


SALWAR KAMEEZ DUPATTA (SKD COLLECTION) The beautiful embroidered jacket with flared kurta detailing on the hemline along with churidars and dupatta is a perfect fit for any occasion. The piece is priced at ₹4,599.

Keeping simple is always elegant. A beautifully embroidered kurta in khadi teamed with dupatta and churidars will lend an elegant look. The piece is priced at ₹3,799.



ART IN STYLE collection draws inspiration from abstract clip art images arranged in asymmetrical formats and whimsical contrasts. These patterns exquisitely stand out in black and white and highlights of beige with dash of red and green.

The beautiful placement print with bright colour highlight straight kurta with $\frac{3}{4}$ sleeves is a perfect wear for any occasion. The piece is priced at ₹1,099.



MUD ART VILLAGE collection explores the rich heritage of mud mirror art commonly known as 'LippanKaam' earlier done on mud walls of homes in Rajasthan. The traditional motifs look beautiful in classic colours highlighted with silver embroidery and mirrors. The collection brings a new contemporary look, yet inspired by tradition with innovative silhouettes in rich fabrics.

The beautiful anarkali placement khari print on bright colour highlighted with mirror embroidery and silver yarns with cap sleeve will lend an elegant look when paired with a contrasted churidar. The piece is priced at ₹2,999.

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TREE OF LIFE collection unfolds a new adaptation of the traditional 'Tree of Life' expressing the beauty of chintz florals in summer pastels. Infusion of metallic copper touches with classic motifs gives the range its light and life. The silhouettes are contemporary yet traditional.

The flared asymmetric hem silk kurta with print trim details and authentic bird print on yoke highlighted with contrast resham and sequin is a perfect wear for the occasion. The piece is priced at ₹2,799.



RUI PHOOL is a cotton flower which inspires the collection. The collection exhibits hand sketched birds adorning the soft cottons in delightful shades of summer yellow, blue and whites with a dash of red colour. The silhouettes are simple, traditional yet stylish and are a perfect wear for a modern woman.

The smart straight cut double layer dress with printed outer layer and contrast solid inner layer will be an ideal choice for any occasion. The piece is priced at ₹1,899.



BIBA GIRLS, a dedicated range from Biba catering to young girls aged between 2 to 15 years, unveils its Spring/ Summer collection for the little fashionistas. The collection exhibits 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 range comprises of lehengas, jackets, anarkalis, asymmetrical kurtas, palazzos, jumpsuits, shorts, dresses and gowns.

The ikkat cotton chambrey jumpsuit with front button opening with elasticated waistband and side pockets from Biba Girl's Spring/ Summer collection will lend a stylish and comfortable look to the little princess. The piece is priced at ₹1,099.



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LYRA ROPES IN **PARINEETI CHOPRA** AS ITS NEW BRAND AMBASSADOR

The ever bubbly and vivacious Bollywood actress Parineeti Chopra has joined the club of celebrity endorsers as Lux Group, a conglomeration of diverse brand portfolio across multiple product segments, announced her as the brand ambassador of Lyra. Lyra today enjoys very high level of consumer awareness and consumer loyalty and has successfully established itself as the largest leggings brand in the women's wear segment.

The manufacturers of Lyra, Ebell Fashion Pvt. Ltd. have further plans of premiumisation and portfolio expansion and by bringing on board Parineeti, the company is planning to target the current youth fraternity reflecting confidence, simplicity and the ability to think out of the box.

Announcing the brand association, Udit Todi, Director, Ebell Fashion Private Ltd., said, "In a very short span of time, the brand has helped us to strengthen our presence in the burgeoning women's leggings category. We have also extended our brand portfolio to intimate wears like lingerie and loungewear for women. Lyra is slowly progressing and carving itself out as a lifestyle brand with the aim to expand into further categories beyond leggings with differentiated offerings in an endeavour to command the highest share in this market."

Lyra is the market leader in the leggings category with highest brand recall in the organized retail or online space. The leggings business is growing by 50 percent a year and currently, the brand commands a market share of 38 percent in the mid to premium segment. Lyra leggings are priced at ₹250 and above.

Speaking on the occasion, Parineeti said, "I find Lyra leggings very comfortable and easy to wear. I can sport them anywhere and at all times. This product from Ebell Fashions is both trusted and known for delivering consistent quality and I am happy to be associated with them."

The roping in of Parineeti for Lyra brand is supported by the brand's latest campaign, 'My Life My Lyra' which has been conceptualized by Rediffusion Y&R.





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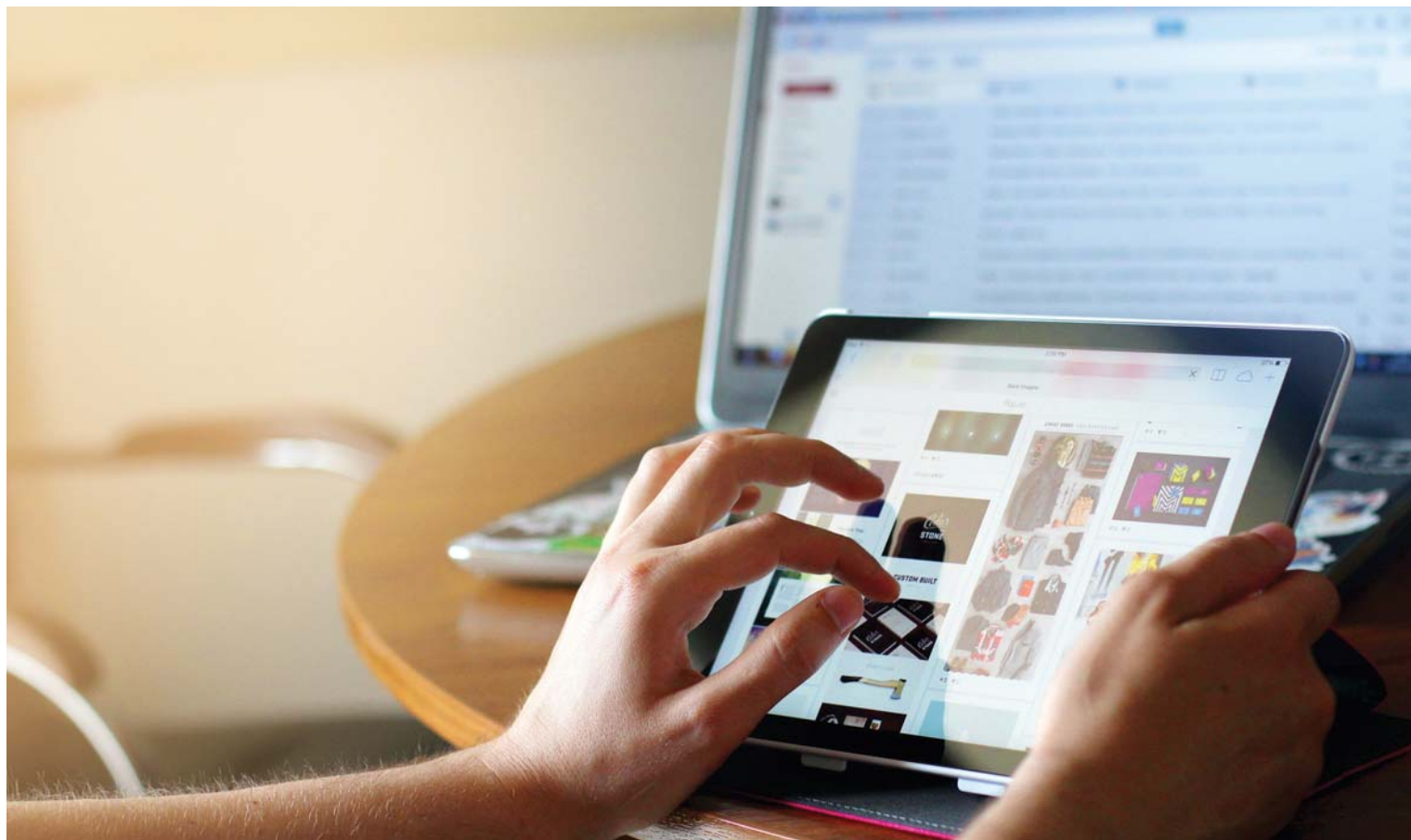
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OBSERVATIONS 2017: ONLINE SHOPPER BEHAVIOUR

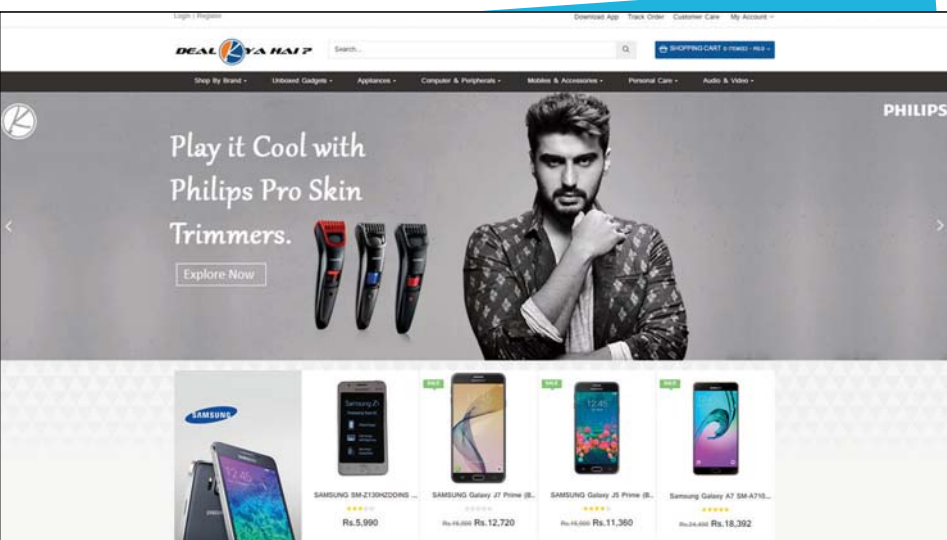
Online retail has come far, from its paltry days leading the way of having just Amazon and eBay in its kitty to a vast expanse of shops to the more synchronized avatar of the mouse-and-webpage. Implementation of technology within the retail space is shaping how consumers interact with brands today.

By Amit Daga, MD, Deal Kya Hai?

More information and choices to compare product and price have become an ongoing popular means to woo consumers. Convenience has also played an important factor, with people being able to shop from the comforts of their designated locations. The ease in payment methods, delivery and customer service adds the needed icing to this elaborately crafted cake.

Buyer behaviour of consumers is proportional to the success of a brand and hence, marketers follow consumer interactions and recent trends closely. This is influenced by many external and internal factors but the promoter company can also influence the final procedure of buyer decision-making process significantly by studying these carefully.





HERE ARE 3 CRUCIAL OBSERVATIONS THAT HAVE SET THE TONE FOR BUYING BEHAVIOUR TO BOLSTER:

Male Purchase Behaviour: Men and shopping in general are not taken under the same breath, yet the rugged sex is successively opting to veer the online way. It has been seen that of all categories involved, 71 percent of the male respondents have bought personal care products placing them way ahead of their female counterparts in buying personal care products online. While one can assume that many purchases have been made

for gifting purposes, in actuality 64 percent of male respondents bought personal care products for themselves. With men leading the pack in buying personal care products, shavers/trimmers are the most sought after products in this segment

Female Purchase Behaviour: It is often said that women are savvier and more engaged when it comes to shopping. Surprisingly, in context to online shopping, women are yet to catch up. Women lag behind in buying online personal care products. Only 27 percent of women buy personal care products online, stating hygiene factors in their reluctance to buy personal care products. When it

comes to the technology category, 80 percent of females seek advice from male friends/ colleagues to buy an IT product online. Females showed high level of dependency in buying IT products like smartphones, laptops and tablets. Only 15 percent of respondents buy electronic products over ₹30,000 online due to warranty concerns

Payment Modes Preferred: Payment is one of the key factors of convenience provided by the online portals. Of all the payment modes favoured, 50 percent of the buyers still prefer COD which has come down from 70 percent post demonetization. Demonetization actually made a dent in the sales of e-retail players where luxury segment or high-end purchases were avoided by 84 percent of the respondents. On affecting payment methods, 50 percent of buyer's pay through digital medium as compared to 30 percent earlier. Net banking is the most preferred payment mode (43 percent) followed by credit cards (36 percent) in non cash payment options, reflecting on most Indians choice to play safe rather than overspend.



CONCLUSION

People are definitely buying more and more online, with certain categories being on top preference. Yet, there are a few hiccups to the smooth sailing as some consumers still feel uncomfortable to buy online. Lack of trust, for instance, seems to be the major reason that impedes consumers to buy online. Also, consumers may have a need to examine and feel the products and to meet friends and get some more comments about the products before purchasing. Retailers and platforms need to find a solution to these problems to ensure the rise of profitability to remain on a progressive trajectory.

FASHION PARADE



HONG KONG FASHION WEEK FOR SPRING/SUMMER

The Hong Kong Fashion Week for Spring/Summer will embark its 24th edition from 10-13 July 2017 at the Hong Kong Convention and Exhibition Centre. Organised by the Hong Kong Trade Development Council (HKTC), the four-day fair is expected to receive about 1,100 exhibitors from across the globe, presenting an array of spring/summer clothing, garment, designer collections, fashion and clothing accessories, fabrics and related professional services.

Of late, the concept of informality in dressing is adopted feverishly by fast fashion retailers, sports retailers and even luxury retailers. Notwithstanding the long-established decorum in countries like England and Japan, the trend to seeking a casual alternative to dressing is becoming more acceptable. Amongst others, “athleisure”, which is defined as “casual clothing meant to be worn for both exercising and for general use” has become so popular that it has carved out a niche in the clothing industry. Global financial services firm Morgan Stanley’s 2015 report estimates that the sportswear industry will represent USD 83 billion in sales by 2020, or more than 30 percent growth. The Chinese mainland in particular, attributes the projected growth in the sportswear market to its booming middle class who are now more aware of maintaining a healthy lifestyle.

The Hong Kong Fashion Week has been keeping its fingers on the pulse to enrich fair content, by adding new elements. Following the Fall/Winter edition held last January, the two new zones- *Fashionable Sportswear* and *Urban Essentials* will again take centrestage at the Spring/Summer edition to encompass sportswear and casual wear respectively. Highlights among them are fashion gallery, which shall feature high fashion and brand labels, as well as fabrics and yarn, clothing accessories and men’s wear. Adding to that, the

TRADE



debut World of Fashion Accessories will house all fashion accessories related zones such as bags, footwear, leggings and socks, gloves, scarves and shawls for buyers' easy sourcing all at a glance.

The fair is zoned to provide maximum exposure for different sectors of the industry. The Thai female fashionable sportswear retailer, Wakingbee Co., Ltd., shall offer all kinds of sportswear for yoga, fitness and running as well as leisurewear. Its co-founders, Ornwassa Siamseranee and Chalita Hongsakul expressed in January's Fall/Winter edition that they made good contacts and successfully got orders from a Hong Kong buyer through their first participation at last year's Spring/Summer edition. They also added that new Fashionable Sportswear zone enabled buyers to find related suppliers easily and allowed them to meet with new buyers from Australia, Bahrain, the Chinese mainland, Hong Kong, Korea and South America and they will definitely come back next year.

To provide more promotional channels, fashion parades will be arranged for exhibitors and designers to present their latest collection to the discerning buyers. While the fair promises to be the region's premier sourcing and marketing platform, it is also a golden opportunity for information exchange within the industry. Renowned international trend forecasters, including Fashion Snoops, will be invited to unveil the latest trends ahead. Co-organised with Hong Kong Research Institute of Textiles and Apparel (HKRITA), a seminar on wearable technologies for fashion will also be organised. A networking reception will also be arranged during the fair for buyers, exhibitors and industry representatives to mingle and expand their business network through personal contact.

ABOUT HKTDC

A statutory body established in 1966, the Hong Kong Trade Development Council (HKTDC) is the international marketing arm for Hong Kong-based traders, manufacturers and services providers. With more than 40 offices globally, including 13 on the Chinese mainland, the HKTDC promotes Hong Kong as a platform for doing business with China and throughout Asia. The HKTDC also organises international exhibitions, conferences and business missions to provide companies, particularly SMEs, with business opportunities on the mainland and in overseas markets, while providing information via trade publications, research reports and digital channels including the media room.



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Pioneer of the Month

TOWARDS A BETTER WORLD

The Tom Cridland brand is making waves around the world and finding a legion of fans that believe it's 'Buy Less Buy Better' philosophy. Images BoF talks to Thomas Cridland, the founder of the sustainable brand about its collections, beliefs and the ways in which it distinguishes itself from fast fashion brands.

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IFF Innovation Crucible



IFF 2017

IFF 2017 Exhibition: The Best of the Future of Fashion at Display

The 17th edition of India Fashion Forum brought in various fashion brands, tech, logistics, retail support and other companies displaying their new collections and services at different stalls or through innovative displays and brandings.

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The Making

THE MAKING OF FENDI'S NEW LUXURIOUS 'LEI SELLERIA' BAGS

Luxury is not a child's play. It requires immense hard work, perseverance and detailing. We bring you the finer nuances of the making of luxurious Fedi 'Lei Selleria' bags.

Pg No. 108

NEW PRODUCT

Innovation at its Best With Girggit's Colour- Changing T-Shirts

Leveraging upon the new technology, a new entrant in the market, Girggit, have come up with a range of colour changing t-shirts. We talk to Himanshu Thakur, founder of the brand to find out about the technology and innovation involved in these t-shirts and also about the brand's future endeavours.

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TOWARDS A BETTER WORLD

FASHION FORECASTS FOR THE YEAR 2047!



– Thomas Cridland
Founder, Tom Cridland

It takes two years for a garment to go from fashion to pollution. The landfills are today filling up with apparel at an alarming speed. One brand with belief in a better way ahead is making waves around the world and finding a legion of fans that believe it's 'Buy Less Buy Better' philosophy. Within two and a half years of its launch, the UK based brand Tom Cridland is already listed on the Sustainia100 and is a Fortune Magazine Cool Company.

1991 born, Thomas Cridland, has been designing clothing since the age of 18. He started this eponymous sustainable fashion brand in January 2014, with his girlfriend of 7 years, Debs Marx when they were both 23. They were backed by just a government start-up loan and a strong belief in a better world of fashion. Tom Cridland initially specialised solely in creating the perfect pair of trousers. In 2015, Tom launched *The 30 Year Sweatshirt*, a sustainable fashion project in the form of a luxury cotton crewneck which was backed up with a 30 year guarantee. This was acclaimed by everyone from the BBC to The Independent to The Huffington Post. Thomas continued this momentum by launching *The 30 Year T-Shirt* immediately afterwards. In June 2016, Tom Cridland was included in the Sustainia100 and nominated for the international Sustainia Award for *The 30 Year Sweatshirt* by a committee led by Arnold Schwarzenegger. The Telegraph stated that "men's wear can lead the race for sustainable fashion" whilst praising Thomas Cridland's work as "faultless." Recently, Thomas has also launched *The Entrepreneur's Shirts* which are Oxfords made from luxurious Italian cotton and again backed by the 30 year guarantee. Ten percent of the sale price of these shirts is donated directly to the charity, DEKI.

IN AN EXCLUSIVE INTERVIEW WITH RAJAN VARMA, MANAGING EDITOR, IMAGES BUSINESS OF FASHION, THIS WONDERFUL YOUNG ENTREPRENEUR, THOMAS CRIDLAND, SHEDS LIGHT UPON HIS BRAND AND HIS HOPE FOR A BETTER WORLD OF FASHION.

Dear Tom, when and how did you get interested in fashion?

I have always been interested in clothing and well made things. Ever since I was a boy, I was very selective about what I liked and always saved up my pocket money to buy garments that really appealed to me. I always treasured them and took good care of them.

You began your company specialising solely in creating the perfect pair of trousers. What did you mean by the term "perfect" then?

I wanted the trousers to be in every tasteful colour you could think of, made from the finest materials we could source, put together by world class craftsmen and seamstresses and cut elegantly but comfortably. That is what I believe constitutes the 'perfect pair' of trousers and that's what I think we have achieved with Tom Cridland trousers.



The 30 Year Sweatshirt



Rod Stewart in Tom Cridland apparel

After the perfect trouser you went on to launch ‘The 30-year Sweatshirt’. What was your prime driver and motivation in deciding to launch this? What were your fears?

I launched ‘The 30 Year Sweatshirt’ because of the rise of planned obsolescence in fashion and the fact that the industry has become the world’s second most polluting. Built-in or planned obsolescence in fashion terms is clothing being made systemically so that it will fall apart to force customers to return and buy more. It’s a sad part of the grim fast fashion empire currently dominating the industry. Andrew Morgan’s *The True Cost* is what truly shed light for me on how bad the situation is. We need to promote sustainable fashion to help ourselves as consumers, help our fellow human beings trapped in horrendous working conditions putting together our clothing and urgently to help our planet that we are damaging irreversibly. That’s why I decided to develop ‘The 30 Year Sweatshirt’ and subsequently ‘The 30 Year Collection’.

Why didn’t you name this too as the “perfect” sweatshirts?

‘The 30 Year Sweatshirt’ was a much more relevant name due to its signature

guarantee. ‘The 30 Year Sweatshirt’ was the first item with a 30 year guarantee that I designed. It was an attempt to make sustainable fashion more broadly appealing and to get consumers thinking about fashion as less disposable. We also aimed to lead an industry trend to protect natural resources by making truly durable clothing. The 30 year period for the guarantee was decided upon together with my suppliers who have been making sweatshirts for over 50 years. This is a conservative and not overly ambitious length of time for us to pledge that garments of our quality will last.

How was the product received by the first set you reached out to?

I was truly overwhelmed by the reaction to it. It was incredibly touching and made the hard work that I put into developing ‘The 30 Year Sweatshirt’ more than worth it. It was life changing for me.

How do you ensure that ‘The 30-year Sweatshirt’ will indeed last 30 years? Can you please elaborate upon the difference your levels of high-spec material and production deliver as compared to standard apparel?

We had to look back to take our concept of the 30 Year Sweatshirt forward. This is a campaign against fast fashion and for sustainable fashion. The 30 year guarantee is no gimmick and invokes a bygone era when clothing was made with care. We developed the 30 year figure with our seamstresses in Portugal who have been making beautiful clothing since 1964. The sweatshirts, t-shirts and jackets are made out of luxury fabric that we source from Biella in Northern Italy, and are now crafted in both Parma, Italy and Serra da Estrela, Portugal. Technological advances allowed us to develop a special treatment to protect the garments against shrinking. We’re selling clothing of a quality you might usually find on 5th Avenue or Bond Street direct to consumer without third party retail markups. This allows us to make our clothing truly durable, which



protects natural resources, and offer it to consumers at a reasonable price. The 30 year concept is the game changer, however, though our process is second to none. Fast fashion is damaging the environment, putting responsible brands out of business and ripping off consumers. We are fighting the corporations that are treating both clothing and those who make it as disposable by offering consumers something better.

What aspect of the product do you stand guarantee for and what aspects you don't?

If anything happens to the product within the next 30 years, we repair it or replace it free of charge. The only thing the guarantee doesn't cover is stains.

Today you have a very wide array of "30 year" collections. What has been the response and which of them are the best sellers?

The response to all 'The 30 year' collection garments has been amazing. The sweatshirts, the t-shirts and the jackets are all extremely popular, with the more classic or conservative colours such as Classic Navy, Grey Seal and Black Cab being best sellers.

Creating the many lines would have each called for specific set of innovations. Can you run us through some which you had to work upon and how these will benefit in the long term?

We put the same attention to detail into all Tom Cridland and 30 Year garments, whether they be a 30 Year Sweatshirt, The Entrepreneur's Shirt or Tom Cridland trousers. The focus has always been on developing unique colours, perfecting the cut, sourcing world class fabrics from Italy, using world class craftsmanship to put the clothing together and using technology to reduce the possibility of shrinking, piling and fading.

Why do you sell your collections exclusively online? Why haven't you opened your own stores till now? Any

IMAGES Business of Fashion



plans to do so in the future?

We have no current plans for brick and mortar retail. The reason we sell direct to consumer online only from www.tomcridland.com is to cut out necessary retail markups and offer truly luxurious clothing at a more affordable price point.

What are your plans on introducing more products/lines? Will they all be on the 30-year concept?

We are always happy to repair any faulty garments but 'The 30 Year Collection' specifically comprises wardrobe staples that will never go out of fashion: plain coloured sweatshirts, t-shirts and jackets. Our next collection will be called 'The Real Music Collection' and features a wonderful print of my favourite rock n' roll musicians of all time, as if they're all playing together in a supergroup. 100 percent of the profits of this collection will go to support the charity is help musicians.

Who are your core customers? Which parts of the world are you strongest in?

There is no typical Tom Cridland customer and that is a deliberate thing.

Our clothing is for everyone, no matter your background, age or nationality. We sell to customers on every continent, though we obviously have big following in the UK and the US.

You have been called "a tailor to the stars" why do you think the stars support you?

It's been a huge honour to make clothing for people like Leonardo DiCaprio, Ben Stiller, Rod Stewart, Hugh Grant, Stephen Fry, Jeremy Piven, Nigel Olsson, Brandon Flowers, Robbie Williams, Nile Rodgers, Michael Portillo, Stephan Merchant, Frankie Valli, Daniel Craig, Neil Young, Danny McBride, Miley Cyrus, Clint Eastwood and Kendrick Lamar. That said, I can't speak for them as to why they were interested in Tom Cridland clothing!

Tell us more about your love for music and 'The Tomicks.'

'The Tomicks' is my rock n' roll band. We have just recorded an album at The Village Studios in LA. I'm a lifelong



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fan of '70s music and I started making clothes for Nigel Olsson, Elton John's drummer since 1969, three years ago and got inspired by him to take up playing music myself. I taught myself the drums by ear and began writing with my bandmate, a piano player whom I met backstage at an Elton gig. The writing went so well we started taking it more seriously and when Kenji Suzuki, Simply Red's guitarist, liked our demos enough to agree to play bass and guitar on the recordings, I decided to use my business earnings to self-fund making the album properly at The Village. My girlfriend of 7 years, Debs, and I are lead vocals, Kenji's on guitar and bass, Nick's on piano and keys, I'm on drums. I wrote the lyrics. Nick and I wrote the music together. It's currently being mastered at Metropolis in London and it's by far the thing I'm most proud of in my life so far. The record will be released later on in 2017.

Tell us a bit about your team – design, production and retail. What parts of the business are shared between you and Debs Marx?

The production team are based in Portugal and Italy. We have logistics and fulfilment centre in England, an accountant, a graphic designer and a photography firm also in the UK.

