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Issue No.

BUSINESS OF FASHION

July 2017

Volume XVIII // No. 7 // ₹ 100

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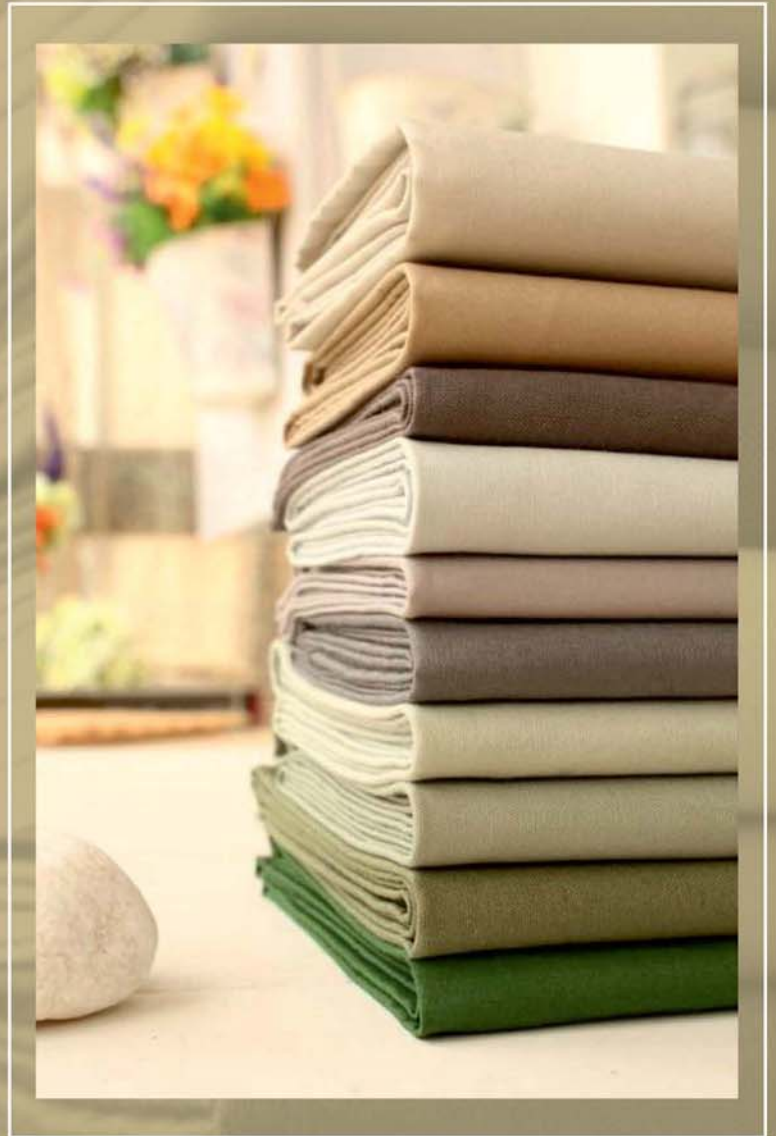


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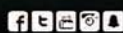


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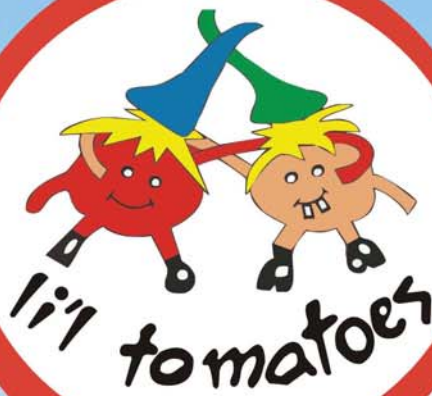
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Dear Friends,

Greetings and a warm welcome to my personal favourite issue—The Denim Special. No other issue inspires more enthusiasm in me (and surprisingly my team too) than the denim issue. It's fairly apparent by the size of the issue too - 352 pages of just denim. It was a lot of hard work and the entire team enjoyed every bit of it because we love jeans. Yes, we all do! We slide into our favourite pair of denims and we feel at home as it moulds onto our body shapes. Personally, I wonder sometimes if my favourite pair of jeans is actually my spiritual partner.

From the ranches and work floors to evolving into a symbol of youth rebellion to being the forerunner of the global casual wear revolution, denim has traversed some interesting trajectories. Since the early 1900s the garment has been continually experimented upon and subjected to bountiful styles, cuts fits, and finishes. Recently, the only sustaining factor has been it's burgeoning dominance over wardrobes across the circumference of the globe, irrespective of gender and age.

Even in India, where western wear has traditionally been a prerogative of men, denim's penetration into the wardrobes of women and kid has been extremely impressive. And, true to the latent potential, as Technopak outlines in the lead research story, the women's denim market in India is growing at an astounding CAGR of 17.5 percent in contrast to the men's segment that relatively lags at 14 percent. In the women's denim trends article, a slew of experts

unanimously agree that it's one of the fastest growing markets of modern times in India.

Along with the core articles dedicated to market sizing, trends and spotlighting what popular brands of the segment has to offer for this season, we have introduced a new section — the IFF Innovation Crucible that encompasses a host of novel features including an exclusive interview with Ram Sareen of Tukatech opening up about the tech giant's expansion plans for the SMEs of India, G-Star Raw's innovation in deconstruction RAW denims and Patagonia's organic and sustainability based denims.

The fashion creation section highlights the efforts, innovations and plans of the unsung heroes of the Indian denim industry — the denim fabric manufactures of India. Also in the section is KVICs attempt towards popularizing Khadi denim among the youth in India.

Across the issue, I am also honoured to share the works of numerous committed and thoughtful people like Meher Castelino, exclusive fashion forecasts by Trend Council, and lots more.

I thank and congratulate all the contributors, participants and the entire BoF team for bringing out this mammoth of an issue and I hope you enjoy it as much as we enjoyed making it for you.

Cheers !!



Amitabh Taneja

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ADVERTISER'S INDEX

11	RED RIDING
12	MASH UP
13	DEAL JEANS
14	VAMI
15	HORIZON
16	HATSOFF
17	CHASE
18	BONJOUR
19	POISON
20	LOTUS JEANS
21	ZOLA
22	SKECHERS
23	FINGERCHIPS
24	KRUNCHY
25	MANYAVAR
26	MOHEY
27	VALA'S
28	DERMAWEAR
29	IRONY
30	ARVIND
31	LI'L TOMATOES
32, 33	CALLINO
34, 35	FOCUS JEANS
36, 37	STRANO
38, 39	EQUATION
40, 41	MANISH CREATIONS
42, 43	SABHYATA
44, 45	MILAN ETHNIC
46, 47	MAYKA
49	SUPERSOX
50	ORION MALL
53	CLONE MANNEQUINS
54	MEXICO JEANS
57	CRUSOE
58, 59	WERT
60, 61	SHASHWAT TEXTILES PVT LTD
62, 63	PINK N PURPLE
64, 65	ZILLIAN
66, 67	INFINITI
81	YKK
85	BODYCARE
87	CANDY SKIN
89	FRAGRANCE

93	BODY X
99	NUMERO UNO
105	GIRLISH & ARK
107	BADBOYS
109	LIVA
111	E2O
113	CITY GIRL
114	LAABHA
115	INDIARETAILING.COM
123	BLACK PANTHER
124	BLACK PANTHER
125	BLACK PANTHER
126	BLACK PANTHER
127	BLACK PANTHER
128	BLACK PANTHER
129	BLACK PANTHER
137	ALCIS
141	SARA J
145	JACK & JONES
147	LEE COOPER
149	ONLY
151	LEAGUE
155	MERINO
157	CELIO
159	APPLE EYE
169	PARX
171	PUPPET NX
173	SHERIFF
177	FLACON
179	HARD CURRENCY
181	STRIDE
185	ARCHROMA
187	TANTRA
193	WELCO
195	LYRA
203	VALENTINO
205	NOVIO
207	NO ERROR
209	GO CONNECT
211	CAMBRIDGE
215	JHON MAJOR
217	ACCESSORIES SHOP
219	UFO
221	TURTLE

Cover on Cover
RIVER BLUE

Front Gate Fold
ROCKSTAR JEANS

Inside Cover
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LEEGEND & CAESAR, ETEENZ,
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Inside Back Cover
INDIAN RAYON

Back Gate Fold
TWILLS

Back Cover
OK BOYS

Inside Gate Fold
PANAM, AFOX, RUFF, COOL
COLORS, YASH FAB RISHAB
APPARELS, MONZA, PUFF

223	SUNNEX
225	HOFFMEN
227	CDF
229	TEXAS
233	SPARK
235	ROOKIES
237	KK FASHIONS
239	AEROMAEN
241	ELAINE
243	MATCHLESS
245	ARCHROMA
247	ORIGIN
249	AWAACS
251	MERCHANTS
253	KIVON
259	DARE JEANS
261	CAA
263	SIGA
274	CENTURY DENIM
289	DEEP BLUE
291	RAM VIJAY
293	SAFEXPRESS
308	IN NEXT ISSUE
329	GMWA
333	IRF TRUSTED
348	LIVE WIRE
349	RECADO
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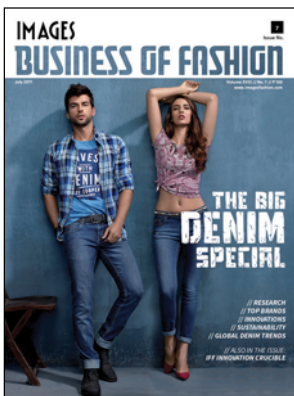
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CAMPAIGN
- >> ROADSTER'S EXPERIENTIAL
STORE



FASHION BUSINESS



Cover Picture Courtesy: Lee Cooper



STORE WATCH
ROADSTER: PIONEERING EXPERIENTIAL RETAIL IN INDIA

Designed by Restore, this first-of-its-kind store in India offers a seamless online to offline experience to the consumer. The road comes alive on a video wall.

Pg No.68

SHOW
Garment Show of India Vouches for 'Make in India'

The NCR hosted the Garment Show of India, a B2B exhibition that connects the apparel retail industry of India, at Pragati Maidan. A report.

Pg No.92



MERGER
Huntsman And Clariant : Two Giants that Impact Denims Announce a Merger of Equals

US based Huntsman Corp and Switzerland's Clariant AG combine to create a \$ 14 billion chemical powerhouse.

Pg No.88



CAMPAIGN
Lacoste Announces A New Ad Campaign: A film called Timeless

Lacoste, a fashion brand by tennis legend René Lacoste, releases its new campaign which emphasises on brand history and symbolism.

Pg No.90

RESEARCH
The Indian Fashion Apparel Market- 2016 and Beyond

Team Technopak sizes the Indian fashion retail market, its key categories and analyses the current and future growth prospects and trends, in an exclusive report.

Pg No.70




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Black Swan Life

A man with dark, curly hair and a light beard is sitting on a white wooden stool. He is wearing a white short-sleeved t-shirt with a pocket on the left chest, a necklace with a dark pendant, a black watch on his left wrist, and blue and white patterned pants. He is also wearing white sneakers. The background is a solid teal color. The text "LIFE BEYOND" is in large black letters, and "limits." is in white lowercase letters, positioned over the man's torso and right arm.

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ROADSTER

PIONEERING EXPERIENTIAL RETAIL IN INDIA

'The Roadster Store', the first-of-a-kind retail store in India, designed and executed by Restore offers a seamless online to offline experience to the consumer. The state-of-the-art design allows the customers to just walk into the store and see the road come alive on a video wall. Co-Founder and Director Lisa Mukhedkar of Restore, spoke about some highlight features of the store to Images BOF.



Myntra's first offline store for one of its in-house brands, Roadster, opened its doors to treat shoppers to a pioneering experience. The first impression of the difference of the Roadster store is, the clearly visible technology. But, the idea of that experiential store runs deep. It stands on the solid ground of creating an unforgettable experience through design and technology.

Roadster is among the top choices of denim aficionados when it comes to apparel, footwear and accessories. The brand is modeled on an outdoor life style. When Restore created the Roadster store, it was with a singular purpose of giving the shoppers an experience like never before.



The customer experience design and the design of the space, which resembles a garage, form a symbiotic relationship and create the desired experience. While the space design brings alive the brand's identity, the customer journey helps the shopper immerse in different aspects of the brand and do much more than just shopping.

'The Talking Store' moniker of the store comes from the larger than life LED façade, which is the store's voice. It transforms into a medium of communication, information dissemination and inspiration for customers. The primary focus as you enter the store is the product, technology just enables and ensures a seamless interaction. The digital displays on the left side of the store are much more than endless aisles, they have the brand ethos in them. Shoppers can plug in and know more about the different collections that are displayed in the adjacent hotspots.

Restore recognized the need of the brand to tell its story at a very early stage. The video wall along with the multitaction table at the cul-de-sac of the ground floor primarily does that, but does not stop there. The video wall is a mirror display of the multitaction screen, a technology which is a first for an Indian retail store. The multitaction display gives a greater opportunity for the shopper to immerse in the brand. Shoppers can watch how the denim apparel is made, select apparel based on the destination they are travelling to and

also get a discount. The adjacent 'Denim Bar' showcases the best of Roadster denim apparel. The shoppers can know more about different washes, cuts and stitches of Roadster's denim catalogue. A complete experience of the brand by design and technology.

The move to the first floor has many visual elements to continue the conversation between the shopper and the brand. The first floor is a product intensive area, but not short of unique experiences. Bespoke design elements that express the brand's individuality are integrated in the space. From hotspots to fixtures, the store design is immersed in the brand's soul.

The Croma screen or green screen technology at the selfie zone separates it from the others. Restore wanted to gift the shoppers a memory of their experience at the Roadster store. Another first in the Indian retail environment, the selfie zone uses trick photography to give shoppers different scenes for their pictures. The switch to offline world is made seamless by another technological innovation. Shoppers can scan the bar code of the products in the store on the Myntra app, which automatically adds it to their cart.

Passive browsing/ shopping is also encouraged in the space outside the dressing rooms. Shoppers can also use the iPads to browse the internet, watch Youtube videos, know more about the brand's collections or shop.

The Roadster store is a space for customers to experience the brand, shop with ease, connect with people and enjoy everything that the brand has to offer from apparel to idiosyncratic experiences.





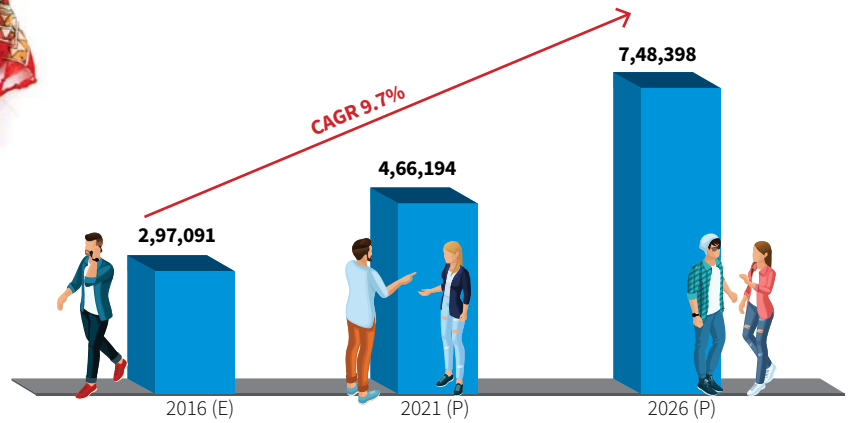
THE INDIAN FASHION APPAREL MARKET- 2016 & BEYOND

Amit Gugnani, Senior Vice President, Fashion - Textile & Apparel, sizes the Indian fashion retail market, its key categories and analyses the current and future growth prospects and trends, with research inputs from Goutham Jain, Principal Consultant, Fashion - Textile & Apparel, and Saima Nigar, Associate Consultant, Fashion - Textile & Apparel, Technopak.

1. Market Overview

Indian economy, one of the fastest growing economies of the world, is witnessing major shifts in consumer preferences. Increasing disposable income, brand awareness and increasing tech-savvy millennial population are the driving factors of corporatized retail within the country. Overall, Indian retail scenario has shown sustainable long term growth compared to other developing economies.

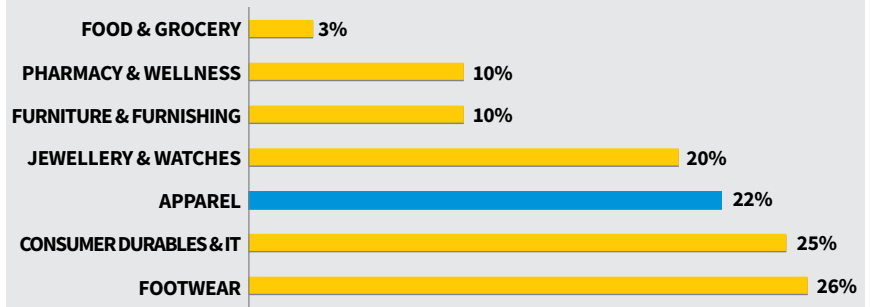
The Indian retail market was worth ₹41,66,500 crores (USD 641 billion) in 2016 and is expected to reach ₹1,02,50,500 crores (USD 1,576 billion) by 2026, growing at a Compound Annual Growth Rate (CAGR) of 10 percent. It is envisaged that the current fashion retail market worth ₹2,97,091 crores (USD 46 billion) will grow at a promising CAGR of 9.7 percent to reach ₹7,48,398 crores (USD 115 billion) by 2026.


TOTAL APPAREL MARKET (INR CR.)


Source: Technopak Analysis

Indian apparel industry which is the second largest contributor in the retail industry after food and grocery is seeing some major shifts. Entry of international brands, changes in preferences from non-branded to branded, the fast growing economy, large young consuming population in the country has made India a highly lucrative market. India has the world's largest youth population, which is becoming fashion conscious owing to mass media and social media penetration. This has opened unprecedented retail market opportunities. The promising growth rate of 9.7 percent makes the Indian fashion industry prominent in the retail sector. With a GDP growth rate of 7 percent, India has an edge over developed markets of the US, Europe and Japan which are expected to grow at a rate of 2-3 percent. Favourable trade policies and increased penetration of organised retail among other factors contribute in making Indian fashion industry attractive for investors.

Within the retail categories, apparel retail has demonstrated comparatively high receptivity towards corporatized retail. High penetration of corporatized retail in apparel has also paved the way to introduce more formal and systematic processes and procedures in operations, procurement and distribution. As a consequence, apparel retail market has managed to harness the advantages offered by modern management concepts leading to improved product offering, better customer management and scientific

CORPORATIZED RETAIL SHARE (2016)


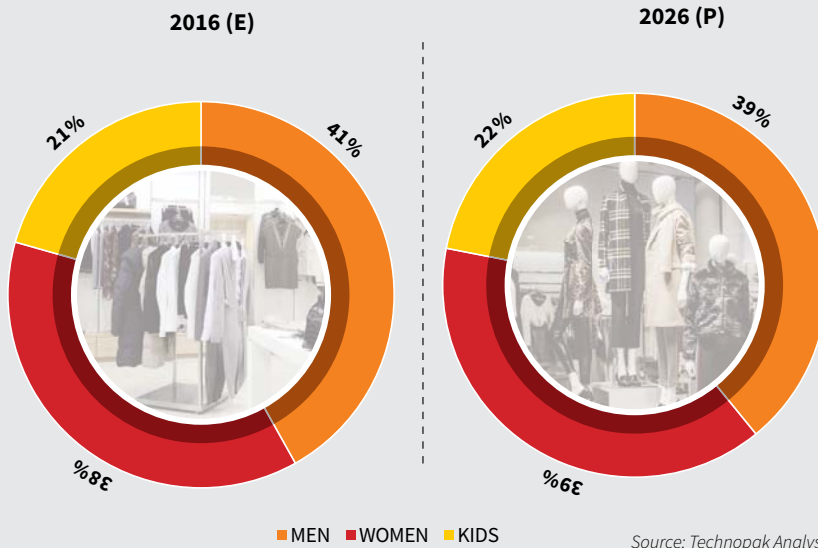
Source: Technopak Analysis

BREAK-UP OF INDIA'S GDP AND APPAREL RETAIL MARKET SIZE


Source: Secondary research, Industry reports, Technopak Analysis



MARKET SPLIT



In recent years, denim, activewear and t-shirts have shown promising growth and are expected to grow at high CAGRs of 14 percent, 14 percent and 12 percent respectively, owing to changing preference of the consumers.



supply chain management techniques. It is expected that apparel retail will continue to witness deeper penetration of corporatized retail beyond the major urban clusters and the increase in the demand of branded products.