We then have one full-time employee, our Sales Manager, Becca. Debs and I design all the clothing and run all our business ventures together.

You are associated with many causes and you support many by sharing part of the sales proceeds. Which are the ones you believe most in? How do you decide what to support and what not to?

There are so many worthwhile causes out there that are worth supporting. I actively try to support charities doing things that I can relate to personally, helping people in need who are entrepreneurial or musical.

Also, tell us a bit about DEKI—that seeks to help entrepreneurs in the developing world and who you support from sales proceeds of 'The Entrepreneur's Shirt'.

DEKI is a wonderful and unique organisation based out of Bristol, where I went to University and met Debs. They wrote to me asking for support and saying yes to them was a no brainer. DEKI helps people in the developing world build long term sustainable businesses through funding and mentorship, giving them a hand

up, not a hand out. It's a fantastic idea and we want to do all we can to help them grow through sales of 'The Entrepreneur's Shirt'.

Please share your beliefs about the fashion business. Do you feel that the fashion industry is at a crisis point?

Sustainability is quite clearly not being treated as a priority in the fashion industry. One only needs to watch 'The True Cost' by my friend, Andrew Morgan, to unravel the grim world of fast fashion. Tom Cridland is now a brand that I not only want to make luxury clothing accessible to people with at a value price point. I want it to be the world's number 1 sustainable fashion brand and for it to make sustainability fashionable in itself.

What are the key challenges in being innovative in fashion and what should be the right approach to fashion R&D across the value chain?

It is not hard to be innovative in fashion if you are a talented designer, as it is a creative led industry and there are an infinite number of lovely prints and patterns that can be put together. That said, the Tom Cridland innovation has been largely conceptual. The right approach to R&D is simple —to focus on making the best clothing you possibly can, rather than trying to cut corners. We're a small, independent brand and not driven by corporate greed. We're free to design further things to keep our customers coming back to buy more. We're not, however, willing to compromise and move towards the destructive fast fashion ethos.

Thank you, dear Tom. We wish you more power to take your ideas forward. And finally, please share your plans for India?

We plan to bring our world Sustainable Fashion Tour to India in 2018. The Indian press have been extremely supportive of our sustainable ethos and India is a wonderful country that I have visited before.

The Entrepreneur Shirt



Thomas Cridland

PALAZZO
PANTS



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Twister

Har Pal Rangon Ki Azadi



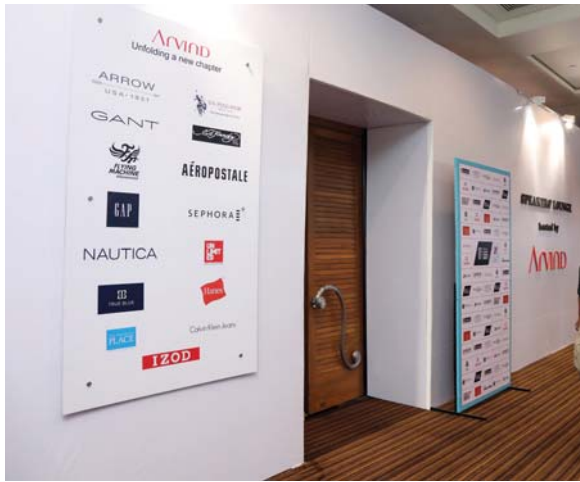
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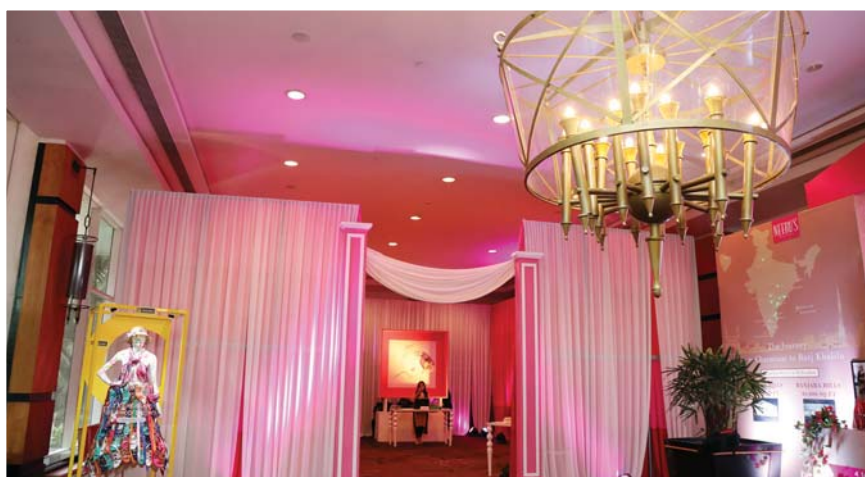
IFF 2017 EXHIBITION: THE BEST OF THE FUTURE OF FASHION AT DISPLAY

- By Tanya Krishna with support from Pratiksha Jondhale & Pooja Chaudhary, Pearl Academy

The 17th edition of India Fashion Forum witnessed a plethora of brands, companies, retail giants, and industry experts in fashion and retail. The event held from April 12 to April 13 at The Renaissance Mumbai, also brought in various fashion brands, logistics, retail support and other companies displaying their new collections and services at different stalls or through innovative displays and branding placed starting right from the entry porch and drive way to the main hallway of the spectacular event. The India Fashion Forum Exhibition Arena was one of the key parts of the two-day event.

Over the years, IFF has also played host to many a top global brand launch into India. The annual congregation of top retailers also attracts a host of exhibitors who wish to connect with and reach out to them. The IFF '17 theme was based on four key pillars: "ANALYTICS : BUY NOW : COMPLIANCE : DIGITAL".

The IFF was supported by Inorbit Malls (India) Pvt. Ltd., Unique Estates Development Company Ltd., Arvind Lifestyle Brands Ltd., Select Infrastructure Pvt. Ltd., Raymond Apparels Ltd., Deal Jeans, Pretr, The Woolmark Company, Philips Lighting India, Gati Ltd., Accenture Solutions Pvt. Ltd., Indian Rayon and TRRAIN, who had either put up their displays or showcased their latest developments or collections at the extravaganza.



The exhibitors included leading Indian and foreign businesses engaged directly or indirectly in the creation, marketing and retailing of fashion and lifestyle products and services. The exhibitors included some well known brands, such as Calvin Klein, Tommy Hilfinger, FCUK, United Colors of Benetton, Deal Jeans, Celio, etc. The first time participants at the IFF were Grishti, Gri Sport, Logic ERP, Gati Ltd., Guy Laroche, Calvin Klein, Candyskin and Simbus Technologies Pvt. Ltd.

Majority of the exhibitors had outreach and visibility as their prime motive. Some shed light on the development of technology in the apparel industry like 3D virtual merchandising planograms, advanced multitasking POS retail machines. Some others like Accenture, Gati, Facebook, Technopak, PWC, Kantar IMRB, AT Kearney, WGSN, The Woolmark Company, Harley Davidson

and Raysil, supported the panel discussions or conferences/ sessions held in the two-day event.

A few brands and companies like The Woolmark Company, Louis Philippe, Mexico Jeans, Celio, Tommy Hilfinger, Raymond Fine Fabrics, Raymond Ready-To-Wear, and Raymond Made To Measure, participated in the India Brand Show and presented their collection via fashion catwalks.

LOOK & DECOR OF IFF 2017

The colour theme of the IFF '17 was all in the shades of fuchsia, which inspire confidence, assurance and maturity and definitely sugar, spice and everything nice. The decoration of the venue for the event was kept classy, professional and neat.

On the left side of the entrance was placed a mannequin, creatively dressed up with footwear and scarf and accessorised with a hat. The very next part was the registration zone. On the

right side of the entrance was another mannequin dressed up with 3D fabric roses.

The pivot of the event was the Grand Ballroom, decorated and designed by Rajiv Goyal. Paris being the fashion inspiration this season, Goyal kept the decoration of the ballroom in tune with the Parisian gardens. The display at the entrance gave a glimpse of the theme. Vintage walls, intricate carvings, serene water bodies, Lightings were all synced with the theme. The round tables were overlaid with gingham table covers while the chairs were decorated with gorgeous bougainvillea. Mint green vintage walls at the entryway cafeteria were beautified with ivory white drapes. A special speakers lounge was arranged for the lunch meet of speakers and CEOs where the walls were surrounded by banners of various brands.



FASHION ORGANISATIONS

BENETTON INDIA PVT. LTD.

The Benetton Group is one of the best-known fashion companies in the world and is present in most important markets in the world with a network of about 5,000 stores. A responsible group that plans for the future and lives in the present, keeps a watchful eye on the environment, on human dignity and on a society in transformation.



DEAL GLOBAL FASHIONS PVT. LTD.: DEAL JEANS

'Deal Jeans' - the retail venture of Deal Global Fashions Pvt. Ltd., is a renowned fashion house with an experience of over 16 years in the market. It was formed with an aim of expressing an innate desire of every girl to be in-trend, making her fashion sense speak her mind out. Deal Jeans is that fashion empowerment a woman uses to bring out the most defining aspects of her personality. The brand fulfills a growing demand for western wear by Indian women and has now forayed aggressively into the competitive Indian retail market. The brand targets women customers in the age group between 18 to 35, who appreciate quality, are fashion conscious, well-travelled and who have had exposure to global fashion. The brand is present across India with all leading retailers in offline and online space.



IMAGES Business of Fashion



CALVIN KLEIN JEANS

Provocative. Modern. Sensual. Iconic. Calvin Klein is a global lifestyle brand that exemplifies bold, progressive ideals and is seductive and often minimal and aesthetic. The brand seeks to thrill and inspire its audience using provocative imagery and striking designs to ignite the senses. After nearly 50 years, Calvin Klein continues to be a cultural catalyst by embracing tension, sparking ideas and creating unforeseen realities. The brand believes in a culture that provokes discovery and brave thinking. It inspires passion in its people. Calvin Klein embodies authenticity and embraces individuality.



DHANANJAI LIFESTYLE LTD.: ETEENZ

Eteenz captures the spirit of fashion encapsulating all the positive answers pulsating in the consumers in terms of quality, style, fit, comfort, colour, price, etc. Exclusive designs, ultimate styles, unmatched quality at right price is the main USP of the brand. High quality at low price ensures customers's satisfaction, retention, expansion and strengthens the brand's recall.

GRENDENE

Grendene, a Brazilian company, is one of the biggest shoe manufacturers in the world (1 percent of the world footwear consumption). The company produces flip-flops and other shoes all over the world. It's famous brands are Ipanema and Rider. Ipanema is summer brand - the world's No. 1 in flip-flops and is finding inspiration in Brazilian beaches and beauty. Rider is technology supported brand with good quality and with a motto of being Lifeaholic - enjoying the life and freedom.



GRI SPORT

In 1977, Italian brothers Graziano and Mario Grigolato decided to put their know-how to work and set up Gri Sport, a specialist producer of handcrafted boots and shoes. Over the years, Gri Sport has focused on state-of-the-art technology, innovation and R&D to become the leading manufacturer it is today, achieving great results with their trekking, safety and casual shoes.



NEERU'S ENSEMBLES PVT. LTD.

Neeru's is changing the game for ethnic wear retailers in India. From a humble beginning of supplying raw material to fashion retailers to being reckoned as a fashion brand that is today synonymous with ethnic fashion, Neeru's has indeed come a long way. The brand kindles fashion with its active participation in fashion weeks and close engagement with celebrity fashion influencers. The journey of Harish Kumar, CMD, Neeru's along with his mother Basant Kaur, the founder of Neeru's, began in 1971 with tailoring and embroidery of superior and intricate designs in Hyderabad. In 1983, Harish started manufacturing and wholesale supplying



GRISHTI

A futuristic thought that gave birth to a neoteric brand. Creating benchmarks with innovative bandwagon designs, and a transformation of Indian dupattas to chic designer stoles is exclusively brought in the field by Grishti.



of fabric to over 1,000 retailers across India. Spotting a potential for handloom, he was quick to introduce handloom and other natural fabrics. This not only came as a fresh boon to the fabric market, which was till then saturated with man-made fibers and fabric, but also gave a respite to weavers from South India helping them generate due economic benefits from their skills of weaving natural fibers. The turning point came in 1991 when he realised that there was the need for a good ethnic wear brand in the country, specially so when ethnic wear had a strong underlying demand. This is when Neeru's journey started as a brand.

VENTURINI FOOTWEAR INDIA PVT LTD.

Venturini brings for the sophisticated and discerning consumers of India the latest fashion as well as the classic Italian look in leather footwear and accessories sourced from some of the largest and most reputed shoe factories in the world. Manufacturing 25,000 pair of shoes, the sponsors and management have more than 25 years of experience of working with some of the biggest brands and retailers in North America, Europe and Asia.



OBAN FASHIONS PVT. LTD.

Oban Fashions Pvt. Ltd, a wholly owned subsidiary of Rupa & Company Limited, was established with the sole purpose of aligning with the values and aspirations of the next gen style conscious youth by making luxury affordable in the premium innerwear segment. Oban offers a myriad of options in terms of options, quality and value in inner and sleep wear under one single roof, comprising of leading international brands.

CANDYSKIN

Candyskin is a high-street lingerie brand, running via an e-commerce portal www.candyskin.com, launched in January of 2017. Candyskin makes beautiful lingerie with popping colours, awesome materials and lots of love. Candyskin aims to empower the female consumers by creating delicious designs, cool colours, and make women feel sexy at the same time.



RAGHUSHREE ENTERTAINMENT PVT. LTD.: REME

Reme was born as an endeavour of its parent company, Cheer Sagar Exports, which was founded in 2012. Reme has since grown expansively in garment and home furnishing market, in a very short span of time. Reme excels in high quality clothes and dynamic design. High class technology driven machines enable the brand to craft high quality products. Reme believes in the strength of creative ideas.



TOMMY HILFIGER ARVIND FASHION PVT. LTD.

Tommy Hilfger is one of the world's leading designer lifestyle brands and is internationally recognized for celebrating the essence of classic American cool style, featuring preppy with a twist designs. Founded in 1985, Tommy Hilfger delivers premium styling, quality and value to consumers with a breadth of collections including men's, women's and children's sportswear, denim, accessories and footwear. In addition, the brand is licensed for a range of products, including fragrances, eyewear and watches. The brand has had its presence in India since 2004.

SHREE K.K. EXPORTS

Shree K.K. Exports has 50 years of experience in garment business, having a full in-house setup for producing 15,000 pieces of ladies fashion garments every day. The company has experience of dealing with Japan, which is the most quality conscious market, since last 40 years, and is also producing for organized retailers in the Indian domestic market.



TCNS CLOTHING CO. PVT. LTD.: W

Born in 2002, W is a part of TCNS Clothing Pvt. Ltd. With an aim to provide fashion in a modern retail environment to the Indian woman, W set up its first brand store in Delhi in 2002-03 in Lajpat Nagar, New Delhi. W appropriates the mental mindscape of the contemporary urban Indian woman – a sensible confluence of Indian and western sensibilities. W is also the pioneer in introducing the concept of 'mix n match' in retail.



SRL TRADING: GUY LAROCHE

A style of refined, stylish, cosmopolitan charm. SRL has meticulously established its status as a vibrant shoe manufacturing and retail company. SRL has become an impeccable beacon of Italian-made design, a promoter of elegant style, sharp-observer of fashion, unconditional precision and careful crafting to express these new lifestyles.



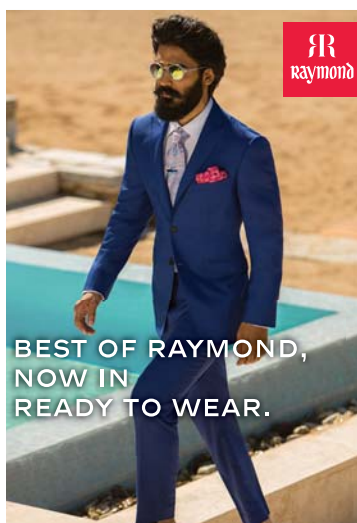
ISKCON APPAREL PVT. LTD.:ALCIS

Alcis is a stylish yet functional performance wear brand launched by Iskcon Apparel Pvt. Ltd., a unit of Paragon Apparels, India's largest speciality integrated manufacturer and exporter and also a recipient of multiple International Awards. Alcis has created the lightest performance tee in the world along with a wide variety of sportswear featuring high tech finishes ranging from UV, nano, soil repellent, water repellent, anti-microbial, anti-odour, anti-wrinkle, anti-stain and wicking finish. Iskcon follows an environment friendly production process and use of renewable resources wherever possible. The company has also launched the NBA and FIFA range in India, under exclusive licenses. 'Be The Game' philosophy pushes its inner being in everything it does.



RAYMOND LTD.

The Raymond group was incorporated in 1925 and within a span of a few years, transformed from being an Indian textile major to a global conglomerate. Raymond offers end-to-end solutions for fabrics and garmenting. It has some of the leading brands and services in its portfolio including Raymond Ready-to-Wear, Raymond Made-to-Measure, Park Avenue, Parx and ColorPlus, amongst others. Raymond has one of the largest exclusive retail networks in the textile and fashion space in India- The Raymond Shop.



MEXICO CLOTHING COMPANY

Established in 2007, Mexico Jeans today is one of the leading denim home grown brands in the country for both men and women. Started by Agarwal brothers, the brand quickly caught on the pulse of the discerning customers by giving him the most fashionable pair of denim which he or she would always want. Mexico Jeans has been the name for innovation and has quickly become one of the most prominent brands in the denim segment. It has been a catalyst in giving new fits, wide array of fabrics and washes. Targeting the young and young at heart, the brand is known today for giving fashion savvy yet cost-conscious customers the latest styles and best quality at an affordable price.

SKECHERS SOUTH ASIA PVT. LTD.

Skechers has become a household name synonymous with performance, comfort and Style, producing not only superior quality footwear but a wide range of products for its consumers. With sales surpassing 3 billion dollars globally, Skechers is clearly one of the top players in performance and lifestyle footwear. With a range of over 3,000 styles for men, women and children, the brand is still expanding around the world.

INDIAN RAYON (A UNIT OF ADITYA BIRLA NUVO LIMITED): RAYSIL

Raysil - the fashion yarn is a 100 percent natural viscose filament yarn that creates georgettes, crepes, chiffons, brasso, shatun, satin, velvet, knitwear and also lustrous embroidery threads and home textiles. Raysil is extremely skin-friendly, has superior drape, rich lustre, brilliant colour depth, softness and smoothness. It is manufactured by Indian Rayon, a unit of Aditya Birla Nuvo Ltd., (Aditya Birla Group) - the leading Indian VFY producer.

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FASHION TECHNOLOGY ORGANISATIONS

INFINITAS TECHNOLOGY SOLUTIONS PVT. LTD.

Infinitas is an IT solution provider with premiere partnership of NCR in India. NCR is the global tech leader in consumer transaction technologies with quality hardware and software and the company makes 550 million transactions possible every day. At the India Fashion Forum 2017, Infinitas being advance partners for India and ME region, showcased NCR technology solutions. The technology solutions has been developed after investing huge time, efforts and money in R&D by NCR. These solutions are meant to give wonderful experience to the operators as well as consumers/ shoppers. Infinitas offers world's best POS XR7 from NCR with dual screen, StorePro - the complete store application, POS RP25 and fast & best quality receipt printers.



LOGIC ERP SOLUTIONS PVT. LTD.

Logic ERP Solutions Pvt. Ltd. is an India based major ERP Software Solutions Company. Logic caters pan India to the industry - retail, distribution and manufacturing targeting macro verticals like: AFS, Pharma, F&B, FMCG, Elec. and Telecom and Wellness. Logic achieved success in fashion vertical with esteemed clients like Gini & Jony, Killer, Madame, Numero Uno, 109F, Portico, Bianca, and many more.

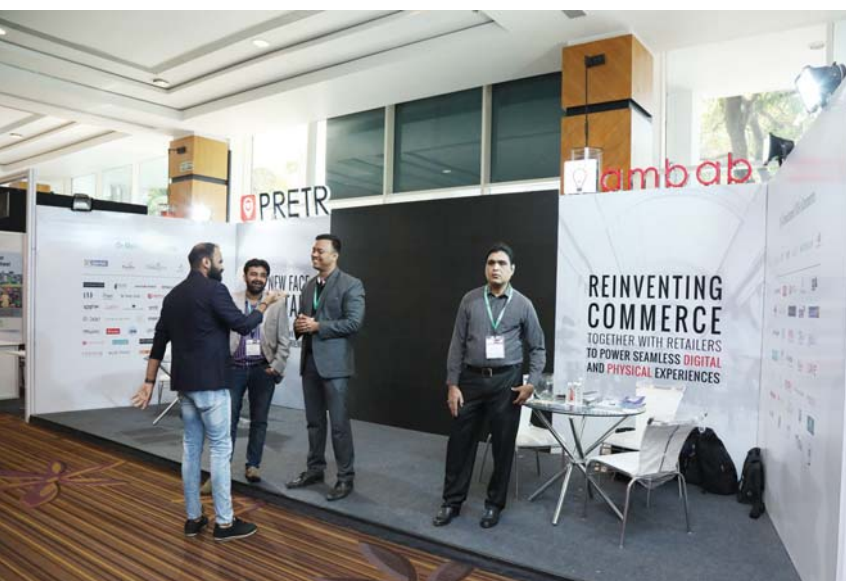


PHILIPS LIGHTING INDIA

Philips Lighting, a global leader in lighting products, systems and services, delivers innovations that unlock business value, providing rich user experiences that help improve lives. Serving professional and consumer markets, the company has led the industry in leveraging the Internet of Things to transform homes, buildings and urban spaces. With 2015 sales of EUR 7.5 billion, Philips have approximately 34,000 employees in over 70 countries. At the India Fashion Forum 2017, Philips sponsored an editorial meet which talked about 'Unique Store Propositions'.

ACCENTURE

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions - underpinned by the world's largest delivery network - Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. At India Fashion Forum 2017, Accenture presented its point of view on The Era of Living Services and how that will shape the Virtualization of Retail. The company representatives further moderated and lead a panel discussion amongst the leaders of fashion brands on 'Internet of Things and Virtualization of Retail'.



PRETR

Pretr is India's first omni-channel ecosystem for malls, retailers and brands to co-create seamless consumer experiences that remove friction from physical commerce. It is a unified and seamless data exchange platform for brands and retailers to enable single identity checkout for the consumers across all online and offline channels. A suite of online and in-store apps, commerce engine, in-store scan engine, middleware, allocation logics, order management tools, analytics, integrations and data exchange to build innovative consumer experiences like never before. Pretr hosts close to 100+ retailers, 15+ malls and powers end-to-end omni-channel for 15+ retailers. Some of its key accounts include Inorbit, Property Zone, Apparel Group, Major Brands, Bestseller, Soch, Jashn, to name a few.



SIMBUS TECHNOLOGIES PVT. LTD.

Simbus Technologies Pvt. Ltd. is the brainchild of veterans in the fashion, FMCG, retail, and manufacturing industries. The company partners the world's leading product lifecycle management company, Dassault Systèmes to offer product life cycle management (PLM) solution and visual merchandising and assortment planning solution for fashion brands and retailers. Its unique engagement approach focuses on delivering tangible business benefits, helping leading companies in the fashion, consumer goods, retail and manufacturing sectors deliver business transformation projects and catalyze their growth plans.



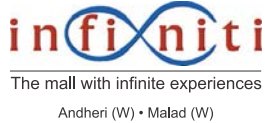
AMBAB INFOTECH

Ambab is a leading internet and mobility engineering company, which partners with the best entrepreneurs, enterprises globally to build their digital footprints from scratch. Ambab is well equipped to engineer the right products for every business needs. Ambab takes care of various tasks like taking business online, building solutions, bringing in omni-channel retail technology.

FASHION RETAIL SPACE DEVELOPERS

UNIQUE ESTATES DEVELOPMENT COMPANY LTD.

At the many Infiniti Malls, joy has no limits. Whatever one desires – formal and casual clothes, shoes, jewelry, furnishings, artifacts, books, electronics, home appliances, groceries, toys, games – all are on offer in infinite array. At any Infiniti Mall, the shopping, eating and entertainment experience is a revelation.



SELECT INFRASTRUCTURE PVT. LTD.

An unmatched shopping experience, innovative events and unique hospitality are only some of the aspects that make Select Citywalk the country's most admired shopping center! Situated in the heart of South Delhi, Saket, Select Citywalk brings a continuously evolving fashion experience to its patrons with the help of some of the best global and Indian fashion brands. The shopping center also hosts of serviced apartments, cinemas, a health club, destination restaurants, cafes and more.



INORBIT MALLS (INDIA) PVT. LTD.

Inorbit Malls, a group company of the K. Raheja Corp, was initiated with an objective to not just create physical structures but also to influence lifestyles. The company is committed to setting benchmarks in retailing in India, by providing an excellent shopping experience to customers. Inorbit Malls combine the knowledge of the Indian consumer and a changing Indian market scenario in locating, designing, planning and managing retail environments. The company began its journey by opening its first mall at Malad in Mumbai to the public in early 2004. Since then, Inorbit has repeated its success with world class malls in Vashi in Navi Mumbai, Cyberabad in Hyderabad, Viman Nagar in Pune, Whitefield in Bangalore and Gorwa Road in Vadodara. The malls have universal class and appeal and seek to provide a one stop destination for fashion, lifestyle, food, and entertainment leading to an international experience.



PRATHAM INFRATECH LTD.

Vegas will be an iconic mixed commercial development which is coming up in the heart of Delhi's largest and fastest developing sub city Dwarka, spanning over 28,000+ sq. meters comprising of 20 Lac sq.ft. of prime development. It is designed by renowned architects Bentel Associates International, Johannesburg, SA. Vegas. And it will offer "Dwarka" a peek into the best of the world. It will be the complete destination highstreet, innumerable and never ending International retail brands; boasting of the largest multiplex of Delhi; luxury hotel; business hotel which will be the golden key to charmed life, serviced suites which will have your personal touch with a magnificent upkeep, lavish offices which will be the ideal choice for the corporate addresses due to its proximity to important business hubs of the city; a complete family entertainment centre that will bound to be filled with laughter and enjoyment, thematic multi-cuisine food court and hypermarket offering unlimited choices, comfort and convenience that is about to change the lifestyle of the city.





GLOBAL FASHION SUPPORT ORGANISATIONS



WGSN

WGSN defines what's next so you can make smarter decisions today. Its global trend forecasters and data scientists obsessively decode the future to provide the authoritative view on tomorrow. With experts in every major continent, WGSN build locally sourced, globally relevant content including daily trend intelligence, retail analytics, consumer insights and bespoke consultancy services.