2. Intersegment Analysis

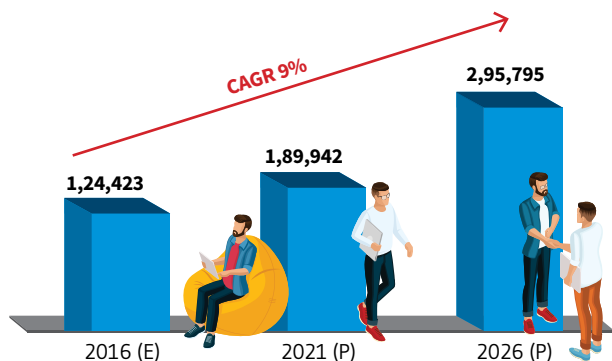
The Indian apparel market can be broadly classified into men's wear, women's wear and kidswear. Currently, men's wear holds major share in the apparel market. It accounts for 41

percent of the total market. Women's wear contributes almost 38 percent, while kidswear contributes 21 percent of the market. It is estimated that over the next decade women's wear and kids wear will demonstrate high CAGR of 9.9 and 10.5 percent respectively, resulting in rise in market share of these categories. Both, men's wear and women's wear is expected to contribute 39 percent each to the total market in 2026, with kidswear accounting for the rest 22 percent.

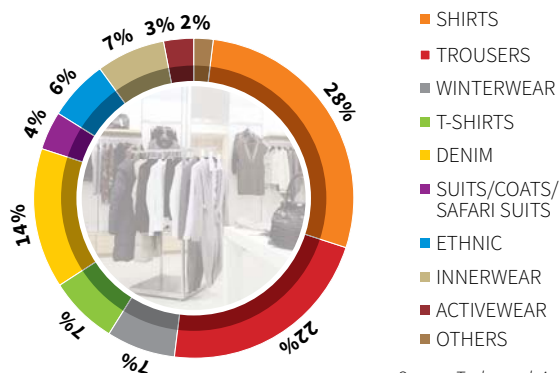
2.1 Men's wear

With the market size of ₹1,24,423 crores (USD 19 billion), men's wear is the largest segment in apparel market and is expected to grow at a CAGR of 9 percent for next 10 years to reach ₹2,95,795 crores (USD 45.5 billion) by 2026. The various product categories of men's wear segment include shirts, trousers, suits, winter wear, t-shirts, denim, daily wear, active wear, ethnic, innerwear, etc. Shirts are the single largest category in men's wear, followed by trousers and denim.

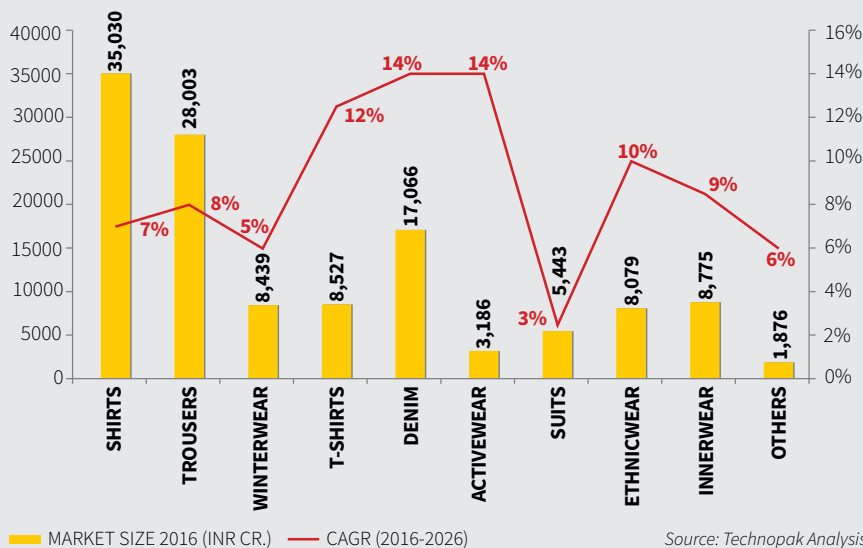
In recent years, denim, activewear and t-shirts have shown promising growth and are expected to grow at high CAGRs of 14 percent, 14 percent and 12 percent respectively, owing to changing preference of the consumers. While denim and t-shirts have matured as categories and have shown a consistent growth over a considerable period of time, activewear has recently evolved and has high growth potential. This is due to the boom in fitness and healthcare. In addition, the consumers in India have evolved and now understand that clothing for fitness is different from everyday clothing. These factors contribute to high growth projections of 14 percent over the next decade. The growth in this category is

MEN'S WEAR MARKET SIZE (INR CR.)


Source: Technopak Analysis

SHARE OF INDIVIDUAL CATEGORIES WITHIN MEN'S WEAR (2016)


Source: Technopak Analysis

CATEGORY MARKET SIZE/GROWTH PROJECTIONS IN MEN'S WEAR (INR CR.)


Source: Technopak Analysis



not just restricted to metros and tier -I cities and has shown growth in tier -II and -III cities as well.

The acceptance of smart casuals in corporate has boosted growth of western wear among working professionals. Formal wear is not restricted only to shirts and trousers but has a wide range of other options such as smart jackets, brightly coloured or patterned shirts complemented with loafers, etc.

Men's denim wear is expected to grow at a rate of 14 percent per year. The young population of the country is the key demand driver of this segment. Due to

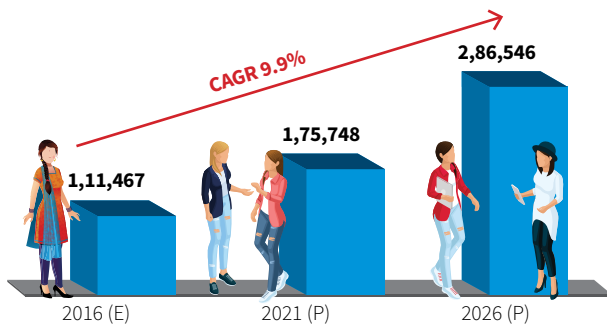
rise in media penetration in the country and global fashion awareness among youth, a shift in consumer's choice of denim wear has been witnessed in the country. Penetration of international brands in denim has provided consumers with ample product options.

2.2 Women's wear

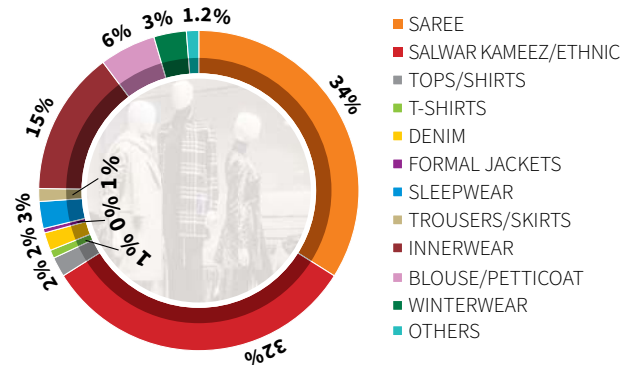
The women's wear market in India contributes 38 percent of the total apparel industry. It is estimated to be worth ₹1,11,467 crores (USD 17.5 billion in 2016) and is expected to grow at a CAGR of 9.9 percent to reach ₹2,86,456 crore (USD 44 billion in 2026). Globalisation coupled with fast fashion has resulted in awareness on fashion

trends and styling. Further, the increase in number of working women has fuelled the women's wear market. The demand is expected for western wear, fusion wear and occasion specific ethnic wear. Women's wear in India comprises of ethnic wear, western wear, Indo-western, innerwear, etc. Ethnic wear is the single biggest category in women's wear segment with a share of 66 percent. In ethnic wear, the saree is perhaps the most common traditional Indian dress for women and has a market of ~₹37,837 crores. It is expected to grow at a CAGR of 5 percent and

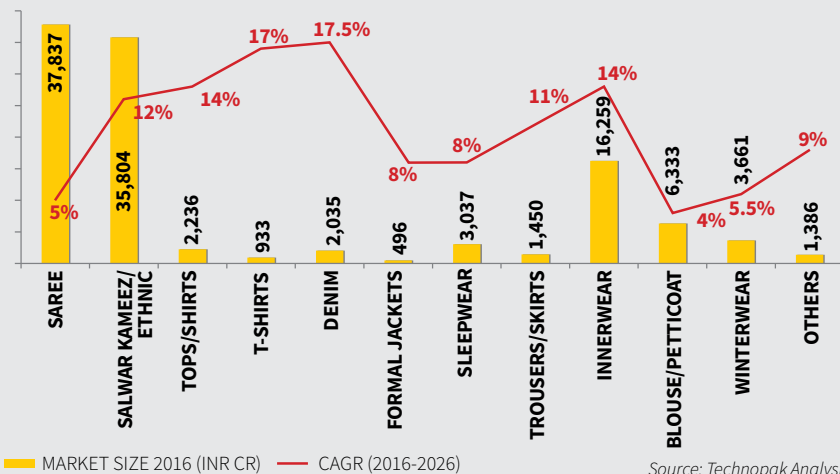


WOMEN'S WEAR MARKET SIZE (INR CR.)


Source: Technopak Analysis

SHARE OF INDIVIDUAL CATEGORIES WITHIN WOMEN'S WEAR (2016)


Source: Technopak Analysis

CATEGORY GROWTH IN WOMEN'S WEAR (INR CR.)


Source: Technopak Analysis

The innerwear category is another promising category in the women's wear market. It is growing at a CAGR of 14 percent and is expected to reach ₹60,277 crores in 2026 from the current market size of ₹16,259 crores. Branded innerwear presently contributes about 35-40 percent of the total women's innerwear market and is expected to reach to 40-45 percent in 2020.

Denim is another high growth category among women's wear and is expected to grow by a promising rate of 17.5 percent for the next ten years to become a market of ₹10,209 crores from ₹2,035 crores currently. Initially, the denim brands used to focus primarily on men, but with the change in the demand and preferences of women, they started catering to women consumers as well. Stretch denims have seen a huge demand among women.

Women's t-shirts and tops categories are also growing fast owing to generic inclination for western wear categories. The women tops and shirts market is of ₹2,236 crores and is expected to grow at a CAGR of 14 percent to reach ₹8,291 crore by 2026. The women's t-shirts market of ₹933 crores is growing in tandem with the growth of other casualwear categories and is expected to grow at a CAGR of 17 percent to reach ₹4,484 crore by 2026.

reach ₹61,632 crores by 2026. Though a market shift is expected from saree to salwar kameez and western wear in urban and semi-urban markets, saree will still remain as the predominant category among elderly and middle aged women across urban and rural India.

Salwar kameez is another dominating category in ethnic wear, especially among the working women because of its comfort level. With a market share of ₹35,804 crores, it is expected to grow at a CAGR of 12 percent to reach ₹1,11,203 crores by 2026. But, it has started facing stiff competition from the western wear owing to increased number of working women in the country, especially in urban areas. The increased competition from western wear has resulted in a new category – Indo-western (fusion-wear).





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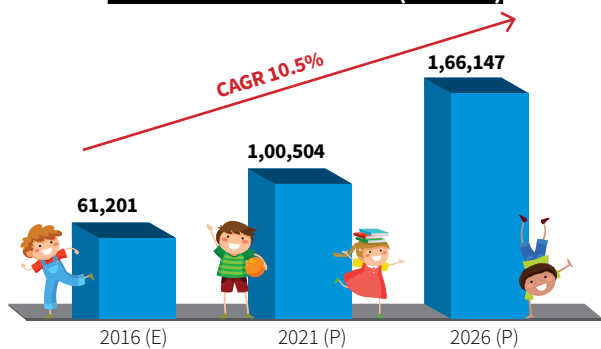


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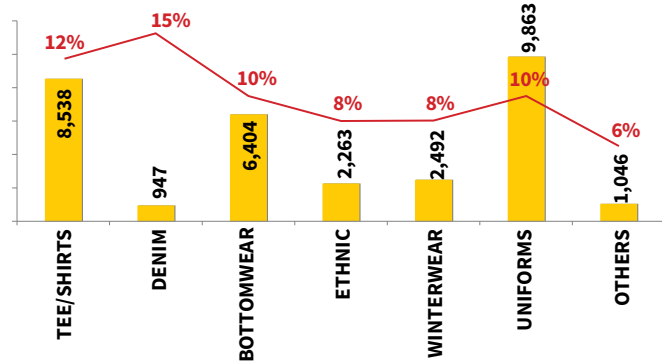
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KIDSWEAR MARKET SIZE (INR CR.)


Source: Technopak Analysis

CATEGORY GROWTH IN BOY'S WEAR (INR CR.)


MARKET SIZE 2016 (INR CR.) CAGR (2016-2026) Source: Technopak Analysis

2.3 Kidswear

The kidswear segment is one of the fastest growing segments in the Indian apparel market. The Indian kids wear market in 2016 was estimated to be worth ₹61,201 crores and accounted for 21 percent of the total apparel market of the country. It is expected to grow at a CAGR of 10.5 percent to reach ₹1,66,147 crores by 2026. With such market potential, a number of national and international players have entered this segment. India, being one of the youngest nations in the world with 29 percent of its population less than 14 years is a lucrative market. The competition between the new entrants and existing players has ultimately

benefited the Indian consumers as the firms have shifted their focus to improve the quality while reducing costs at the same time.

Awareness about latest kidswear is not only limited to metro cities but it is widespread among tier -II and -III cities also due to access to various media such as televisions, smart phones, movies etc. With growing disposable income, exposure to global fashion trends and entrance of foreign brands in the country - spending on kidswear by Indian populace has increased.

The kids wear market can be categorised into boy's wear and girl's wear.

Boy's wear

The Indian kidswear market is slightly skewed towards boy's wear which accounts for 51 percent of the total kidswear market. In 2016, boy's wear was estimated to be worth ₹31,552 crores and is expected to grow at a CAGR of 10.3 percent and reach ₹84,678 crores by 2026.



The various categories among boy's wear are t-shirts, denims, bottom wear, ethnic, winter wear and uniforms. Uniforms, t-shirts and bottom wear are the dominating categories among boy's wear. They together contribute around 78 percent of the total boy's wear market. However, t-shirts and denims are considered high growth potential categories in the segment with a CAGR of 12 percent and 15 percent respectively. The increased fashion awareness among kids has made western wear such as denims and t-shirts popular.



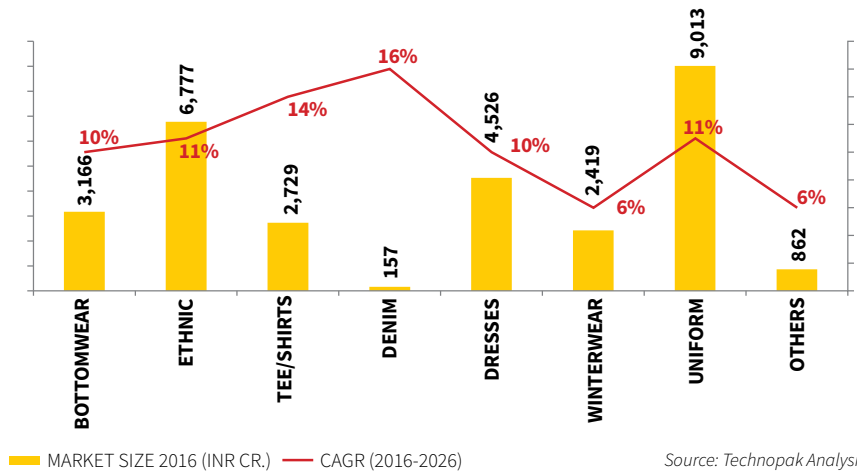


Girl's wear

Girl's wear market, which accounts for remaining 49 percent of the kidswear market, comprises of bottom wear, ethnics, t-shirts, denims, dresses, winter wear and uniforms. Like boy's wear, uniforms are the dominating category among girl's wear as well. It is worth ₹9,013 crores and is expected to grow at a CAGR of 11 percent to reach ₹25,591 crore by 2026. Another dominant category in this segment is ethnic wear, which comprises 23 percent of the girl's wear market. But, a major shift has been seen in trend among girls wear in recent years. Western wear categories such as denims and t-shirts are growing faster than traditional categories. These categories are expected to register CAGRs of 16 percent and 14 percent respectively.

IMAGES Business of Fashion

CATEGORY GROWTH IN GIRL'S WEAR (INR CR.)



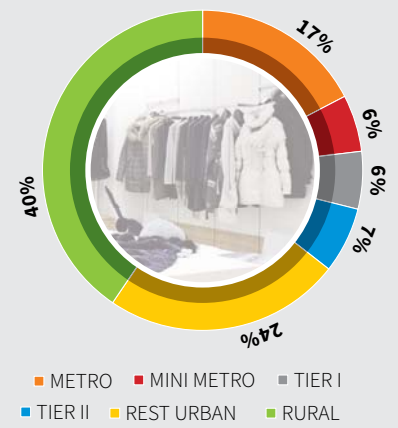
Source: Technopak Analysis

3. Region-Wise Distribution of Apparel Market

Demand for various apparel categories varies substantially across the country. The urban market that mainly comprises of metro cities such as Delhi/NCR, Mumbai, Bengaluru, Chennai, etc., are the biggest markets for apparel in India and contribute 23 percent to the Indian apparel market. Considering the fact that almost 70 percent of the population resides in villages, the major contribution of urban cities to the apparel market indicates the higher purchasing power of the people in urban cities, their frequency of purchases and tendency to purchase premium and quality products. The metro cities house almost all the big national and international brands, driven by the well informed and employed population. The metros also witness huge penetration of women's western wear as compared to tier-I or tier-II cities of the country. The well informed and trend conscious female customer base has led to deeper penetration of brands and private labels in the metros.

But lately, many global brands have started penetrating into tier-I and -II cities, while domestic brands are also strengthening their position in these markets. Many fashion retailers and apparel brands have already established themselves in smaller cities. High real estate costs, competition among

REGION-WISE DISTRIBUTION OF APPAREL MARKET

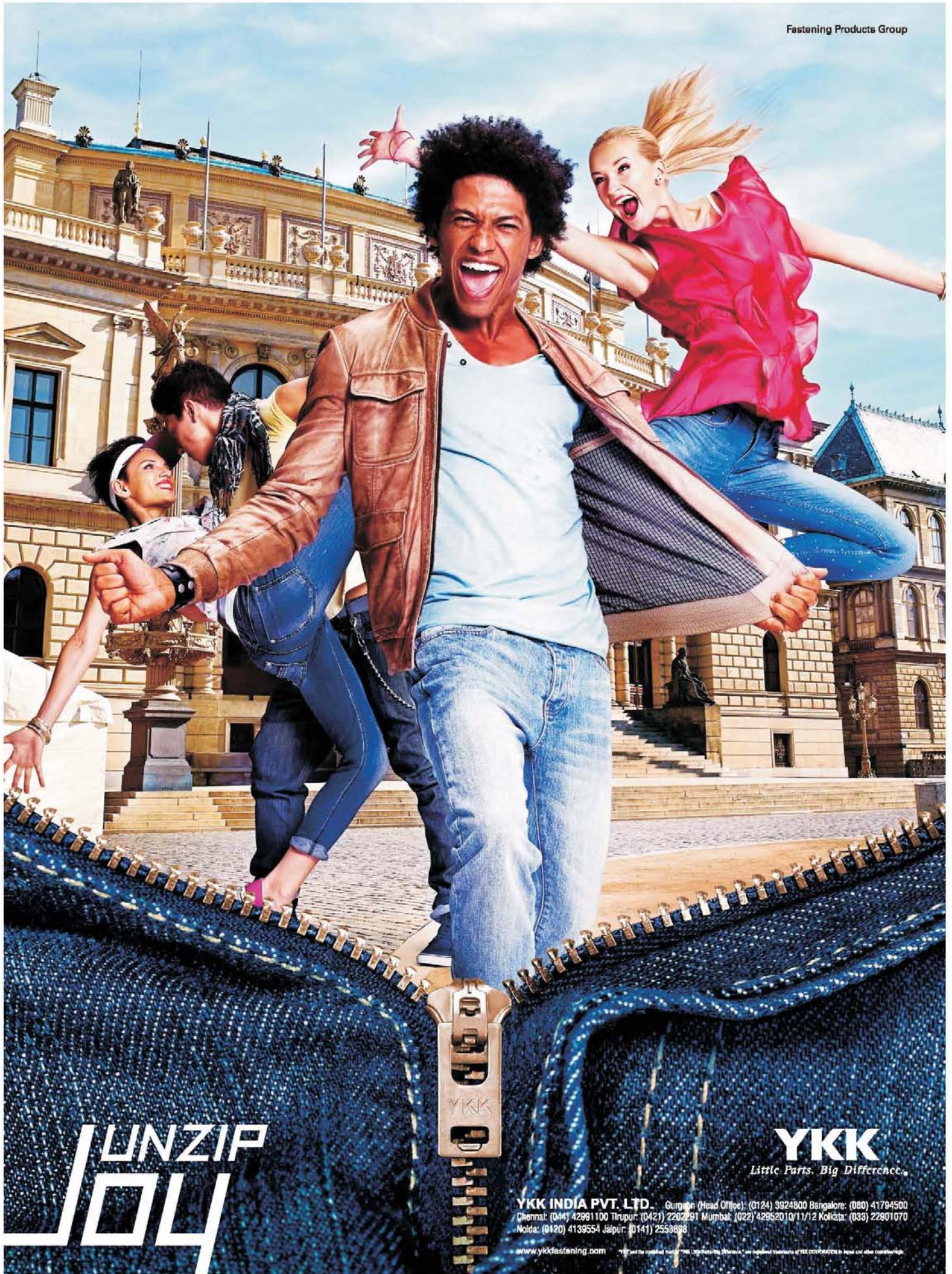


Source: Technopak Analysis

branded players and saturation in metro cities of the country have made big brands to move towards the smaller cities of the country. The increasing purchasing capacity and awareness of fashion and trend in small cities has resulted in providing a huge market to the organised players of the country.