THE WOOLMARK COMPANY

The Woolmark Company is the global authority on wool. It promotes Australian Merino Wool as the ultimate natural fibre and premier ingredient in luxury apparel. The Woolmark logo is one of the world's most recognised and respected brands, providing assurance of the highest quality, while representing pioneering excellence and innovation from the farm to the finished product. The Woolmark Company showcased new trends in sports and fashion this year at India Fashion Forum, through The Wool Lab and Merino Innovations.

FASHION LOGISTICS ORGANISATIONS

GATI LIMITED

Gati Limited is a 6,000+ people strong organization with an annual turnover of USD 250 million (2015-16). It has an unmatched network delivering 6 million plus packages a month to 99 percent of India's districts (covering 17,000 pin codes). Gati Limited offers e-commerce logistics, surface express, air express, rail express, warehousing and 3PL solutions, cold chain solutions, international freight forwarding and customs clearance services to customers spread across industries, supply chain solutions, trading services and fulfilment services. Significant experience and execution capabilities has enabled Gati to develop firm relationships with a diverse customer base and offer services that are tailored to meet customer-specific requirements. Furthermore, Gati has a strong market presence in the Asia Pacific region and South Asian countries.



SAFEXPRESS PVT. LTD.

Safexpress began its journey in 1997 with a mission of delivering logistics excellence to its customers and ensuring their success. Today, the firm has firmly entrenched itself as the 'Knowledge Leader' and 'Market Leader' of supply chain and logistics industry in India. Safexpress offers a wide range of innovative supply chain services including express distribution, 3PL and consulting. The firm provides value-added logistics services for 8 different business verticals.



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THE MAKING OF FENDI'S NEW LUXURIOUS 'Lei Selleria' Bags

Luxury is not a child's play. It requires immense hard work, perseverance and detailing in the process of making something luxurious and perfect. Now, most of us just love Fendi's luxurious collection of bags. There is something about the Fendi and its bags and accessories. The bright colours, quirky designs and materials make it captivating and frivolous. Every season, the brand delivers a unique collection. So, what really goes into the making of these lavish bags?

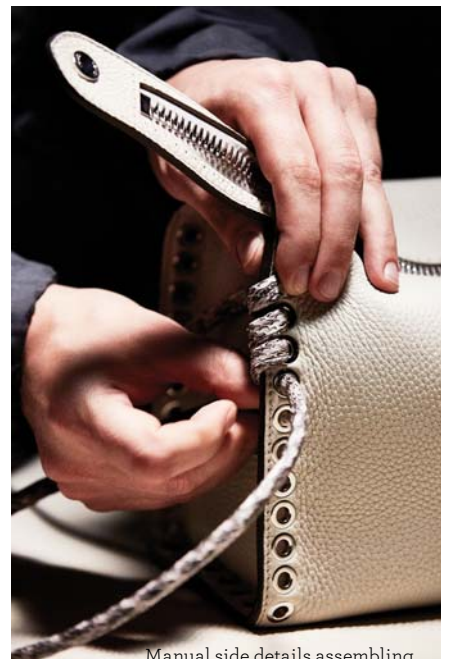
The new Fendi Lei is presented in new versions that give an additional luxurious touch to this timeless and extremely sophisticated bag, already an icon of the Selleria family. The Selleria collection was a completely handmade collection originating from Adele Fendi in 1988. Unique craftsmanship, endless research, attention to refined details, etc., are some of the defining features of the Salleria line. Beautifully handcrafted by the Fendi artisans thanks to the manufacturing techniques inherited from the Roman master saddlers, the Lei is pure expression of whispered luxury and of the Maison's key codes of highest craftsmanship.



Zippers and handles ready for assembling



Poppers and detail elements



Manual side details assembling



Final accessorising tools



Finishing touches



The magic of a Fendi bag

Contemporary and compact yet extremely soft at touch, the Lei is shaped out of the most genuine Roman leather — a signature of the Selleria line — and enriched with precious finishes, crafted according to the most ancient and treasured techniques.

New details and workmanship further enhance the beauty of this bag, such as the lace-up: a macro whipstitch trim created in leather or exotics that decorate the sides of the bag, inserted by hand into small loops and inspired by the Selleria stitching itself. A unique workmanship with a daring mix of materials that adds an unexpected twist to the rigorous graphic shape and volume of the Lei.

The iconic Selleria stitches on the front add a final contemporary touch to the design of this exclusive boston bag that fascinates the sophisticated women in search of refined details and an eternal feeling. This is a unique creation that perfectly merges tradition with modernity, always in the Fendi way.





INNOVATION AT ITS BEST WITH **GIRGGIT'S COLOUR- CHANGING T-SHIRTS**

- By Tanya Krishna

With all kinds of innovation and technology already taking over the fashion industry, we almost forgot there is always something new coming this way. And now, we have been offered a range of colour changing t-shirts by a new entrant in the market, Girggit. Standing true to its name, Girggit (meaning, chameleon, in english) t-shirts change its design and colour in sunlight. The same t-shirt looks different in design and colour if worn indoors, and changes form when one steps out.

These men's t-shirts are made from super fine-combed cotton and are available in extra small, small, medium and large sizes on all the leading e-commerce portals, said a statement. Talking about the innovations involved in the making of these, Himanshu Thakur, Founder, Girggit, said, "Based on solar active technology, colour-changing inks and dyes are engineered for application on Girggit t-shirts. Much like a flower that blooms in the sun's rays, the hidden colours found in Girggit's exclusive prints unfold into vibrant colour upon exposure to sunlight, then returning to their original state without sunlight." Now, that's a new and an out of the box innovation. Don't you think?

Girggit came into the cause in 2016 with a creative mission to dress the young people who are not only lively at look but fashion flows in their nerves. "When Girggit, an idea, was taking place, the room was occupied by thoughts such as what are the aspirations of today's customers and how I can help them in meeting their



part. Apart from the colour changing line, there is also a fashion line in the top wear segment for both men and women which is again based on the season's trend and consumers' need. The entire collection is developed after a detailed research on the fashion forecast, trends and most importantly, on the changing demands and preferences of the present youths.

Priced affordably between ₹699- ₹1,499, the brand stands for change in terms of both technology and innovations in the fashion industry. Thakur assured that Girggit will very soon apply this 'colour- changing technology' to other apparel categories as well.



Girggit is like an eternal alliance intended to dress young people who have a casual dress sense, who evade stereotypes and who aspire to feel good in whatever they are wearing. Within a span of one year, Girggit has gained a lot of popularity and acceptance among its customers and retails through major e-commerce websites like Flipkart, Snapdeal, Limeroad, Paytm, Amazon and Shopclues. Thakur also apprised, "By the end of the year, we are going to make a foray into the brick and mortar market too."



fashion aspirations. Girggit is a part of Shree G. Pingaksh Finsol Pvt. Ltd., which always emphasises on creativity, commitment and accountability to make the brand transparent yet trendy. Within 1 year of presence in the market, Girggit has gained a lot of popularity in media both online and offline," Thakur maintained.

Effortless style, authenticity, and comfortable living are at the fingertips of the brand's outlook. Girggit's aspiration is to be the best casual fashion brand with an outstanding price-value statement, capturing market trends and newness in colour, quality fabrics, and shapes, and expressing them in the relaxed, effortless, and comfortable Girggit style. The brand's founder continued, "The idea behind the brand is its unique colour changing technology which has been used on the t-shirts wherein the design team focuses not only on the surface ornamentation of the product but also on the technology

Girggit claims to bring alive the fashion forward attitude of the young crowd and has been adapting to the fashion market quite well. The brand's USP is its colour changing technology wherein, the brand holds an exclusive place in India. "With creative ideas and transformations, we are coming with a lot of interesting fashion surprises in the fashion world," Thakur concluded.





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CASUAL WEAR IN INDIA

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CASUAL WEAR IN INDIA

As the segment continues to grow further, Technopak defines and sizes the current casual wear market in India and forecast its future.

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Plain Palazzo
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Jeggings

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RESEARCH:

CASUAL WEAR IN INDIA

Changing life styles, the comfort seeking middle class with high disposable income, and increasing urbanisation has lead to casualisation of both men and women's wardrobes in India. As the segment continues to grow further, Amit Gugnani, Senior Vice President - Fashion (Textile & Apparel), Saima Nigar, Associate Consultant - Fashion & Textile Division and Anil Sharma, Consultant, Textile & Fashion Division, from team Technopak define and size the current casual wear market in India and forecast its future.

The apparel market size in India in 2016 was estimated to be ₹2,90,000 crores which is expected to grow at a CAGR of 9.7 percent to reach ₹4,66,000 crores and ₹7,48,000 crores by 2021 and 2026 respectively. Of the total apparel market in 2015, men's wear accounted for 41 percent, women's wear accounted for 38 percent and kidswear accounted for 21 percent.

CASUAL WEAR RISING

Within the overall apparel market, the Indian casual wear market has evolved significantly over the last couple of years. The industry has witnessed rapid growth, triggered by increasing usage of casual wear by fashion conscious employees of major MNC's due to the relaxation of dress codes. The change in work culture is offering immense potential for the manufacturers of casual wear. These brands are growing across all segments of the Indian market (premium, medium and value for money). International brands like Tommy Hilfinger and Espirit have seen steady growth over the years in their casual wear segment. Other brands such as Calvin Klein and Guess are increasing their footprints in this segment. Even premium brands such as Mango, Zara and Arrow have introduced casual wear at the entry level to attract first time consumers.

CASUAL WEAR CATEGORIES

Casual wear is a broad movement in India and is seen manifested in the following sub- categories:

Rugged Casual: The rugged casual category includes garments for outdoor sports, like hunting, fishing, backpacking, rock climbing, etc.

Dressy Casual: This form of dress is more casual than that associated with a cocktail party. Dressy casual is a form of attire that involves a slightly more elegant style of normal casual wear, such as dress slacks and a sport coat or blazer.

Business Casual: A comfortably relaxed version of classic business attire, with no sacrifice of professionalism or personal power.

Smart Casual: This category demands a pulled-together, harmonious, complete look with colours, fabrics, shoes and accessories, for both men and women.

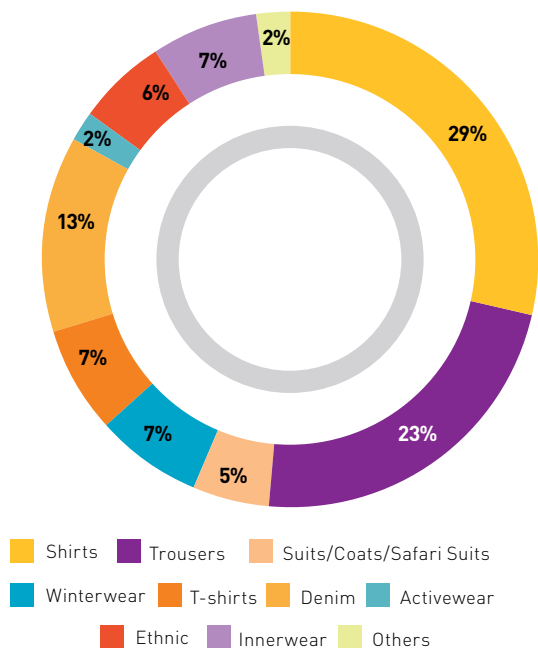
Active Casual or Sporty Casual: This category is not about playing a sport, but more about the relaxed look of a spectator. This category encompasses functional sports, apparel for gym, running, roller blading, biking and other fitness activity.

MEN'S CASUAL WEAR

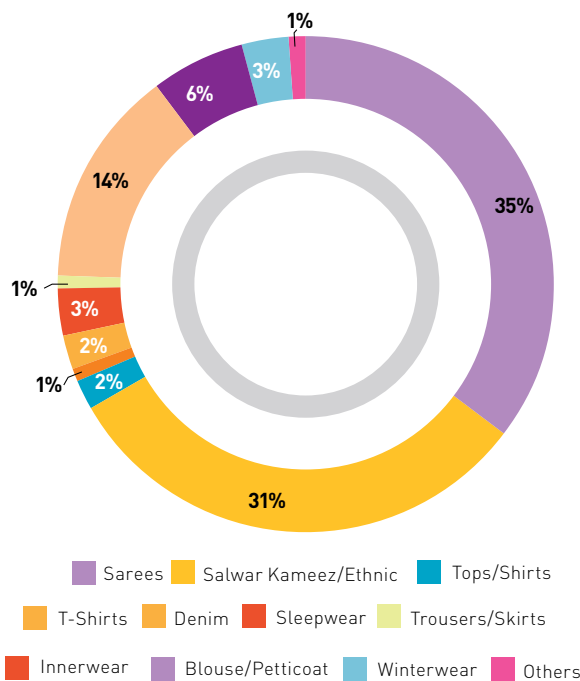
Men's wear market in India in 2016 was ₹1,24,423 crores and is expected to grow at a CAGR of 9 percent to reach ₹2,95,795 by 2026. Owing to the gradual shift of men's apparel market towards casual wear such as denims, activewear and t-shirts/polo are growing at a much faster CAGR of 14 percent, 14 percent and 12 percent respectively. This is also a result of growing fashion consciousness and aspiration beliefs, higher disposable income, increasing brandisation, and acceptance of specialised clothing with features such as odour resistant jeans etc., not just in metros, but also in tier -I and -II cities across India.



SHARE OF INDIVIDUAL CATEGORIES WITHIN MENSWEAR (2016)



SHARE OF INDIVIDUAL CATEGORIES WITHIN WOMENWEAR (2016)



Source: Technopak Analysis

Because comfort and functionality are of utmost importance, casual wear is quickly replacing the traditional sarees and salwar kameez in a woman's everyday wardrobe.

WOMEN'S CASUAL WEAR

Women's apparel market in 2016 was ₹1,11,467 crores and is expected to grow at a CAGR of 9.9 percent to reach ₹2,86,456 crores by 2026. Denim, t-shirts and inner wear represent the three fastest growing categories growing at a CAGR of 17.5 percent, 17 percent and 14 percent respectively.

A women's casual wear collection largely comprises tops made out of chiffon, cropped or utility pants, fashionable skirts, silk, velvet, cargo, capris and shirts made out of denim, silk and chambray, different washes of denim, leather or denim jackets, etc. Because comfort and functionality are of utmost importance, casual wear is quickly replacing the traditional sarees and salwar kameez in a woman's everyday wardrobe. Complimentary accessories like scarves, hats, mittens, handcrafted belts, etc. have made the women's casual wear market much more versatile and dynamic.

KEY PRODUCTS DRIVING CASUAL WEAR

A. DENIMS

The Indian denim market is exhibiting continuous growth over the years. With new technologies, trends and higher market reach, this sector has promising growth potential. Even in rural areas, denim is becoming highly fashionable with most men and teenager girls opting denim wear over traditional outfits.

Denim is a high growth category as it is fashionable and comfortable, and enhances style quotient. The value growth within the denim wear owes to increased demand for stretch and light weight fabric, varying colours, styling and detailing. This trend is emerging across all categories (men's, women's and kids).

In 2016, the denim wear market was estimated at ₹20,205 crores and is expected to grow at a CAGR of 16 percent to reach the market size of ₹77,999 crores by 2026. The market in



celio*



men

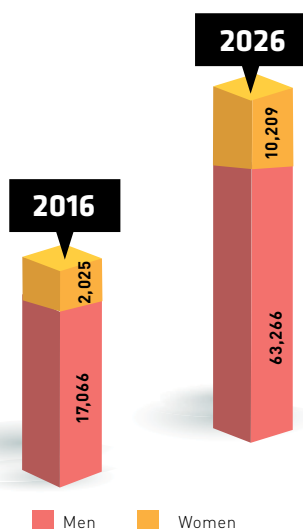
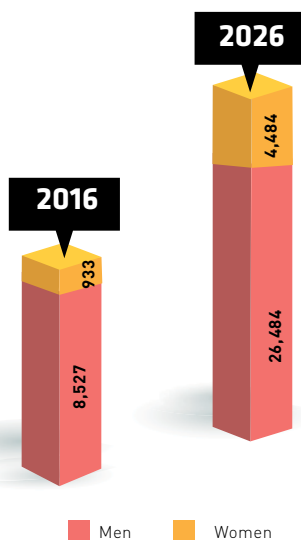
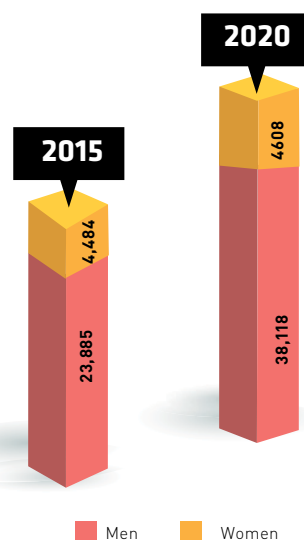
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DENIM MARKET SIZE OF INDIA (INR CR)

MARKET SIZE OF T-SHIRTS (INR CR)

MARKET SIZE OF CASUAL SHIRTS/TOPS/TROUSERS/SKIRTS


Source: Technopak Analysis



India is dominated by men's segment, which accounts for ~85 percent of the total market size accounting for ₹17,066 crores in 2016 and is estimated to grow at CAGR of 14 percent to reach ₹63,268 crores by 2026. Whereas, the market size in 2016 for women's denim was ₹2,035 crores and is estimated to grow at CAGR of 17.5 percent to reach ₹10,209 crores by 2026.

B. T-SHIRTS

T-shirts is considered as one of the most comfortable and dynamic categories of casual wear. Due to its soft knit fabric, fits, and the versatile use, it is highly acceptable to a wide segment of customers. The market size of men's t-shirts in 2016 was ₹8,527 crores and is estimated to grow at CAGR of 12 percent to reach ₹26,484 crores by 2026 and for women the market size for t-shirts was ₹933 crores in 2016 and is estimated to grow at a CAGR of 17 percent to reach ₹4,484 crores by 2026.

C. CASUAL SHIRTS/TOPS/TROUSERS/SKIRTS

Due to comfort choices for fabric, designs, fits - this product category of casuals has been quite popular with youth in both urban as well as rural areas. In 2015, the market size

for men's casual shirts and trousers was ₹23,885 crores and is estimated to grow at CAGR of 9.8 percent to reach ₹38,118 crores in 2020. Whereas, the market size for women's casual shirts and trousers in 2015 was ₹2,500 crores and is estimated to grow at CAGR of 13 percent to reach ₹4,608 crores in 2020.

CONSUMER PREFERENCES & KEY TRENDS

Due to abundant style options, changing life styles, actively growing middle class with high disposable income, and increase in brand awareness and exposure to western fashion, the average Indian apparel consumer has become much more picky and aware of their fashion needs.

Increasing urbanisation, higher discretionary spending and evolving lifestyle is leading to casualisation of both men and women's wardrobes. Smart casuals with a few do's and don'ts are becoming more and more acceptable on a daily basis and are not strictly restricted to a Friday dressing format anymore. With an increase in the fashion conscious population, growing working women populace in the country, the segment shall





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Online retail helps brand reach untapped markets where it find difficult to open and sustain exclusive brand outlets. Also, convenient options like cash-on-delivery, try-and-buy, easy returns policy, etc., are making the e-tailing space more competitive and dynamic.

continue to grow further. Even the older consumers have also experimenting with casual wear category.

FOCUSED APPROACH FOR E-TAILING

The Indian online fashion retail industry has hitherto exhibited a great success story mainly due increasing internet and smartphone penetration, convenience of in-home shopping, aggressive promotion and pricing strategy (mainly led by discounting) by online players and easy options (cash on delivery, free return, etc.). Online retailers like Amazon, Flipkart, Myntra, Snapdeal, Jabong, etc., are aggressively building fashion category since this category is key growth driver. Online retail helps brand reach in untapped market where brands will find it difficult to open and sustain exclusive brand outlets. Also individual fashion designers are able to leverage online platform for their exclusive designs.

Considering the above reasons many casual wear brands and retailers are venturing into the e-tailing space. Convenient options, like cash on delivery, try-and-buy, easy returns policy, etc., are making the e-tailing space more competitive and dynamic.

RISE OF PRIVATE LABELS

Private labels are win-win solution for both big retailers and value for money first time consumers as these labels ensure that a certain minimum quality and image. Young population from middle class India is becoming image conscious and is a significant contributor to the casual wear market.

THE WAY AHEAD FOR CASUAL WEAR

The Indian casual wear market is booming and the rural markets will play a pivotal role in this growth story. Factors including a growing middle class population, rising disposable income, increasing brand awareness among the consumers in terms of quality and up-gradation of service standards, rapid shift from tailored to ready-to-wear suits, the growing service sector ensure promising future for casual wear segment. There is a huge scope for product innovation within the casual wear segment. India has become a market with a plethora of opportunities and brands and retailers who understand the needs of Indian customers better are expected to leverage the opportunities to derive growth.





INDUSTRY TALK: DECODING THE REVOLUTION OF CASUAL WEAR IN INDIA

India's proclivity towards casual wear has exploded over the last few of years. A slew of experts from the fashion business industry discusses the evolution and current footing of the segment in this exclusive feature.

By Rajan Varma & Shivam Gautam

Comfort and functionality are the two most important aspects of an apparel, yet these two are the words that got little attention in the history of fashion. And this is where casual wear created magic. Casual wear stresses comfort, practicality and freedom — freedom to choose how we present ourselves to the world; freedom to diminish the lines between men and women, old and young, rich and poor, etc.

Today, casual wear is the neophyte sovereign of the fashion world. It has swept through global fashion sensibilities with unflinching determination and has entrenched its stronghold as a wardrobe staple throughout the world. The fashion industry has probably not witnessed a force more unrestrained than casual wear in its past. I am a convert to casual myself and I am not the only one; I believe more than one third of the global population have embraced casual wear in the last couple of years and the trend shows no signs of waning. In fact it is only gaining momentum with each passing year. Personally, I believe that the rise in the popularity of casual dressing will go down in history as one of the most profound cultural changes of the 20th century.





“Casual is the dress code that emphasizes comfort and personal expression over presentation, formality and conformity.”

—Usha Periyasamy,
Director - Operations and Brands, Classic Polo.



“The increased urbanisation and social media connectivity has also helped advance the casual wear market.”

—Praveen Mutha,
MD, Cool Colors, Bafna Clothing Company
Pvt. Ltd.



“The key characteristics that can define the genre are comfortability, everyday wear, simple shapes and flexibility.”

—Kunal Mehta
VP Marketing and Business Development -
Being Human Clothing.

Even India, a country that has always lagged behind global fashion trends, was quick to adapt to this casual way of dressing. Today, the Indian casual wear market is flourishing fueled by factors such as increasing purchasing power, changing lifestyle patterns, increasing nuclear families, and the influence of western culture. Changing lifestyle and favourable demographics have also created growth-oriented environment, resulting in all major domestic and international casual wear brands capitalising on this highly lucrative market segment.

So what exactly is casual wear? How does the fashion industry define casual wear?

“Casual is the dress code that emphasizes comfort and personal expression over presentation, formality and conformity. More simply, “casual” can be defined as something relaxed, occasional, not planned, or informal. Today, getting casual right will set you free from traditional rules, looking out of place or being either under or over dressed ever again. It’s considered smart enough to be appropriate in a relatively

formal situation yet stylish enough to make you look great down the pub,” says Usha Periyasamy, Director - Operations and Brands, Classic Polo. According to Praveen Mutha, Managing Director, Cool Colors, Bafna Clothing Company Pvt. Ltd., comfort above all attributes is the key in defining a product as casual wear. Though the lines have blurred with many categories borrowing styles and ideas from each other the market still retains the basic nature when it comes to categorising casual wear.

The definition may also alter depending on seasons or occasions, but basically, anything that can qualify for being worn for leisure or casual work dressing will qualify as casual wear. As opposed to formal wear, which is constructed, unwashed, clean and crisp, casual wear tends to be unconstructed, more washed and with more trim details. Also, the term casual wear has evolved into a broad term that covers a gamut of products ranging from office and workplace — casuals on one end of the spectrum to beachwear on the other. However, the boundaries between the different kinds of casual wear are blurring; and the typical Indian consumer now prefers to use casual

wear interchangeably in different occasions. “The key characteristics that can define the genre are comfortability, everyday wear, simple shapes and flexibility. Furthermore, casual wear has expanded way beyond these words as nowadays it can be worn anywhere with a little mixup like business casuals, smart casuals etc,” says. Kunal Mehta, VP - Marketing and Business Development, Being Human.

Also, according to experts like Narinder Kaur, Creative Head, Turtle Limited, the pattern and the color mix are also distinct defining characteristic of casual wear. “There is play and liberty of designs with shapes and sizes. The styling details are also sporty in contrast,” he adds.

Emergence & Evolution in India

It is hard to pinpoint the exact moment when casual wear took off in India. India’s apparel market has always enjoyed aspirational shoppers who are deeply connected with brands and styles, in addition to the global exposure that made them seek out casual wear as the trend caught on in the west. According to most experts, the presence





“The consumer for casual clothing is spread from tier -I to tier -III cities. Infact, lower city denomination has a wider base for the casual market as their taste and buying power makes it an easy purchase.”

–Narinder Kaur
Creative Head, Turtle Limited



“The casual wear market began to emerge strongly in the early 2000s and the trend has been becoming stronger since then.”

–Hetal Kotak
CEO, Lee Cooper.

of casual wear in India, can be dated long back. “We can say that the hints of casual wear started in 1960s-1970s,” says Kunal Mehta.

But it was not until the first decade of 21st century that it was well established. “The casual wear market began to emerge strongly in the early 2000s and the trend has been becoming stronger since then,” says Hetal Kotak, CEO, Lee Cooper.

Another important aspect that accelerated the rise of the category is the concept of Friday Dressing in the corporate world. Even globally, the concept was a major contributor that bolstered the current dominance of business casual. Casual Fridays were something of a gateway drug that eventually urged an obvious, but also revolutionary, question – Why not be casual on other days, too? Eventually a growing number of companies called for a permanent casual dress mode. Something similar happened in India too. “The emergence of casual wear can be associated with the concept of Friday Dressing at offices and also with a lot of major companies like Infosys, IBM doing away with a formal dress code to work,” says Dattatray S. Naiknavare, Chief Brand Manager, Indigo Nation.

Echoing his thoughts, Anjana Reddy, Managing Director, Universal Sportsbiz Pvt. Ltd. (USPL) said, “The category saw a paradigm shift in 2013-14 where most corporate houses accepted and relaxed the norms for their office wear. Online boom has also played a big role in the shift and emergence of casual wear.”