The rural apparel market in India is still primarily catered by unbranded and unorganised local players. Need based clothing and price sensitivity among people of rural India does not make it a lucrative market for branded players.





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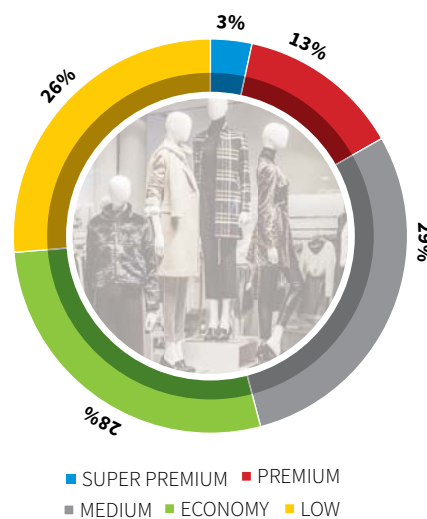
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**PRICE SEGMENT-WISE
DISTRIBUTION OF APPAREL MARKET**



Source: Technopak Analysis

The medium price segment holds majority of the share among apparel segment by holding 29 percent followed by economy which holds 28 percent of the share of the apparel market of the country.

Customers across income groups purchase medium priced apparel at varying frequencies. Sometimes the customers of the premium and super premium segment wish to trade down to medium segment while in some other cases the low income customer prefers to trade up to medium segment depending on the requirement of the attire and look. Many Indian consumers of the medium income level prefer medium price segments as it offers the assurance of certain minimum quality standards at a reasonable and affordable price.

The super-premium and premium price categories are value driven categories and the product offerings of these segments come from established brands.

4. Price Segmentation of Apparel Market

The apparel market can be broadly divided into super premium, premium, medium, economy and low price segments. The medium price segment holds majority of the share among apparel segment by holding 29 percent followed by economy which holds 28 percent of the share of the apparel market of the country. The price sensitive rural population forms a major chunk of 54 percent of the low and economy price segments of apparel market.

5. Select Trends of Indian Apparel Market

In India's high-growth, fast-changing retail apparel market, with significant new growth opportunities for both foreign and domestic players. As a result of it, Indian apparel industry is witnessing some specific trends.

5.1 Sustainable and eco-friendly manufacturing

As the country is confronted with pollution issues, it has become





5.2 Increased inclination towards smart garments

With technological penetration in everyone's lives, garments too are witnessing some major up-gradation in technology. After smart phones, smart televisions, smart watches, etc., 'smart shirts' have emerged as a new trend in apparel industry. Companies are trying to woo the customers by providing smart shirts to the growing tech freak population of the country.

Right now, the wearable technology market mainly consists of wearable devices such as fitness bands, smart watches etc. But, recently there has been a shift towards smart garments among premium and luxury customers.

5.3 Smart casuals

Corporate dressing these days is not restricted to strict formal wears in pastel colours and minimal designs but has gone under a transition. In women's wear the concept of smart casuals has carefully replaced traditional formal wear such as sarees, western formals and salwar-kameez. Increasing inclusion of smart casuals or semi-formals has resulted in acceptance of chinos and other relaxed trousers along with half sleeved shirts or t-shirts.



Once considered value conscious, consumers of tier-II cities are now open to spend more on fashion and look good. Apparel retail in non-metros is growing exponentially due to which more brands are entering hinterlands.

imperative for textile industries to adopt eco-friendly strategies. The industry is focusing on reducing water consumption and techniques to avoid usage of organic colours in apparel manufacturing. Consumers are sensitive and are increasingly getting aware about environmental issues, resulting in growing inclination towards eco-friendly and organic apparels. Brands/private labels have started catering to this market especially in babies, kidswear and premium adult wear category segments.



5.4 Continued rise of 'organised retail'

The Indian fashion retail industry is transforming rapidly and is seeing shift from unorganised to organised retail. The transformation is due to increase in income, increased penetration of branded wear in country and awareness of fashion trends among consumers. But, nowadays couture is not limited to metros only. Tier-II cities and semi-urban cities have emerged as huge potential markets for these organised players. Penetration of organised retail chains has contributed to the growth of apparel market in these markets. Market expansion in non-metros seems an lucrative opportunity for domestic and international brands. Once considered value conscious consumers of tier-II cities are now open to spend more on fashion and look good. Apparel retail in non-metros is growing exponentially due to which more brands are entering hinterlands.

5.5 Apparel sales in e-commerce

Online shopping in India is not a new phenomenon anymore, although it is

in nascent stage but blooming very rapidly. E-commerce has grown in recent years and has touched every person's life. It has played a very vital role in bridging the gap between consumers residing in tier-II and tier-III cities and premium wear sellers. It has made availability of premium brands in semi urban areas where these brands have no retail outlets.

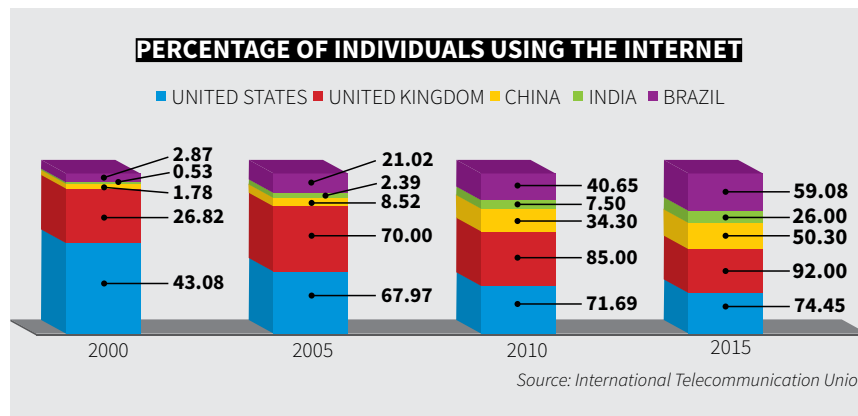
In India, e-commerce portals and marketplaces have established themselves by providing huge discounts to lure customers thus changing the consumers' mindset and providing wider range of products to

According to Technopak Analysis, currently there are 431 million internet users which is expected to reach 750 million by 2026.

choose from. According to Technopak Analysis, currently there are 431 million internet users which is expected to reach 750 million by 2026. Cash crunch due to demonetisation along with improvement in net banking facilities will fuel the growth of e-commerce in the country. The government's initiatives to develop cash less, inclusive and digital citizens has provided further boost to e-commerce industry. The e-tailers have started launching their private fashion labels to increase their profit margins.

6. Challenges for Fashion Retail in India

Despite of growing at a promising rate, Indian fashion retail is facing its own challenges. Some of the major challenges faced by fashion industry in the country are as follows:





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India has an advantage of having a unique age group of 20-25 on which it can capitalize on, which is called demographic dividend. On the other hand, western economies have a burden of ageing population. However, the industry is struggling with the challenge of shortage of skilled workforce.

6.1 Infrastructural bottlenecks and efficiency

Indian fashion retail industry faces challenge of inadequate infrastructure such as poor conditions of roads, highways etc., which results in becoming roadblock in growth of apparel fashion industry. India, to grow to its fullest potential, would have to invest heavily in infrastructure such as proper connectivity of roads, inland waterways, etc.

According to World Bank's Logistics Performance Index 2016, India ranks at 35 when compared to 160 countries. It scored 3.42 on a scale of 5, thus showing a huge scope of improvement in infrastructure which is a major hurdle in logistics of the apparel industry.

6.2 Poor internet penetration in the country

Despite e-commerce blooming in the country, India has poor internet connectivity as compared to other



growing economies. In India, e-commerce is in its nascent stage but has grown significantly in the last fifteen years and is set to grow at a high rate in the next decade. However, the quality of internet services provided is poor due to lack of infrastructure. To ensure long term growth of e-commerce in India, it is essential to upgrade the internet services. Unless, the government takes initiatives in this direction, e-commerce industry would not be able to reach its fullest potential. In addition, Cyber security is another major threat in e-tail industry.

6.3 Changing consumer behaviour

In today's business environment, consumer is the king. It has become imperative for the manufacturers to

cater to the consumers according to their taste and preference. With mass media penetration and growing disposable income, Indian consumers have become more demanding and adaptable to change in fashion. With the rapidly changing profile of consumers, it has become challenging for retailers to keep up with shifting shopping demands. Shoppers today are well informed about fashion trends and demand accordingly. Thus, it becomes challenging for retailers to cater their customers with constant change in preferences.



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HUNTSMAN AND CLARIANT TWO GIANTS THAT IMPACT DENIMS ANNOUNCE A MERGER OF EQUALS

US based Huntsman Corp and Switzerland's Clariant AG announced that they are combining to create a chemical manufacturer with a market value of more than \$14 billion, after years of tentative mutual approaches.

The two companies informed that their Boards of Directors unanimously approved a definitive agreement to combine in a merger of equals through an all-stock transaction.

The merged company will be named HuntsmanClariant. On a pro forma 2016 basis, the combination of both companies will create a leading global specialty chemical company with sales of approximately \$13.2 billion, an adjusted EBITDA of \$2.3 billion and a combined enterprise value of approximately \$20 billion.

The combined entity will benefit from each other's strengths. It will have a significantly improved growth profile in highly attractive end markets and geographies. HuntsmanClariant will leverage shared knowledge in sustainability and boast a much stronger joint innovation platform. This will enable the development of new products in order to deliver superior returns and drive shareholder value.

"This is the perfect deal at the right time. Clariant and Huntsman are joining forces to gain much broader global reach, create more sustained innovation power and achieve new growth opportunities," said Hariolf Kottmann, CEO, Clariant. "This is in the best interest of all of our



Peter R. Huntsman,
President and CEO, Huntsman

stakeholders. Peter Huntsman and I share the same strategic vision and I look forward to working with him," he added.

Peter R. Huntsman, President and CEO, Huntsman, commented, "I could not be more enthusiastic about this merger and look forward to working closely with Hariolf Kottmann, a man I have admired and trusted for the past decade. We also look forward to a close association with his immensely talented colleagues around the world. Together, we will create a global leader in specialty chemicals with a combined balance sheet providing substantial financial strength and flexibility."

The new company will accelerate value creation for shareholders through a more robust combination of technology, products and talent. The combined company expects to realize more than \$3.5 billion of value creation from approximately \$400 million in annual cost synergies. The full synergy run-rate will be achieved within two years of closing. These synergies will be



Hariolf Kottmann & Peter R. Huntsman shaking hands



Hariolf Kottmann, CEO, Clariant

realized by reducing operational costs and improving procurement. The targeted synergies represent roughly 3 percent of total combined 2016 revenue with one-time costs up to \$500 million. There will also be additional cash-tax savings. The combined company, incorporated in Switzerland, will be governed by a Board of Directors with equal representation from Clariant and Huntsman and will follow Swiss Corporate Governance standards.

The transaction is targeted to close by year end 2017, subject to Clariant and Huntsman shareholder approvals, regulatory approvals and other customary closing conditions. Clariant and Huntsman are confident that the required regulatory approvals can be obtained in a timely manner.



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LACOSTE LAUNCHES NEW AD CAMPAIGN FOR ITS 'TIMELESS' COLLECTION

By Tanya Krishna

Lacoste, a fashion brand by tennis legend René Lacoste in 1933, released its new campaign 'Timeless' with an emphasis on the history of the 84-year-old shirt with the green crocodile logo.

The fashion powerhouse with retail locations in 110 countries and worldwide sales of \$2.15 billion, didn't release its first TV spot until 2014. The brand's first campaign 'The Big Leap' which had introduced the tagline 'Life is a Beautiful Sport', was a superbly shot romance that compared a first kiss to plunging from a skyscraper. 'Timeless', a short film from BETC Paris that spearheads the campaign, follows a lovestruck couple through the years, all in the space of a single train trip. "The idea and story behind the 'Timeless' campaign is a composition that is a testament to the brand's timelessness. Over time, styles change but the polo t-shirt retains its timeless elegance. The brand has had a changeover between the two champions, René Lacoste and our new brand ambassador, the new Crocodile, Novak Djokovic (ace international tennis player)," informs Rajesh Jain, MD & CEO, Lacoste India.

Directed by Seb Edwards, the epic cinematic fresco is set in the 1930s where a man experiences love at first sight. He sets off on the trail of a mysterious woman, jumping on the train she is riding. But as soon as he reaches the first car, he finds



himself in the 1940s. Determined to find her, the hero begins a frantic quest that takes him through carriages and eras, until he ultimately arrives in the present. The film captures this rare, yet vital, emotion with all the more grandeur and romance as this “chase” takes place over eight decades, reminding us that life itself is a beautiful sport.



“Lacoste has developed for Novak Djokovic an eponymous clothing line to be worn on the court. These outfits have been specially designed to kit out the champion during the Grand Slam’s tournaments as well as dress him for the other tournaments of the season.”

—Rajesh Jain,
MD & CEO, Lacoste India

The couple, played by Damien Chappelle and Dorcas Coppin, are seen in spectacular settings: a 1930s Parisian train station brought to life by 250 extras, authentic trains from each decade and outstanding style fashioned by Madeline Fontaine, nominated for an Oscar for Jackie. It is magnified by a cinematic soundtrack by Max Richter that gives the viewer goose bumps as of the first second.

Talking about the brand’s new collection, Jain said, “At Lacoste, our collections are sports-inspired. In the coming season, the brand’s sporting DNA is at the heart of pieces that explore abstract geometry, like colour blocks or playful stripes, and ultimately find the sublime in the simple. Lacoste has developed for Novak Djokovic an eponymous clothing line to be worn on the court. These outfits have been specially designed to kit out the champion during the Grand Slam’s tournaments as well as dress him for the other tournaments of the season. The Novak Djokovic collection is a line of performance products that fuse functionality with style.”

Lacoste, a historic partner of the Roland-Garros tournament for more than 45 years, unveiled its new co-branded collection to celebrate the 2017 edition of the French Open. Contemporary and graphic, this collection proposes clothing for men, women and children which combines pleasure, comfort and modernity

The new brand video is catching the attention of the viewers in an instant and making them feel alive. Lacoste is receiving an overwhelming response by the audience. Broadcast around the world, the campaign will be shown on TV, online and outdoor. The campaign is accompanied by digital ads and bumpers.





GARMENT SHOW OF INDIA VOUCHES FOR 'MAKE IN INDIA' WITHIN ITS ONE-STOP SHOW FORMAT

The national capital hosted the Garment Show of India, a B2B exhibition that connects the apparel retail industry of India, on a high note at Pragati Maidan. The Garment Show of India is the only B2B show for domestic apparel industry in Delhi which will connect retailers, wholesalers, distributors, e-commerce companies, retail chains with suppliers in North India. The event was inaugurated by Manoj Tiwari, President, BJP unit in Delhi, in the presence of well-known retail chains like ITC Wills Lifestyle, V Mart, V2, Unik Bazar and brands like Kaira, Cactus, Fashion Factory, the press and other media.

More than 100 exhibitors, comprising of leading brands and manufacturers and retailers of a variety of products like ladies tops, trousers, leggings, denims, mens's shirts, blazers, suits, trousers, t-shirts, kidswear, sportswear, ethnic, party and occasion wear participated and showcased their latest collections at the event. Participants and brands from all garment hubs like Delhi, Noida, Jaipur, Mumbai, Bengaluru, Ludhiana, Kolkata, Hyderabad, Tirupur and many others were also seen at the show.

“Our vision is to make Garment Show of India a one-stop platform for everyone who is involved in the apparel, fashion or retail business. The idea is to bridge the gap between buyers and sellers. Our exhibition has manufacturers/ brands that can offer quality, fashion and competitive prices and match up with the requirements of retailers, retail chains, e-commerce companies and distributors,” said Gagan Marwah, Organiser, Garment Show of India. Leading retail chains like Pothys, Chennai Silk, RMKV, Shoppers Stop, Lifestyle, Landmark Group, Bazar India, Reliance Trends, Amazon, Snapdeal, Myntra, Westside and many more visited the exhibition.



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Massive promotions were being carried out through newspapers, radio, outdoor advertisements, social media and roadshows all over the country, in order to attract visitors from all parts of India, especially from tier -II and -III cities.

Shiv Naresh, one of the well-known players in sportswear; Brand Kaira from Hyderabad that makes attractive ladies wear; Babeez from Mumbai, a brand for kids and infants; Indira Hosiery Mills from Ludhiana; Cactus from Bengaluru that makes innovative denims; Dotted Jeans, a high fashion brand for all type of denims; Tinted, Royal Wood, Mac Mount and several other companies participated in the exhibition.

The theme of the show was 'Make in India'. "The garment industry is one of the largest industries in India and provides a livelihood to many people. The textile and apparel sector contributes 14 percent to industrial production, 4 percent to India's Gross Domestic Product (GDP) and constitutes 15 percent of the country's export earnings. It employed nearly 51 million people directly and 68 million people indirectly in 2015-16. As everyone says, 'Roti, Kapdaa aur Makaan' are the three basic necessities of India. Kapdaa, or Clothing is certainly a basic necessity, however, it also adds fashion, uniqueness and motivation to our lives," said Manoj Tiwari.

Since GST is a current topic, a wide-ranging discussion on the issue was also conducted on Day 1 of the show. Retailers and manufacturers expressed their concern over 12 percent GST

rates on readymade garments and its impact which has been affecting market sentiments for many months now. They requested Manoj Tiwari to consider subsidised rates for garments as it comes under basic necessities and GST will make garments very costly in times to come.

The growth in apparel industry of India is a natural follow up to an increasing working population and disposable incomes. The Indian economy is a powerful magnet for concerns all over the world and a sizeable number of international brands have already entered the Indian market. "Our mission is to work on our PM's vision of 'Make in India' and thus we created this platform, Garment Show of India as Indian manufacturers have the expertise, craftsmanship and marketing skills to be able to produce variety and quality wear," said Gagan Marwah.

After the inauguration, Tiwari visited all the stalls at the three-day event and appreciated the wide range exhibited. He also said, "I am delighted to see this latest range of apparels and appreciate the efforts of organisers for putting up this brilliant show."

Garment Show of India is a venture of Saina Events, a Delhi-based publication house and event management company that was started by the husband wife duo of Gagan Marwah and Deepti Marwah, around eight years ago. The company started the exhibition in the year 2015 with a vision to create a connecting link between manufacturers and buyers of garment and provide an opportunity to small and medium sized companies to understand and interpret the market trends and bond with the most important people in apparel industry.





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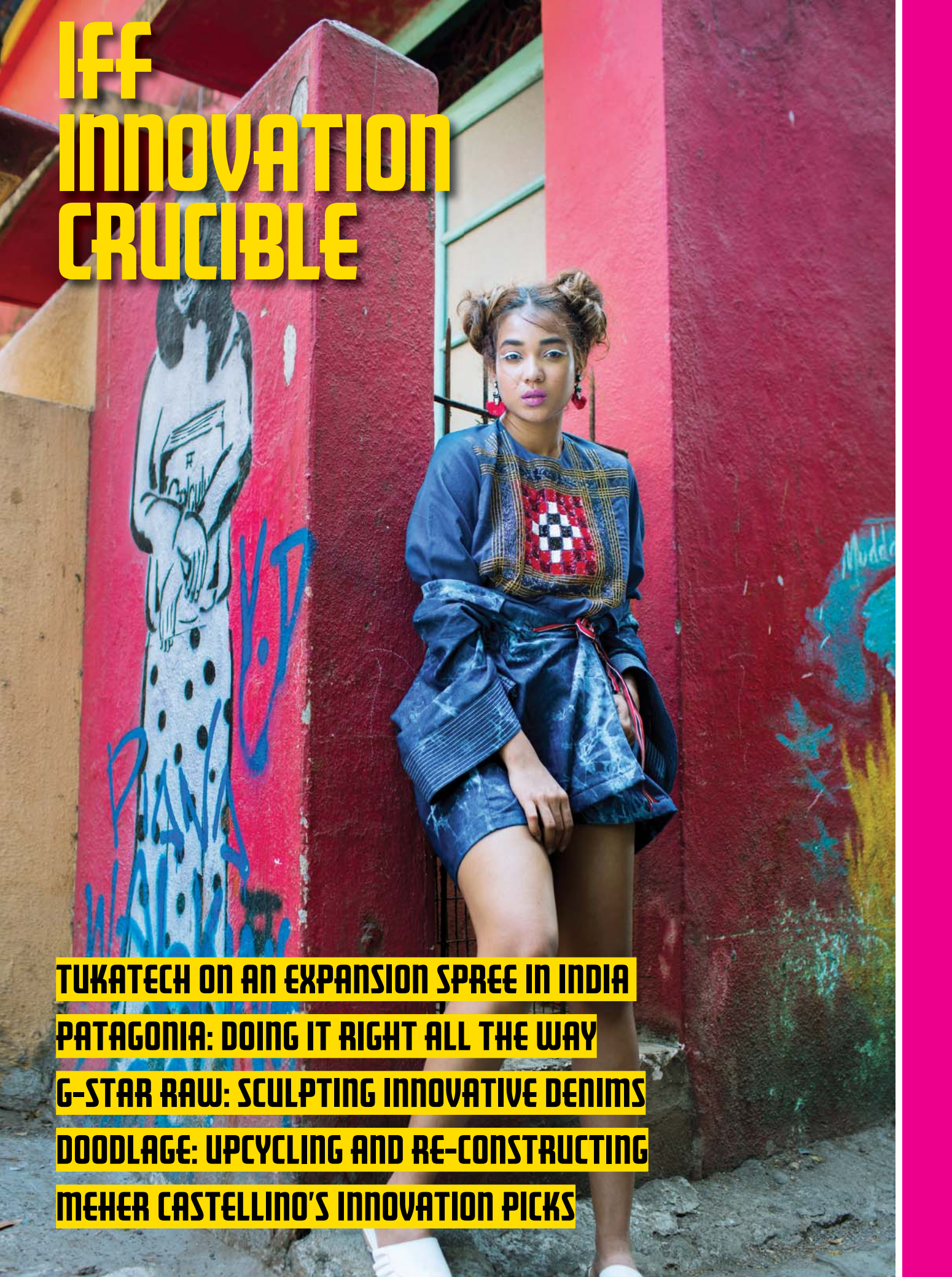
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A woman with her hair in buns, wearing a blue patterned top and shorts, leans against a red wall. The wall features a black and white graffiti of a woman in a polka-dot dress. The background is a vibrant red wall with some blue and yellow graffiti.