But did it affect the formal wear market? There were conflicting opinions, as we found out. While a fair section of sentinels, including Kamal Khushlani, Founding Director, Mufti, believes that ‘with the rise of casual and smart casual dressing in offices, formal wear is a declining market’, experts like Pragati Srivastava, Brand Head, Parx believe otherwise. “Over the last few years as the casual wear category has witnessed accelerating growth formal wear is increasingly giving way to trendier lines of clothing that includes casual apparel,” he expressed.

Growth and Major Categories

Casual Wear has been a booming market for the better part of the decade. In the last 5 years, it has expanded and reached even greater heights. Innovation, experimentation and global collaboration has helped create vast pool of designs and styles. Business casuals, corporate casuals, smart casuals, resort casuals, party wear, active wear, etc. there are too many categories that have emerged. “There has been an accelerating growth in the casual wear segment in the past few years and according to prominent research houses, by 2019, it is expected to touch ₹3.94 lakh crores,” says Anjana Reddy.

So what are the categories that are pushing this segment in India? According to Usha Periyasamy, “The women’s casual wear categories encompass casual





“The emergence of casual wear can be associated with the concept of Friday Dressing at offices and also with of major companies doing away with a formal dress code to work.”

—Dattatray S. Naiknavare,
Chief Brand Manager, Indigo Nation



“There has been an accelerating growth in the casual wear segment in the past few years and according to prominent research houses, by 2019, it is expected to touch ₹3.94 lakh crores”

—Anjana Reddy,
Managing Director, Universal Sportsbiz Pvt. Ltd.



“The entry of the global brands has been one amongst biggest reasons for the growth the casual wear market is witnessing in India.”

—Pragati Srivastava,
Brand Head, Parx

shirts, tops, casual trousers, denims, t-shirts, activewear, and dailywear. The men's casual wear market has higher penetration and is comparatively more mature than the women's casual wear market. However, the women's market has started picking up pace in recent years, and has witnessed the entry of many brands into the segment.”

Elucidating on the categories that push sales in the men's casual wear segment



Mouli Venkataraman, Arrow, Brand Director, Arvind Brands highlighted casual shirts, t-shirts, crewnecks and polos, shorts, chinos, denims, activewear, and dailywear. The growth rate of casual wear categories in both the men's and women's segment has attracted many existing and new players towards focusing on these categories.

Demographic and Socio-Economic Growth Factors

The growth of the casual wear category in India can be better understood by co-analysing it with the key changes in the general ecosystem of the country. Changing lifestyles, higher disposable incomes, home grown brands bringing contemporary international fashion to Indian stores and well known international brands setting up business in India, etc, — a profusion of factors has given impetus to the changing fashion sensibilities of the Indian populace. This changing fashion sense coupled with affordable prices have grown the market for casual wear. The success of e-commerce has also contributed to this growth. “The rise of purchasing power in India combined with healthy competition has created the fast-growing market for casual wear. The changing of attitudes starting with

the workplace has also enabled changes in the age group that enjoy casual wear. The visual impact of city life feeds the aspirations of the youth and in turn, helps brands grow. The increased urbanisation and social media connectivity has also helped advance the casual wear market,” says Praveen Mutha.

India is an extremely young market with a dominant youth quotient in the consumer profile, and Naturally, youngsters tend to dress more casually given their lifestyles, “Youth surge is the biggest promoter of this category. About 50 percent of the population as of 2011 census is below 20 years and 65 percent is below 35, so India becomes a very good market for casual wear. Another important factor is the changing weather charged by global warming. With general rise in temperatures, t-shirts are becoming a round the year phenomenon in most parts of the country (barring few months in the north). Also, for the time pressed consumers of today, casual wear is easy to maintain and wear; it naturally becomes a smart lifestyle choice,” says Mouli Venkataraman.

>

Over all, a plethora of factors have helped fortify the casual wear market in India including penetration of media, development of smaller towns, growth and influence of mobile internet, etc.

Deeper Into India

Trendy casual wear is no longer the prerogative of the urban masses but it has also penetrated the semi urban towns and tier II and -III cities of India. The population of these cities today is far more aspirational and demonstrative and showcases a higher propensity to buy 'brands' in the casual wear space. "The consumer for casual clothing is spread from tier -I to tier -III cities. Infact, lower city denomination has a wider base for the casual market as their taste and buying power makes it an easy purchase. The colour and pattern suits their loud pallet," says Narinder Kaur.

In smaller cities, people have a strong desire to wear similar kind of clothing and brands as in the bigger cities. Brands have increased their presence realizing the potential of this market. "Aspirational youth residing outside the top 20 Indian cities have a higher propensity for casual wear fashion products. They have a strong desire to wear the same kind of clothing and similar brands as their counterparts in the bigger cities. This leads most of the mid segmented fashion labels to perform well in tier-II, -III and smaller cities," says Usha Periyasamy.

For some brands, causal wear performs even better in smaller towns. "The highest growth rate in casual wear has come from tier -II and -III cities only. There has been a degrowth in metros in the casual wear segment," says G.S.Naveen, M.D, Twills.

Casual Wear Across Age Groups

Presently, the median age of men in India is 25.9 years, while that for women is 27.2 years. It is expected that the median age of the country will remain favorable, in the age range of 25-30. This



lower median age reflects a youthful population that has a higher propensity for buying casual wear products. But gradually, the market has witnessed a welcoming change. Casual wear is progressively gaining popularity across all age groups. "It is mostly popular among the youth but it is now popular in other age groups as well," says Sandeep Jain, Executive Director, Monte Carlo.



"Scarcity of suppliers of latest fabrics from the mills, lack of vendors for various washes, print technology and embroidery are a few bottle necks being faced by the players in the casual wear industry."

—G.S.Naveen,

M.D, TWILLS, Twills Clothing Pvt Ltd

Experts also have to believe that it is the youth of the country that can be attributed to this phenomenon. "As an on-trend 'youth' fashion brand, at Lee Cooper we believe that the casual wear market is dominated by young consumers (who are aspirational and seek differentiation and who believe that clothing is a critical reflector of who they really are). They are in a way causing a ripple effect and have a huge impact on the older generation as well adopting this trend. Today the country wants to look good wherever they go and this is causing a huge spur in consumption across customer segments irrespective of age, income strata, etc.," says Hetal Kotak.

The Indian Market With Respect To the Global Market

Traditionally, India has been a late bloomer when it comes to adopting global fashion trends. The Indian market is always couple of seasons behind the international market trends. But has things changed over the years? "Yes, it is. India is the highest youth driven country and here youth is much aware about the global fashion which derives them to be up-to-date with the same Also, as Indian Market



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is completely globalized, a lot of multinational brands are in India with the trends from all around the world. So, the Indian consumer market and brands are very much at par with its western peers being in a direct competition with them," says Kunal Mehta. The casual wear market in India is still relatively young. Due to the vast demographics and the fragmentation among so many categories in addition to the strong hold of traditional wear, it is still a market that can't be considered at par in terms of consumption. "However, in terms of style, design and variety it is absolutely at par with innovative designers from India making a mark and even exporting their creative styles," expressed Praveen Mutha.

Influence of International Brands

"The entry of the global brands has been one amongst biggest reasons for the growth casual wear market is witnessing. Global brand entry has enabled in setting up of higher benchmarks right from store design,



"It's a short term pain with the increasing competition, but it will prove to be a long-term joy with respect to expansion of the market."

—Kamal Khushlan,
Founding Director, Mufti.



"Fast changing fashion which leads to higher inventory risks, competition from the unorganized sectors specially in women's wear are the recent bottlenecks that the players in the industry are facing."

—Sandeep Jain,
Executive Director, Monte Carlo.

visual merchandising, product pricing, product designing, marketing etc. Their entry has widened the perspective of consumers which in turn has resulted in higher acceptability of new trends, styles in the market. Overall it has made the market a lot more competitive," says Pragati Srivastava.

With the increasing exposure to international fashion trends, the Indian consumer today is aware of global trends and has given him more variety to choose from. However, it has also been a source for healthy competition in offering customers a lot more. "Global brands have definitely made consumers aware of global trends; but even better for Indian brands it has made them re-think their strategy, designs, etc. The game has reached the next level," says Dattatray S. Naiknavare.

"But it's a short term pain with the increasing competition, but it will prove to be a long-term joy with respect to expansion of the market," says Kamal Khushlani - Founding Director, Mufti.

Some Constrictions on the Casual Wear Market in India

The casual wear market is based on daily changing fads and it poses as a



challenge to Indian manufacturers. "The lead time of the Indian manufacturers is quite high, which gives them tough time in competing with the faster repeat cycle of the western labels. The concept to shelf time gap is too high. Lack of proper infrastructure adds to this," expressed Narinder Kaur.

And this also leads to inventory risks which smaller players might find crucial to deal with. "Fast changing fashion which leads to higher inventory risks, competition from the unorganized sectors specially in women's wear are the recent bottlenecks that the players in the industry are facing," informs Sandeep Jain.

Citing supply chain complications, G.S. Naveen says, "Scarcity of suppliers of latest fashionable fabrics from the mills and lack of vendors for the various washes, new technology of prints and embroidery are a few bottle necks being faced by the players in casual wear industry."

Another major bottleneck is the availability of good retail spaces and premium retail malls. "Overall availability of quality retail environment continues to be a challenge, other than the metros," says Hetal Kotak. In addition, existing labour laws, infrastructure and cost of real estate impede retail growth thereby affecting the casual wear industry.



TOP CASUAL WEAR TRENDS 2017

With mounting western influence, entry of global brands and a penchant for comfort casualisation has gained unprecedented momentum in Indian fashion. We find out what the experts from the industry are betting on for the coming season in casual wear.



The demand for casual wear in India is escalating as the modern Indian customer do not compromise with comfort and functionality. With the rapid rise of globalization over the past decades and the advent of digital media, the spread of fashion across global cultures have picked up tremendous pace. The world has become a global village and consumers are constantly following international trends even in a country like India that, traditionally, seldom kept pace with global trends. Yet inspite of having a strong correlation with global trends there remains a strong Indian flavour to its interpretation. "India is influenced by global casual wear trends, especially with the recent launches of the international apparel brands. Yet, the overall trend is often customised in India to the tastes and preferences of the audiences," expressed Pragati Srivastava.

Talking about the contrast, Anjana Reddy said, "India departs from the international trends when it comes to colours, looks and silhouettes. Besides, the designs are also modest as compared to western casual wear," says Anjana Reddy. Also, while at it, a fair section of designers take the liberty of coming up with indigenous trends as well. Explaining this phenomenon, Praveen Mutha says, "India is a market filled with creators too and using art and innovative designs from Indian designers there are trends created here as well. As India is a large market, it has the ability to accommodate a wide variety of trends."

Trending Categories

"Denim is the undisputable leader in the Indian casual wear market," says Hetal Kotak. "In fact, denim has started competing with formal categories due to the increasing acceptance of casual clothing at workplaces. The option of selecting colours, finishes, looks, wash effects, etc., has tempted the consumer significantly," he adds.





Apart from denim, shirts, t-shirts, chinos, dresses, skirts, knits with polos and crews, smart casuals and activewear are mentioned as the best selling casual wear categories in India in contemporary times by the experts we interrelated with.

Colours and Fits

When it comes to colours, Indian consumers have, of late, have shown a propensity to experiment in casual wear and hence all sorts of colours are acceptable. Blues, whites along with bright and neon colours like burgundy, orange, green, yellow, etc., have been faring well in the market. Cool pastels, monochromes, neon hints, indigo and neutral colours remain the top favourites. "A wide and happy palette and designs have come in play. Checks, prints and solids are also going good," says Narinder Kaur.

Styles and fits in vogue include simple cuts and sleeker looks like ultra slim fit, and slim fit.

Forecasts for AW'17-18 & SS'18"

In men's wear, casual shirts, t-shirts, chinos, shorts and denims will remain the highest expected best selling

products in the near future. In winter, outer wear like jackets and sweat shirts are the most vital selling categories," says Usha Periyasamy.

Atheisure is also expected to rule the casual wear category in the future. "Athleisure!! Hence stretch fabrics, knits, breathable fabrics, with finishes like quick dry, anti-odour, anti-stain, etc., are slated to trend in the coming seasons. Prints and checks are still going good. In terms of colours - esp., pastel colors, and monochromes with bright colour detailing will be in trend," says Dattatray S. Naiknavare. Also, the coming years are expected to be dominated by cleaner cuts albeit more experimental than in the past.

Indigo is also expected to dominate in the coming seasons. "Be it shirts, t-shirts or bottoms, indigo will be a staple. Also, natural fibres like khadi and linen in pure and blended forms will enjoy demand. Bright colors will be in vogue along with gents tones of khaki, beige and grey. Indigo blues have reserved its place," adds Narinder Kaur.





CASUALISATION OF WOMEN'S AND KIDSWEAR

As the number of financially independent women are increasing, their preference to comfortable yet trendy clothes are going up as well. Because of the comfort and effectiveness advantages, casual wear is quickly replacing the erstwhile staple, ethnic wear, in Indian women's wardrobes today. Penetration of international brands and availability at affordable prices have pushed the segment to extreme versatility. "There is a conscious effort at making a different fashion statement on different occasions and thus, the look is tailored to the requirements of specific occasions. Moreover, the width in each category is also increasing, e.g -- denim have been sub branched to skinny jeans, boyfriend jeans, flare jeans, distressed jeans, etc., and shorts into hot pants, culottes, etc.," says Hetal Kotak.

The casual wear category might be dominated by men's wear but the women's segment is miles ahead in terms of innovative, cuts, trims and embellishments. Casualisation has helped create a new category of contemporary ethnic wear, where a blend of casual stylings are skilfully crafted into traditional wear. "A recent trend that has crept into the women's casual wear segment is the fusion of traditional Indian ethnic wear with western wear making it a trendy combination. Such apparel has found resonance with the working women making it fashionable for the daily use as well at workplace. Styles, cuts and designs of western clothing combined with Indian ethnic wear have made a mark for itself," says Anjana Reddy.

The core product categories that have seen strong casualisation in the women's segment include tops, shirts, t-shirts, denims, jackets, skirts, utility pants, and contemporary ethnic wear," expressed Kunal Mehta.

Also, children these days have become more brand and style conscious than the previous generations. Today, kids have emerged as a separate buying group all together and hold their own choices. This metamorphosis of children; becoming independent buyers is enhancing the kids wear market. The penetration of casual wear is more in this category as comfort is the paramount constituent of this category. Apart from the usual denims, capris, tops, shorts, skirts, etc, even uniforms have undergone casualisation. "Overall, for kidswear, including the uniforms category, casualisation has had a very strong influence. Today, t-shirts, shorts have become one amongst the largest growing categories in this segment," says Pragati Srivastava.



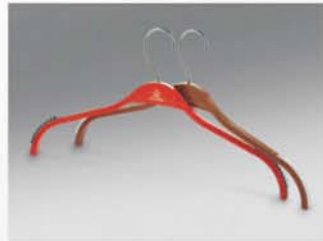


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>BEEVEE<

BEEVEE is a complete body of revolutionary styles in cargos designed specially for the new age men. The brand helps its consumers to flaunt their charm and allows them to be the centre of attraction. Crafted using the finest materials and cottons, in international styling and high quality, BEEVEE adds splendor to various occasions, moods and attitudes. BEEVEE offers an array of classic designs in cargos to choose from.

Target Customers and USP

The brand targets the style conscious men in the age bracket of 18 to 40 years, who dare to flaunt their individual style statement. The USP of the brand lies in the wide collection it offers along with the international quality standards and competitive pricing.

Retail Mapping

Present across 1,200 MBOs pan India, the brand boasts of a comparatively stronger hold in tier-I and -II cities. Also, due to its ubiquitous presence in multiple leading e-commerce websites like Flipkart, Amazon, Jabong, Snapdeal, Limeroad, Abof and others, BEEVEE is emerging as a strong player in the tier-III cities and rural areas as well.

Domestic Retail Expansion Plans

As of now, the brand plans to aggressively add more shop-in-shops as well as increasing its presence in LFSs and MBOs.

Technology Deployment

As a new age brand, BEEVEE banks heavily on technology. The brand's principle is to adopt the latest technology and update its machineries and softwares regularly.

Product Basket

BEEVEE offers a wide range of collection in shorts, three fourths, track pants, cargos, trousers, joggers and knitwear. Though cargos have been the core top selling line.



BRAND UPDATE

- > Year of brand launch: 2000
- > Total number of MBOs: 1,200
- > Number of states present in: 29
- > Number of cities present in: Pan India
- > Same store sales growth rate: 25%
- > Name of own on-line store:
www.beevee.in

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>BEING HUMAN<

Being Human, a clothing line with a heart, was launched by Salman Khan in 2012. Globally licensed to Mandhana Retail Ventures Ltd., it has its footprints in over 15 countries with over 550 point-of-sales. Royalties from merchandise sale give impetus to the initiatives of Being Human-The Salman Khan Foundation in India, dedicated to the twin causes of education and healthcare for the underprivileged. This unique business model finds an instant international connect, acceptance and appreciation. The ability to look good and



do good at the same time empowers consumers globally and wins their hearts. It is retailed across multiple channels including exclusive stores, shop-in-shops, distributor networks and e-commerce websites internationally and in India. With its trend-setting international design, impeccable quality and customer friendly retail environment, the brand is truly global in spirit and offers top-notch apparel and accessories for both men and women.

BRAND UPDATE

- > Year of brand launch: 2012
- > Number of countries present in: 14
- > Total Sales Turnover in India as in FY16-17: ₹220 crores
- > Total number of doors, the brand is present in India (on date): 261
- > Total number of EBOs: 60
- > Total number of SISs: 202
- > Total number of MBOs: 46
- > Others (SOR): 11
- > Number of states present in: 22
- > Number of cities present in: 68
- > Average sales per sq. ft. per month: ₹1,894 (Approx. for April '16 to Mar '17)
- > Average bill/ticket size: ₹2,500
- > Same store sales growth: 8-10%



Myntra, Jabong, etc. The brand is also present internationally in Mauritius, Nepal, France and the Middle East.

Domestic Retail Expansion Plans

Being Human plans to open 40 to 50 exclusive stores in the next 2 to 3 years.

Product Basket

Being Human is a complete casual wear brand and is known for its shirts, t-shirts, polos, jackets, tops, trousers, chinos, denims, shorts, dresses, knits, belts, caps, flip-flops, etc.

Theme and Core Elements of the Latest Collection

Being Human's latest casual wear collection has four themes for men and three for women. The first men's theme, *Sub Urban* has trends like high low layering, edgy urban street sports vibe, distressed graphics mixed with classy colours like grey, black and white. The second theme, *Mystic Earth* has earthy tones with shades of indigo for a soft artisanal vibe. The palette here is of natural tones like ecru, khaki and blues. The third theme, *Glow* encompasses luxury street sports. The colours are matte in finish and the palette is of deep blue and black. Youth direction is inspired by EDM and other electronic music subcultures and style tribes. The fourth theme, *East via West* has a culture clash where opulence of the oriental far East meets sophistication of the West. The style here is described as Modern Bohemian.

The first women's theme called *Through the Looking Glass*, has chalky palette with a subtle greyness, with focus on delicate tones. The second theme, *Land of a Dreamer* has mixed patterns, geometrics to go against floral. The third theme, *Dawn to Dusk* has a sense of luxury and optimism with rich upbeat mid tones. The collection is also characterized by balance.



USP and Target Consumer

The brand's USP is celebrity, charity and fashion. The customer base consists of people who believe in international fashion and follow the latest trends, however they believe in doing good too by helping the brand's charity initiatives of healthcare and education. Hence they "Look Good and Do Good".

Retail Mapping

Pan India, Being Human has 60 exclusive brand outlets (including franchise outlets), 262 SISs including LFS and MBOs. Nationally, the brand has 8 distributors serving 104 retailers. Area wise, the brand enjoys strong demand in North, West and East. The brand has also registered a rising response from tier -II and -III cities. Being Human's online partners include



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>BLOOD<

Incepted in 1997, Blood started production of jeans, chinos, formal pants and shirts from the house of PP International with core focus on men's bottom wear. The company went into an expansion mode in 2006 where it extended its product range to encompass a contemporary range of men's bottom wear with its strength in producing designer jeans. In 2016, the brand started manufacturing shirts.

Target Consumer and USP

The brand targets men from the age of 18 and above from tier -I and -II cities. The USP of the brand is quality with excellent accessories and skin friendly wash and fit.

Retail Mapping

The brand's mode of operation is through direct retailers. As a whole, the brand is present in about 4,000 MBOs across 70 cities. Slowly, as the brand is expanding its market, it is also appointing distributors for different markets. Blood's strongest markets are the tier -I and -II markets of West Bengal. The brand is yet to go digital.

Domestic Retail Expansion Plans

Blood is presently trying to strengthen its market in the East, with the South being its next targeted market. The brand is also looking to introduce new casual wear products to further strengthen its overall presence.

Product Basket

The brand's product line consists of jeans, trousers, cotton trousers, and casual shirts. Jeans remain the core selling product with casual shirts picking up very fast.

Collections

In the latest collection, Blood is playing with colours like green, khaki, brown, vat blue, etc. The brand is also promoting the same through hoardings, newspaper ads, in-shop brandings, trade fairs, B2B advertisements and buyer-seller meets.



BRAND UPDATE

- > Year of brand launch: 1997
- > Total number of MBOs: 400
- > Number of states present in: 13
- > Number of cities present in: 70
- > Average bill/ticket size (FY16-17): ₹1,500



>CLASSIC POLO<

The Royal Classic Groups, started as a small knits manufacturing unit in Tirupur in 1990, launched Classic Polo in 2001. Today, the brand is present pan India in all leading MBOs, Large Format Stores, Exclusive Stores and also has an online presence. Classic Polo started primarily manufacturing t-shirts and slowly moved into designing and manufacturing complete wardrobe solutions for men. The brand is recognised today as the largest selling t-shirt brand in the country with the widest distribution network supporting the sales and marketing of all its branded merchandise.

USP Target Consumer

The USP of the brand is affordable superior quality apparel and it caters to the aspirational men who want to flaunt their individual style statement.

Retail Mapping

Classic Polo retails all over India through EBOs, LFSs and MBOs. The brand is particularly strong in South India but is also growing faster in the East, West and North. In addition to its own website, www.classicpolos.com, it also retails online through Amazon, Myntra, Flipkart, Paytm, Snapdeal and Jabong. Classic Polo is also present internationally in Singapore and Kenya.

Domestic Retail Expansion Plans

East and West India are the major expansion zones of the brand in the next 2-3 years followed by North India.

Technology Deployment

The brand is planning to employ SAP and robotic warehouse to make the backend and front end (till POSs) connected online and in realtime. This will bring the customer very close to the brand.

Product Basket

Classic Polo is a casual wear brand that comprises of t-shirts, shirts, trousers, jackets, sweaters, denims, sportswear, lounge wear, innerwear, as well as accessories. The brand also encompasses an impressive range of business casuals.

Theme and Core Elements of the Latest Collection

The brand's latest collection features a trendy array of prints, indigos, etc., and is based on 4 themes including, *Encounter Culture*, *Intense Indigo*, *Summer Marls* and *Disrupted Chevrons*.



BRAND UPDATE

- > Countries present in: India, Singapore, E.Africa
- > Total number of EBOs: 104
- > Total number of SISs: 50
- > Total number of MBOs: 4,000
- > Total number of Large Format Stores: 350
- > Number of cities present in: 58
- > Total retail space across EBOs & SISs: 1,20,000 sq.ft.
- > Total sales turnover in India (FY16-17): ₹154 crores
- > Average sales (FY16-17): ₹850/sq.ft/month
- > Average bill/ticket size (FY16-17): ₹2,100
- > Same store sales growth rate: 14%
- > Share of sales from online: 5%

>COOL COLORS<

Bafna Clothing Company is one of India's fastest growing garment maker. An ISO 9001 certified company based in Bengaluru, it has a steady presence across India, Singapore and UAE. The company's leading brand Cool Colors believes in the idea of 'life is now'. In a world where fashion is evolving everyday, the brand believes in implementing change and taking clothing to a different level. Bringing a new trend to casual and chic dressing for men, the brand allows its garments to reflect each person's individuality by giving the scope of choice amongst a variety of designs, fabrics and styles. The company is headed by Praveen Mutha who serves as Managing Director. With over 20 years of experience in the garment industry, he has steered the company to greater heights and continued success in every endeavour.

Having just entered the eastern India space, the brand is currently striving to establish its stronghold.

Product Basket

Cool Colors offers a wide range of casual shirts, t-shirts, shorts and trousers that guarantee unmatched quality, trendy styles and superior comfort.

Theme and Core elements of the Latest Collection

Cool Colors launched the *Ace Anthology*, a tennis themed collection that celebrates the spirit of the game. It is a grand summer collection that comprises of a variety of styles, from stripes and checks to striking solids.



BRAND UPDATE

- > Number of countries present in: 3
- > Year of brand launch: 2002
- > Total number of EBOs: 4
- > Total number of SISs: 100
- > Total number of MBOs: 900
- > Number of states present in: 16
- > Total retail space across EBOs & SISs: 12,00,000 sq.ft
- > Average sales per sq. ft per month (FY16-17): ₹900

Retail Mapping

The brand operates across leading stores in India, Singapore and the UAE, with over 1,000 MBOs and 4 EBOs. The brand is focused on creating a strong presence that goes across metros to tier-III cities. Embracing the rise of mobile and internet penetration, the brand has managed to maintain a fairly equal growth rate across all markets. Of late, the brand has ventured into Nepal as well.

Domestic Retail Expansion Plans:

Cool Colors' expansion plan consists of increasing its distribution network through a mix of EBOs and MBOs.



>DE MOZA<

De Moza is a brand owned and managed by Audaz Brands Retail India Pvt. Ltd. Launched as a basic legging brand in kiosk format in 2013, De Moza now offers complete everyday fashion bottom wear across casual to ethnic wear. Today, it operates in stores, shop-in-shops and online channels with wide range of product categories. The company comes with over 15 years of technical knowhow of making superfine cotton and viscose fabrics and garments.

Target Consumer

The brand targets modern women who are well updated in fashion trends and expect a high level of craftsmanship.

Retail Mapping

Being started from Bengaluru, the brand is quite strong in South and West where it has a decent penetration. With more focus on fashion, De Moza is looking at expanding to the North in the second half. It is focusing more in tier-I and -II cities since its target group is more towards this market. However, the brand's basic range would be available in all markets in India.

Domestic Retail Expansion Plans

De Moza is planning to expand its EBO presence to 50 stores by the end of FY 2019 and SIS to 100 in order to take the total brand doors count to 200.