TUKATECH ON AN EXPANSION SPREE IN INDIA

PATAGONIA: DOING IT RIGHT ALL THE WAY

G-STAR RAW: SCULPTING INNOVATIVE DENIMS

DOODLAGE: UPCYCLING AND RE-CONSTRUCTING

MEHER CASTELLINO'S INNOVATION PICKS

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Contents ■ 97-138



Fashion Pioneer

SPEED, SENSE & SCIENCE: TUKATECH ON AN EXPANSION SPREE IN INDIA

Tukatech, a premier provider of fashion technology solutions for the apparel industry is looking to expand its market share in India with focus on SMEs, shares founder and CEO - Ram Sareen.

Pg No. 100



Ethics

Body Shop's Campaign Against Animal Testing

Actress Jacqueline Fernandez joins The Body Shop's new campaign for a global ban on cosmetics animal testing on products and ingredients by 2020.

Pg No. 116

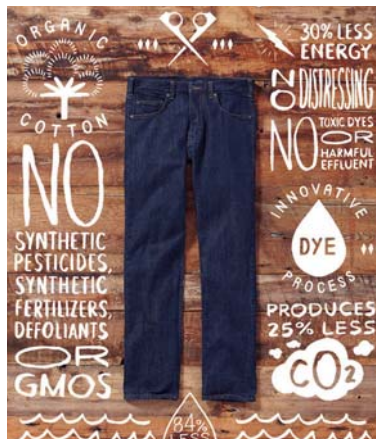


IFF Innovation Crucible

EXPERIMENTAL Denim Off the Beaten Path

Veteran fashion columnist Meher Castelino writes on how designers are experimentally using denim for new fashion horizons— shoes, bags, apparel, accessories, jewellery and even furnishings.

Pg No. 118



THE RIGHT WAY

Patagonia: Doing it Right All the Way!

Creating best products while causing no unnecessary harm and reducing impact on environment - is what Patagonia strives for. Jeans made of 100 percent organic cotton and advanced dyeing processes reduces the use of water, energy and chemicals and produces less carbon dioxide.

Pg No.134

Innovations

G-STAR RAW: CRAFTING INNOVATIVE DENIM

Redefining the meaning of RAW by deconstructing denim to its purest form, G-Star came up with innovations in construction, silhouette and shape.

Pg No.130



RECYCLING

Doodlage : Upcycling and Re-constructing from Waste

Doodlage re-designs, re-constructs and re-cycles old clothing or industrial waste to create something that is totally new and interesting. Each of their up-cycled garments are unique and stands out.

Pg No.136





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SPEED, SENSE & SIMPLICITY

TUKATECH ON AN EXPANSION SPREE IN INDIA

Tukatech Inc, USA, a leading provider of fashion technology solutions for the apparel industry was founded in 1995. It offers award-winning 2D pattern making, grading, and marker making software, automated marker making software, 3D sample making/virtual prototyping software, as well as garment plotters, and automatic spreaders and cutters for apparel production. Their systems encompass training, consulting, process engineering, and implementation of their technologies.

Tukatech is now looking at expanding its market share in India. It already occupies 85 percent market share of the educational institutions and over 60 percent of the big apparel brand businesses in India. Having served almost all the high end international and national brands, their focus is now to bring the technology to SMEs in the apparel industry. Some of Tukatech's prestigious global clients are Guess, Jockey, Speedo, Calvin Klein, Forever New, Jones New York Lingerie, MIT, etc., and in India its clients include designer Tarun Tahiliani, BIBA, W, Westside, Pantaloons, Reliance, Orient Craft, Arvind, Gokul Das, Raymond, Color Plus, etc. With its latest innovation TUKA3D Enterprise Edition all set to increase the efficiency in product development, and reducing the time and cost in developing new samples and enabling effective 360 degree communications and faster sample approvals through TUKA Cloud, the company aims to revolutionize the apparel SME sector.

Ram Sareen, the charismatic founder and CEO, Tukatech Inc., shares his plans, vision and beliefs on the best way ahead for the Indian apparel manufacturing industry in an exclusive free-wheeling interview with Rajan Varma, managing editor, Images Business of Fashion.

Dear Ram, you have great plans for India. How exactly has the Tukatech journey and the journey of apparel tech been in India?

Ram Sareen (RS): In India, till just a few years ago, only the progressive companies had a few CAD systems, maybe one station here and one station there but nobody made patterns and backups on the computer in totality. Vijay Agarwal who was the chairman of AEPC and also, of The Creative Group made a statement openly that Tukatech was the one who pioneered digital pattern-making in India. Today

in 250 colleges across the country, including the NIFTs, IAMs, Amity, etc., they teach with Tukatech systems because this has become a standard of the industry. On the industry side, let's take the example of Tirupur, the knitwear hub. Over 75 percent of the industry uses Tukatech. This is because we are not trying to teach the person an operating system, like others, but we are trying to teach them how to use technology by using computers and their own skills. Ours is a very different platform, it's on a Windows operating system so whatever little bit of initial hesitation the user has it goes away and after that he/she can use any system. Things are still very complicated in India, and since our fundamental belief is to continuously try to simplify things, so we are very positive about what we can bring to the table.

How do you feel our part of the globe fares on this acceptance and adoption of technology and blending it with skills?

RS: If you look at the industry in south east Asia, whether its Vietnam, India, Bangladesh, Pakistan, China etc., the middle management is all Sri Lankans! Why is that? It's because of Sri Lankan training grounds—their inhouse training culture and their quest for always excelling themselves. They are not benchmarking against each other, they are benchmarking against others. Throughout my travels in India, Pakistan, Bangladesh, I meet so many people who desire to come visit Sri Lanka in the hope that they'll learn something. And, interestingly, whenever I take the Sri Lankans to the United States, where we have done an amazing job in California, they are amazed by how much they still have to learn. So, it's like relevant benchmarking. Its about who you want to benchmark!

Sri Lanka's largest apparel company Brandix made a statement lately, where they said that they decided to take out other technologies and roll out Tukatech worldwide after they came to visit us at California. Incidentally, 82 percent of the Californian apparel industry uses Tukatech, and California defines fashion today worldwide. Even New Yorkers run to California for fashion.

Why do you say this? What would be the difference between a California Fashion creation ideology versus New York?

RS: California is the design capital of the world across all industry segments — automobile, furniture, home furnishing, clothing, etc. But in clothing it caters to a different market, to a junior market which is from ages 14 – 30. And, despite restrictions and limited budget, they all want to be

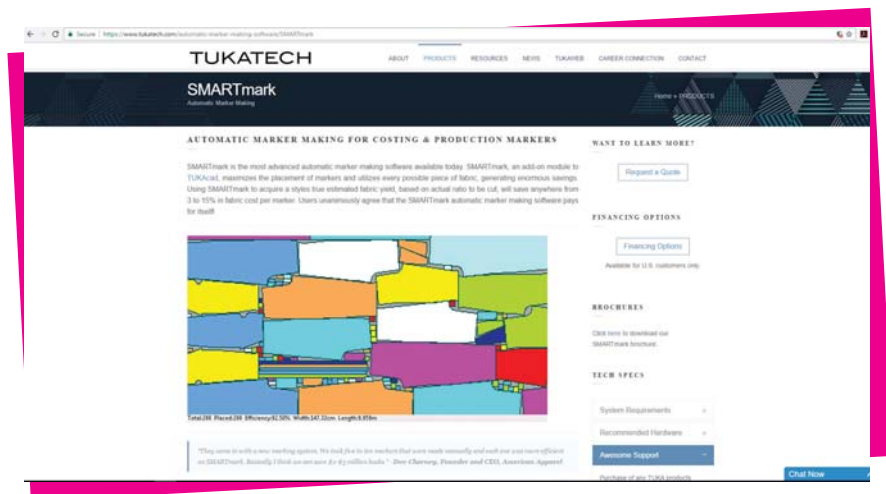


fashionable, so they are looking at designing something which is high fashion, much cheaper and is delivered fast. We all talk about ZARAs and H&Ms of the world but there are hundreds of fast fashion companies in California. They have no option but to move fast as the competition between them is fierce. They have to go every month, actually 13 times a year, to show their lines at Market Weeks. In the market week schedule, you are going to go to New York 10 times a year, twice a year to Las Vegas and once a year to Los Angeles. And, in the US it doesn't matter whether you are a fashion brand or a private label; if you want to show your lines to retailers you have to be at these market places. New York is of course the most organized. The segments are very specialised - children's clothing is different, the junior market is different, there are missy markets, contemporary market, men's market, women's market, and the list goes on. Buyers go with appointments to view the lines on display. It's sad that market weeks never took off in India, we should have had that!

We do have the seasonal buyer-seller meets—the winter fairs and summer trade fairs in India.

RS: It's not the same. The retail sector in India is not organized either at the selling side or at the buying. In the US, core decisions are made at the market week in terms of what to buy for which sector, how much to buy, for which retail market, etc. The retailers come and buy from there.

We had discussed this with Mr. Uppal from Richa Apparels when he was the Chairman from APEC and he had set up a space at the APEC Centre in Gurgaon where the objective was for



all exporters to have their showrooms and where the buyers would come on weekly/monthly basis with prior appointments.

But don't exporters mostly make products based on specifications of buyers/retailers, so how would that have worked?

RS: That was the old trend, but now the only exporters who are surviving are the ones who have taken the pain away from the buyer, and have created their own design labs. Look at sourcing companies like Asmara, Indochine, etc. These guys have hundreds of inhouse designers, so the design talent is there.

So, do you feel that such places are the best incubators of fashion creation?

RS: Let me ask you, where does any innovation happen? Where does the talent develop? Where does any great designing happen? It happens at the place where manufacturing happens

and it doesn't matter which industry it is - whether automobile or furnishing, innovations happen in the factory not on a drawing board, and definitely not in front of a computer. If you must produce something it has to happen where the core assets are.

Historically we had designers who created an image which was transformed into a product and based on the created fit for the brand. This process took a very long time and caused a lot of confusion on both sides. The industry realized that this was a super time-consuming cycle and everybody wanted to reduce it. Tukatech has played a major role in that with our 3G technology and Tukacloud. We have created an atmosphere in the digitized world where we have no dummies to fit the garment on, and where we have nobody who makes test patterns and sketches. Rather, we talk

to people in a vertical design room. The Californian fast fashion companies that I talked about mostly have vertical design rooms. And they come up with 1000-2000 new styles per month. If they were to work in the old ways they would not survive. They approve 50-75 new styles every day. This also means that somebody also has to produce all of them. Clearly, they don't have an army of people to do this but what they do have are good asset bases and good communication setups.

2000 new styles per month is huge, so exactly what are the basics that acquiring such capabilities is based upon?

RS: If you look at the essence of design,

the fabrics changes but the silhouette stays the same. Silhouettes are just given newness, making longer, shorter, wider, sleeker, etc. And value added by putting embellishments on them. So, I'm not creating a new fit. The problem when you're working with vendors is that everybody is starting from scratch all the time. So, what we've done with TukaCloud and Tuka3D is that we've created a sane collaboration for everybody — it doesn't matter who I am or where I am - so long as I can see what you're exactly going to show me and I can approve or make changes but in a virtual manner. For example, designers in Indochina (which is a little over a billion dollars) used to take 90 days from the concept stage to the time the

garment has been approved, and then it went for cutting and sewing which in itself only took 30 days. The question now was 'why the 90 days'? This was because in between the 'I said this' and 'now you said that'. And then I wanted to see it in different fit, fabric, cut and so on. Nobody could get it together in time. And, can you guess how much it takes now? It only takes 7 days. In 7 days we are ready to cut and sew. So, we took a 120 days cycle and shortened it into 45 days. What does that do for the retailers? Less markdowns, you are closer to the market, you know what's selling, and you know where to repeat. That is obviously much higher profitability. The biggest negative factors in retail are not knowing what to buy and buying without an estimate of what could happen six months from now. Nobody has that divine vision. Definitely not, with this new millennial buyer who is looking at instant gratification and who believes in "I want to see it, and I want to buy it."

Can you share some such implementation experiences in the Indian sub-continent.

RS: I have clients in Pakistan who are doing demand manufacturing for local market. They have zero inventory, zero fitting models, zero at every stage in physical form. But they have digital databases and are showing digitally. When and if a customer buys only then it gets converted into a garment and is shipped. That, my friend, is a real business model. When you go to Pakistan and look at the domestic market it will amaze you how large that market is. When they look at the market here (in India) and the products they are puzzled. The amount of talent that is sitting in a country like Pakistan for women's, for prints, for newness, it is amazing! Do you know why? It is because they are working in the digital world over there, and so they are far ahead. You should travel with me sometime and



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see some of the companies. Lulusar is a brand that launched just in April and is 100 percent digital. It is a company of just 9 people and is doing an amazing job. How and why? It is simply because they took 100 percent A to Z technology. Lulusar is owned by a sourcing company called Matrix Sourcing, a very large company which does about 600 million dollars based of sourcing in Lahore, Pakistan. They have been my clients since 2005, and the managing director Azfar Hasan is a very dear friend. He is so deep into technology that I am yet to meet a person who is a bigger technology freak! We were so impressed with them that we interviewed some of the team and will upload it on our website as a customer spotlight soon. These guys have their own IT department and have their own programmers, they write programs for sourcing with basic iPhones using GPS and knowing where all their engineers are. Everybody is telly-connected from factories to retail floors to the management. Sitting in Lahore they can see what is going on in Indonesia or wherever their factories are.

Sapphire is another such example. It is one of the 10 largest companies in Pakistan's domestic market producing 1000's of garments a day and they have several factories and all are based on strong technology. Sapphire just visited Lulusar and when they saw how our technologies were used they are extremely keen on us.

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Purely from the perspective of analyzing the efficiencies you bring in, can you share what values you bring to the bottom-lines of your clients?

RS: Everything that we do can be quantified but it doesn't get to you press guys. Many things are milestones in the journeys of companies and we don't put the information on paper. But I have written private documents quantifying the savings, for example somewhere we redirected 37 percent workforce, somewhere 48 percent of the steps were eliminated with the technology, etc., We share case studies on our website and I invite you to study them. In 2012, after we did the 200 million-dollar division of Brandix we did a case study of that. In fact, that division was going in red and now we got it into black. It was all about the planning of systems and technology. And because we are not a software company, we

are an engineering company which both makes the systems and also does the consulting, the engineering, implementation and guaranteeing the results, there is no limit to what we do. This a project by project work.

You had written that you are aware a lot of companies cannot afford your technology right now, and you're looking at solving this. How are you going to manage that?

RS: You have to go back to the history of Tukatech. I am an immigrant in the USA, the first generation and so I have a baggage that I took with me which is of being an Indian. The gap between rich and poor is always there and the gap becomes bigger and bigger everywhere, whether it is India or America. When I started this company I saw that the poor guy doesn't have the access to capital so we went into fundamentals. You see, as per the processes are concerned it doesn't matter if it's the smallest or the largest company—they all have to make patterns and they all have to make the markdown. Only the scale changes and the market changes, the basics remain the same.

We know there are companies who want to adopt 3D technologies that just don't have the capital. I've always believed that companies of all sizes

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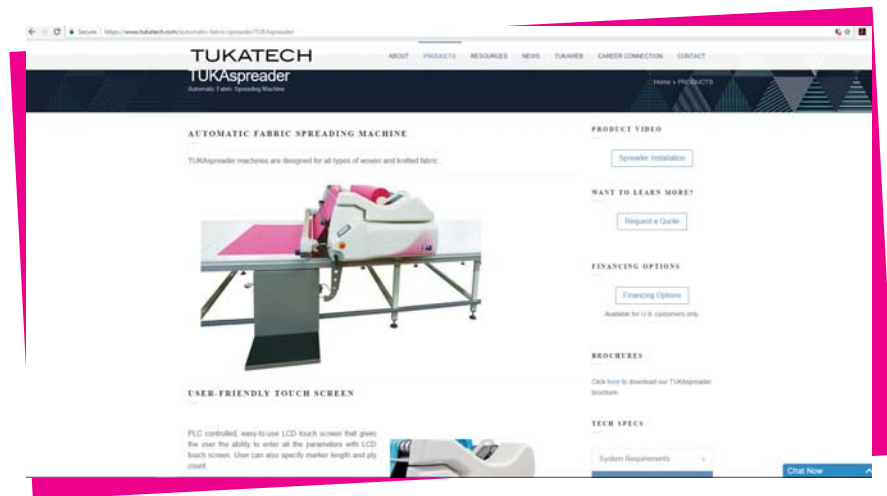
should have the same access to advanced technology. We've seen the industry in California transformed by the affordability and availability of TukaCAD [for digital pattern-making, grading, and marker-making], 82 percent of the California apparel industry uses Tuka systems. We hope to see a similar phenomenon in India with the onset of a more economical edition of TUKA3D.

In general, the cost of the guy with Tukatech technology goes down whereas the cost of the guy doing it manually goes up. And that was the gap between the two. So, I created what we call TukaCenters and then we created TukaWeb. These TukaCenters have been in the market place for the past 17 years. Currently there are 44 TukaCenters around the globe. We also realized in the early days that to make a TukaCenter where we put 50-60 stations of computers and softwares and people working in them we had to spend over a million dollars. So a better system was needed for us too.

It works like this now-- you want to make your own pattern but you don't have your own system or the capital so you pay just 10\$ an hour and make your pattern. If you don't have training on how to use it you can pay 500\$ a day and get trained. This concept spread like wild fire, and later some people didn't want to come to centers so we started renting software off the TukaWeb, and people could just do it at their homes and email us. We would plot it for them. It was a bit expensive to rent as you may not need it every day, you'll maybe need it 2-3 times a week. They were all sending it to one place the TukaCenter and this base of centers became bigger all around the world. Then we did this for schools and colleges.

We currently have 10 TukaCenters in India. In Delhi we have 3 and are opening two more. Currently they are in Noida, Okhla and Gurgaon; and we

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are opening one more in Noida because Noida's grown so much and one more in Gurgaon because Manesar has a lot of the industry.

I created these TukaCenters for a person who has nothing - only an idea, maybe not even the skills of making the patterns, so this person can walk in and say "can you make the pattern for this?" We would say, 'oh yes we will do it a-la-carte!' So, this has been going on and people were continuously sending their runners to pick up the stuff!

We have so many colleges and schools in California, and an year ago they made TukaTech TukaCAD a course textbook. This is how we have, and will continue to change California fashion.

The California industry needed more pattern makers, more fashion graduates and more people who had hands on understanding of the language, rather than just minor exposure or some lab time.

In the garment industry the base of the industry is pattern making, if you don't know pattern making you cannot be anybody. You need to know how to balance a garment or what is wrong with it, and where you need to adjust to make it happen, and this requires some basic understanding. I sit on the board of 130 universities and have changed the syllabus to make sure that the kid who is coming out of the school is able

to add value from Day-One rather than start as a trainee and then spend two years wasting time picking up threads, swatch cutting and sampling.

Now, the kids add value from day one. All the students have to do is rent TukaCad for 25\$ a month. The mechanism for students is the same as the with the industry. I send you a dongle, a software, and you begin.

Any recent upgrades or developments in this system you have created?

RS: Oh yes. We are also the first ones to do it on the Cloud, so whether the students needs a hardcopy to submit their homework or a soft copy it is possible. There are 1,248 Kinkos connected to us which FedEx owns. They are all part of my network and within my software there is a link for you to use if you want to send the pattern to the Kinkos. You put in your postal code and it'll show you 3 locations within 5 miles, select that from our board and pick up your work from there. These Kinkos have become a huge asset for the garment industry.

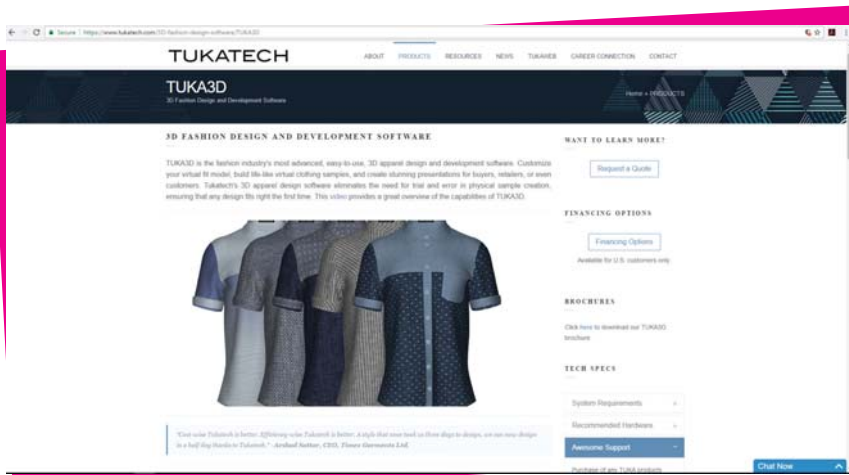
The global industry is also often saying that I don't make patterns but I want you to send me your patterns so I can correct it and tell you where the garment is not fitting. Because you didn't know so this pattern was coming

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from one office into your office and it used to take 5 days for the pattern to arrive previously but because of FedEx and us they now simply upload and within few hours it's been printed and has been delivered.

If you go to the 7th Avenue in New York, there is a very large Kinkos. From early morning to 10'o clock at night the plotters are doing TukaPlots from 60 different countries and these are coming in from all the design houses. They all used to pay 60\$ and wait 4 days for FedEx now it's done for 10\$ and a few hours. So, the difference that we have made to the industry is time, speed and accuracy, and like I said before we simplify things.

How much is TukaTech betting on 3D?

RS: 3D is the way forward as it takes the guess work out of what you meant by the sketch because a sketch is not to the scale. 3D takes away the guess work of the print versus the garment, what is the scale of that, placement of that, colour-ways of that. We are now launching TukaDesigner. TukaDesigner will be an app that they can download and work on the cloud for 29\$ a month. There are several applications on it depending on who you are and what your role in the garment industry is you can download your chosen app for 29\$, and there are several apps being offered for 29\$ each, and each one is on the same platform. So if you guys were

sketching it, sketching goes away, and now you're working with a 3D Asset. If you are a print designer you can decide which print will look like what and at what scale. At Texprocess, in Frankfurt, Tukatech is launching a suite of applications that will change the design community. The patent-pending applications and processes will eliminate sketching, and thus design misinterpretations. By working with existing 3D garments, real scale prints, Pantone-based true colors and pattern repeats, the entire supply chain will be able to collaborate and communicate design ideas at a fraction of the time and cost.

Does it also show motion, in terms of the fabric flow properties as different fabrics have different falls, different behavior?

RS: Of course, but that is for the ones doing the final development. I know this is going to sound very arrogant but it's not - we are the only company in the world which has a built-in motion stimulator.

You mean that it simulates the motion of the fabric?

RS: Yes, that and the collision of the fabric against the body in motion as it moves.

So, did Tukatech partner with some other tech majors for developing this?

RS: Yes, we partnered with the largest CAD company in the world AutoCAD,

AutoCAD's parent company is called Autodesk and is a 2.2 billion dollar company. Further, for the film industry and the gaming industry there is a software called StudioMax we partnered with them too. So, the underlying engine for the motion stimulation is 3D StudioMax and then for making the presentation it is 3D StudioMax.

This development considers the warp, the weft, and the stretch against body pressure. The entire fabric physics and how it collides with body. All other technologies apart from ours as of now are static.

The app filters down all the aspects of the garment, there are 100s of motion built in the app that test the fit as it would on a model, to check the ease, the stretch, the movement. It captures it all.

If a technology doesn't give me all this then I will have to cut, sew and see it on a real person to make sure what I saw is what I got. For example, for tight jeans considering only the front and back rise is futile, only when you squat do you realise what a good fit is.

So, is 3D inevitable for maximum success in mastering digital-based garment manufacturing?

RS: We are already doing great right now with Brandix, and in Pakistan, there is a company called US Apparel which is the largest H&M supplier for woven women's wear. If you go to my website you will see that without 3D they have gone 99.8 percent first process approval. Before that they used to make 5 samples a day and only 93 percent were getting approved and now only one sample in house goes out.



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The Cloud is what everyone seems to be moving to. How does TukaCloud help the apparel industry best?

RS: The TukaCloud is an amazing engine that we created by organizing the entire company not only pattern makers, or sample makers, or brand managers etc., all people who get involved with the design or the development process. With this they are all connected and it doesn't matter if it is iPhone or iPad or Windows. What happens is that the process becomes all digital and when everybody says yes then only one sample is cut and sewn.

At Victoria's Secret, one of our biggest customers, what used to take them days and weeks now it takes hours. The Victoria's Secret team is connected to the TukaCloud, Amazon is connected to them and in three days they go from product development to approval to finished products! Recently Amazon launched several brands in UK which are all working on Tuka. We are so glad that we can come out of the box and show something which is so different and unique.

You've made this entire mammoth network on apparel manufacturing, controlling the process, the systems, the accuracy, the efficiency, the performance, and now let's come onto the other side that is the next



generation of this something that has huge significance for online retailing. This would be that the customer can map their own size sitting at home via a camera resource and which will enable to match the best body fit according to their size. Your comments on this please?

RS: Amazon just launched a camera with a depth sensor for 200\$ where you can take a picture with your garment on and then there are fashion consultants who will give you their opinion and help style. Amazon is collecting this database. Amazon is a very smart company and you can't mess with them. If you do, you will lose. So, if you should do something, it must be something they are not doing as they are way ahead of you. In 2012, we developed Tyco which aimed at digital showrooms with creative body scanners. All that failed. There were so many things that are different, for example every brand has a fit model. This is not the measurement - it's the shape of that person, and people within that shape are their customers. If they try to deviate from that, then it's going to be a different fit. So, the question for many was whether I just focus on customers who fit my size or do I change my business model to cater to people who have different shapes and models.

But I believe you are about to launch something that enables this now?

RS: Yes, but to do this meant that we had to create a mechanism to cater to what we call mass customization. You see, even as a user, there is a mechanism where I want to build something. I see a product first-time at a website and I want to try it, and there is a button that says Try It On. I click on that button to try on and it takes me to another window and says tell me what your body shape is and there are 5 different shapes of body. Post few measurement and it tells you to verify height, bust, hip and your waist it gives an approximate body type. It creates an avatar of you, and based on the measurement chart it shows the accurate fit size to try. And it will also show you where it is tight and loose, and how it fits and falls in motion on your avatar.

We are launching that next month in New York. It is an app called Virtual Closet that scans your closet and puts your outfit together and it's all working in a 3D way. I have hundreds of customers right now and more than 650 brands that have already have 3D digital data to form the garments. It morphs a garment and it's almost like putting a garment in front of the mirror and thinking how does it look and fit.



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dealing with very diverse shapes, age groups and the builds are so varied. Lulusar has come up with something very interesting with us. In their sizing chart, we have created a regular fit, a tall fit and a petite fit. Regular it is 5'7" to 5'9" ; under 5'7" is petite fit and 5'9" and up is tall.

Control of fit is a major aspect. Everybody can do trials by hit and miss but that is tailoring not mastering!

In conclusion is there something you wish to tell an apparel manufacturer who wants to try Tukatech?

RS: I would like to invite them to try TUKA3D Enterprise Edition which includes all the high-functioning 3D development capabilities for a virtual product development at a more attainable price. While TUKAcloud, is a web-based sample room for digital collaboration. This solution serves as a database of virtual samples, and is also a communication platform that enables product development to take place in a digital environment reminiscent of the traditional design process.

'Going virtual' has allowed apparel manufacturers to reduce their product development time considerably, and increase their first-sample acceptance rate. Today, there are many eCommerce retailers using TUKA3D for designing, developing, and uploading their realistic looking digital assets.

They do not require a photo shoot, inventory, or warehousing; the best part is no markdowns. This is "Demand Manufacturing". This is the best way to be profitable and be ahead of everyone else. We are proud to be labelled as the "DISRUPTIVE TECHNOLOGIST" and want our customers to be number one.

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Fit is critical so I guess when you begin work with a brand you also help them find and define their fit models? And there must be at least 40-50 fit models. Exactly how many fit models are there that you are aware of?

RS: Absolutely! That's the number 1 criteria, if I'm going to do something in the virtual world it needs to be a replica of the real world fit model. And no, there are many more models—there are around 2,000 fit models, and we currently have approximately 650 fits of which we have replicas of their bodies. And they are all different. We took 12 girls for junior market, all 12 of them are within ½ inches height difference, but visibly they all look different due to their shapes. When I say, fit sells I say it because fit is more important than fashion.

Let's talk sizing now. There is a major problem in terms of sizing—uniformity and definition—especially in India. A customer just doesn't fit the same size in different brands. Your comments.

RS: There will never be uniformity in sizing. The culprits for this are the Americans. They created this thing called vanity sizing. In the UK sizing is much more standardized. But India is tough because we are





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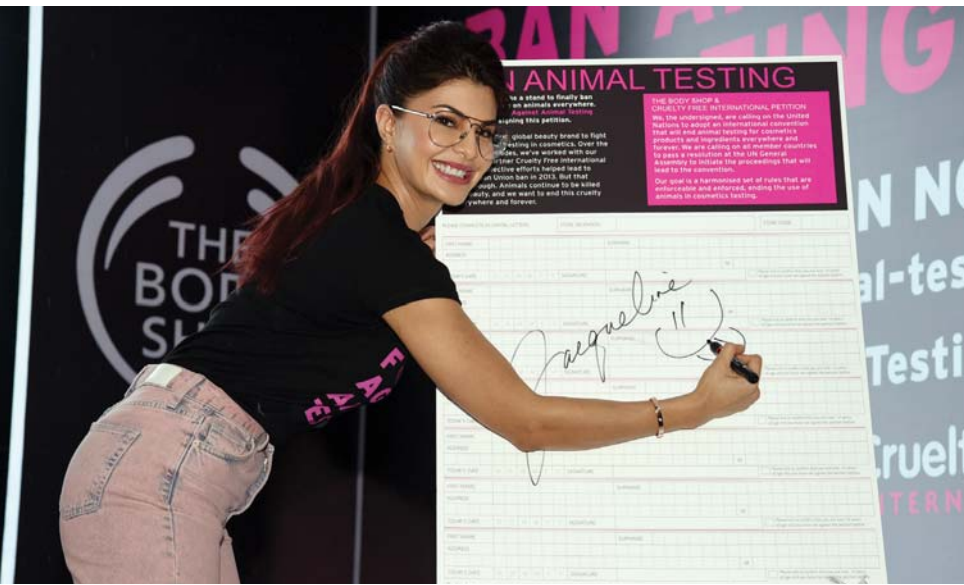
THE BODY SHOP'S CAMPAIGN AGAINST ANIMAL TESTING

By Tanya Krishna

Actress Jacqueline Fernandez has joined the social cause for a global ban of cosmetics animal testing on products and ingredients by 2020. The initiative has been taken by international beauty brand The Body Shop through which Jacqueline already has a special line of cosmetics. Partnering with the leading non-profit organization working to end animal testing, Cruelty Free International, The Body Shop will take the 'Forever Against Animal Testing' (FAAT) campaign to the United Nations, and request an international convention banning cosmetics testing on animals. Through the campaign, the brand is calling out to people, who care about animal welfare, from across the globe to join the cause and sign the petition.

The potential for animal testing is still a huge risk around the world, with over 80 percent of countries still having no laws against testing in cosmetics. Cruelty Free International estimates that approximately 5,00,000 animals are still used in some countries in cosmetics testing every year.

Speaking on the campaign, Jacqueline Fernandez, Brand Ambassador of The Body Shop India, says, "Real beauty cannot be achieved at the cost of harming anyone, especially animals. The concept of animal testing for cosmetic brands should be banned. A socially responsible conglomerate would prefer not to implement testing measures that prove hazardous to anyone's health. That's why I extend support to The Body Shop's noble initiative to end this atrocious practice across this industry by launching a campaign to spread a global ban on animal testing of cosmetic products and ingredients. I request you all to sign the petition and save our animals." Shriti Malhotra, COO, The Body Shop India, says, "We are pleased to say that India was the first country in South Asia to ban animal testing



campaign ever to seek a global ban on the use of animals to test cosmetic products and ingredients. We will take this petition to the United Nations to compel them to create a global law to ban animal testing in cosmetic products and ingredients.”



Michelle Thew, CEO of Cruelty Free International, says, “People are confused about animal testing. The world over, people want this cruel practice to end, yet existing laws are a patchwork of different rules with some very big gaps. While more and more countries require non-animal safety tests and many have taken steps to prohibit cosmetics testing on animals, there is more work to be done. Where animal testing is allowed - on both products and ingredients - most countries do not require testing data to be made available to the public or even to regulators. This makes it extremely difficult to know how widespread animal testing is. We are delighted Cruelty Free International and The Body Shop are together campaigning for a ban that would finally end animal testing forever.”

The Body Shop was the first international beauty brand to campaign against the practice of animal testing in cosmetics in 1989, leading the way to a European Union-wide ban on animal testing in 2013.

The petition can be signed online or at any of The Body Shop’s 3,000 stores across the world. Consumers are being encouraged to use the campaign hashtag, #ForeverAgainstAnimalTesting, on social media to raise awareness of the issue.



in 2013. The Body Shop is proud to be a cruelty free brand and a staunch supporter of effective, modern, non-animal alternatives to cosmetic animal testing. With our FAAT campaign, we are asking our customers to help us end the unnecessary and outdated practice of animal testing for good by signing the petition in our stores or on our website.”

Rules on animal testing in cosmetics are currently patchwork, with legislation differing around the world leaving consumers ill informed. Traditional animal tests have never been validated for their use in reliably

detecting the safety of cosmetic products and ingredients. There are now modern alternatives such as artificially grown human skin, that are, in the majority of cases, as effective as the animal test they replace and have been validated by authorities.

Jessie Macneil - Brown, Senior Manager International Campaigns and Corporate Responsibility, The Body Shop, says: “The Body Shop passionately believes that no animal should be harmed in the name of cosmetics and that animal testing on products and ingredients is outdated, cruel and unnecessary. This is why The Body Shop and Cruelty Free International have partnered to deliver the largest and most ambitious



Rinku Sobti

DENIM

OFF THE BEATEN PATH

Denim in the past has been popular for jeans and at times shirts. Designers have now become more experimental and are using denim for new fashion horizons— shoes, bags, apparel, accessories, jewellery and even furnishings.

By Meher Castelino

When it comes to fashion, no fabric has made an impact on the lifestyle of people globally more than denim has done. Its history is vast and varied taking the fabric across several continents before it was established as a fabric that has remained on the top of the fashion charts for decades.

The fabric was first used during the Gold Rush in the 19th century in California for the miners. Levi Strauss also put his name on it when the clever tent salesman used canvas tenting to make trousers. It then moved to France where the French alternative was more suitable. 'Made in Nimes' France, it was called Serges-de-Nimes (cloth of Nimes). Funnily, the Americans preferred the French version to their own but shortened it to just 'denim'.

The characteristic blue hue according to history dates back to the 18th century when it is believed that Genoese sailors discovered the toughness of denim that was ideal for uniforms but white was difficult to keep clean. Dyeing it blue or indigo, the sailors gave birth to a fashion sensation. The word 'jeans' is supposed to be a derivation of the word Genoese and so 'denim jeans' became the 'must have' in all wardrobes. Denim from being ideal for work wear moved to becoming a fabric of rebellion in the 50's but it has now moved into a fashion item.

In the past, it was popular amongst the men for jeans and at times shirts. In fact jeans in denim were the only garments that were worn by women for a couple of decades, till designers became more experimental and moved the fabric into women's wear in a big way.



Nina Lekhi



Veruscha

HAUTE STEPPING DENIM

Denim has moved off the conventional beaten path in the 21st century and is now looking for only new fashion horizons. Footwear is one of the categories that apparently appears to work rather well with denim since the fabric has a sturdy quality to match the designing requirements for shoes. Payal Kothari the Shoe Sculptor's label 'Veruschka' has created 'The Denim Courtyard' Collection for 2017. "The collection of shoes is influenced by the blue city of Jodhpur in shades of denim ideal for the Indian summer. The collection is grounded, sophisticated and high on comfort," informs Payal Kothari. The collection offers wedges, comfortable block heels, ballerinas and some stylish heels all crafted in blue denim.



Nina Lekhi

DENIM ARM CANDY

If footwear has brought in denim as a favoured medium then can handbags be left far behind? Think of handbags and denim fits in really well as arm candy. Nina Lekhi of 'Baggit' the multi-crore-handbag brand has created her signature line called 'Nina Lekhi' all in versatile denim. "Denim is like your second skin which clutches to you with its distinctive finishes. It has an aura of comfort that you want to carry about and around you. It has been there for years and now it has become a premium offering available in Black and Indigo colours. Denim makes commuting comfy and consumers have got used to the material and offered textures. Denim bags are like vintage, which don't lose their appeal with time but add to their beguiling avatar. The refreshingly eye-catching washed denim fabric bags from 'Baggit' make them excitingly alluring and fashionably feminine. The bags are lightweight and easy to maintain because of their fabric base. The brown detailing at the base and strap has added extra oomph to them. The addition of stitched safety pins around the zip give the bags a raw look, which appeals to the consumers when they want to experiment with fashion," reveals Nina Lekhi who has created backpacks, sling bags, handbags and short handle creations.





Aniket Satam



Masaba



Shruti Sancheti

DESIGNERS' DENIM DIRECTIONS

From footwear to handbags it is garments that have always been the favoured avenue of denim globally. Now Indian designers have moved onto the denim road in an aggressive and fashionable manner that gives this tough fabric an exciting fashion angle which moves from high fashion to prêt and casual wear as well as from the western to the ethnic segments.

Aniket Satam's cute dress is a refreshing take. "Denim is a versatile textile, which has universally bound us in a new genome. Its timeless appeal has refined comfort and style across centuries. What was introduced, as a miner's uniform has become a wardrobe staple, turned into an almost second skin to everyone across the globe. Denim like water takes any shape and transforms into a stylish ensemble with cool street style vibe. For the resort 2017 collection I have used denim textile with Orissa ikat rumal to create Indie cool cropped tops. The same denim edition also features for oversized kimono jackets textured with tonal enzyme washes," says Aniket.

Farah Sanjana's oversized, large lapel, bomber, jackets with amazing texturing



Masaba

add an innovative dimension to denim when teamed with stylish maxis or skirts.

Masaba Gupta launched a large women's wear denim collection in March 2017 that reflected her characteristic trendy youthful touches. Cute sack dresses with funky white motifs, maxi pleated skirts, accentuated with buttons, drop waist smocks with frilled Tamil alphabet printed hemlines, distressed pants, printed jackets and loose tent dresses were in soft shades of blue denim.

Mayyur Girotra goes ethnic with denim for lehengas that are heavily



Rajaesh Pratap Singh

embroidered with a festive scene teamed with a shirt and tank top. He also adds long sleeved shirtdresses with elephant motifs splashed on them, while wide patio pants and cold-shoulder cropped top intricately embellished with animal designs complete the look of his denim collection.

Sayantana Sarkar's outfits have shades of dark grey in denim for asymmetric dresses, shirts, jumpsuits, pinafores, harem pants and a tiny blouse in ink blue denim that are teamed with fluid checks to give an interesting appeal to denim.

Shruti Sancheti loves to experiment and her Amazon India Fashion Week Collection had denim for asymmetric midis with striking embroidery. There were full flared anarkalis with long-sleeved boleros and curved hemline kurtas with dark blue denim palazzos. "I used denim for my Autumn/

Winter 2016 collection. The range was very well received as I used denim for fusion wear as well as Indian wear rather than limiting it to just westerns. I also added elements like tribal and Kashmiri embroidery but kept the soul of the collection youthful and young. After that I am regularly working with denim along with other fabrics as it does impart a young and contemporary look and appeals to a cross section of buyers," feels Shruti Sancheti.

Designer Ragini Ahuja's 'Ikai' label has stylish denim for fashionably belted loose pants that are teamed with a cute denim bralet; while the front buttoned, straight skirts with baggy shirts are splashed with giant multi-coloured appliqués for added fashion drama. Her stylish long four-pocket denim lab coats are highlighted with floral embroidery to give them a stylish impact.

Rajesh Pratap Singh's recycled denim men's

wear collection at Lakme Fashion Week Summer/Resort 2017 was a feast for the eyes. Churidars, kurtas, baggy wrap pants, boxy shirts, jackets, coats, patched reused, reworked, bombers were part of a collection that offered limitless men's wear mix and match options.

Rinku Sobti who loves working with traditional hand-woven textiles turned to hand-woven denim for her prêt collection 22017. "It's a young look that offers smock dresses, mini skirts, tops, long sleeved shirt dresses, shorts, cropped blouses and one shoulder minis," reveals Rinku.

Some designers have been more adventurous as they have moved into the traditional drape and designed denim saris, which have proved immensely popular. Bollywood actress Sonam Kapoor sported a denim sari by Masaba Gupta and created quite a stir at the event.