Technology Upgradation

In order to target its customers who are young and fashion conscious, De Moza is working very closely in digital marketing, especially Facebook and Instagram. The brand has also introduced innovative loyalty programs for its e-commerce site.

Omni Channel Presence

De Moza has already initiated the process of getting into omni-channel by the second quarter of this year. The brand will soon have virtual store presence in Bengaluru.

Product Basket

The brand's product basket comprises of leggings, pants, palazzo pants and essential innerwear like camisoles and tights.

Total Share of Revenue from Casual Wear

Almost 65 percent of the brand's sales comes from the casual wear category.

Theme and Core Elements of the Latest Collection

De Moza's latest collection is summer friendly inspired by the Bohemian and folkloric art with intense motifs and prints in modern fabrics and silhouette.



BRAND UPDATE

- > Number of countries present in: 2
- > Year of brand launch: 2013
- > Total sales turnover in India as in FY16-17: ₹11.5 crores
- > Total number of doors, the brand is present in India (on date): 60
- > Total number of EBOs: 15
- > Total number of SISs: 25
- > Total number of MBOs: 10
- > Others: 10
- > Number of states present in: 20
- > Number of cities present in: 30
- > Total retail space across EBOs & SISs (in sq. ft.): 6,750 sq.ft.
- > Average sales per sq. ft. per month for FY16-17: ₹45
- > Same store sales growth rate : 24%
- > Name of own on-line store: www.demozastores.com
- > Share of sales from on-line (in %): 25%



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>DUKE<

L udhiana based Duke Fashions (India) Ltd., a much-favoured name in knitwear and fabric and having made key style statements in the segment, is acknowledged today as the undisputed leader in the industry. The company's values are based on its authentic fashion understanding heritage, dating back to the launch of the brand in 1966. Duke offers full range of clothing for men, women and kids. Duke introduced the Step Ahead, a premium lifestyle footwear collection for men which is specially designed and crafted for utmost comfort, style and durability. Duke Fashions (India) Ltd., has been conferred with President's Award, two national awards, i.e., Excellent Quality Readymade Garments and Outstanding Entrepreneurship, crowned with the Indian Power Brand at Power Brand Glam 2013 held at Las Vegas, USA. Duke has been given this award for its innovation, product quality, being the most preferred apparel brand and for its inspirational leadership which has shaped and continues to shape India's destiny.



USP and Target Consumer

The brand's USP is "to know and understand the customers well and provide international designed garments with contemporary styling at Indian prices for the masses".

Duke targets customers who are modern, premium and mid-premium Indian youth. It is a single brand for men, women and kids for summers as well as winters.

Retail Mapping

Duke products are exclusively placed at big chain stores like Central, Reliance Trends, Reliance Market, Arvind Retail, Easy Day, Metro, Best Price, Total Superstore, Aditya Birla Retail, HyperCity, Brand Factory, Spencers, etc. The brand also retails through online websites like Myntra, Snapdeal, Jabong, Flipkart, Fashionara, Amazon, Returnfavor, and also through its own e-commerce store www.dukeindia.com. The success of the exclusive showrooms is driving the company to new heights.

Domestic Retail Mapping

Duke has an unbeatable marketing network comprising of over 4,000 multi brand outlets and over 360 exclusive stores across major cities in India. The brand has already covered entire towns or cities and are now looking for extension in the covered cities and in the export markets for the growth of its business in Gulf countries.

BRAND UPDATE

- > Year of brand launch: 1966
- > Total sales turnover in India as in FY16-17: ₹2.90 crores approx
- > Total number of EBOs: 360
- > Total number of SISs: Over 50
- > Total number of MBOs: 4,000
- > Total number of LFS: Over 300
- > Number of states present in: 29
- > Number of cities present in: Over 250
- > Name of own online store: www.dukeindia.com
- > Share of sales from online: 8%

Technology Deployment

The brand utilizes the latest technologies and works hard to always achieve the very best so that, together with Duke, its customers can go higher and reach further than ever before. Duke collection places strong emphasis on intricate craftsmanship and mirror finishing with great alacrity. The key expression is cutting edge technologies and relentless quality checks by a quality assurance team to achieve impeccable synergy. The brand's in-house knitting, dyeing, mercerizing, finishing, compacting, garment printing, embroidery/ printing and manufacturing facilities feature state-of-the-art machineries and equipment supplied by world class Juki, Fuku Hara, Pegasus, Yamato, Brother, Barudan, Stefab, Ramsons and others. The embroidery section is fully computerized. By using high quality fabrics and the best pattern technology, Duke is able to deliver stunning fashion at affordable prices. The design studio of the company is well laced with expert professionals and latest softwares.

Omni- Channel Presence

The brand is present both in online and offline business and is getting a great response.

Product Basket

Duke provides an endless range of products including t-shirts, jackets, sweaters, sweatshirts, tracksuits, thermals, jogging suits, shirts, denims and trousers, lowers, bermudas, shorts, value packs, lounge wears, accessories, etc. for men, women and kids. The brand's new footwear collection 'Step Ahead' is the first premium footwear collection. Duke offers shoes like casual shoes (lifestyle), sports shoes, loafers, joggers, running shoes, smart casuals, sneakers, moccasin, sandals, flip flop, etc., which are exclusively available on e-commerce websites and www.dukeindia.com.



Share of Casual Wear in Total Revenue

Casual wear range is very important for the brand and the segment contributes to 80- 90 percent of sales for Duke.

Theme of Latest Collection

Duke's latest collection celebrates the spirit of fashion as inspired by the style of California, USA. Duke's Spring/ Summer 2017 collection channels the excitement, iconic, legendary and progressive style of California. The collection features a variety of t-shirts, shirts, denims, trousers, tops, lowers, bermudas, capris, shorts, and value packs for men, women and kids that have the California feel. This classy and trendy collection features superb fits, easy to maintain, vibrant colours, a variety of fabric and interesting patterns inspired by the melting pot culture of the United States. With selections for the beach, for the weekend and even for formal outings in the city, this collection will allow the consumers to live the California life.



>GAP<

GAP, one of the world's most iconic apparel and accessories brands, was founded in San Francisco in 1969. Beginning with the first international store in London in 1987, GAP continues to connect with customers online and across the brand's about 1,700 company-operated and franchise retail locations around the world. GAP includes women's and men's apparel and accessories, GAPKids, babyGAP, GAPMaternity, GAPBody and GAPFit collections. GAP was launched in India in May 2015 and quickly scaled upto 11 stores over 10 months. In October 2016, the brand launched gap.nnnow.com to retail through the omni-channel route, and has recently launched on market place via amazon.in. The expansions across the channels has occurred in a brief 2 years span, allowing the customers access to GAP through multiple channels.

Target Consumer

GAP is the authority on classic American style and presents a line of denim and classic casual apparel and accessories for men, women, kids and babies. The GAP consumer is SEC A+, A and B+, ranging in the ages of 0-40.

BRAND UPDATE

- > Country & city of brand origin: **USA, San Francisco, California**
- > Number of countries present in: **49**
- > Year of brand launch (India): **2015**
- > Total number of doors in India: **11**
- > Total number of EBOs: **11**
- > Number of states present in: **7**
- > Number of cities present in: **7**
(Considering Noida, Gurgaon fall under Delhi NCR)

Retail Mapping

GAP retails online through Amazon.in and GAP.nnnow.com. It is present in metros and tier -I markets through physical stores. Of late, the brand also has launched stores in two tier -II cities which include Indore and Pune.

Domestic Retail Expansion Plans

GAP plans to continue expanding into tier -I and -II markets, along with offering the brand's reach to 1000s of postcodes.

Omni-Channel Presence

GAP currently retails online through Amazon.in and nnnow.com. It offers customers the flexibility of click and collect in-store, or shipping to their postcode. Additionally through the omni-channel, the brand is able to offer customers an endless aisle of products, i.e., the entire range of GAP products are available to customers. The brand



also is able to manage missing sizes – as the best available size is fulfilled from the closest store/warehouse. This allows year round availability of product and ensures that a sale opportunity is never missed.

Product Basket

GAP is the authority on casual comfort and style. The collection, season upon season, reflects elevated everyday. Its styling is classic while being comfortable.

Theme and Elements of the Latest Collection

The GAP summer collection is focussed on themes like lightweight fabrics such as tencel, linens and cottons. The theme revolves around summer, party, getaway and work. It includes a lot of summer friendly dresses in light colours and materials, basic and comfortable tees and shorts among other key styles for the season.



>HORIZON<

One of India's mid-segment producers of men's wear, Horizon is riding high on a strong legacy of craftsmanship, unmatched quality and exemplary style. With humble beginnings that dates back to 2007, the brand today holds an inimitable position in the sphere of trend inspired fashion for the cosmopolitan man.



Brand USP

The brand offers a wide range of casual and semi casual shirts and believes that the competition in the market is tough and challenging since every player is dealing in almost the same kind of products. Horizon's USP lies in the fact that all the products have same designing, no matter which part of the country they belong to. Also, pricing, product quality and services are a few factors that set Horizon apart from the other brands in the market.

Target Consumer

The brand's clientele is always in the look out for something new. They look out for new developments in checks, prints, plain and linen, etc. Horizon's target customers fall under the age group of 18- 60 years and belong to the mid-segment of society. This segment has increasingly become selective and aspires to wear only high quality clothing.

Domestic Retail Expansion Plans

As of now, the brand is present in about 700 MBOs across 10 states and is striving to expand throughout the country. Horizon believes that major expansion for a brand is possible initially only through MBOs. In line with this, the brand is planning to concentrate all its endeavours on this channel in the near future. Horizon is also vying to expand its business in



its retail network and is targeting at expanding by 15- 20 percent.

Technology Deployment

The brand gives great credit to technology for its operations including supply chain management along with order indent and also in predicting fashion, getting higher footfalls and managing supply chain among other things.

Product Basket

Horizon is known for its range of casual and semi casual shirts, that enjoy unprecedented demand in the market. Horizon offers shirts in the price bracket of ₹1,195 to ₹1,595.



BRAND UPDATE

- > Year of brand launch: 2007
- > Total number of EBOs: 1
- > Total number of MBOs: 700
- > Number of states present in: 10



>INDIGO NATION<

Indigo Nation was founded in 1999 by Indus-League, which was later acquired by the Future Group in 2005. As a brand, Indigo Nation is young, edgy and unconventional. Indigo Nation has always been the cult brand for the young and the restless, delivering fast fashion to the young Indian who forever aspires to be in and who believes in engineering change rather than merely embracing it. It's for the maverick adventure junkies for whom everything is subject to change.

Retail Mapping

Indigo Nation is present across some of the most reputed retail chains of the country including Reliance Trends (128 stores), Central (33 stores), Pantaloons (67 stores) and Brand Factory (51 stores). It also retails through 55 EBOs, 59 franchisees, 6 FBBs and over 200 MBOs. Online partners include Flipkart, Myntra, Snapdeal, Jabong and Amazon. The brand is not present in any international markets as of yet but is in talks for entry into international markets in Oman, Dubai and Sri Lanka. The brand's core business is driven between the states of Andhra Pradesh, Telangana, Kerala and Karnataka, that delivers about half of the Indigo Nation's business.

Technology Deployment

To ensure that the brand is at the fingertips of each sales person, it utilises a brand training app called FLARE (Future Lifestyle Apparel Retail Experience). FLARE serves as an encyclopedia of the brand providing information of the brands'

BRAND UPDATE

- > Year of brand launch: 1999
- > Total number of doors in India: 450
- > Total number of EBOs: 114
- > Total number of SISs: 235
- > Total number of MBOs: 110
- > Number of states present in: 23
- > Number of cities present in: 135
- > Total retail space across EBOs & SISs: 4,4500 sq. ft + 62,000 sq.ft respectively
- > Total Sales Turnover in India as in FY16-17: 217 crores
- > Average sales per sq.ft. per month: ₹1,074
- > Average bill/ticket size: ₹2,600
- > Same store sales growth rate: 18%
- > Share of sales from on-line: 5%



campaigns, highlights stories of the season, planogramming guide, etc. at the touch of a button. Each employee takes a quiz via the app and his score is sent to the brand team. This acts as an important tool in enhancing their brand knowledge.

Marketing Strategy

Indigo Nation's marketing strategy has been changing dynamically over the years. The focus has been primarily on the digital and social media platforms with an offline-to-online integration. The brand has been focusing on various customer engagement programs at colleges, pubs, startup events, etc. The brand campaign 'StartupNation' saw an all digital launch on YouTube, Facebook, Twitter, Instagram, Google network sites, blogs, etc., and was then taken to the OOH medium. The brand saw a 40 percent LOL growth during the campaign period.

Product Basket

The brand's product basket includes shirts, blazers, accessories, trousers, t-shirts, casual jackets, waist coats, denims, boxer shorts, winter wear, fashion vests. Shirts contribute to 55 percent of the business, followed by denims and trousers at 30 percent each.

Theme Of the Latest Collection

The theme of the SS'17 takes its inspiration from the life of the modern hipster; it's a reflective of what a hipster does in his day to day life. Core design elements of the SS '17- reversible shirts, reversible shorts, longline shirts, etc., turn up denims and crop trousers in ultraslim fits. It also includes a wide range of washed out checks and prints, athleisure inspired wear and hipster inspired graphic tees.

Campaigns

Indigo Nation saw a remarkable response to its campaign #StartupNation - a campaign that best reflects the fearless and risk taking attitude of the real life Startup heroes. The concept was a platform for the young startup entrepreneurs to share their journey and express their views on the Indian Startup ecosystem and saw enormous success. The brand organized and partnered with several national level startup events across the cities such as - Techfest IIT Mumbai, NDTV Unicorn Awards Delhi, Unplugged Bangalore, August Fest Hyderabad, Tech Circle Kochi and Techkriti IIT Kanpur.



>JACK & JONES<

Started in 1990, Jack & Jones is a democratic jeans brand that helps fashion conscious men create their own personal style. Today, Jack & Jones is one of the Europe's leading producers of men's wear with more than 1,000 stores in 38 countries with products being sold by thousands of wholesale partners all over the world. In India, Jack & Jones was introduced in the year 2008. The brand continues to have a high level of expertise when it comes to the craftsmanship, quality and design of jeans. Over the past few years, Jack & Jones, through its marketing activities, has built a perception of being a disruptive, rebellious and an edgy brand.



Target Consumer

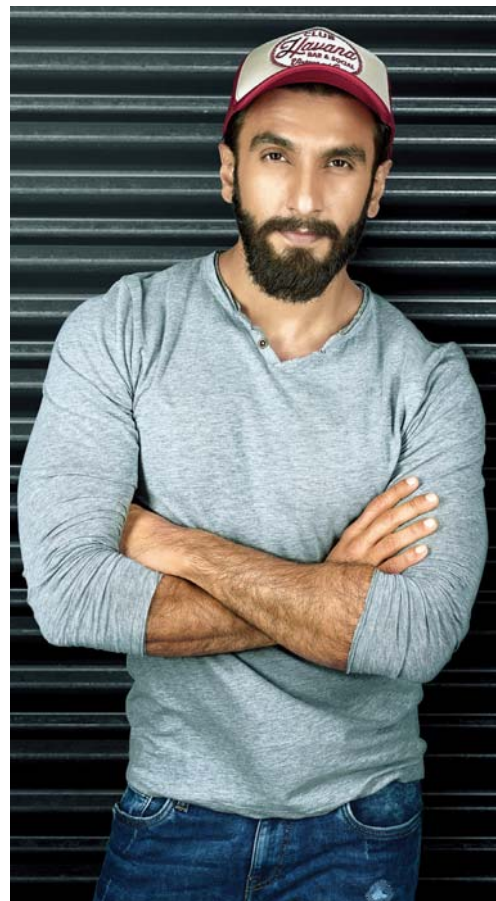
The brand targets men who want to flaunt their individual style statement.

Latest Campaign

With its latest marketing campaign *Don't Hold Back*, the brand communicates call to action towards shunning all inhibitions and following one's gut irrespective of what the world says or its obvious consequences. This campaign resonates the way of life of today's youth and the merchandise offered allows the male consumers to incorporate this attitude in their daily life.

Retail Mapping

The brand currently has 66 stores and 251 shop-in-shops spread across the country. Available at leading online partners along with own website for



e-commerce, Jack & Jones is present in 38 countries globally.

Domestic Retail Expansion Plans

Jack & Jones continues to look forward to explore opportunities in new markets, especially in tier -II and -III cities.

Technology Deployment

Technology is positively contributing to almost all functions of the retail business like operations, supply chain management, marketing, customer accessibility, etc. E-commerce has allowed the brand to reach the consumers in places where physical stores are not feasible. Jack & Jones is currently working on its omni-channel strategy.

Product Basket

Although denim is regarded as the backbone of Jack & Jones' business, the brand, today, has diversified into other product categories as well, such as accessories, shirts, t-shirts, pants, shorts, winter wear, trousers, innerwear, etc.

BRAND UPDATE

- > Country & city of brand origin: **Denmark, Brande**
- > Number of countries present in: **38**
- > Year of brand launch: **1989**
- > Year of Entry in India: **2008**
- > Total number of EBOs: **71**
- > Total number of SISs: **251**
- > Total retail space across EBOs & SISs: **1,95,712 sq.ft**
- > Name of own on-line store: **www.jackjones.in**



ANALYSIS

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SUPPLY CHAIN & LOGISTICS

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MARKETING & BRANDING

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East India

Piyali Oberoi | piyalioberoi@imagesgroup.in, +91 9331171388

Editorial Contacts

Surabhi Khosla
surabhikhosla@imagesgroup.in

Charu Lamba
charulamba@imagesgroup.in



>LACOSTE<

In 1933, René Lacoste, a French tennis legend and André Gillier, the owner and President of the largest French knitwear manufacturing firm of that time, set up a company to manufacture the prominent logo-embroidered shirt. The champion had originally designed this for his own use on the tennis court, golf and sailing. This was the first time that a brand name appeared on the outside of an article of clothing - an idea which has since become extremely successful. This shirt revolutionized men's sportswear and soon replaced the woven fabric, long-sleeved, starched classic shirts. Today, it continues to offer the same quality, comfort and solidity on which it built its name. Lacoste believes in providing a superlative experience to its customers and hence is very selective about the retail areas. In India, the brand has one or two flagship boutiques in each of the key cities, i.e., Delhi, Mumbai, Bengaluru, Chennai, Kolkata, Hyderabad, Chandigarh and Pune, with approx. 1,200-1,500 sq.ft. boutiques in other key retail developments.

Target Consumer

Lacoste caters to men and women who possess an active life-style and desire comfortable, affordable yet qualitative, timeless products to accompany them in the different moments of their daily lives. Lacoste products assist these individuals in expressing their lifestyle that encompasses elegance, refinement, comfort and quality to the outer world.

Retail Mapping

Lacoste has selective distribution policy which is essential to keep the exclusive positioning of the brand. The distribution strategy is led by one or two flagship stores in each of the key cities, i.e., Delhi, Mumbai, Bengaluru, Chennai, Kolkata, Hyderabad, Chandigarh and Pune in India, with approx. 1,200-1,500 sq.ft. boutiques in other key retail developments. The brand also has a digital flagship store (online store) in India. Lacoste is present in international markets across 120 countries wherein 2 Lacoste products are sold every second. In India, the brand sells one product every 2 minutes.



BRAND UPDATE

- > Country & city of brand origin:
Paris, France
- > Number of countries present in: 120
- > Year of brand launch: 1933
- > Total number of EBOs: 38
- > Total number of SISs: 9
- > Number of states present in India: 15
- > Number of cities present in India: 20
- > Total retail space across EBOs & SISs:
5,9530 & 4,271 sq.ft respectively.
- > Name of own on-line store:
www.lacoste.in



Domestic Retail Expansion Plans

Delhi and Mumbai being the most important markets, the brand has much deeper penetration in these markets and intends to expand further. It is keenly watching the premium developments in tier-I and tier-II cities, both in terms of consumer demographics and psychographics, and also in relevant retail developments. The brand is open to exploring store opening at any location in India where like-minded brands are present and quality infrastructure is available.

Technology Deployment

Technology has played a phenomenal role in the fashion industry for both the customers as well as sellers. With the emergence of the online podium, the industry has provided a convenient shopping and less time-consuming experience to the customers. Data availability and analysis ensure understanding of customers' buying patterns and future forecast is relatively better planned. The age-old principles of good quality product, great customer service assisted by new technological tools provide a perfect blend to bring a smile to customers' and sellers' face.

Omni-Channel Presence

Besides retail boutiques, the brand also has its digital flagship store (online store) in India which has certainly aided the sales in the country while offering convenience to our patrons.

Product Basket

Lacoste's product portfolio entails apparel and accessories, leather goods, watches, sunglasses, perfumes, footwear and underwear. The iconic polo t-shirts still reign as one of the best selling product.

Theme and Core Elements of the latest Collection

Flash Riviera and *Yazbukey* collection are the latest casual wear collections from the brand. *Flash Riviera* consists of beautiful summery shades which set the tone for this season's lucky escape. It's signature features are cotton linen, tennis ball remix, shades of blues and micro patterns. Paris-based accessories designer *Yazbukey*, renowned for her bold pop preferences and playful approach to design, gave her own personal vision of contemporary sportswear. This fun-infused collection is an unusual game of tennis played between *Yazbukey's* emoticon tennis balls and Lacoste's crocodile who are seducing each other in a line of apparel for men, women and kids, as well as in the line of leather goods.



>LEE COOPER<

Lee Cooper is an authentic British denim brand which has been catering to the youth and their celebrity icons since 1908. Creating specialised cuts and innovative new styles has always been at the core of the brand. Innovation, originality, style, attitude and comfort have been the ideologies that have always been at the core, resulting in the creation of jeans such as flexible denim, water resistant denim and reverso jeans. Lee Cooper entered India through a licensee agreement with Future Lifestyle Fashion Ltd. in 2007. Today, the brand is retailed out of more than 6,000 outlets worldwide in nearly 100 countries.



USP and Target Consumer

In India, the USP of the brand lies in the fact that apart from having a very strong foothold in men's category, its women's line has got a very exciting response, being by far the best accepted brand in key premium retail chains like Central. Lee Cooper's kids range is also doing exceptionally well across chains like Lifestyle and Central.

Lee Cooper considers the young and youthful, who exuberate attitude and confidence at all times as its core target consumer. Looking cool without trying too hard is the mindset that the brand's customers live with and hence being on-trend is what matters the most to them.

Retail Mapping

Lee Cooper has a global presence in more than 100 countries. In India, the brand is present in more than 150 cities including primary markets like Mumbai, Bengaluru, Kolkata, Hyderabad, Pune, Delhi and Chennai. Lee Cooper retails through large format stores including Central, Lifestyle, Reliance, etc. with majority of business coming from department stores. The brand has SIS presence of more than 1,200 doors. The brand is also planning to expand in tier -II and -III towns in times to come. Lee Cooper also retails through major e-commerce websites like Jabong, Myntra, Amazon and Flipkart.

Domestic Retail Expansion Plans

Lee Cooper boasts of an extensive presence across India and the brand's key focus is to drive organic growth, that is, growth from existing doors with penetration of newer lines and sharper product offerings across categories in men's, women's and kids' segments. In terms of inorganic growth, the brand is planning to add around 500 doors spread across LFS and EBO channels within the next 2-3 years.

Product Basket

Lee Cooper, being an on-trend brand, invests a lot of time in understanding the emerging trends and identifying cuts and washes that will excite the customers. The brand offers a *comprehensive* range of products for men, women and kids, where denim is the clear forerunner across all portfolios with a close chase by tees and shirts/ tops.

Share of Casual Wear in Total Revenue

Around 40 percent of the total business of the brand comes from its casual wear range.

Theme and Core Elements of of the Latest Collection

The brand has four core themes for the Spring/ Summer 2017 collection:

1. *Brit Love* showcases iconic graphics and imagery representing Britain like the Big Ben and the British flag in the colour palette of red, white and blue.
2. *Tea Lane* pays a tribute to the age-old tea cafe culture in London with breezy dresses for women and indigo prints for men.
3. Street fashion gets its due with the *Norm Core* design story comprising of versatile casuals and semi-formals for men and women that can be dressed up or down and are great for casual Fridays at work.
4. Dabbling in innovation this season, *Tech Artistry* is Lee Cooper's attempt to revolutionize the use of technology in fashion. With the use of laser patterns are created on denims for women and a pigment spray is used to lend a burnt out acid wash look in ombré on denim dresses and jeans for women and shirts and jeans for men.

BRAND UPDATE

- > Number of countries present in: **100+**
- > Year of brand launch: **1908**
- > Total Sales Turnover in India as in FY16-17: **Approx ₹500 crores**
- > Total number of EBOs: **12**
- > Total number of SISs: **1,200 +**
- > Number of states present in: **20 +**
- > Number of cities present in: **150 +**
- > Total retail space across EBOs & SISs (in sq. ft): **Approx. 3,00,000 sq.ft.**
- > Same store sales growth rate (in % for EBOs): **more than 50%**
- > Share of sales from on-line: **5%**





>MONTE CARLO<

Monte Carlo is a powerful brand that straddles the ready-to-wear industry with a massive range of year-long clothing for the young, fashion-conscious adults. Launched in 1984 by Oswal Woollen Mills Limited, Monte Carlo was a significant step in the evolution of the branded garment industry in India. Initially, the brand's forte was woollen pullovers and jackets but in 1999 the brand launched men's t-shirts. Today, Monte Carlo is not just an exceptional brand but emerging as a symbol of all that fashion should be. In its studios are tomorrow's garments under development and on its floors, the latest machines that will make them possible.

Target Consumer and USP

Monte Carlo's current brand USP is offering international fashion at affordable prices. The brand's target audience is upper middle class and young executives. The core of the consumer base comprises of 25+ age bracket.

Retail Mapping

The brand's current retail network comprises of 240 EBOs, over 1,200 MBOs and 350 LFS across India. Monte Carlo enjoys a strong demand in the upper part of the country, along with the East and Central markets. In metros, the sale is high but the viability is less because of rentals as compared to tier-I and -II cities, that also serves as a strong market for the brand. In the digital space, the brand is present through its own portal www.montecarlo.in along with the country's

leading portals like Flipkart, Jabong, Paytm, Amazon and many more. Monte Carlo is also present in international markets like Bangladesh and Nepal.

Domestic Retail Expansion Plans

Monte Carlo plans to open 20-30 stores every year in the next 2-3 years.

Brand Extension

Product initiation is a continuous process at Monte Carlo. As far as brand extension is concerned, it has launched its kids category a few years back.

Product Basket

The brand's current product portfolio includes shirts, trousers, t-shirts, ladies tops, kurtis, denims, shorts, and casual woollens. The brand's core top selling lines are t-shirt and sweaters/sweatshirts in summers and winters respectively.



BRAND UPDATE

- > Countries present in: **Beyond India, Bangladesh & Nepal**
- > Year of brand launch: **1984**
- > Total sales turnover in India (FY16-17): **₹580 crores**
- > Total number of EBOs: **240**
- > Total number of SISs: **10**
- > Total number of MBOs: **1,200+**
- > Others: **300+**
- > Number of Indian states present in: **Pan India**
- > Number of cities present in: **All major Indian cities**
- > Total retail space across EBOs: **2,20,000 Lakhs**
- > Same store sales growth rate: **16%**
- > Name of own on-line store: **www.montecarlo.in**
- > Share of sales from online: **4%**





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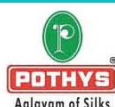
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>MUFTI<

Mufti was launched in 1998 with one driving ambition, to provide an alternative dressing solution, that didn't conform to the 'uniform' codes of mainstream fashion. Kamal Khushlani started manufacturing men's shirts under the label Mr. Mister. Recognizing fashion was the core strength of this fledgling brand, many boutiques deemed this startup label fit for their shelves. Realizing its true potential, and that of the market, the brand decided to move into overdrive. An ambitious project to leapfrog into a leadership position in men's fashion was initiated in 1998 and Mufti was launched. Mufti is uniquely original in everything it does. Everything, beginning from the name (a term from pre-independence India) to its business values, to its image and advertising, reflects this belief.

USP and Target Consumer

Mufti celebrates fashion and leads with fresh fashion every season. The brand targets metrosexual male in the age group of 16- 40 years seeking fashion as an expression of his individuality.

Omni-Channel Presence

Mufti is available on all major e-commerce websites as well as on www.muftijeans.in and are currently experimenting with TataCLiq to link its customers directly with its EBOs.

Retail Mapping

The brand is well penetrated in the country and are now focusing on increasing its presence in the South and Northeast. Mufti retails through EBOs, MBOs and large format stores and is emerging strongly in the e-commerce channel of business as well.

Domestic Retail Expansion Plans

Mufti has aggressive plans but the brand believes in biting as much as it can chew. The fashion brand will venture into associated ranges, but gradually.

Product Basket

Mufti is a premium fashion brand for shirts, t-shirts, jeans, jackets, blazers,

sweatshirts and accessories. The brand's top selling lines are shirts and jeans and the others are growing every season.

Theme of the Latest Collection

Mufti is pushing the barrier for innovative fabrics in shirts. It's collection has three major sections, that is, authentic, preppy and relaxed.



BRAND UPDATE

- > Year of brand launch: 1998
- > Total Sales Turnover in India as in FY16-17: ₹650 crores
- > Total number of doors, the brand is present in India: 1,852 Approx.
- > Total number of EBOs: 252
- > Total number of MBOs: 1,500
- > Total number of LFS: 100
- > Number of states present in: 23
- > Number of cities present in: 500 +
- > Total retail space across EBOs & SISs (in sq. Ft): 1.75 Lakh plus
- > Average sales per sq. ft. per month for above (in INR): ₹1,404
- > Average bill/ ticket size for above (in INR): ₹3,000
- > Same store sales growth rate (in % for EBOs): 4% Approx.
- > Name of own on-line store: www.muftijeans.in
- > Share of sales from on-line (in %): 7%

>PARX<

Parx is a men's casual wear brand from the house of Raymond. Started in the year 1999, the brand is currently one amongst the fastest growing men's casual wear brand in the country. Parx operates through Raymond shops, multi brand outlets, exclusive brand outlets, large format stores and e-commerce channels.

Target Consumer

Youth is the helm of Parx's target audience with the core audience being in the age group of 22-30 years. Parx offers affordable fast fashion for a young high spirited individual who takes initiative, wants something better and is ready to face the future.

Retail Mapping

Parx has focussed specifically towards tier-II and -III markets to expand its presence via EBO or trade expansion. With LFS and online, the brand has ensured a strong connect with tier -I and metro audience.

Domestic Retail Expansion Plans

In the fiscal year 17-18, the brand plans to open 10+ EBOs across tier -II or -III markets.

Technology Deployment

Parx is now looking at establishing a better online-offline connect with omniflow integration to serve the customers better. Areas like CRM, understanding of consumer behaviour, etc., have seen tremendous improvement with growth in technology.



Omni-Channel Presence

Although still in the developmental stage, Parx is trying to establish a proper omni flow connect via Raymond Next.

Product Basket

Parx offers all day casual wear solutions aimed for young audience in the age group of 22-30 years. Shirts are the largest selling brick for the brand followed by knits, denims, trousers, etc. Key lines like reversible shirts and t-shirts are the most popular offerings of the brand, followed by fabric lead innovations.

Theme of the Latest Collection

The SS '17 collection has been launched under the umbrella branding theme of Summer + Beyond. The collection is based on four themes - *City of Cuba* (inspired from Cuban culture), *Fresh Factor* (representing fabric innovations in bamboo, linen, tencels fabrics), *Great Escape* (represents the print collection of SS '17) and *Denim Love* (representing the denim collection).

BRAND UPDATE

- > Year of brand launch: 1999
- > Total number of EBOs: 12
- > Total number of SISs (LFS): 139
- > Total number of MBOs: 410
- > Number of states present in: 26
- > Total retail space across EBOs & SISs: 17,000 sq.ft.
- > Average sales per sq.ft per month: ₹926
- > Same store sales growth rate: 9%
- > Name of own on-line store: www.raymondnext.com
- > Share of sales from on-line: 5%





SHERIFF <

Sheriff is a men's wear brand which has covered a long journey since 1985. The brand started from manufacturing shirts and later added t-shirts to its portfolio to become a complete men's wear brand. Using best of fabrics, cuts, styling, etc., the brand has built a strong hold in the North Eastern terrain. Priced reasonably, the brand is within the reach of many providing them with contemporary fashion.



USP and Target Consumer

The brand's USP lies in providing contemporary fashion, high value garments at affordable prices.

Sheriff caters to young aspiring male in the age group of 22- 45 years. The brand's consumers have a distinct taste for fashionable clothing.

Retail Mapping

Sheriff is strong in the North Eastern terrain of India and is expanding rapidly in other states as well. The brand is also available online at Flipkart, Snapdeal, Amazon and others.

Domestic Retail Expansion Plans

The men's fashion brand is planning to open several EBOs in the coming months.

Technology Deployment

Technology is the key changer in every sector and it has been giving significant benefits to the fashion industry as well. Sheriff has been receiving its bulk orders online and social media is also impacting the brand in a big way.

Product Basket

Sheriff is a men's wear lifestyle brand and offers a vast range of products including shirts, trousers, t-shirts, denims, suits, shorts and accessories.

Share of Casual Wear in Revenue

Casual wear is the strongest category for Sheriff. The casual wear segment contributes to almost 70 percent to the brand's total sales. The brand is witnessing a significant rise in this and is planning to expand the category as well.



BRAND UPDATE

- > Year of brand launch: 1985
- > Total number of EBOs: 10
- > Total number of MBOs: 400
- > Number of states present in: 10
- > Number of cities present in: 45
- > Total retail space across EBOs & SISs (in sq. ft): 7,600 sq.ft.
- > Average bill/ ticket size for above: ₹1,000
- > Same store sales growth rate: 18%

>STATUS QUO<

Started in 1998, Status Quo began with an aim to create a whole range of impressive and vibrant apparels for the youth, and has now become a well-known brand of choice for self-directed youngsters. Complimenting their beliefs with modish designs, the brand helps youngsters to stand apart from the teeming millions with its unique and exciting designs along with consistent quality. The brand has an installed capacity to produce 2.5 million pieces per annum and is the official licensee for Baahubali 2, Emoji, Garfield and Archie. Recently, it has associated with Royal Challengers Bangalore for their fashion apparel collection.



Target Consumer

The brand's target customer is between 15 to 40 years.

Retail Mapping

The brand is available through 1,100+ MBOs across the country and has a presence across all LFSs like Shoppers Stop, Lifestyle, Lulu and Central with 140 touch points. Status Quo also retails through Amazon, Flipkart, Myntra, Jabong, ABOF, Snapdeal, TataCLiq, Paytm and it's own website statusquo.in. The brand is also present in countries like Saudi Arabia, Dubai, Kenya and Tanzania.

Domestic Retail Expansion Plans

Status Quo is looking at increasing its shop-in-shop count to 105 from the present count of 70 by end of this year. It also plans EBOs expansion from early next year. New Indian markets that the brand is exploring now are Bihar, Kerala, Himachal Pradesh and Jammu & Kashmir.

Technology Deployment

The brand is constantly working on upgrading its systems, site, web store apart from upgrading most of its machines in the factory for better productivity.

Product Basket

As a classic casual wear brand, Status Quo's present product portfolio consists of shirts, waist coats, shrugs, blazers, t-shirts, shorts, joggers, trousers, denims, sweatshirts, sweaters and jackets.

The Latest Collection

After successful collection of Baahubali 2, the brand is all set to launch its collection for Royal Challengers Bangalore in Autumn/Winter 2017. In forthcoming season, the brand has added new categories like shrugs, waist coats for men along with ankle length trousers, available in black, white, khaki, olive and navy colours.



BRAND UPDATE

- > Number of countries present in: 5
- > Year of brand launch: 1998
- > Total sales turnover in India(FY16-17): ₹110 crores
- > Total number of doors, the brand is present in India: 1,300 +
- > Total number of SISs: 70
- > Total number of MBOs: 1,100 +
- > Online & Others: 140
- > Number of states present in: 260
- > Number of cities present in: 270
- > Total retail space across EBOs & SISs: 17,500 sq.ft.
- > Average sales per sq. ft. per month(FY16-17): ₹1,650
- > Average bill/ ticket size (FY16-17): ₹1,500
- > Same store sales growth rate: 15%



and 375 plus MBOs. Success also has a remarkable presence on Flipkart and is looking forward to tie-ups with other online players very soon.

Product Basket

As a men's wear lifestyle brand, Success offers choices for a complete men's wardrobe including suits, blazers, waistcoats and trousers. It also enjoys equal demand for its range of casual jackets, waistcoats, denims, shirts, t-shirts and accessories.

Theme of the Latest Collection

The brand is currently innovating in top-of-the-line digital prints in shirts as well as t-shirts. Also keeping the Indian climate in mind, the brand's SS '17 collection encompasses lightweight cottons and linens carefully tailored into unlined comfortable blazers and spry jackets that are smart for the day wear yet equally casual for an evening outing. It also encompasses trendy trousers in smart stretch fabrics that have just enough Lycra for movement as well as in maintaining shape.

>SUCCESS<

Headquartered in Kolkata, Success was launched in 1996 by Agwani Fashions Pvt. Ltd. Initially, Success was a trouser brand, but over the years, it has outgrown and now offers men's complete trousseau. The brand offers a fusion between the global fashion trends and the ever-evolving taste of the customers, also keeping in mind the proverbial Indian climate. As a consumer oriented brand, it lays emphasis on research of current paradigms of consumers, consumer feedback and implementation of the same in the products so as to stay relevant to the varying requirements of its consumers.

As a brand that promptly adapts to fashion, Success has stood its ground firmly and has also evolved with each passing milestone.

USP and Target Consumer

The brand excels in fast adaptation of the changing trends in men's fashion and putting forth finished product instantaneously. This keeps Success at par with the global trends whilst ensuring the same for its customers. The brand offers trendy and classic styles for men from the age of 20 and up.

Retail Mapping

The brand is present in more than 40 cities across 24 EBOs, 46 plus LFSs and SISs, including Brand Factory and Central,



BRAND UPDATE

- > Year of brand launch: 1996
- > Total number of EBOs: 24+
- > Total number of LFSs and SISs: 46+
- > Total number of MBOs: 375+
- > Number of cities present in: 40+

>TANTRA<

Tantra was India's first start-up t-shirt brand, which has garnered a strong mind-share with the youth, without major advertising or promotions, purely on the strength and creativity of the product, from a few stores, to large format stores, to EBOs (30+), to exclusive stores outside the country. Tantra encapsulates the 'can-do' and creative spirit of India.

Target Consumer

'First World Creativity at Third World Prices', that's how Tantra explains their products, which they like to call 'creative ideas' instead of products. The brand translates this USP for their customers in various ways through cutting-edge designs, art and humour, etc., curated by the Tantra design team. To cater to the challenging demographics and psychographics of India, Tantra has created a host of sub-brands/labels to address each of these constituencies. Hence, not one message fits all, but tailor-made creativity.

Retail Mapping

Tantra is, today, present in 24 cities across 12 states in India. Traditionally an offline brand, Tantra still has much catching up to do in the online space. The brand is planning to grow simultaneously in both the hemispheres, as well as adding other alternative marketing channels. The North, South and West are traditionally strong markets for the brand, hence the future growth areas are clearly defined. In the last year, Tantra added an exclusive brand outlet in Kuala

Lumpur, and is looking forward to replicating this elsewhere.

Domestic Retail Expansion Plans

Tantra aims to stay focussed on its key strength, i.e., design, art, ideas, and the creativity. Along with it, the brand plans to add on EBOs (4 added in the last 4 months). For the roadmap ahead, Tantra is looking at beefing up on all its faculties, to capitalize on an expanded footprint.

Technology Deployment

For Tantra, technology assistance is relative for the online space. With regards to products, DTG printing is creating and opening up a huge range of possibilities.

Theme and Core Elements of the latest Collection

The upcoming collection is labelled under the predictive theme Pre-Winters and Autumn/Winter. Within these pedantic headings, the brand has worked magic and guarantees a good time for all.

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BRAND UPDATE

- > Number of countries present in: 3
- > Year of brand launch: 1997
- > Total number of EBOs: 30+
- > Total number of SISs: 15+
- > Total number of MBOs: 500+
- > Number of states present in: 12
- > Number of cities present in: 24
- > Name of own on-line store: www.tantratshirts.com
- > Share of sales from on-line: 8%



>TURTLE<

Turtle is a lifestyle brand for men which started its journey in 1993 with primary focus on readymade shirts. The company started its operations with mere 20 shirts a day on job work basis and today, it manufactures 2 lakh shirts annually, incorporating international styles with great value in its design ethos, sensibility and pricing. In the arena of men's fashion, Turtle stands for style that's focused, sophisticated yet fun-loving, exuding confidence and brimming with enthusiasm.

Brand USP:

The product and the fit is the main USP of the brand. At Turtle, the core philosophy is to provide trendy fashion to its consumers and this makes the brand a preferred destination to shop for the buyers.

Retail Mapping

Turtle retails in the East and South India and is also present in few parts of Central and West India. The brand is present in both tier -I and -II cities and is planning to increase its footprints in smaller cities as well. Turtle also retails through online channels and has a little presence in the Middle East.

Domestic Retail Expansion Plans

The fashion brand is planning to aggressively expand and open outlets in the east and tier -II, -III and -IV cities. Also, it is planning to consolidate its growth level in all the stores which are in operation.

Technology Deployment

Turtle is using technology in all spheres of the organisation starting from order booking, inventory and consumer insight.

Omni- Channel Presence

All the stores of Turtle are connected with the main warehouse and individual stores, which gives an edge for the availability of the products. If, for any reason, the said product is not available in a particular store, the store manager can have the same delivered to the customer via omni-channel.

Product Basket

The brand offers complete men's wear range including shirts, trousers, t-shirts, denims, suits, blazers, jackets, pullovers, wind-cheaters, accessories, etc. However, shirts, trousers and denims are the top-selling products of the brand.

Share of Casual Wear in Total Revenue

Casual wear is very important for the brand. Turtle had recently introduced denims in its collection which has been accepted by the buyers with good sales, approximately 40 percent.

BRAND UPDATE

- > Number of countries present in: **India and Middle East**
- > Year of brand launch: **1992**
- > Total number of EBOs: **100**
- > Total number of MBOs: **1,200+**
- > Number of states present in: **East & South Indian states**
- > Number of cities present in: **Approx 50 cities plus**
- > Same store sales growth rate (in % for EBOs): **10%**
- > Name of own on-line store: **www.turtleonline.in**
- > Share of sales from on-line: **4%**



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>TWILLS<

Twills was launched in the year 1999. The brand grew rapidly thereafter and by 2002, added a complete range of men's wear merchandise such as denims, trousers, casual shirts, semi formals and t-shirts. The brand launched a 5,000 sq.ft. exclusive store at MG Road, Vijayawada in 2008. By 2009, the brand had expanded operations pan India. Last year, it added another milestone in its repertoire by opening its sales and marketing office in Jogeshwari, Mumbai.

Target Consumer

'Value for Money product' is the brand USP. The brand is known for its casual wear range that features superior fabrics and latest trends at mid segment prices. About 60 percent of the target audience are below the age group of 40 years and 40 percent are office going category.

Retail Mapping

Twills is present pan India. Andhra Pradesh is the brand's strongest market followed by Maharashtra, U.P. and Odisha. Online sale is very minimal and the sale volume from international markets is very negligible as it is only recently that the brand has entered the overseas markets.



Domestic Retail Expansion Plans

The brand plans to add 100 EBOs, 200 SIS and 2,500 MBOs in the next 2 - 3 years.

Product Basket

Twills' product basket comprises casual shirts, cotton trousers, denims, t-shirts and semi casual shirts. Casual shirts and trousers are the brand's top core selling products.

Theme and Core Elements of the Latest Collection

Twills believes that conceptualised selling adds to the volume. The brand's designing team comes up with ideas and new sustainable concepts every season. Twills had promoted the eco spirit and yoga concepts in the past, which enjoyed an overwhelming response. The brand's main concept for the AW '17 collection revolves around sustainability and is named *Swaraj*. Ecu and Khadi based fabrics are used for the garments in this concept. In addition to this, the collection also features various other concepts.



BRAND UPDATE

- > Number of countries present in: 3
- > Year of brand launch: 1999
- > Total sales turnover in India(FY16-17): ₹190 crores
- > Total number of EBOs: 91
- > Total number of SISs: 150
- > Total number of MBOs: 3,500
- > Number of Indian states present in: 26
- > Number of cities present in: All metros, tier -II & -III
- > Total retail space across EBOs & SISs: 1,35,000 sq.ft.
- > Average sales per sq.ft Per month (FY 16-17): ₹9,000
- > Average bill/ ticket size(FY 16-17): ₹1,200
- > Same store sales growth rate: 30%
- > Name of own on-line store: www.twills online.com

>VERO MODA<

A brand known for its classic styling, premium fabrics, trendy collections and offering runway styles at affordable prices, Vero Moda was launched in 1987 and soon became one of Europe's largest women's wear clothing brands. Vero Moda's healthy and successful start provided a solid foundation for the continuing expansion and success of the brand. The brand entered India in 2010 and ever since, it has been recognized as one of the most admired women's western wear fashion brands consecutively for four years in India. Apart from this, the brand has won numerous accolades in digital marketing and integrated marketing campaigns.



Target Consumer and USP

The Vero Moda woman is the one who uses fashion as a tool to sharply demonstrate her personality. Vero Moda caters to the needs of the self-driven and ambitious woman who looks for fashion that is effortlessly chic, smart and structured attires that allow her to sail through a busy day. Fashion at Vero Moda is distinctively tailor-made with an eclectic mix of the season's trendiest fashion statements and classic wardrobe staples.

Retail Mapping

The brand currently has 64 stores and 176 shop-in-shops spread across the country. The brand is also available at most leading online stores apart from its own website for e-commerce. Globally, Vero Moda is present in 45 countries.

Domestic Retail Expansion Plans

The brand continues to look forward to explore opportunities in new markets especially in tier-II and -III cities.

Technology Deployment

Technology is positively contributing to almost all functions of the retail business like operations, supply chain management, marketing, customer accessibility, etc. E-commerce, for example, has allowed brands to reach consumers in places where physical stores are not feasible. Vero Moda is currently working on its omni-channel strategy.

Omni-Channel Presence

Vero Moda's partnership with Tata CLiQ is one of the strategic alliances in the omni-channel approach. Once ordered on Tata CLiQ, the customer gets the option of either getting the products delivered to him within six hours or collecting the product from the store. The focus is to be as close to the customers as possible.

Product Basket

Vero Moda offers quality, affordable and inspiring clothing for the young

woman who wants to look good and have fun with her look. The collection includes tops, jeans, jackets, dresses, trousers, shirts, skirts, shirts, leggings, accessories, winter wear, etc.

Theme and Core Elements of the Latest Collection

As can be seen in the brand's present *Sicily* collection, Vero Moda introduced a line that offers an amalgamation of navy blues, whites and stripes that enhance the laid-back weekend vibe. To complement this, the brand has also accentuated this nonchalant vibe with a line of statement accessories that add a hint of drama to day-to-day outfits; be it in the form of over-sized frills, ruffled sleeves or a chunky neck piece. On the occasion of World Environment Day, Vero Moda launched a line that is heavily inspired by all things green. Called *Go Green*, the collection is designed in Linen with prints influenced by the flora and fauna. Pantone's colour of the year, Ivy Green dominates the collection.



BRAND UPDATE

- > Country of brand origin: **Denmark**
- > Number of countries present in: **45**
- > Year of brand launch: **1987**
- > Total number of EBOs: **64**
- > Total number of SISs: **176**
- > Total retail space across EBOs & SISs: **1,75,169 sq.ft.**

>WROGN<

Founded in 2012, Universal Sportsbiz Private Limited (USPL) consolidated three celebrity fashion brands under its retail umbrella. USPL, a celebrity commerce company, co-founded by Anjana Reddy and Sachin Tendulkar, has Accel Partners on its board. The brand portfolio includes Wrogn, a men's casual wear brand inspired and co-owned by Virat Kohli; Imara, a contemporary women's ethnic and fusion wear brand with Shraddha Kapoor; and Ms. Taken, a women's western wear by Kriti Sanon.

Target Consumer

Wrogn is a casual wear, sophisticated youth fashion brand, for open-minded and progressive men. It targets men in the age group of 22 to 28 years. Wrogn is India's most quirky youth fashion brand and does not wear blinders and questions everything. Fashion is personal and may vary from one person to other, based on region, skin type, size and other matrix. Wrogn defines the consumer idices with the needful requirement catering to the consumer segments accordingly.

Retail Mapping

Wrogn is retailed across 34 cities nationally through e-commerce websites like Myntra, Jabong, Flipkart, through large format retail stores like Shoppers Stop, through its brand website along with its exclusive brand store. Wrogn has a strong market share in the South followed by the West, East and the North respectively with contribution as high as 40 percent coming in from tier-II and -III markets. Wrogn is currently retailed in India only.

Domestic Retail Expansion Plans

Wrogn is planning to have 100 exclusive brand stores in the next 3-4 years. It also plans to set a global footprint into other countries in the Middle-East, Europe and South East Asia.

Technology Deployment

The brand uses technology to map the colours, silhouettes, patterns and stories apart from the price matrix, sizes, etc. to plan its offering. Tech becomes an intrinsic part of the analysis as the mapping is routed across the respective men's casual wear category across various brands. Wrogn has adopted software to define the above matrices apart from the stock replenishment module.

Omni Channel Presence

The strategy has largely been through its exclusive brand store and the brand website where the purchasers are mapped and recognised on both platforms for re-targeting with the offering of products. The omni-channel



initiatives are largely activation led to allow the customers to avail offers using the same mode of gratification through online and offline. In the FY 17-18, the brand plans to include a higher involvement from other channels of sales as well.

Product Basket

Wrogn is a breakaway youth fashion brand and offers a complete range of men's casual wear comprising of, t-shirts, shirts, denims, trousers, shorts, joggers, footwear and other categories. The brand can safely confirm that its shirts are the top selling lines.



FASHION CREATION

- » WGSN'S FASHION FORECASTS FOR A/W 2017-18
- » ASTORMUELLER'S 10TH ANNIVERSARY OF MAKING IN INDIA
- » BEST OF CASUAL LOOKS BY BLOGGERS
- » REVIVAL OF BALUCHARI



The best **OUTFIT** in the
world is the one that
looks good on you

— **SUMMER ESSENTIALS '17**

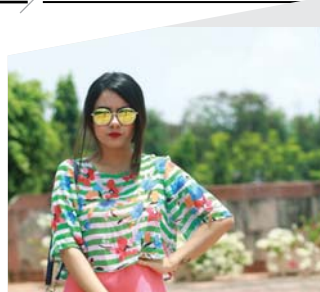




CASUAL WEAR TRENDS
**BLOGGERS ROCKING THE
CASUAL WEAR LOOK**

Casual looks are always evolving in the fashion industry. Street style bloggers provide all the inspiration that you need to style the latest casual trends. Roposo zeroes on the top bloggers who nailed the summer casual look for 2017.

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Make in India
**ASTORMUELLER COMPLETES
10 GLORIOUS YEARS IN INDIA**

AstorMueller is well known across Europe through its flagship brand Bugatti. On the occasion of its decennial anniversary in India, IMAGES BoF talks to the group about their journey over the last decade and what it took to dramatically alter the landscape of fashionable footwear in India.

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TRENDS A/W 2017

**WGSN BUYERS BRIEFING:
KEY FASHION TRENDS
FOR AUTUMN/ WINTER
2017-18**

Priya Sachdeva, Business Director— South Asia, WGSN, shares key insights on the season's key trends in new and carry over items to colours, key details, fabrics, key silhouette and finishes.

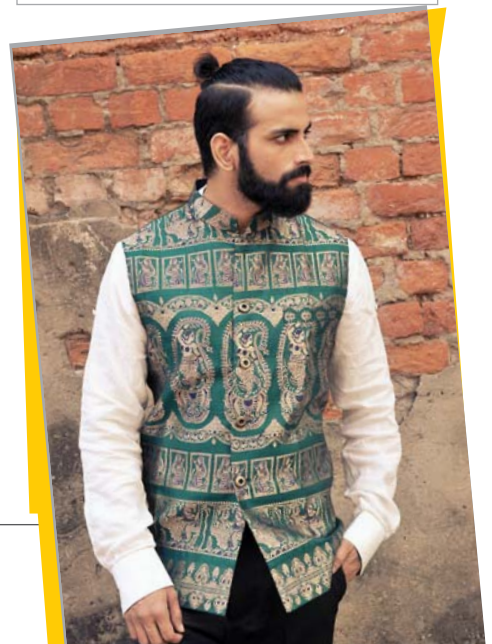
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HANDLOOMS
**REVIVAL OF INDIAN TEXTILES:
THE CASE OF BALUCHARI**

Tantuja, the West Bengal Weavers' Co-operative Society is attempting to revive the original and traditional Baluchari back into the spotlight. We present an overview of the initiatives.