Rustic Coats

visualised not only in shades of blue but even beige, brown and rust; while denim kid's wear has always been a favourite of parents and designers when it is called 'Cruise Chaos' once again designed by the students.

RELAXED DENIM COMFORT

Denim's versatility knows no bounds as is evident from the way the fabric has moved effortlessly into other genres that are quite different from fashion. There is denim used even as upholstery for sofas and furniture that is proving very popular in 2017. Kamdar Pvt Ltd the decades old top furniture store in Mumbai has specially designed a sofa with a pair of cushions for a discerning client. "We made this exclusively for a customer who is very particular about comfort and style and is partial to organic eco-friendly material for furniture. It has proved to be one of our most successful designs," states Deepak Grover, Sales Manager, Kamdar Pvt Ltd.

When it comes to soft furnishing denim scores on all fronts. It looks great as curtains, is ideal for table cloths and napkins, as well as runners and in its very light weight it looks good even for bed covers.



STUDENTS' DENIM DRAMA

Denim hasn't just excited Indian designers but also caused a sensation amongst graduating students who have dabbled with denim for not only garments but also accessories and jewellery. At the Le Marque 2017 show by the students of the Le Mark Fashion Institute, denim was the base for an interesting embroidered collar, handbag and necklace created into multiple rows of denim baubles with an impressive rosette in one corner.

Students of the B D Somani Institute of Art and Fashion Technology have presented dazzling bridal collections of lehengas, cholis and dupattas with intricate texturing, patchwork and embroidery during their annual shows. The 'InJeaneous Jodhpur' and 'Mela Mélange' collections brought denim into the bridal wear category in 2016 and 2017.

The denim men's wear collection called 'Rustic Coast' by the students was





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HARD
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G-STAR RAW

CRAFTING INNOVATIVE DENIM

Endeavouring to redefine the meaning of RAW by deconstructing denim to its purest form, G-Star has come up with new innovations in denim construction, silhouette and shape.

By Bharti Sood

Founded in 1989, G-Star RAW, highly innovative denim brand, has today become a leader in the jeans industry. Driven by a philosophy of “Just the Product” and with complete dedication to quality and progress, the Dutch denim brand produces pioneering products and is rapidly growing into a global brand.

In 1996 the brand introduced wearable and desirable raw denim products and in the same year it also invented the ‘3D Denim’ method of jean construction, with the creation of the G-Star Elwood. Using additional leg panels and darts, with baked and laundered finishing treatments, this 3D Denim created a fit unique to G-Star.

Celebrated for their artistry and constant innovation in creating alternative styles of denim, G-Star extensively researched how to create the ultimate flattering jean for women. Having identified the ideal shape, size, and position of back-pockets, G-Star discovered the secret of slimming side-seams, and perfected the critical waistband. G-Star today offers a wide range of apparel, accessories, footwear, and eyewear, alongside its jeans core.

Retail Presence

G-Star is retailed through more than 6,000 points-of-sale in 70 countries across the world, 500 of which are mono-brand stores. The brand entered the Indian market in 2014 through



online shopping destination Jabong. In July 2015 this celebrity-endorsed label opened its first store at Palladium Mall, Mumbai in partnership with luxury label marketer and distributor, Genesis Luxury. G-Star today has five own stores in India located at Palladium Mall, Mumbai; DLF Promenade, Delhi; Mall of India, Noida; Phoenix Market City, Pune and Bengaluru. Genesis aims to open 30 points of sale for G-Star in the next five years. A pair of denim is priced anywhere between ₹6,000 and ₹14,000.

Brand USP

G-Star RAW is best known for its ecological take on denim production—often creating styles using Japanese selvedge,

unwashed and untreated raw denims and organic fabrics that aim to help save the environment. The brand is famous for making raw or unwashed denim positioned as ‘luxury denim for the streets’.

Brand Associations

The label G-Star RAW is a celebrity favourite, worn by the likes of Cara Delevingne, Rita Ora, Jay Z and Gwen Stefani. It is sported by Hollywood actress Liv Tyler, world chess champion Magnus Carlsen and singer Pharrell Williams, who had collaborated with the brand for award-winning ‘RAW For the Oceans’ fashion collection made from recycled plastic found in the ocean.

Collaborations and Collections

Unrestrained by its industry, the brand ventures into notably unconventional collaborations with artists and fellow product manufacturers equally committed to innovation, technology, and craftsmanship. Since 2004, G-Star has created seasonal clothing collections with industrial designer Marc Newson, merging Newson’s industrial design influences with the denim craftsmanship of G-Star. Another collaborative facet is the ‘RAW Crossovers’, which play an important role in the brand’s identity. These unique design experiments fuse the G-Star DNA with that of fellow product manufacturers. The RAW Prouvé line is the latest in the series, alongside projects with Leica cameras and Land Rover vehicles.





G-STAR RAW RESEARCH III COLLECTION UNVEILED AT PARIS FASHION WEEK

Led by its Executive Creative Director, Aitor Throup, the G-Star Raw innovation lab unveiled its third line of Raw Research deconstructed denim designed in its purest form, as part of its third new collection for men and its very first for women.

The collection presented new innovations in denim construction, silhouette and shape, all underscored by an undyed, unwashed and untreated raw denim. The brand's in-house innovation laboratory followed the same design approach for both men's and women's collections. Each collection featured 10 pieces presented in undyed calico denim. In addition, the same collection went through a process of hand dyeing where the indigo was added to the raw garments, resulting in an organically irregular visual effect. The G-Star innovation lab separated, analyzed, and utilized the core elements of denim - the raw fabric and the indigo dye - in new and experimental ways.

Presented during Paris Fashion Week on June 23, the collection also sees Throup's first ever collective work of women's wear. The first dedicated women's styles reflected the overall design philosophy of Raw Research III, and the resulting pieces seamlessly blended minimalism and functionality, without compromising femininity. Said Executive Creative Director Aitor Throup, "We are coming out of an age when technical and functional design



SUMMER'17 Collection:

DENIM REWORKED IN EVERY STITCH, A STORY

As part of G-Star's continued dedication to the craftsmanship of denim, G-Star RAW explored and reworked traditional techniques into new executions and lived-in washes for their summer '17 collection, Denim Reworked.

G-Star RAW believes that jeans got better with time — repaired, re-built and restored. To celebrate the craftsmanship and time-tested approaches to denim restoration, G-Star followed three inspiring denim-lovers, to talk about their journeys and the denim stories behind them.

is considered inherently masculine. We believe that our obsession with product design principles such as ergonomics and concinnity is as relevant for women as it is for men. By clashing tradition with innovation, the resulting prototypes serve as blueprints for the main collections in the future.” All new styles of the Raw Research were presented in 44 different hand-dyed color options. The line will hit select high-end concept stores the world over in early December 2017.

The first denim journey featured Daniel Werner, a Berlin-based collector and hunter of all things denim. The pieces he collected were mostly hidden treasures, each with its own story of craftsmanship. The second denim journey introduced Shanice Silva Cruz, the first female BMX rider to do a front flip. The third denim journey featured artist Ricky Lee Gordon covered in paint splashes who used the city as his canvas.



MILESTONES

1989: G-Star Raw came into inception.

1991: The brand joined hands with French designer, Pierre Morisset to push the boundaries of denim.

1994: Gapstar became G-Star

1996: 'Raw Denim' concept for Spring/Summer 1996 unveiled, which triggered a revolution within the denim industry. G-Star introduced untreated fabrics in solid colours.
- 3D denim approach invented in construction techniques.

2000: A-Crotch pant introduced with an A-shaped cut and angular seams.

2004: G-Star collaborated with Australian industrial designer Marc Newson and a unique capsule collection was formed.

2005: First RAW Crossover revealed-automotive equivalent, Land Rover – resulting in the RAW Defender.

2007: G-Star presented its unorthodox denim approach for the first time at New York Fashion Week.

- G-Star took to the canals in its second RAW Crossover – the RAW Ferry.
- G-Star launched RAW Footwear at the trade fair Bread and Butter, Barcelona.

2008: First RAW Icon, Dennis Hopper introduced by G-Star. Subsequent RAW Icons included Benicio del Toro and Michael Madsen.

2009: The Arc Pant born from innovative 3D approach, for Spring/Summer 2009. The Arc Pant created a contemporary silhouette using twisting inner and outer seams that 'turn' around the leg.

- Legendary photographer Anton Corbijn began shooting G-Star campaigns in raw, black and white style.

2010: RAW Essentials line introduced. The range exclusively used raw selvedge denims, demonstrating the forefront of denim craftsmanship.

- The third RAW crossover was created, the RAW Cannondale; limited edition bicycles made in collaboration with American bicycle specialist Cannondale.

- Another icon denim, the Type C, was revealed during the G-Star show at New York Fashion Week. Designed extremely tapered with oversized rear pockets.

2011: G-Star and manufacturer Vitra launched Prouvé RAW: an exclusive range of classic Prouvé pieces, infused with G-Star design aesthetics.

2012: First G-Star Women Store opened in Amsterdam to provide a refreshingly refined in-store experience of finding perfect fitting jeans with ease.

- G-Star RAW Tailored Atelier, a touring customization service introduced to provide customers an all around the world opportunity to personalise their denim.

2013: The Art of RAW seasonal campaign introduced to explore the unlimited possibilities of denim through differing disciplines. The campaign featured electronic musician Skrillex, Kasabian guitarist Sergio Pizzorno and ballerina Keenan Kampa.

- G-Star launched the RAW Leica, a RAW Crossover with German camera company Leica and produced a special edition of the 'Leica D-Lux 6 series'.

- A distinct G-Star eyewear range RAW Eyewear unveiled, using innovative flat lenses and premium frames, executed with superior craftsmanship.

2014: RAW for the Oceans initiative introduced in partnership with Bionic Yarn and The Vortex Project. Curated by Pharrell Williams, the initiative used ground-breaking technology to create yarn from retrieved ocean plastic, transforming it into a new generation of denim.

2015: G-Star collaborated with photographer Ellen von Unwerth on two consecutive brand campaigns.

- Prouvé RAW: Office Edition launched, reviving a series of office furniture designed by Jean Prouvé, manufactured by Vitra.

2016: Pharrell Williams became co-owner of G-Star RAW. Aitor Throup transitioned from consultant to Executive Creative Director for G-Star RAW.



PATAGONIA

DOING IT RIGHT ALL THE WAY!

Creating best of products, causing no unnecessary harm and reducing impact on environment – is what Patagonia strives for. Their line of jeans are made of 100 percent organic cotton and adopting innovative methods and advanced dyeing process reduces the use of water, energy and chemicals and produces less carbon dioxide compared to conventional denim dyeing processes.

-By Bharti Sood

Founded by Yvon Chouinard in 1973, Patagonia is an outdoor company based in Ventura, California. A certified B Corp, Patagonia's mission is 'to build the best product, cause no unnecessary harm and use business to inspire and implement solutions to the environmental crisis'. The company is recognized internationally for its commitment to authentic product quality and environmental activism.

Patagonia gives 1 percent of its sales to support environmental organizations around the world, funding at the grassroots level, to community-based groups working to create positive change for the planet.

Patagonia is out to change the denim business. An innovative dyeing process enables the brand to reduce dramatically the use of water, energy and chemicals and produce less carbon dioxide compared to conventional denim dyeing processes. Not only so, their denim jeans are made from 100 per cent organic cotton and are also Fair Trade Certified™ for sewing.

Mark Little, Patagonia's Product Line Manager for Sportswear, shares, "Denim itself has always been a progressive product. Denim was always a form of anarchy; James Dean was a disruption in creative culture, then there was the punk rock era. They were major disruptors and denim was on the curve of it. Now we are trying to disrupt the way we think about denim."

Collection: Advanced Denim

When it comes to giving denim its signature blue, most dye houses use synthetic indigo dye applied on huge production lines that use a lot of water and energy. Indigo doesn't adhere readily to denim, which makes the dyeing, rinsing and garment-washing process resource intensive. Patagonia has introduced a new range called 'Advanced Denim', which replaces indigo with an innovative dyeing process. The brand employs Archroma Advanced Denim Technology, that colours it with sulphur dyestuffs that bond more easily to denim. This results in much



Mark Little
Product Line Manager for
Sportswear, Patagonia

that's a critical thing to explore," shares Mark.

Patagonia's 'Advanced Denim' technology has been honoured with the prestigious 2012 ICIS Innovation Award and Innovation with Best Environmental Benefit Award. Archroma was one of the first companies to be awarded a European EU Ecolabel* for its illustration collection of jeans in recognition of the sustainability benefits of 'Advanced Denim'.

Says Mark, "Patagonia is aiming to have a positive influence and lead the industry in a better direction. Our goal is not to take over the denim business, it's about showing people a different way of doing things; a cleaner way of doing things."

Brand Engagements: Fair Trade Certified™ Sewing

Patagonia denim jeans are Fair Trade Certified® for sewing. By partnering with Fair Trade USA the brand helps garment workers to get closer to a living wage. Informs Mark, "In an industry where workers are among the poorest paid in the world, it's good to know that your clothing is Fair Trade certified for sewing. We pay our workers "a premium" for each piece of Fair Trade clothing, which can be used to improve their communities and standard of living."

Retail Presence

Patagonia currently operates stores across the globe and have a distinct philosophy when opening new ones. They believe in using and improving existing buildings, rather than constructing new ones. When they can't stick to this principle, they design their buildings with aesthetic appeal, try to make use of environmentally conscious construction materials and fixtures, and build them to last. Emphasis is on making the stores unique by reflecting the history and natural features of their locations.

Patagonia Denims have widespread presence in Argentina, Australia, Canada, Chile, China, Czech Republic, France, Germany, Hong Kong, Ireland, Italy, Japan, South Korea, Taiwan, U.S.A and Virgin Islands (U.S.).

Online Presence

Patagonia denims are available at backcountry.com, evo.com, moosejaw.com, mountaingear.com, eir.com. The brand is also retailing through their own portal Patagonia.com.



shorter production lines that uses 84 per cent less water, 30 per cent less energy, and emits 25 per cent less CO₂ as compared to conventional indigo processes.

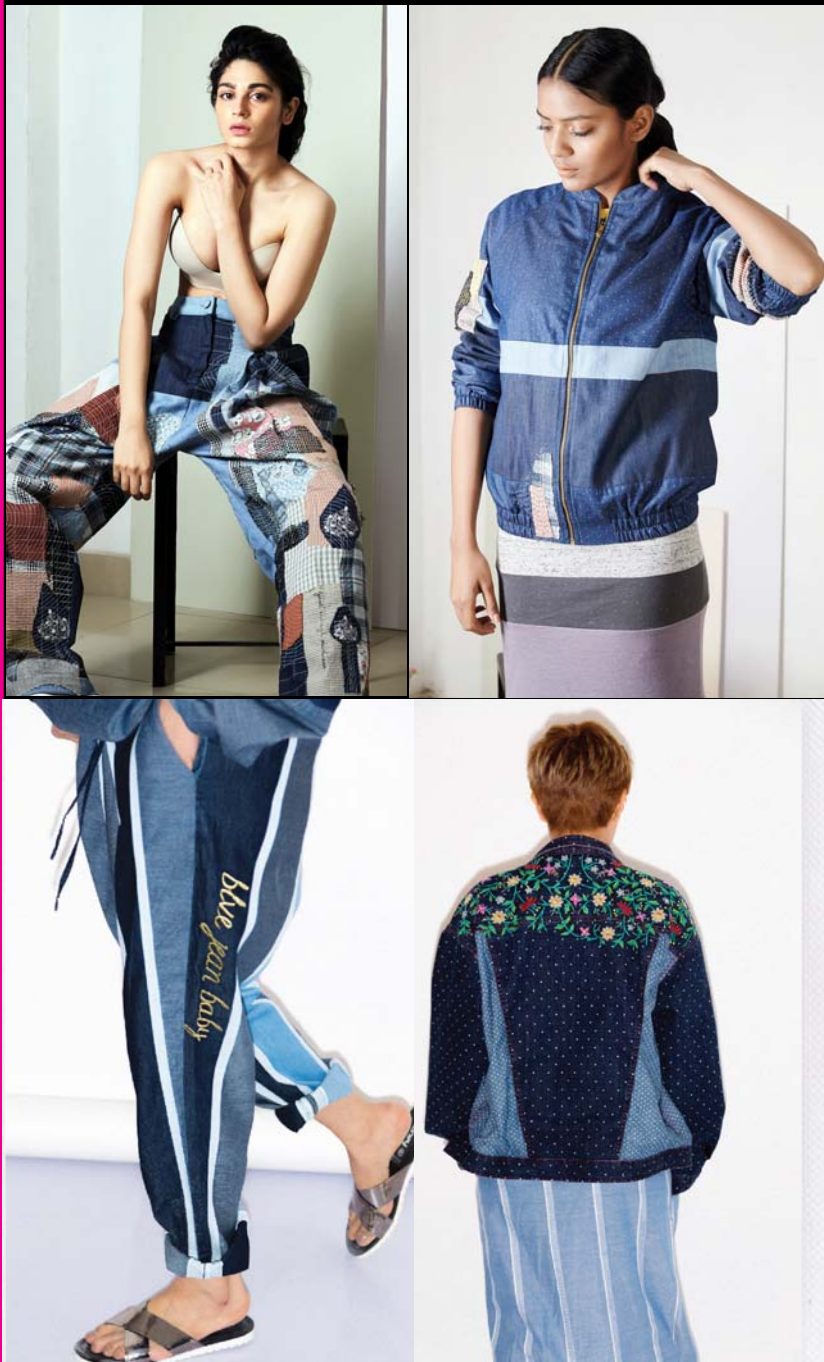
"The production of conventional denim demands enormous volumes of water and energy since synthetic indigo, used for dye by most producers, doesn't adhere well to denim. Therefore the processes of dyeing, rinsing and the washing of garments are extremely resource intensive. Everybody has different production cycles but we found that in the conventional dyeing process you're using multiple baths to dye the fabric; anywhere between 10- 14 dye baths. With the new process, we use two. Water is a precious resource, so if there's an opportunity to reduce usage for any product or apparel, then

Materials & Technology: Organic cotton

The R&D department at Patagonia is constantly improving and innovating on materials being used, to create most durable, long-lasting and best-in-class products.

Conventional cotton is thought of as one of the dirtiest fibres in the fabric industry, and Patagonia has therefore been careful to use only organic cotton since 1996, farmed without the usual mix of synthetic pesticides, herbicides, defoliants and fertilizers that can pollute water and air. Patagonia® Denim uses only 100% organic cotton grown without GMO seeds employing nature-based solutions to manage pests and build healthy soil.





— **Kriti Tula,**
Head Designer, Doodlage Retail LLP

A blend of sustainable and exclusive high street fashion, Doodlage merges innovative designs with sustainable techniques of clothing to create chic and eco-friendly fashion. Doodlage re-designs, re-constructs and re-cycles old clothing or industrial waste to create something that is totally new and interesting. Each of their up-cycled garments are unique and stand out with their design, cut and colour. Kriti Tula, Head Designer, Doodlage Retail LLP, talks to the Images BOF team about the innovative techniques being employed by the brand.

IBoF: Tell us a little bit about your philosophy of your up-cycling old items and what values does it seek to propagate?

Kriti Tula (KT): Doodlage works to create unique, environment friendly products, which are high on style. I had my 'big-idea' moment, during a student internship at a large export house. I wondered if the mounds of fabric discarded due to miniscule variations in pattern design or colours, could be put to better use. Step by step, through multiple up-cycling based projects and industry experience, both in India and abroad, and a talented team working tirelessly with me, I turned up-cycling into a bold new statement. Everything at Doodlage is made with love; every piece we make is exclusive and unique.



DOODLAGE: UP-CYCLING AND RE-CONSTRUCTING FROM WASTE

By Bharti Sood

IMAGES Business of Fashion



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Blowash

For Distributorship, Dealer, EBO & Franchising Mr. Anuj Batra (President), Alcis Sports +91-9818379923, anuj.batra@alcissports.com

IBoF: Why do you think no waste philosophy is important for the world? What steps do you take to ensure that eco friendliness is maintained at your end in the process of recreating or reconstructing the product apart from the fact that you were using something which was previously wastage and would have not been eco-friendly?

KT: In today's age, there is a high rate of consumption of natural and man-made resources by the fashion industry for garment manufacturing purposes due to the constant demand by the ever growing population all over the world. This results in immense wastage of textiles, yarns and other materials that are discarded from factories in the form of trimming, excess fabric and factory rejects during the manufacturing processes. The higher the rate of consumption the higher is the amount of waste.

The main culprits that contribute to such wastage of resources are fast fashion brands, uninformed people and non-sustainable products. Once the clothes are old or out of season, people usually tend to throw it away. Or, if the clothes are defective, they end up in the dumps too. Due to fast fashion, the availability of low quality clothing is immense, which makes people buy even more than usual that indirectly makes them contribute to the overall wastage of textiles that end up in landfills and take ages to decompose.

My main aim was to create awareness about over consumption of resources and its wastage and how it could eventually end up harming the ecosystem. I chose to take the concept of creating sustainable and affordable clothing out of waste textiles forward to help manage the textile waste caused due to the industries.