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BLOGGERS ROCKING THE CASUAL WEAR LOOK

Casual looks are always evolving in the fashion industry, thanks to bloggers all around the world. Creating an iconic look off the runway has become as important as that on the runway. Street style bloggers provide all the inspiration that you need to style the latest casual trends. Here are the top 7 times Roposo bloggers who nailed the summer casual look. Get inspired from these bloggers to sport the trendiest casuals in 2017.

By Sushmita Dutta, Fashion Team Lead, ROPOSO



STATE IT OUT LOUD

Naina Ruhail of *Speak What You Love* is bringing the feminist crowd together with this statement making t-shirt dress for the summers. Take a hint from her style game and pair your longline t-shirt with denim shorts and high top sneakers. Sport a dark lip and round frames to pull off the casual look.



BRING BACK THE '90S

Malvika Gupta from *Style on Wings* sporting a one shoulder top with an uber cute pair of denims is the look we all want to follow this summer. Cute and quirky prints are very summer friendly, and a must have in your wardrobe. From the choker to the cartoon prints, this is a revival of the '90s fashion.



MILITARY FOR SUMMERS? WHY NOT!

Juhi Godambe knows how to work military's favourite colour for the summers too. She paired her olive green dress with block heel leather boots. The colour palette is quite winter friendly, yet this utilitarian look works well for summers too. Adorned with wide belts, straps and a double breasted look, Juhi keeps the look chic.



LAYERING WITH DENIM

A sleeveless denim jacket belongs in everyone's wardrobe as it can be paired with anything during summers. Blogger Nidhi Kunder, from *The Chic Armoire*, nails the outdoor vibe with her yellow printed dress layered with a denim jacket. She accessorized her outfit with tan gladiators and a colour-pop sling bag. As summer dresses are an everyday necessity, it's best to mix and match with other pieces such as shrugs and maxis, creating summer inspired casual looks.



STRIPE AND PATCHES

Madhura Bhogale nailed the striped look in an ankle length jumpsuit with embroidered patchwork. The vertical stripes add to her height, along with the slim belt which breaks the monotony. Pairing this outfit with nude ankle strap heels, Madhura created a classy and on-trend look for the summers. The patchwork or embroidered feature is also a 2017 trend, donned by almost all street-style bloggers during the fashion weeks.



MATCHING SEPARATES

Shabnam struck a solid pose in her coordinated look with a camouflage inspired print. Her blazer and shorts set were subtly balanced with the white pieces. Adding a neutral white bralette, block heel shoes and a handbag keep the focus on the matching set. Matching only the colour palette is a thing of the past, while selecting a uniform pattern all over is how fashion bloggers are breaking the monotony.



COLOUR THERAPY

While the casual look is about embracing the youth, Samidha Singh from *The Style and More* blog has played around with a range of hues in her outfit. Pairing a floral and striped top with a solid pink maxi skirt is the perfect way to blend colours and prints together in one outfit. Pairing her canary yellow heels with reflectors, she pulled off the street style look with much elegance.

These 7 bloggers inspire us to style the latest casual trends for summer 2017. Whether you prefer to wear peppy colours every day or are comfortable in monotone outfits, these bloggers can show you how!





WGSN BUYERS BRIEFING

KEY FASHION TRENDS FOR AUTUMN/ WINTER 2017-18

Tanya Krishna, Team Images BoF presents
the highlights of Priya Sachdeva's
presentation.

As the industry moves towards Autumn/Winter 2017-18 and retailers and brands are getting ready with their new collections, Priya Sachdeva, Business Director- South Asia, WGSN, shared key insights on the season's key trends in new and carry over items to colours, key details, fabrics, key silhouette and finishes, at the India Fashion Forum 2017. Sachdeva says, "This Buyers' Briefing forecasting by WGSN is done much closer to the season based on not just the forecasting which the company has done already about 18 months in advance, but also based on the catwalks that happen, based on what the bloggers are saying, based on the trend spotters and also based on what the media is talking about. So, it's a recap of the season," said Sachdeva, accentuating the importance of what she was presenting.

KEY COLOURS:

Black and blue for Autumn/ Winter and multi-colour which is a return because it talks about prints which are going to be important for the season. There are also neutrals and pinks which will still be key. Major colours of the season will be:

Baked Pink and Terracotta: Warm up baked shades will be the important colours of the season globally. Also, terracotta will be in trend, which is a fresher option for pink colours. These will look strong on luxe velvet and satin look and will be a key fashion look across categories.

Baked Pink (For Men): Baked pink, which is a toned down version of the pink, is ideally coordinated with cold neutrals and can be paired with denim blues, for men's wear.

Jewel Tones: Jewel tones are seen a lot in India because of the wedding and party season. The key colours which will be in trend are teal, purple cast blues and fuchsias. These can be best used on slim fit dresses, reinforced shoulder blouses and jackets.

Wine Tones: Wine tones can do really well in India and can be a great alternative to black. Wine red can be matched with season's pinks and terracotta tones for some newness.

Wine Red (For Men): Wine shades compliment versatile men's wear darks such as navy blue, black and charcoal greys. The deep red and purple hues give a message of elegance and it can be used in outerwear and knit wear.



Picture courtesy: WGSN



Picture courtesy: WGSN

Deep Red: Deep red tones offer a more sophisticated alternative to the usual bright reds associated with Christmas and party delivery. This is a colour that will work across season along side denim ranges. It will work well with sweaters, blouses and party dresses.

Fire Orange (For Men): In the red palette, fire orange will be the colour for men's wear. It will be an orangy tinged red and perfect for casual outer wear, knits and brings confidence into the season's checked shirts.

Acid Shades: Acidic shades, having an artificial quality, will slowly take hold. This might feel a bit too forward for few customers but it is good for the youth customers, who are looking for an edgy look. For maximum commerciality, one can layer it with a basic colour and with similar silhouettes.

Spiced Yellows: Mustard spiced yellow has been there for a while now. Tonal and head to toe dressing will look the newest in this shade. It can also be paired with baked soft pink tones for a more muted look.

Inky Blues: Blues have always been important for Autumn/ Winter. For this season, inky blues are going to be important. This colour will appear

good in knit wear, outer wear and casual separates.

Intense Blue (For Men): For men, intense blues are the shades and it's a story ranging from deep blues to cobalt. Blue appears good in knit wear and casual separates for men.

Earthed Greens: Earthed green is the next colour that is going to be in trend. Its basically working on an earth palette. Organic shades of green feels fresher evolving the military tones of previous season into something more sophisticated.

Army Greens (For Men): Army greens continue to be an important shade for men. Styling them with neutral shades look really contemporary. For a younger, active market, one can also mix neons, adding a vibrant sporty element to it.

Metallics: Metallic shades have been on the rise and in India as well, this is going to be an important colour to look out for. Colours and finishes which range from commercial matte silver to statement gold with pale lilac shade, adding a newness to it. Minimal decoration will work best with this colour, but one can add ruffles for some extra interest.



KEY ITEMS:

Product and category wise key items that will definitely be trending for the pre-fall 2017 season.

Dresses: Dresses remain dominant as the biggest category for apparel followed by trousers. This is a clear message that there's a shift towards dresses. Also, sweaters have registered biggest increase from the last year. This is the global data based on catwalks. In this category, specifically within this pre fall collection, lengths are going to be really important. Midi, mid calf lengths paired with long maxi are the most relevant lengths for pre fall 2017 and each of them is going to increase.

Soft Midi: Mini and short dresses have suffered in the last season and seem to be dropping down. Looking specifically at the midi, the dress lengths in midis will be key for Autumn/ Winter 2017-18 season, particularly for office wear. Higher necklines will look great for occasion wear ranges while simple round necks and t-shirt dress styles will be more important for a sporty or youthful customer. Cotton and chiffon fabrics can be used for a softly draped look with asymmetric hemlines and volume sleeves. Slits can be used for party wear collections.

Ladylike Tea Dress: A ladylike tea dress is really graceful and is very important for the season. Its cut quite high waisted to accentuate the silhouette and one should try it in dark brown, floral and quirky geometric prints for the right look and one can also use embellishments on it.

Fit & Flare Dress: Fit and flare dress has been trending well and has the potential of going forward. This can be in both soft as well as structured design. Opt for a silhouette to update

commercial items such as shirt and lace dress with hemlines ranging from just above the knee to midi. One can also opt for deep V design for a more layered look.

Skirts: In skirts, asymmetric, vinyl, A-line patterns and pencil styles will be prevalent.

Soft Asymmetric Skirts: These are going to be an important item for the upcoming season. In skirts, try folds and subtle ruffles and midi/ mini length shapes, which are working well across various categories like career wear to party deliveries.

Vinyl Skirts: These are already making an impact at retail this season and will undoubtedly return for Autumn/ Winter 2017-18, as customers are becoming familiar with patent and glossy finishes. It's a little directional for India but celebrities now have well adopted it. A-line minis and knee length skirts are most commercial interpretations for the vinyl skirt.

Opulent Pencil Skirts: The pencil skirts will see more of rich jacquards and brocade fabric, which are in floral, animal or Asian inspired scenery. So, there is a lot of inspiration from interiors which is happening in apparels now.

Trousers: Taking a look at trousers, there will be a much varied selection of styles coming through as customers are becoming more receptive and experimental with the trouser silhouettes. Cropped lengths are dominating and the straight legged are the newest shape. But the interesting shape that is coming up is the cuffed trouser, which is not sporty as it should be but is more formal and is coming into regular wear category.



Picture courtesy: WGSN

Straight Trousers: Straight legged trousers are coming back to become a wardrobe staple and is a great alternative to the wide legged trousers. They use stretchy cotton or wool blends, either shortened just above the ankle or featuring front slit.

Cuffed Trousers: Cuffed hemlines will emerge as one of the newest updates spotted across a variety of styles from front pleat chinos to leather carrot leg shapes. These work equally well as casual styling and for dressier look.



Picture courtesy: WGSN

Pleated Trousers (For Men): In men's wear segment, pleated trousers are becoming more voluminous at the thigh area. Its tapered trousers with a little tailored look, but with baggy style and this will act as an alternative to straight trousers.

Leisure Suits: Leisure suits will become very important as athleisure and will be an important trend globally. Suits will now have additional details including elasticated waist, drawstrings and patch pockets. One can coordinate it with casual separates, to complete the overall tailored sports theme.



Picture courtesy: WGSN

SWEATERS:

Apart from dresses, skirts and trousers, sweaters will be a key item for the season. Few important trends in this category are:

Friiled Knit Wear: This is a key trend in sweaters. More of ruffles will be seen in Autumn/ Winter 2017-18 and this will

continue to be a trend in the next season as well. This trend of ruffles will be accompanied by fitted silhouette, to give it a trendy look.

Volume Sleeve Sweater: The volume sleeve sweater is another interesting trend for the season. In this, bell shaped sleeves add volume with dropped shoulders giving it a relaxed feel.

Technical Sweat (For Men): Coming to men's wear, bonded jersey and neoprene add a futuristic appeal to the sweatshirts. The differentiation is that one can use taped seams, reflective fabric and waterproof zips for a tech look. One can also use quilting to add a protective element so it has a fashion element as well as it protects the user.

Cut & Sew Roll-Neck: Another important trend for men's wear is cut and sew roll neck. For jersey wear and fine gauge knits, mock necks and t-shirts add a modern retro look. Black or white versions can be used for multiple layering. But one can also use rich jewel tones paired with tailored look for a more formal appearance.

JACKETS:

Coming to jackets, finally the blue zone in the biker jacket is moving out and they are making way for newer silhouettes. The most notable trend story is the military jacket from casual shapes to dressy band stand jackets. The blazer is the lead silhouette with oversized proportions as an important feature. Some of the key trends in this category are:

Oversized Blazer: The oversized blazer will be an important fashion item for 35+ ranges. One can use it for high low styling. Men's wear inspire double breasted or one and a half breasted blazers which also give a new look.

Military Jacket: Military jacket has seen a trickle down from designers such as Burberry, Givenchy and LV. Vintage

inspired jackets are seen in abundance across editorials and fashionistas. Admiral jackets have a dress up box quality and more subtle interpretations can be simple actions like piping, gold buttons applied to navy blue pique coats and jackets.

Contemporary Military Coat: Tailored coats will also be important this season. Focus on clean and crisp silhouettes with exaggerated details such as oversized pockets and belts will be in trend. Long line slim silhouettes will define this category with a classic palette of army green, midnight blue and black.

Oversized Lapel Coat: Wide lapels raise the classic look even further. This look is not about oversized and men inspired shapes, but instead focuses on large statement lapels for regular sized silhouettes.

Satin Duster: These will be important for a little bit directional customer. It is both shiny and in matte finishes and is a transitional range which means that one can wear it in seasons which are not purely Autumn/ Winter but somewhere in between. This is a versatile and travel friendly item, occupies minimal space and still has a dressy look to it.

Knitted Tee: Knitted tee is interesting because it has been worked in different manner. Knitted tee and fitted silhouette provide a dressier option to simple jersey tees, particularly for layering. Styles include short and three quartered sleeves, contrast collars and retro striped details.

Sportif Anorak (For Men): Coming to men, Anorak is a key style element but this is made slightly different with colour blocking which will be important for the youth market. Also try pops or vibrant colours, half zip necks, draw cord trims and pockets for activewear feel. One can also use technical wool for an updated look.

>

FABRIC AND DETAIL:

The fabrics and details in apparel which are important and are trendy for the season are:

FABRIC:

Lush Velvet: Lush velvet has shown a whooping increase year on year across apparel in the global market. Retailers are increasingly pushing this typical party wear fabric into everyday styling.

Vinyl: Vinyl is another fancy fabric which can be used in a more casual context. It is again driving home high low aesthetics of the season. Pair vinyl with casual themes and items to balance the look.

Ladylike Lace: Lace quality with a vintage flair invents the dress code this season. Almost opaque constructions appear contemporary and asymmetrical in panel dresses. One can also add frills for a more heritage charm.

Casual Brocade: Brocade is coming back again in trend. In keeping with the old increasing trend towards category

mixing, opulent brocade is showing up on bomber jackets and hooded coats. Floral, paisley and furnishing patterns are seen with metallic threads and colours that are dark and metal tones.

Flat Wool: Flat wool is another fabric that is coming in the market. Flat wool has a contemporary look. Keep minimal embellishments to preserve the understated luxury tone of the fabric but consider double face large lapel look for coats and jackets, for higher price points.

Flat Wool (For Men): In men's wear, flat face wool adopts a modern approach. Minimal embellishment is going to be crucial to keep the luxurious look of it.

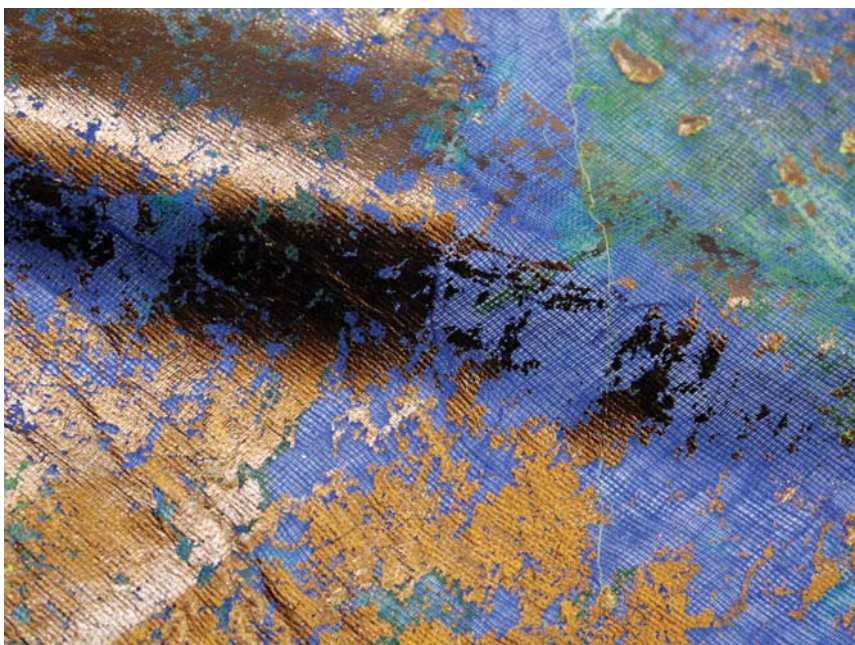
Satin: Satin is already important for dusters, for soft midi dresses and woven blouses. One can use silk or polyester satin with simple contemporary shapes



Picture courtesy: WGSN

both in high sheen and matte finishes. Use raw hemlines for juniors and the premium category. Hemlines of trousers and dresses and shirt cuffs are left unfinished and this unfinished look with satin would be a new trend for the season. Its almost like the DIY look to counter balance the very luxurious feel of the fabric.

Sweet Sequins: Sweet sequins will do well in India. Try detailed sequined formations and cascading borders on



Picture courtesy: WGSN



Picture courtesy: WGSN

sheer organza and chiffon and pastel shades for a trendy look.

Plisse: Plisse is another fabric detail which is going to be important. Commercially, this is interpreted in cropped wide legged trousers and simple tops but can also be used for dress category. This is a look that works very well across contemporary and party wear ranges and can also be translated into jersey and knit wear ranges.

DETAILS:

Poppers: Having made a quite return on pants and button down skirts, are popper fastenings. These work very well on silhouettes like duster and trench coats, simple dresses and blouses. Use on side helms, on backs and shoulders for a trendy look. One can also use micro buttons on sheer blouses and lace dresses.

Outsized Detail: Outsized details or the really big detailing of either the belt or button or the strings across hoodies,



Picture courtesy: WGSN

jackets and outer wear are also going to be an interesting element that one can add and this is also key for accessories and footwear.

Statement Pocket (For Men): In men's wear, the trend will be the statement pockets, functional flap pockets and enlarged pockets reinforcing the clean work wear look.

Tape Ties: Tape ties continue to compliment contemporary shades. Another detail is the feature sleeves - long straps and drawstring cuff designs of tops, jackets and dress sleeve as a decorative detail and also as a control sleeve volume. Sleeve straps are also

going to be important. Use different colours and different material options for an outstanding detailed piece.

Dynamic Taping (For Men): For men, sports taping and monochromatic tones will be important. It's a different element and will very well go with the casual market. Infact, one can consider doing a logo tape, a great branding detail for brands. Taping is also making its way into tailored outer wear giving it a more modern sporty look.

Ruffles & Folds: The appetite for ruffles doesn't seem to be slowing down. It firmly remains as a favourite detail across all product categories.

Split Sleeves: Split sleeves and cold shoulders have already become popular and an update on that can be seen on both the shoulders and cuff level. Upper slits evolve from popular cold shoulder look while cuff splits range from just below the armpit to wrist to below elbow cuts. You can also update the look with layered options and introduce pops of bright colours.

Drop Sleeves: Drop sleeve is an updation to the cold shoulder silhouette, are subtle, cut out to just below the shoulder. Shoulder remains fully covered while sleeves are cut out and joined back by buttons. This is a look best suited to occasion wear, for the contemporary market.



Picture courtesy: WGSN

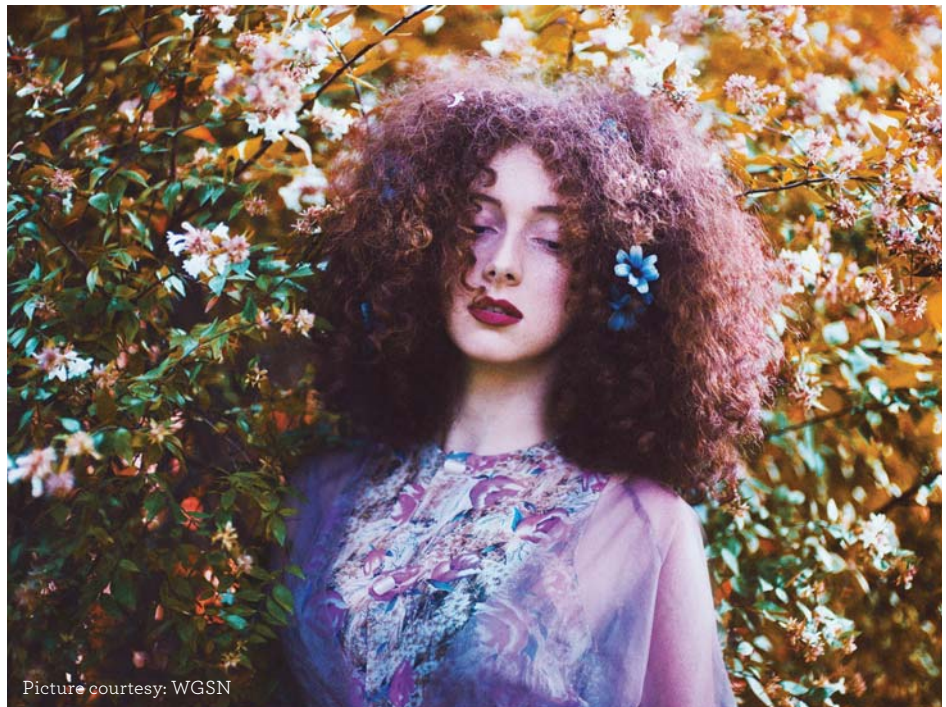


Picture courtesy: WGSN



PRINTS AND PATTERNS:

Coming to print and patterns that are going to be relevant, its a strong season for print and return of the lady like dressing. The major prints that are going to be prevalent are large florals, stripes, plaids/ checks and bitsy. While bitsy florals have grown more than just floral prints. From stripes followed as bold bands, the next trend will be of reduced slim lines or stripes.



Picture courtesy: WGSN

Sartorial Checks (For Men & Women):

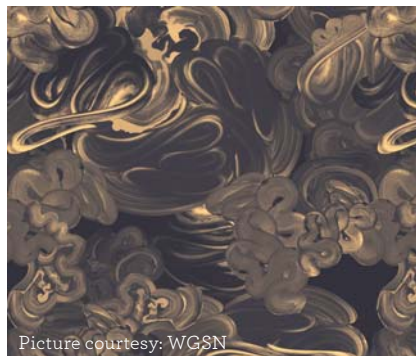
Sartorial checks feel new and will be in soft powdery or washed out look. These can be used across blazers, outer wear blouses, dresses and volume trousers. Key colours in this print will be baked pink, winter terracotta and wine tones as well as grey and beige, which is classic.

Faded Checks (For Men):

In terms of category, the highest percentage of plaids and checks include tailoring followed by coats and then shirts.

Winter Prairie: The next important print is the winter prairie. Florals continue to gain traction and reinvent themselves season after season, remaining at the core of the current retail offerings. Prairie and motifs with darker bases are prevailing. Try dry botanicals for a fresher prairie inspired look.

Bar Code: Bar code, that is, the vertical stripes almost has a grown up attitude. Bold bands are replaced by slim lines in a subdued monochromatic palette.



Picture courtesy: WGSN



Picture courtesy: WGSN



Picture courtesy: WGSN

Fine Stripes (For Men): Graphic splicing and stripe mixing are key techniques to use and narrow stripes work good for men's wear as well.

Miniature Repeats: Inspirations from interiors continue as designers look to vintage tiles and wallpapers to design this season's geometric prints.

Retro Geos (For Men): Softer geometrics are used for men's wear.

New Skins: Skin prints are in trend with more vibrant colours and are more abstract. The looks could be as leopard skin, zebra or snake skin. But consider this look to evolve stylized stripes in marbled organic print.

Hyper Florals: Hyper florals are the key prints and offer a slightly psychedelic look to the overall piece.

Band Tee Updates: The band tees are enjoying a good commercial success, replacing classic band imagery for non-music related motive, including animal and brand logos. Bold colours and 1980s aesthetics run throughout. Pair it up with dressier pieces to counter balance the casual, rock inspired nature of the item.

ACCESSORIES:

There is a lot going on in the accessories segment which include jewellery, earrings, chokers, while its hard to see key items in bags category. Some of the key trends in this category are:

Minimal Maximalism: Minimal and maximal is running side by side this season with refined shades and details being transformed by outsized proportions. The buckle emerges as a key reference point for accessory design within this theme.

Shoulder Skimming Earrings: These earrings are key with many influential bloggers and editorials heavily backing this must-have item. This is an obvious inclusion in party deliveries and luxury market. But will work for younger markets in more directional twist on smart casual pairing.

Necklaces: For necklaces, the choker is really going strong and has grown almost 4 times within necklaces segment since last year. Within choker, there are many styles, like slogan chokers, etc.

Ring Sets: These are an entire set of rings for all the fingers. Rings continue to be less prominent across collections. However, the ring sets in antique finishes will add an element of interest.

Floating Ring: These offer newness and is appearing in a lot of variety of designs. Large, encrusted diamonds in a floating design will be the key. But one



Picture courtesy: WGSN



Picture courtesy: WGSN

can also do a more minimalistic design replacing diamonds or gems for beads or geometric studs for everyday use.

Hoops: These are tracking really well. Inter-connected designs and classic silver or gold look are going to be the key. Multiple rings can be stacked up and intertwined to create a dangled chain effect using various sized hoops. Try off circular interpretations for evening wear and longer lengths to tie in with the shoulder skimming trend.

Statement Shoulder Bags: The update in this is to use detachable straps transforming hand held and clutch bags into shoulder style. One can also customize these bags with bespoke embellishments.

Top Handle Handbags: A shift away from shoulder styles to these ladylike

top handle bag, which is going to be important for all occasions. Oversized or boxier proportions are going to drive newness in styles along with the introduction of gussets to accentuate this structured shape.

Party Wear Shawls: The embellished shawls are also gaining traction and can be seen styled back with oversized sweats so one can either wear it casually or can wear it in a lot more dressier look. It works equally well with casual styling and party.

Patterned Neckerchief: These are getting popular with a short length scarf tied at the front.



FOOTWEAR:

Few important trends to look out for in the footwear category are:

Decorative Mule: Ornately embellished uppers gain traction for day to evening look with close to uppers filter through as a new fashion style. Block heels continue to uphold wide commercial appeal but the introduction of the new kitten to mid heights will rebalance the category.

Sock-fit Boot: This is an interesting take on boots. Sock-fit uppers take on new identities. Metallic infused fabrics and embellished heels carry the item very well. For a sporty twist, one can use knit design details such as ribbed ankles and breathable vent for a trendy look.

Loafer Boot: Mid heel silhouettes in patent finishes provide everyday appeal while higher heel heights in velvet or suede can be translated for more evening wear.