Doodlage is a perfect sync of sustainability and innovativeness. We work with eco-friendly fabrics, such as organic cotton, corn fabric, banana fabric. Another source of fabric is the left over or quality, discarded textiles from large manufacturers, which account for the "wastage" in export terms. We also source fabrics, which are left unused by other retailers post-cutting. Much like pieces of a puzzle, these bits and pieces come together, each with their own story. We love experimenting with textures, embroideries, panels, washes, shapes and sizes to optimize the use of every little piece.

IBoF: Tell us something about your focus on denims? What types of products do you create out of recycled denims?

KT: Denim requires a lot of resources to be created. A single pair of denim pants require 10 buckets of water for it's processing. This makes denim even more valuable. Every scrap, cut and sew waste piece of denim can be used to make a variety of up-cycled products which are also sustainable and sturdy. The products created out of denims

at Doodlage are jackets, pants, shirts, dresses, laptop sleeves, handbags, clutches, passport cases, shoe bags, wallets and toilet kits.

IBoF: What percentage of your overall sales come from denims? What are your future plans to target the denim's category?

KT: 25 percent of the overall sales come from the denims category. Since denim is a very sustainable material, we make sure that every scrap of denim is used in each collection. We would be incorporating denims in the menswear collection, accessories and other products that are still being conceptualised.

IBoF: What has been the acceptance of consumers towards eco-friendly and re-constructed apparel? Are they willing to accept it?

KT: In the recent past, people have recognised Doodlage as a sustainable fashion and lifestyle brand and have realised how important it is to manage waste in order to create less pollution. Up-cycled products breathe in new life to the discarded fabrics and materials which are in good condition. We make sure that we keep the aesthetics of our products visually appealing and that every piece is special. Consumers have accepted eco-friendly and reconstructed apparel since it is the need of the hour and one of the many ways to manage textile waste.

IBoF: How do you price the recycled products and how does it compare to the product which has been recreated for the first time?

KT: Our prices range from ₹2,500 to ₹15,000 depending on the kind of product and the amount of work that goes in conceptualising a particular piece. We keep our prices competitive with other pret brands and make sure that the fair wages of karigars are covered through it.



FASHION

RETAIL

RESEARCH: THE INDIAN DENIM WEAR MARKET

- DENIM MARKET TRENDS:
MEN, WOMEN & KIDS
- CUSTOMISATION IN
DENIMS
- TOP DENIM BRANDS
- MOST CONSCIOUS
BRANDS

Contents

R

139-272

FASHION RETAIL



152

CATEGORY STUDY

How 'MAN-LY' ARE TRENDS IN MEN'S DENIMS

The article explores the changing trends for men's denims in India as shared by a few top industry veterans.

Pg No. 152



CATEGORY STUDY

TRENDS IN WOMEN'S DENIMS

Images BoF talks to the leaders of major women's denim brands and analyses the various trends in the segment and the prospective growth.

Pg No. 162

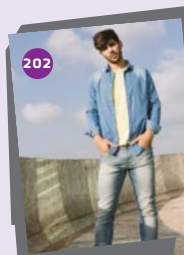
BRAND WATCH

IMAGES BoF introduces some of the most vibrant Denim brands in India today.

- 194 7th Sin
- 196 Afox
- 201 Awaacs
- 202 Being Human
- 204 Button Noses
- 206 CDF Columbia
- 208 Courtyard and Kraburs
- 210 Dare Jeans
- 212 Deal Jeans
- 214 Focus Jeans
- 216 Force Denims
- 218 GAP
- 220 Hard Currency
- 222 Hoffmen
- 224 Jack & Jones
- 226 Jealous 21
- 228 Killer
- 230 Lee Cooper
- 232 Leegend and Ceasar
- 234 Mexico
- 236 No Error
- 238 Parx
- 240 Pepe Jeans
- 242 Poison
- 244 Puff
- 246 Ricado
- 248 Rookies
- 250 Spark
- 252 Strano
- 254 Sunnex Jeans
- 257 Tarama
- 258 Texas Jeans
- 260 Toonz
- 262 Urban Navy
- 264 Urban Touch
- 265 Wert



194



202



214



212

SUSTAINABILITY

THE NEW WAVE: THE RISE OF ECO FRIENDLY DENIM

Good news is that concerned brands across the world are taking sustainable measures to prevent hazardous impact on the environment. We present a few.

Pg No. 266

Fashion Retail



COVER STORY

THE INDIAN DENIMWEAR

MARKET 2016:2026

The youth driven denim market promises unmatched growth. Team Technopak, size the market and delve into its dynamics as a whole.

Pg No.142

Focus Feature

EMERGENCE OF CUSTOMIZATION FOR THAT PERSONALISED DENIM

With an increasing number of customers gravitating towards perfect fits and designs in accordance to their personality, the trend of customisation in denims too is slowly picking up in India.

Pg No. 182

CATEGORY STUDY

NO MORE KIDDING WITH THE TRENDY KIDS DENIMS

Leaders from renowned denim brands in the kids' category talk about the trends, opportunities and evolution of this segment.

Pg No. 174





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THE INDIAN DENIM WEAR MARKET 2016-2026

With government's efforts to boost cashless transactions and reform indirect taxation with the nationwide unified tax structure GST, corporatized retail is all set to accelerate at a phenomenal rate. The youth driven denim market promises unmatched value as well as volume growth in the overall Indian apparel market. Amit Gugnani, Senior Vice President- Fashion and Saima Nigar, Associate Consultant- Fashion and Textile Division, Technopak, size the market and delve into its dynamics as a whole.

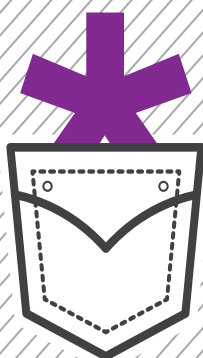
The Indian fashion retail market is continuously evolving and is expected to perform at a high Compound Annual Growth Rate (CAGR) of 9.7 percent to reach USD 115.14 billion by 2026, up from the current market size of USD 45.71 billion. Domestic fashion retail has been demonstrating high receptivity towards corporatisation. The Government's efforts to boost cashless transactions and reform indirect taxation with a nationwide unified tax structure, Goods and Services Tax (GST) are also expected to accelerate corporatized retail. At the same time, the Indian apparel market is also witnessing a growing inclination towards western and casual wear. Denim is amongst the highest growth categories in the Indian apparel market.

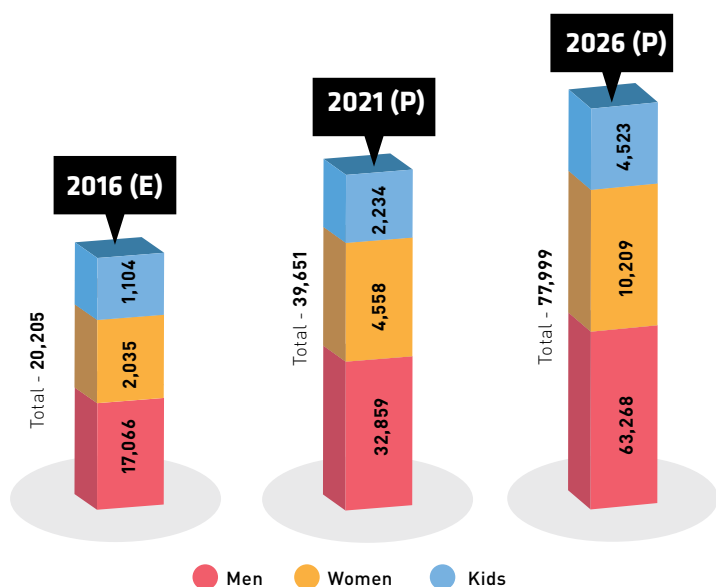
DENIM MARKET SIZE & GROWTH

The market size of Indian Denim Wear was estimated to be ₹20,205 crores in 2016. The market is now

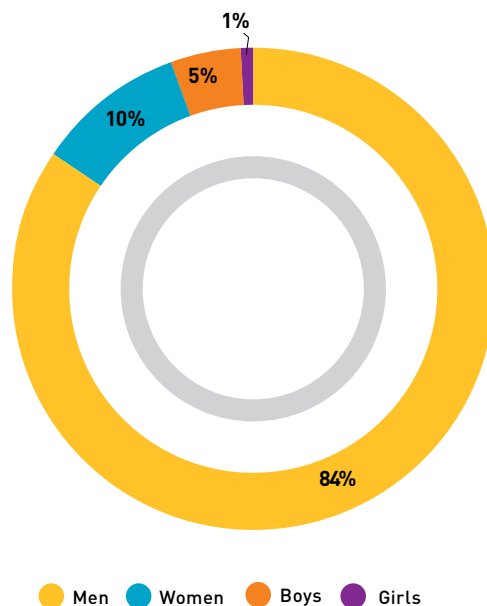
projected to grow at a CAGR of 14.5 percent and reach ₹39,651 crores by 2021, and ₹77,999 crores market by 2026. The men's denim segment comprises ~84 percent of the market while the women's denim segment and kids' denim segment comprise 10 percent and 6 percent respectively.

Men's Denim Segment: Men's denim enjoy the largest share and are poised to grow at a high CAGR of 14 percent over the next decade. Until a few years ago, denim was popular with men in the urban cities only, however, it has now gradually become popular in the semi-urban and rural markets also. Growing awareness and an increasing affinity for global fashion have led to this development. Denim is considered the most versatile fabric for men with multiple applications over casual wear, work wear and everyday wear.



INDIAN DENIM WEAR MARKET 2016 - 2026
 (INR CRORES)


INDIAN DENIM WEAR MARKET SHARE 2016



Women's Denim Segment: Among Indian women, jeans or denim trousers are the most popular articles. Women across different age brackets and spanning all shapes and sizes like to wear denim as it is comfortable, functional and durable. Denim is also gaining popularity in athleisure form among women owing to the comfort provided by stretch denims. Women who are not at ease with western wear have taken up wearing jeans by pairing them with Indian ethnic wear like kurtis. This mix and match style is gradually picking up, particularly among women in small towns and those who come from a traditional background and is likely to further fuel the growth of the segment.

The fashion and fit element which is an inherently necessity in women's apparel has been taken care of through the introduction of flexible/ stretch fabric for different applications.

This segment is expected to grow the fastest at the CAGR of 17.5 percent.

Kids' Denim Segment: This is the smallest segment in the domestic market, but is expected to grow at a high rate primarily due to the availability of the products led by the innovations in the industry for natural, hygienic and flexible fabrics.

INCREASING DENIM AFFINITY
 The denim segment has always been one of the leading segments in the apparel industry. The blue denim has remained a wardrobe essential for decades. Due to its increasing popularity in India, denim wear is now also witnessing huge demand among masses. There are certain key attributes which are making the future of denim wear industry promising:

Durability: This is one of the major reasons which make it popular among masses. Denim wear is considered durable as it is made up of a sturdy cotton twill textile. It is woven in a manner that it can be effortlessly worn in any condition.



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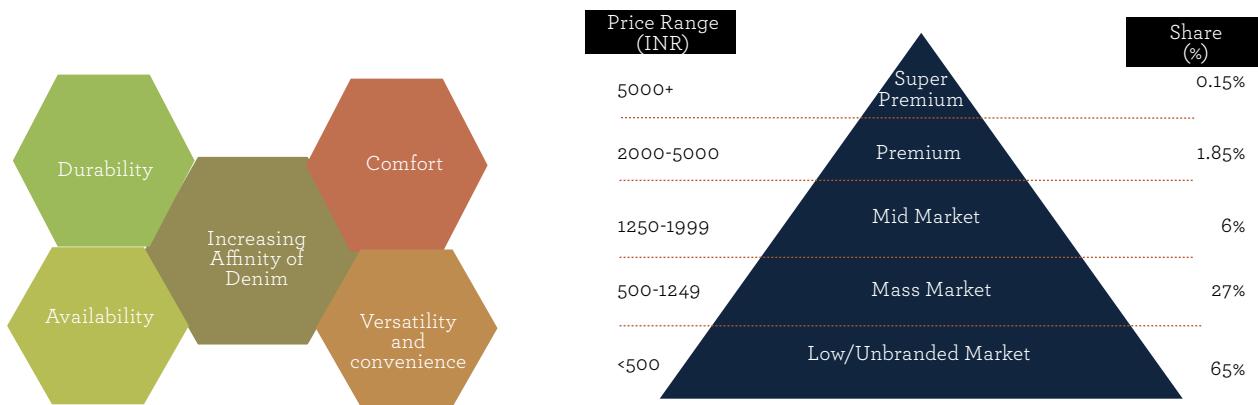
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EXHIBIT 3: DIGITAL PENETRATION



Comfort: Conventionally, denim was made from 100 percent cotton, but modern interventions have made varieties of denim available in the market. Today, denim blended with polyester is also popular as it manages shrinkage and crease. Stretchable jeans are also popular among masses as they provide comfort and a better fit.

Versatility and Convenience: Denim apparel are considered low maintenance, ready to wear clothes, which is another reason for their increasing acceptance. In addition, denim wear is available in different designs, stretch and colours which make it a preferable choice among consumers. Denim is finding

ways into other components of the wardrobe in the form of dresses, joggers' pants, jeggings, light weight denim shirts, denim shorts, accessories out of denim fabrics etc.

Availability: Denim wear is now much more easily available in the market, deeper across the country and across different market segments and varied price points as well. Thus, bringing it within the reach of different income groups.

PRICE SEGMENTATION

The denim market can also be segmented based on its 'premiumness'. There are therefore several clusters that cater to different targeted price points. The super-premium, premium, and mid-market segments together made up only 8 percent of the total Indian denim market in the year 2016. The overall growth during the year mainly came from an increase in the 'value' of sales, which in turn was driven by consumers having higher disposable incomes. On the other side however, brands in the mass market and unbranded segments made up for a staggering 92 percent of the total denim market in 2016. The key factors responsible for the growth for this part of the market was the huge 'volume' of sales coming from the increasing penetration of these





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brands into tier -II and -III cities and the rising aspirations of consumers from smaller cities to follow the latest trends like their peers from metros.

KEY TRENDS AND GROWTH DRIVERS

The Indian Denim wear market is currently dominated by unorganised players. However, with many private labels and international brands entering Indian apparel market, the inclination towards branded denims is increasing among consumers.

The future value growth within the denim category shall be because of the increased demand for enhanced product attributes: fashion, quotient, stretch and light weight fabric, varying colours, styling and detailing. This trend is emerging across both men's and women's segments. The above factors shall combine to drive relatively higher levels of growth of the mid-premium and premium/luxury segments as well.

Recent trends have indicated increased penetration of denim category across semi-urban and rural centres which shall drive volume growth across mass market and unbranded segments.

Certain factors which are contributing as key growth drivers of denim wear in the country are enumerated below: >

Youth as a growth driver:

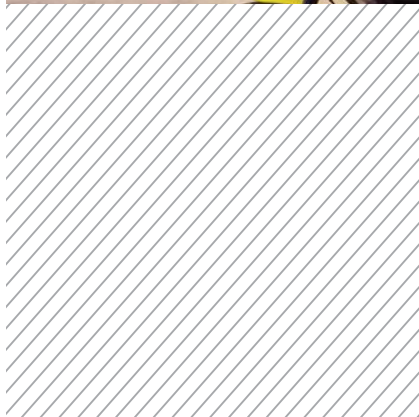
Youth (15 to 29 years old) who comprise 26 percent of the consuming population, are a key growth driver of denim wear in the country. Increasing disposable income, comfort, quality and brand consciousness are major reasons behind increasing acceptance of denims among this young population.

Growth of the organised retail sector:

The denim wear market is dominated by unbranded denim products who constitute ~60 percent of the market and thus tend to give intense competition to branded denim players. However, with many private labels and international brands entering the Indian apparel market, the inclination towards branded denim wear is increasing in consumers.

Online penetration of denim:

Increased penetration of internet coupled with burgeoning smart phone market has resulted in the growth of e-tailing in India. Due to ease of ordering online, paucity of time, flexible return policies and the cash on delivery, the youth of India is more likely to purchase denims online.






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Increased rural spending:

Rural areas are developing at a rapid pace and so is their purchasing power. With the percolation of mass media, people in rural areas are also aware of fashion trends. Their inclination towards western wear is another reason for the growing demand of denims in rural areas. The mid-value segment of denim wear, characterised by quality, value-for-money, and increasing styling quotient, is the preferred choice of people from rural areas.

Growing popularity of engineered/distressed denim:

The emergence of tattered denim has provided a perfect option for fashion conscious youth. The applications of distressed/ripped/tattered/patched denim are not restricted to bottom wear jeans but can be seen in jackets, shorts, skirts etc. These are emerging as one of the most stylish must haves for both men and women. This trend has been re-emerging in many new avatars every season.

New denim fabric washes:

In denims, 'wash' refers to shade of the denim fabric. Jeans

manufacturers are focused in achieving different hues of blue by washing the fabric in certain dyes, bleaches or other agents that affect the denim colour. Dark indigo, faded blue/vintage/aged, stone wash and distressed jeans are new denim fabric washes in trend these days.

Changing classification of consumer's wardrobe:

The change in classification of consumer's wardrobe has acted as a growth driver for the casual wear and denim wear in India. Earlier, fashion was considered as a basic need to be purchased on the basis of the requirements. Consequently, the typical consumer wardrobe was limited to basic categories like shirts, trousers, winter jackets and sweaters, sarees and salwar kameez. The basic purchase parameters were limited to the basic functions of the cloth, comfort and price. However, with the changing socio-cultural values, increased per capita consumption, increasing exposure to international fashion trends and growing disposable income apparel market is slowly becoming more occasions specific. Consequently, fashion basket has expanded to include clothing like sports/gym wear, occasion specific ethnic wear, jeans etc.

CONCLUSION

The Indian denim wear market is expected to witness huge growth in the coming years. With the country's ever-expanding economy, booming consumption, urbanisation, and growing middle class purchasing power; denim wear has a huge opportunity to grow. The increasing shift of the rural fashion market from ethnic wear to western wear is one of the key growth drivers of denim industry. The large youth population with rising disposable income and awareness towards fashion will act as a catalyst in the growth of denim wear in the country.

The denim market indeed holds much potential for brands and retailers, however to capitalise on this growth potential, retailers need to focus on factors such as pricing, quality, consumer preferences, key trends, innovations, etc. Retailers can also leverage the available growth opportunities in denims by expanding into online channels and omni-channels of retailing.



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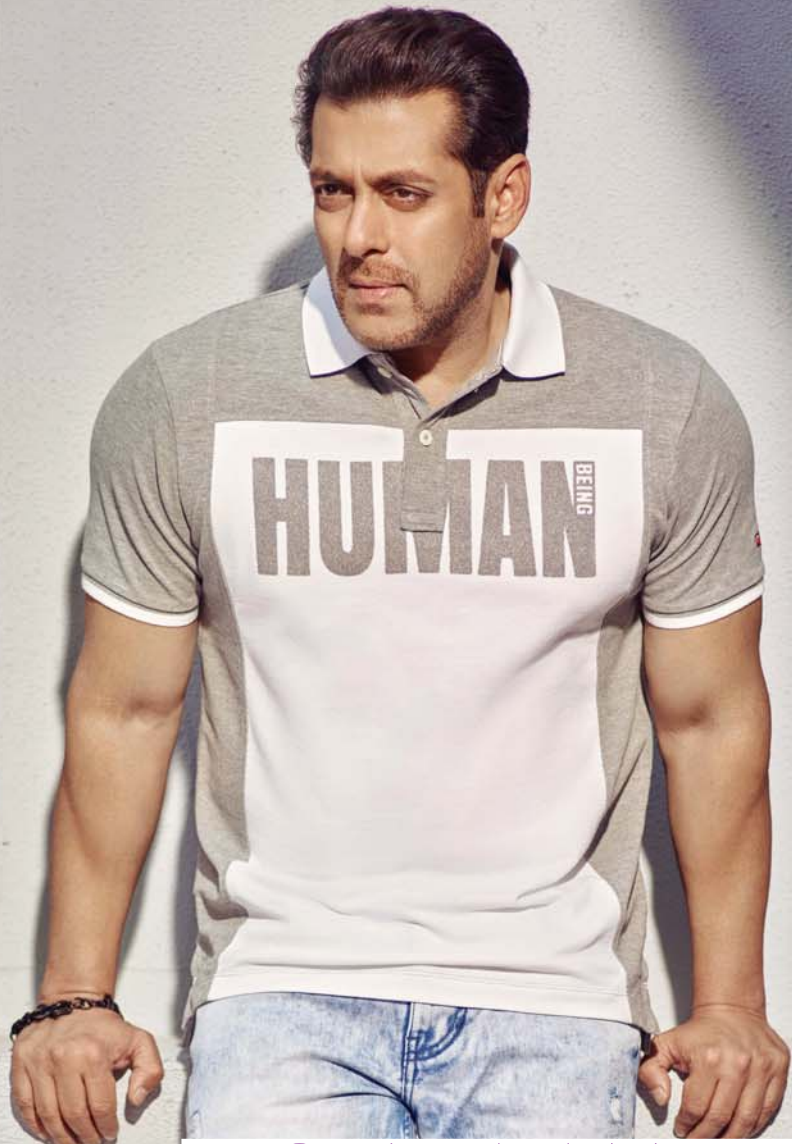


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HOW 'MAN-LY' ARE TRENDS IN MEN'S DENIMS

Denim is the eternal embodiment of masculinity. From the wayward gunslingers of the Wild West to Rockstars of LA, denims have traditionally been inspiring visions of stereotypical masculine potency. But lately, the rebellious persona and acceptance of denims have drastically changed over the world. Denim has evolved, morphed into multiple identities and has become a wardrobe staple for men even in a country like India. The article explores the changing trends for men's denims in India as shared by a few industry veterans.