Kitten Heels: This is going to be important in India. Its an update to the classic styles and comfort is still a very much key message for this footwear and this offers a feminine alternative to the block heels.

Mary Jane: Mary Jane shoe will be seen throughout the season but in more metallic pattern and embellished styles. Contrast coloured constructions, wedge heels, and maximal heel embellishments will add a modern edge.



Picture courtesy: WGSN



Picture courtesy: WGSN

Multi-Buckle Shoe: An update on this is the encrusted heel shoe charms and ornate buckle or there can also be a little bit of embellishments for a dressier look.

High Vamp Pump: It has chunky block heels and these are becoming more mainstream now. The barely-there-heels offer an update to the ballerina shoes. There is a comfort level to it but still dressier enough. It can be used very well for career footwear.

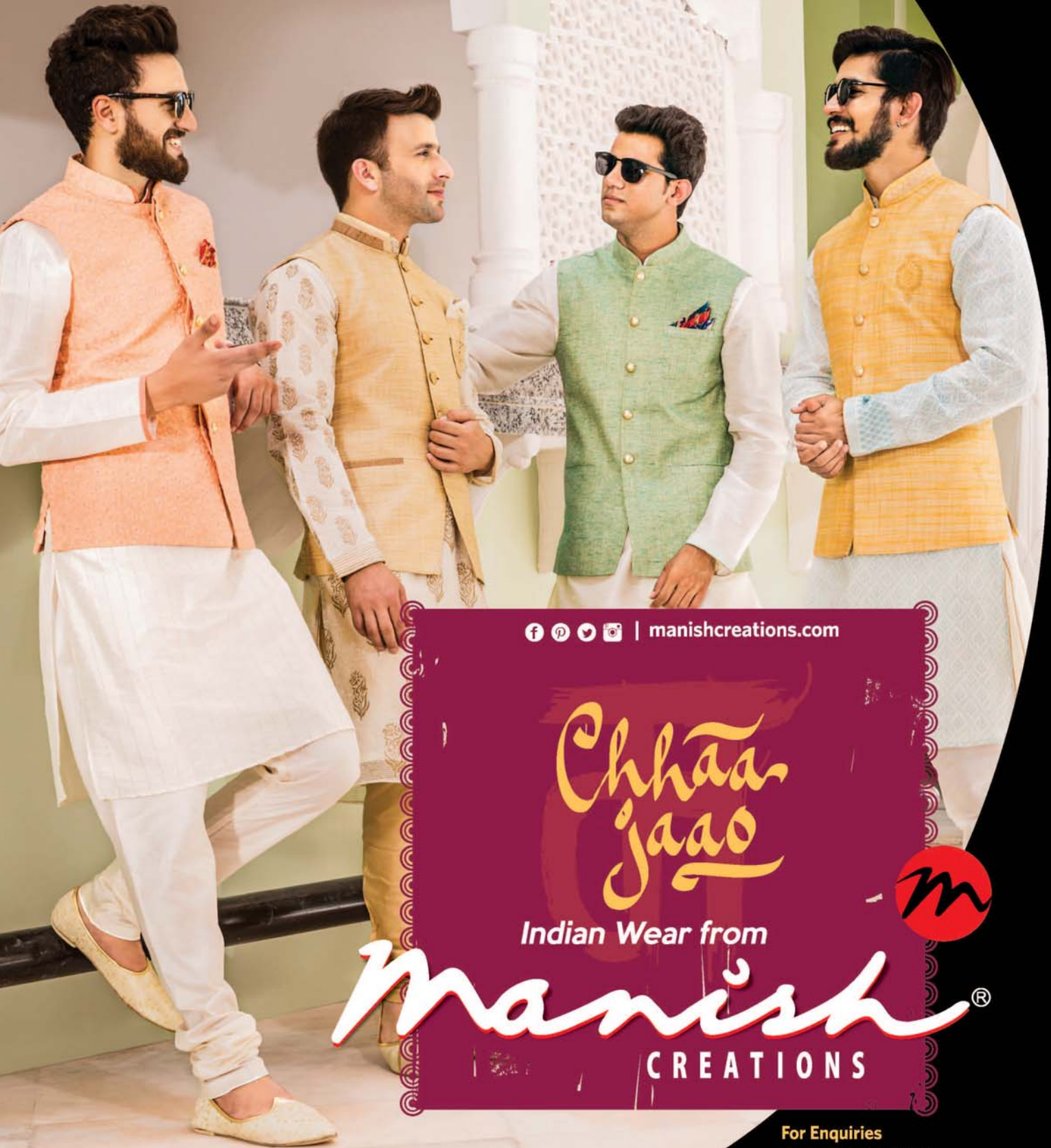
Pearls: We think that these are going to be important for footwear as well as with oversized or exaggerated proportions. The focus shifts away from pearl necklaces towards embellishments whether they are on earrings or footwear. This will be a key detail to develop across accessories for party deliveries.

Piercing: You can incorporate pierced hardware into handbags or into youthful chokers or earrings. This is going to be very important in the juniors market.

Charmed/ Jewel Encrusted: The multi coloured gem embellishment add an edge of eccentricities to product categories, consider removable charms.



Corporate Office
Paridhan Garment Park
Kolkata - 700 015
P +91 33 2323 6060/61



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For Enquiries
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Corporate Office
Paridhan Garment Park
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Anjali Sondhi: +91-9810204297
anjalisondhi@imagesgroup.in

Bhavesh Pitroda: +91-9867355551
bhaveshpitroda@imagesgroup.in

FOR EXHIBITOR ENQUIRIES

North: Vineet Chadha
+91-9350897807
vineetchadha@imagesgroup.in

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

South: Suvir Jaggi
+91-9611127470
suvirjaggi@imagesgroup.in

West: Bindu Pillai
+91-9820324063
bindupillai@imagesgroup.in

West: Waseem Ahmad
+91-9833628852
waseemahmad@imagesgroup.in

FOR DELEGATE REGISTRATION
Sarika Gautam: +91-9717544226
sarikagautam@imagesgroup.in



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ASTORMUELLER COMPLETES 10 GLORIOUS YEARS IN INDIA

With a history dating back over 80 years, AstorMueller is well known across Europe through the exclusive premium shoes they craft, it's flagship brand Bugatti and Daniel Hechter. On the occasion of it's decennial anniversary in India, IMAGES BoF talks to the group about its journey of the last decade, and what it took to dramatically alter the landscape of fashionable footwear in India.

- By Rajan Varma

Headquartered in Switzerland, AstorMueller's journey began in 1928, when Johann Müller, grandfather of AstorMueller Chairman Tim Müller, established the Johan Müller Workshop for bespoke shoes, in Schwelm, Germany. The interesting part of the group's name is that Astor was the name of the company where Tim Mueller's father, Johann Mueller, began working right after school. When he established the company, he included the name Astor, along with his own, for good luck. Today, AstorMueller has a presence in over 35 countries through its shoe brands.

The group is one of the few to consistently maintain double-digit growth in the men's footwear segment and achieve over 50 percent growth in the women's category. The primary reason for the steady growth is the quality inherent in the shoes, and this comes from the processes, systems and adaptability to evolve with the times. "Our vast design expertise ensures that we live up to the philosophy of "when the shoe fits, the foot is forgotten". Consumers know it when they see it and their instincts are reaffirmed when they wear it. Over the years, we have dedicated a lot of effort to keeping an ear close to the ground, while maintaining constant, close communication with retailers. This varied system of intelligence gathering leads to consumer insights as well as market patterns, which helps us adapt and predict changes more accurately," said the chairman of the group Tim Mueller.

Journey to India

The Indian division was set up in 2007 with the country office in Bengaluru. AstorMueller was thus one of the early movers and the first major European shoemaker in the manufacture and export of high-end shoes. Over the years, AstorMueller have contributed immeasurably



to the Indian footwear industry, and have successfully highlighted India's potential as a global manufacturing hub, which is expected to encourage other international brands across varied sectors to follow suit. At the heart of this process has been extensive training, skill-development, and technology implementation towards production of critical European technical components. The group's 'Make in India' ambition has successfully equipped regional supply partners with the latest manufacturing knowhow, technologies, systems and processes, enabling both scale and quality to take quantum leaps.

Today, India is the largest producer of Bugatti and Daniel Hechter shoes for AstorMueller, operating with a network of production facilities in Agra, Ambur, Vellore, Ranipet and Dewas. The group also has two state-of-the-art sample rooms in the country and as of 2016-17, AstorMueller produces 4 million pairs of shoes in India - almost all of which are exported to Europe.

Bugatti

The AstorMueller group's flagship brand Bugatti is regarded as one of the top three fastest growing footwear brands in Europe. Globally, Bugatti shoes are known for exceptional fit and finish, alongside a trendsetting collection. The secret to Bugatti quality are the industry-leading standards maintained across AstorMueller's cutting-edge design and development centres in Germany, Portugal, Romania, Italy, China and India, as well as the superior fit that stems from the AstorMueller focus on quality.

In image studies by the leading trade publication, TextilWirtschaft, Bugatti shoes have been rated among the highest for brand image, out of the 30 top brands in Europe, consistently through 2011, 2013, 2014 and 2015. Tim Müller told BoF, "These studies primarily reflect the opinions of the dealer network in Europe, specifically Germany. When Bugatti is declared as the top brand with the best outlook for the future, it is an indication of not just the brand image, but also retail performance and market growth. What they have said about us each year has continued our resolve to deliver shoes that people love, backed by great channel service. The positive outlook emerges from a multifaceted marketing strategy which begins with a focus on the product itself. Then, it becomes a question of communicating the brand's values from the audience's perspective."

Response in India

Having been soft launched exclusively online in India last year, the brand met with a strong traction and garnered over 1.5 lakh fans on social media within a very short span of time. "A major part of our appeal is that we launched the latest European styles in India at the same time, so we do have select styles from our global collection available in India. We also have an India-specific range for men



and women, specially designed and handcrafted keeping in mind consumer preferences, the climate and other such important considerations,” said Tim Müller.

The brand is for age groups across the board, from the young biker and fashion-lover to the senior urban executive. The Bugatti wearer is stylish by instinct, an achiever by design, enthusiastic and self-assured about life. The target audience includes those who prefer to always dress well and appropriately for the occasion – whether that means the traditionally affluent, the professional rich or the young urban executive. Also, with its affordable prices, the brand quickly appealed to Indians who match lifestyle with reality and everyday living.

The Bugatti collection in India features over 200 styles for men and 80 styles for women in casuals, formals and boots. It is constantly updated with the latest designs from Europe. Many of these styles feature a handcrafted wash-finish, making them truly unique. The Spring/Summer '17 collection features a diverse range of styles, colours and moods, for men and women. It is a strong, contemporary line that includes formal derbies, casual



Uwe Hahn,
Consul/ Head of Administration,
German Consulate, Bengaluru

A special celebration was called for at a private venue in Bengaluru to mark the decennial anniversary. Congratulating the group, **Uwe Hahn, Consul/ Head of Administration, German Consulate, Bengaluru** said, “AstorMueller is the ideal symbol of German-Indian collaboration in an industry that plays an important role in people’s everyday lives. A German company contributing to the development of the manufacturing sector in India, making shoes of the highest quality, is a strong indication of where we can go in the future.”

Tim Müller, Chairman, AstorMueller, commenting on the milestone, said, “From the beginning, we have only used the finest materials carefully chosen and sourced from around the world. The objective is then to combine these materials with our own design expertise and technical knowhow. Finally, with the craft-making tradition that India is famous for, we craft our shoes to a state of perfection. We proudly say we have Indian DNA.”

moccasins, sneakers, pumps and active lifestyle wear. It’s a collection that has something for everyone.

The brand has also added a new collection called ‘Athleisure’ – an extension of its casual lifestyle category, which has carved out a niche for itself. The Athleisure collection makes a strong fashion statement and is well-built for an active lifestyle.

As a brand, Bugatti is uniquely positioned to fill a void in the premium space, offering the bespoke quality of a designer label, along with exceptional value. This segment is growing at 30-40 percent per year, and is clearly set to be the most important one in the Indian market in future. “Indian consumers are developing a distinctive fashion sense of their own and are more independent in the sense that they largely put personal preferences above perceived global trends. Moreover, most of the global bigwigs have already established themselves in India and a fair section of Europe and America are fully set to launch themselves too. The

growth rate is indeed promising and we expect it to remain on the upswing,” says Tim Müller.

Growth wise, over the last two years, the brand has taken small steps with the aim of understanding the retail system and the way consumers interact with it. There have been a few roadblocks, as growing brands are likely to face, but overall, the brand’s presence so far has been productive and positive and if Tim Müller is to be believed, Bugatti would “definitely like to have mono-brand stores as part of the distribution channels”.

The brand also is vying at expanding its retail footprint in tier-I cities across all retail channels. “We intend to make our presence felt especially at high streets, premium malls and shop-in-shops at major departmental stores and multi brand outlets. We are currently working with retail partners who understand the potential of the premium segment, offer latest fashion trends to their consumers and recognise the strength of the Bugatti brand,” says Tim Müller.



NEXT ISSUE

THE BIG DENIM SPECIAL

WHICH WILL BE LAUNCHED AT INDIA'S BIGGEST TRADE FAIRS



According to surveys almost 50% of the global population wears jeans at least once on any given day. **JEANS ARE TODAY UBIQUITOUS. THEY ARE THE FOREMOST GLOBALLY PERSASIVE FASHION CATEGORY. But why exactly are jeans so big? Why are they the obvious No.1 choice of the world?**

While we know the history of jeans, but we cannot directly credit their global popularity merely on the jeans being an American icon. Jeans have since come a long way.

Jeans grow more comfortable with wear and have also adapted wonderfully to becoming much more softer and more intimately individual to a wearer with fit variants, fiber and finish innovations, distressing, customization, etc. With such great virtues, they have also become the default mode for people uncertain as to what clothes to wear.

The modern consumer is essentially looking for ways to feel and look better about themselves and about the world, and, if jeans continue to help them do so jeans will survive. Jeans manufacturing processes today stand accused of resource wastage, damage to the environment and exploitation of labour.

The greatest challenge before the denim industry today is whether it will continue to stand for a better world. We explore this critical subject and many more in the July 2017, Denim Special issue.

Some highlights of this blockbuster issue...

- Lead Research on the Indian Denim Market. Its Size, Segments & Key Market Trends
- The relevance of denims today
- Impact of Sportswear & Athleisure
- Denim Sales in Physical versus Online Stores
- Penetration of denims in Tier-III, Tier-IV cities and rural India; kidswear and 45+ age brackets
- Women's Denims
- Current Trends and Preferences in Denims
- Denims Fashion Forecasts 2017-18
- Emerging Vistas in Perfecting the Fit
- Latest Innovations in Denim Fabrics
- Prospects in Blended Denims—Silk, Khadi and Wool Denims
- Latest trends in Effects, Finishes, Trims, Accessories and Embellishments
- Sustainable Denim Production
- Customization in Jeans
- Great Denim Stores - Case Studies
- Industry Talk — India's top Denim Brands
- New International Denim Brands in India
- Top Denim Fabric Companies.

Also in the issue:-

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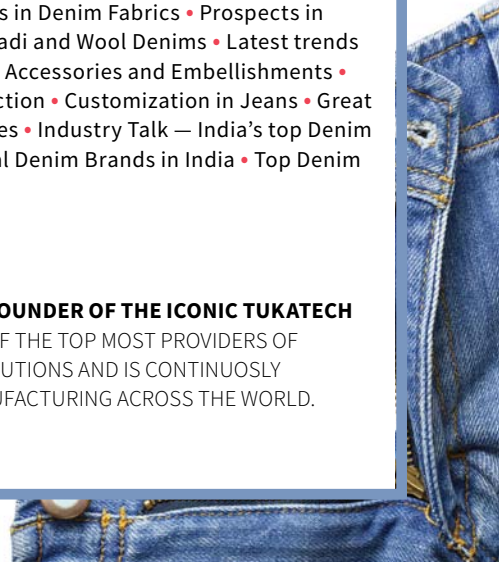
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REVIVAL OF INDIAN TEXTILES: THE CASE OF BALUCHARI

Tantuja, the West Bengal Weavers' Co-operative Society is attempting to revive the original and traditional Baluchari back into the spotlight. Presenting an overview of the initiatives...

-By Jahnvi Popat

India, symbolic of a chalice overflowing with cultural diversity, is abode to an impeccable assemblage of traditional textiles and craftsmanship. Whether it is the Kanjivaram sarees of the South, Pashmina shawls of the North, Bandhej sarees of the West or Baluchari sarees of the East, Indian weaving skills are unparalleled and revered across the globe.

With India's colonization by the British in the 18th century, the selfish western influence manifested in the gradual decline of the traditional textile and clothing industry which not only displaced thousands of artisans but also threatened the rich art of weaving to extinction. The need to revive these traditional handlooms is further accentuated in an era of globalization and urbanization. This call is being addressed by many fashion designers and it is led by the Modi government with the *Make in India* initiative.

One such call is being addressed by revival of the Baluchari sarees which are exquisite handloom silk sarees where the motifs too are depicted in silk. The use of zari in the silk saree transforms the name to Swarnachari. Its specialty lies in the design of the pallu or the aanchal, border and buti on the ground and the purity of the raw silk.

Baluchari sarees can be thought of as a textile narration of the social and cultural environment prevailing in Bengal. The five metres of textile was and is more than a piece of clothing it is a threaded capsule of the Indian culture and social circumstances.



Malla dynasty, there was no turning back. Baluchari was back on the textile map.

A reason why Bengali art was revered in a unique fashion was its openness to the adoption and articulation of this new mass produced imagery, which deviated from the comparatively closed and repetitive artistic conventions in most parts of India which had brought about a certain degree of stagnancy and decadence in pictorial expression. For artists in Bengal, the absorption of modernity did not signify the degeneration of tradition but its consolidation. This led to the widening of the repertory of images and therefore their language of expression. The motifs on the pallu are proof of this. Motifs like these do not appear on any other type of textile, anywhere in India.

Clearly, India cannot afford to lose such a prestigious skill and heritage. The concept of revival of Baluchari needs to be redefined.

The origin of the Baluchari sarees can be traced back to the 16th century when a group of experienced weavers migrated from Varanasi to Bengal and settled in Baluchar village in Murshidabad. They weaved beautiful designs on silk fabrics mainly used as sarees - exclusively patronized by the Nawabs and other members of the royal household. With the abolition of the Nawabs and the imposition of British rule in Bengal, Baluchari perished due to a low level equilibria. The demand directly declined with the declining royal support as the sarees were too costly for common people. On the supply side, the Baluchar weavers kept the skill confined to their community and shifted jobs to sustain livelihood leading to skill extinction.

After independence, around 1956, Baluchari was reintroduced in Bishnupur in the district of Bankura due to the initiative of Sri Subho Thagore and Smt. Kamala Devi Chattapadhyia. Once Bishnupur became the capital of the

Defining the revival of Baluchari in its own way, Tantuja, the West Bengal Weavers' Co-operative Society is spearheading a revolution in the traditional handloom segment. In addition to marketing handloom sarees in their 83 showrooms and e-commerce through Flipkart and Amazon, Tantuja became the recipient of the National Award for Marketing of Handloom Products, 2015 from Ministry of Textile and the 'Best Turnaround Story' by India Retail Forum 2016. Focussing on bringing the original and traditional Baluchari back into spotlight, it has opened numerous stores specifically devoted to Baluchari, the flagship one being in Park Street, Kolkata. A project on the revival of Baluchari is also under operation, where 7 weavers from Bishnupur weave the original Baluchari, using the meticulously time taking

>



The concept of revival of Baluchari needs to be redefined. More initiatives are required both by the private and the public entities to ensure that India does not forget its traditional and aesthetic skill and roots, in an age of the pervasive western influence.

As Roy explains the various challenges of this journey of revival, it is understood that there exists both supply and demand side obstacles. The demand side comprise of the dwindling demand for traditional textile and the fact that Baluchari isn't a daily wear textile product. The supply side issues are extensive and demand attention. Intrusions and cheap selling of the Mahajans under which the weavers work, non availability of adequate credit and quality raw materials at reasonable price, primitive method of dyeing and inadequate marketing network, are a few of them.

Jala technique. The 21st century Balucharis, more than often, have parallel panels of motifs, saving up on labour hours.

Tantuja seeks to make this project of revival not only a socially desirable one but also an economically viable operation.

Passionately devoted to preserve this Bengali artistry, Tantuja has adopted a modern outlook to Baluchari too. It has collaborated with designer Abhishek Dutta, to attend to the dwindling demand of Baluchari, something which is bought only during occasions and festivities by women, and 'usually not owning more than two or three', as remarked by Rabindranath Roy, Managing Director, Tantuja. This has resulted in a collection, never seen in recent times. It comprises of jackets, kurtas, lehengas, dhoti pants, bags, wallets, ties, jackets not only for women but men too. The economic pricing aims to satisfy the upper middle class, which will also fulfil their artistic fervour.

Other aspects of their project on revival include technological upgradation and establishment of yarn banks in the Bishnupur Cluster, opening more outlets devoted solely to Baluchari, collaboration with NIFT and Cluster Development Project of the Government of India. Hence, there exists a comprehensive outlook and approach addressing all the demand and supply side issues.

While one cannot promise a fortunate result with utmost surety, Tantuja has taken a step towards a seemingly right direction, accepting a modern outlook but not compromising on the originality of the Baluchari sarees. More initiatives are required, both by the private and the public entities to ensure that India does not forget its traditional and aesthetic skill and roots, in an age of the pervasive western influence.



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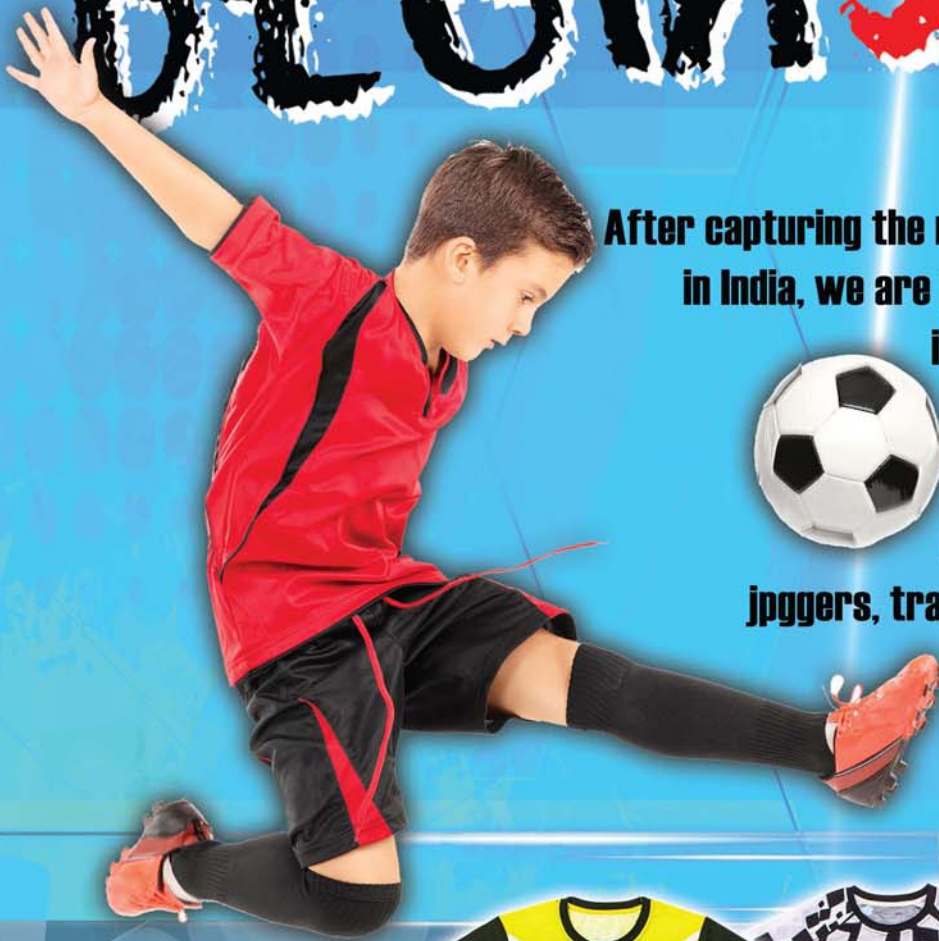
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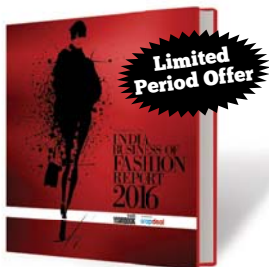


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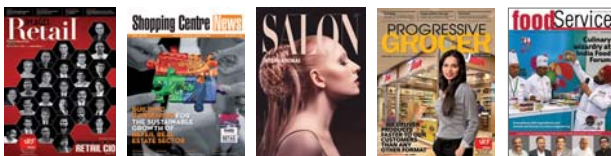
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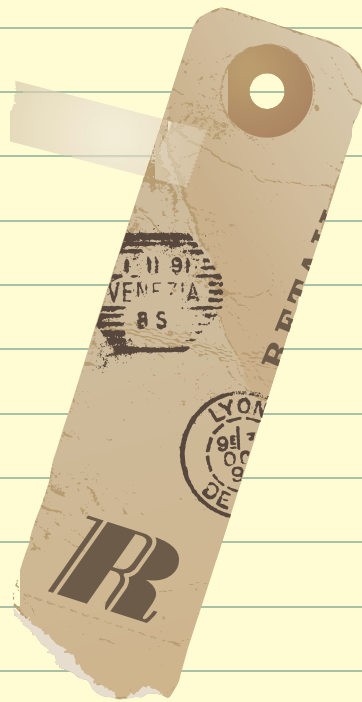
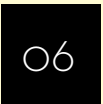
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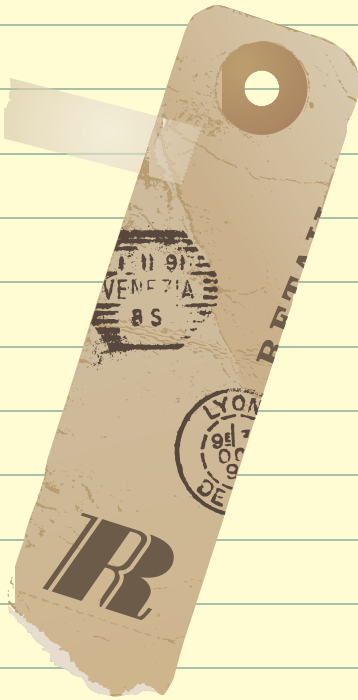
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