By Zainab S. Kazi with inputs from Gurbir Singh Gulati

If we have to take a jog down memory lane to remember the brands that were well accepted in India, say about a few decades ago, then, without any doubt, Levi's ruled the game. Back then, the brand was considered as the epitome of what denims could offer. Pepe and Lee Cooper were the other denim brands that had huge aspirational value. To talk about local brands, Ruff & Tuff, Killer, Newport and Spykar were most prevalent. Fast forward to today and we have countless brands offering denim wear in India. International brands like G-Star and Jack & Jones have taken over the aspirational value from brands like Levi's and Pepe in a way.

Aptly citing the changing dynamics of denim wear in India, Sartaj Singh Mehta, Vice President - Design, Pepe Jeans India, shares, "A lot has to do with the digital boom; social media channels have led to the creation of the eponymous 'street style'. Today bloggers, and influencers are shaping fashion norms and denims, because of its versatility has been subjected to massive experimentation and facelift. From the year 2016, we have seen denims totally being re-invented from what they were earlier – very basic in nature to high fashion pieces. From embroidered, to patchwork denims to distressed or even the recent fad-badges, denim wear has been totally redefined. While brands might have a fraction of a say in influencing what the customer buys, one has to also consider the mindset of today's consumer which is very different. They are fashion savvy and driven by trends and most importantly, they know what they are looking for."

According to Vineet Gautam, Country Head, Bestseller India that owns brand Jack & Jones, where earlier, men's denim had been long associated with outdoor rugged personality as it took inspiration from miners' and workers' dressing, over the years they have not been confined to music artists, biker groups and youth clubs but have been wholeheartedly accepted by people with different personalities and backgrounds. Gautam makes a point when he shares, "They are now sported across age groups and occasions, happily travelling from social escapades to workspaces." This resonates with the changing work culture we see here in the country where it isn't uncommon to see men and women sporting a denim bottom with a blazer/jacket to give their attire a formal look. Weddings and other formal occasions will also have guests flaunting their denims with embellishments as against before where formal wear meant anything but denims. Saurabh Singh, Head of Design, Men's Wear, The Mandhana Retail Ventures Ltd., shares, "The classic western vibe of jeans continues even today, so does the rockers' influence. But today, what we are seeing are also new influence on denim design from the youth subcultures like 90's sports look, active wear influence which resulted in the athleisure trend and also a lot of 70's and 80's DIY aesthetics with lot of patches, badges, doodles and embroidery which is the hottest trend right now. Unita Chandan, Creative Director, Hard Currency and 10 Pound, shares her views on the evergreen influencer in denims - the vintage look. She says, "Vintage, old school denim trends and washes keep making their way back into the market. Worn out, distressed denims are rising, especially by celebrity influencers."



"From the year 2016, we have seen denims totally being re-invented from what they were earlier – very basic in nature to high fashion pieces."

–Sartaj Singh Mehta,
VP - Design, Pepe Jeans India



"Vintage, old school denim trends and washes keep making their way back into the market. Worn out, distressed denims are rising."

–Unita Chandan,
Creative Director, Hard Currency & 10 Pound



Being Human



“The influence of sportswear has been so huge that almost everything is 100 percent stretch today in the denim wear category which once was a main stay of sportswear.”

—Hemant Jain
Director, Killer

band which can be pulled on like a classic jogger pant. The styling and fabric innovations still continue in this direction influenced by sportswear.” Hemant Jain, Director, Killer, feels “The influence of sportswear has been so huge that almost everything is 100 percent stretch today in the denim wear category which once was a main stay of sportswear.”

Vineet Gautam from Jack & Jones adds, “Two things common in both sportswear and denim are ‘fit and functionality’. While the denim marketers are able to sell denims basis office, formal, weekend, seasons, locations and lifestyle; sportswear have been implying to intersect these spaces gradually. So now, with trends like athleisure, we have track pants which have the same allure of weekend denim street-wear.” Hetal Kotak, Chief Executive Officer, Lee Cooper, makes an interesting observation when he shares that the sportswear influence has been prominent in the denim category and that jogger denim and knit fabric based denim bottoms have found rapid acceptance from consumers.

On the assumed threat of athleisure on denim wear, Oliver Kaye, Business Head, Gap India, feels, “Denim is a staple for any one’s wardrobe, be it man, woman or child. While athleisure has its appeal, denim is evergreen and classic. Athleisure won’t ever dent the denim segment. While trends may come and go, denim is a foundation of one’s wardrobe meant to be paired with a white tee, polo, shirts, and so much more. This versatility piece of clothing cannot be replicated by any other product category especially when it comes to men’s wear. This is why denim

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“While the denim marketers are able to sell denims basis office, formal, weekend, seasons, locations and lifestyle; sportswear have been implying to intersect these spaces gradually.”

—Vineet Gautam,
Country Head, Bestseller

Sportswear - A Reason for Dent in the Demand for Denims?

With the growing influence and acceptance of athleisure clothing today, is it right to judge the future of denims as being in close competition to it? Check your own wardrobe and you will see that there obviously is no competition here. Denims have their own space. They never cease to attract. What sportswear has in fact done is that it has made the denim more flexible. It has led to the invention of stretch in denims, making it super comfortable and stylish to wear. Saurabh Singh shares, “Sportswear has had a very big impact on the denim jeans. It started with the introduction of stretch jeans in late 70s and early 80s and have evolved ever since in the form of new fabrics and fits, jeggings being the most extreme form it took. The other big impact of sportswear happened in the last decade when Jogger jeans was introduced in its authentic form. It was knitted fabric dyed and washed like a jeans and latter the woven fabrics started imitating the knit structures to achieve the same look and feel. Even styling of the jeans took on the elements of jogger pants, with cuffed hem and elasticated waist



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“Sportswear, on the other hand, is an evolving category and is gaining momentum but still in current context it is not a strong challenge to denim wear.”

– Pragati Srivastava,
General Manager, Parx



“The growth for us in the denim category has be substantial and it has been the fastest growing product category for us in the last few years.”

– Saurabh Singh,
Head of Design - Men's Wear, The Mandhana
Retail Ventures Ltd.

commands a very strong space in a person's wardrobe from a very early age.”

G Satyanarayana, Head - Sales and Business Development, Rookies, strongly feels that these categories are totally leisure and comfort wear oriented and will not have any effect on the denim category.

A well known name in the men's wear category, Parx has been dressing men for both formal and casual wear. To hear what the brand feels on this topic, we talked to Pragati Srivastava, General Manager, Parx, who stated that the denim as a category has evolved over a period of time and has become an all day wear category. Srivastava adds, “This has helped the category in developing its own niche and a distinct space in a man's wardrobe. Sportswear, on the other hand, is an evolving category and is gaining momentum but still in current context it is not a strong challenge to denim wear.”

The Growth Story

The growth of the category for each brand accentuates the above mentioned fact that the emergence of sportswear and athleisure hasn't really dented the prospective of the denim wear growth story in India. According to Sartaj Singh Mehta, “Industry reports suggest that the denim industry in India is expected to grow at a CAGR of 15 percent. Kotak from Lee Cooper shares, “We have seen very healthy growth rates of over 60 percent in men's denim.” For Jack & Jones, the growth has been more than 2 folds in terms of volume in same store in the past few years. Saurabh Singh from Being Human says, “The growth for us in jeans category has be substantial and it has been the fastest growing product category for us in the last few years and we have responded to this change by enlarging the line and product offering. We are hopeful for its further growth.” Men's denim has been



Rookies

the fastest growing category in Parx's product portfolio as well and Srivastava proudly shares that it has helped the brand evolve as one amongst the fastest growing men's casual wear brand in the country.



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Jack & Jones



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Trending Now

Skin fit denim bottoms are most in demand across brands and so are denims with vintage look. Kaye from Gap India elaborates, “Skinny jeans have been a huge denim trend for men for a while now. In Gap, we also have witnessed a good demand for distressed denims. Another popular denim is the 4-way stretch - a style of denim that allows fluidity of movement. It’s a 2-way stretch for warp and weft both, giving the product a very strong construction. This works particularly given that we offer 3 length options for every waist size. To share an insight on the washes, our indigo and selvedge wash is most popular due to its classic look which weather really well through multiple washes.”

Mehta from Pepe Jeans has something very interesting to share away from the style and colour that are trending currently. Opening a page from Pepe’s brand book he shares, “Denim dungarees is a wardrobe classic currently because of the various styles, washes, colours as well as its functionality and stylish appeal. We also have a good demand for denim shorts and for our spring summer collection, we had shorts in different

colours – white, blue and then ombre shades of white and blue, and these did really well as shorts are no more seen as a functional outfit only bought for holidays. Washes that are doing well for us are enzyme wash, river wash, acid wash, bleach wash, stone wash and micro sanding.”

At Being Human, Saurabh Singh shares that the classic vintage wash with authentic look is the best seller for them followed by jogg jeans without the cuff and then there is crisp raw wash look jeans in both blue and black versions. In washes, according to him, authentic vintage wash, acid wash combined with vintage and 3D wash with mild distress and repair, work very well for the brand.

Chandan from Hard Currency shares the ones doing well for them. “Slim fit sells best among all the fits in men; natural looking washes are catching on and colour denim is in high demand. In washes, heavy enzyme and ozone wash that gives worn out and faded look and metallic touches on puckering effect are in demand,” she says.

At Jack & Jones, it is the distressed look with rip repairs, raw blue (rinse finish), jet black (stay black) clean finish and in washes, it is mid stone, greys and deep plain classic blacks that are in trend. The Lee Cooper slim fit denim

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“Skinny jeans have been a huge denim trend for men for a while now. In Gap, we also have witnessed a good demand for distressed denims.”

—Oliver Kaye,
Business Head, Gap





“Lee Cooper denims with acid wash, enzyme wash and towel wash have worked extremely well for us.”

–Hetal Kotak,
Chief Executive Officer, Lee Cooper



“Laser technology for denim finishing is a costly technology and only premium brands with high selling rate can afford it.”

– G Satyanarayana,
Head - Sales and Business Development,
Rookies

and skinny fit denim have both been a huge hit among their patrons. The Lee Cooper bi-stretch denim has also been very well appreciated owing to the enhanced comfort at the knees while sitting/ stretching, according to Kotak. Adding on to the washes bit, Kotak shares, “Lee Cooper denims with acid wash, enzyme wash and towel wash have worked extremely well for us.”

Effects and Embellishments

A pair of plain denims has its own charm but then, the ones with some effects and embellishments has its own set of target audience. At Jack & Jones, for example, printed denims, thread embroidery, patches and badges are most popular embellishments whereas when it comes to effect, according to Gautam, 3D whiskering and motifs done with laser techniques are doing well. Kaye from Gap India shares, “For men, deconstructed denim has made a comeback in a huge way. Previously seen as a style statement for college students, now older age groups are also seen flaunting this effect. As for the popular elements, patchwork, embroidered denim, studded denims are some of the popular elements used in denims. Patchwork denim jacket, in particular, is popular currently.”

For brands across, rivets in darker shades, badges and 3D whiskering is working very well along with occasional trends of denims with leather patches showing a good demand.

Of late, we have noticed that laser technology is being adopted by some denim brands as a replacement for the traditional methods of denim finishing like sandblasting, stone washing, etc. But has this trend caught up in India as well? According to Satyanarayana from Rookies, “This is a costly technology and only premium brands with high selling rate can afford it.” Though Pepe’s Mehta shares another view where he says, “Laser technology is used widely in India as well as worldwide because of its ‘environment friendly’ properties. The finishing that is given by laser is unlike any other



because of the precision as well as the timing, whether its the design or using laser in denim finishing.”

Saurabh Singh from Mandhana brings in the fact that laser is environment friendly hence is catching the attention of brands across. He shares, “Laser technology is being adopted to go green and avoid the excessive use and wastage of scarce resources like water, most importantly. It is been used by some brands as an apt replacement for the traditional methods of denim finishing. It is the fastest growing and accepted method. The best feature of the technology is that it requires very little water as it is done by computer controlled systems. Additionally, it saves time and cuts down the cost of production.” Gautam adds to this, “Laser machines are much faster, accurate and environment friendly too. As a result, they are gaining popularity but their costs have to be brought down so that they can be installed by low scale vendors too.”

Soon to Come

Talking about trends that we would be witnessing in this category, industry experts have interesting insights to share. According to Sauabh Singh, mix-and-match, DIY embellishments, monochrome colour blocking and repaired remade look will witness a good demand. Gap India's Kaye feels that destructed slim fit jeans, skinny jeans, ankle length denimns and stretch skinny denims would be the future of men's denim.

Hard Currency's Chandan shares her views saying, "Metallic denims, vibrant/tropical prints, structured fabrics are to be seen in the near future. Reverse printing and ombre denims will see a comeback." To hear it from Gautam, "Laser run motifs, padded riders, Japanese silhouettes, side embroideries on outstream and printed/camo denims have a bright future. Future trends will also have a good demand for anti-fit denim and denim made of light weight

fabrics along with denims with a lot of zips all over for a rugged feel. According to Kotak, denim joggers for men will do well. Srivastava from Parx adds, "Fabric with softer hand-feel, heavy distressed, skinny fit, hyper stretch and embellished denim will do well."

The Lure of Luxury

The industry seems divided in their opinion of the demand and prospects for luxury denims in India. Where some feel that the country is prepared to have luxury denims luring in customers, there are some who are of the opinion that the market is not quite ready for them. According to Saurabh Singh, "Luxury denim has a limited prospect in India as very few people are interested in superior quality craftsmanship which is what luxury and premium denim stands for abroad. Brands like Denham, Nudie Jeans or Japanese brands making the highest quality jeans." Sharing a different view, Gautam says, "Luxury and premium denims

certainly stand a chance provided there is some innovation/uniqueness in the offering as Indian customers are quite discerning at all levels." Kotak adds, "There is definitely a market for luxury and premium denims in India but as a premium high street denim brand, we like to ensure our garments are economical. We believe in making the best of fashion affordable, for the ever aspiring Indian consumers."

To conclude, Kotak shares it beautifully, "Denim as a category has undergone a sea change, that is, from being a rebellious category to a category that is an 'initiator' into the world of fashion. Today, denim at work, or even at a formal occasion is acceptable and we believe that Bollywood celebrities, rockstars, sports stars and even bloggers are playing an instrumental role in shaping the way trends are performing today in the denim world."







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TRENDS IN WOMEN'S DENIMS

With time, denim has evolved in every way - styles, fabrics and fits, products, occasions and more. Today, denim is not just a bold fashion statement but a wardrobe staple for many women across India. And this wardrobe staple has taken more than one form to suit the needs and personality of the wearer. Images BoF talks to the leaders of major women denim brands and analyses the various trends in the segment and the prospective growth of this market in the times to come.

By Zainab S. Kazi with inputs from Gurbir Singh Gulati

It isn't uncommon to spot a woman wearing a pair of denims with an ethnic Indian kurti. The functionality and perceived image of denim has gradually changed for Indian society over the years, especially when it comes to it being owned and worn by a woman. From being a strictly western wear, denims today are a part of majority of the wardrobes in India with the growing emergence and acceptance of Indo-western wear.

The Market Mapping

"The estimated market in women's denim in India is about ₹1,800 crores, growing at a CAGR of 18.5 percent to reach an expected ₹35,000- ₹37,000 crores by 2025. Most of the denim brands catering to the men's segment have realised the growth potential of women's denim in the country. The trend towards casualization combined with the growing preference of look and comfort among women drives the women's denim market in India," apprises Rahul Gupta, Vice President, Jealous 21.

Hetal Kotak, Chief Executive Officer, Lee Cooper, accentuates the growing popularity and acceptance of denims in the wardrobe of an Indian woman stating, "For us, the women's denim market has proved to be one of the fastest growing market in the recent years and we believe that women are following fashion more closely than ever before and want to ensure that they have the latest in fashion at all times." According to Sameer Patel, Founder and Chairman, Deal Global Fashion Pvt. Ltd., a brand that was one of the earliest to tap the market for women's denim wear in India, "The market is projected to grow at a CAGR of 15 percent by 2018." He mentions the Indo-western culture catching momentum while deciding on the choice for clothes. "Women who are not at ease with western wear have taken up to wearing jeans by pairing them with Indian ethnic wear. This mix and match style is gradually picking up, particularly among women in small towns who come from a traditional background and is likely to fuel the growth of the segment," he adds. Yogesh Kuruba, Proprietor, Focus Jeans, agrees to this point when he says, "Among all types of denim wear, jeans or trousers are the most popular articles among Indian women. Women in different age brackets of all shapes and sizes like to wear denim as it is comfortable, functional and durable. The mix and match style where women pair denims with ethnic wear pieces like kurtis, is gradually picking up and would most likely fuel the growth of the segment." Reiterating the fact, Vineet Gautam, Country Head, Bestseller India who operates women's wear brands Vero Moda and Only in India, shares, "The growth of Indo-western fashion has also largely shaped the denim story in India. Acceptance of denim as work wear has also boosted the category."

Where denim bottoms have seen good demand by women across the country, when it comes to denim shirts, the profile of women who opt for the same are usually the ones who work in a corporate office set-up. Sameer Patel from Deal Jeans elaborates, "Women who buy shirts are mainly professionals who believe in being well-groomed at work or women who do not experiment in fashion with trendy tops but rather prefer a comfortable clothing for their daily wear."

Denim – The Differentiator

Where denims are a wardrobe staple for men, for the women in India, denims are still entering the wardrobes. Earlier when only urban Indian women were seen wearing a denim,



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“Women are more trend conscious and apart from trendy clothes, they require their denims to be of good aesthetics and fit.”

–Prem Gupta,
CEO, Tarama



“We have observed that men tend to be more ‘functional’ about denim, i.e., they are more interested in the comfort.”

– Hetal Kotak,
CEO, Lee Cooper

today the dynamics are different. Women in tier -II and -III cities and towns and women belonging to SEC C are also opting for denims even if that means teaming denims with an Indian kurti. Sameer Patel (Deal Jeans) accepts, “For men, a denim is their essential garment while for women, it is a symbol of modern thinking. Today, women judge their level of modernity on the basis of clothing. For women, fit plays a crucial role unlike men who do not consider minute details. Women are always keen to be in trend and will search the trendiest clothes offered to them before make a purchase unlike

men.” Speaking on the same lines, Kuruba from Focus Jeans maintains, “Like every other item in a woman’s wardrobe, even denims have the same respect. Unlike men, jeans are bought to make a statement or establish an image of the wearer/ buyer.” Hetal Kotak (Lee Cooper) adds, “We have observed that men tend to be more ‘functional’ about denim, i.e., they are more interested in the comfort. Moreover, they would like to have one denim in different colours and be okay with it. Women, on the other hand, are more trend conscious. Citing the differentiating factors observed, Gautam from Bestseller



Focus Jeans

India, adds, “The factors that men and women consider while purchasing a pair of jeans can vary to a very large extent. While male shoppers look at fit, durability, elasticity and quality; the needs of a female shopper are more fashion centric whereby factors like popular trends, relevance of brands internationally, play a critical role.” Prem Gupta, CEO, Tarama, also agrees, “Usually for men, their jeans become a part of themselves. Once they find their fit, they mostly don’t change it. On the contrary, women are more trend conscious and apart from trendy clothes, they require their denims to be of good aesthetics and fit. The choice of fits, washes and embellishment is much wider than men’s.” Patel from Deal



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“Sequined denims have been adding the much needed spark to the wardrobe as well.”

—Vineet Gautam,
Country Head, Bestseller India



“Ripped, tearing grinding and embroidered denims are in vogue in India.”

—Naresh Varwani,
Director, No Error

Jeans also feels that women consumers are more difficult to please because they are always in a frame of mind to pay for fashion that meet their desires. He shares, “They take many things into consideration before shopping and two of the foremost things that rule their decisions are choice and price.” Vineet Gautam (Bestseller India) adds, “The fashion preferences of a female shopper constantly evolve on trends, patterns, cuts and fabrics as per the merchandise offered by fashion brands. Thus, a female shopper at all points of time, has a variety of options to choose from. Brands therefore have to be constantly at the top of their game to ensure that the fashion they offer is at par with their competition. The width of the range in women’s denim is always more compared to men’s wear.”

Trending

When we look at the denims in vogue, the current top 3 selling denim styles are flair cropped pants, studs and ripped embellished shorts and patchwork in hues of blue, according to Patel from Deal Jeans. Naresh Varwani, Director, No Error, shares, “Ripped, tearing grinding and embroidered denims are in vogue in India.” Prem Gupta from Tarama apprises, “Our white mom fit in high rise is simple, relaxed and offers effortless casual style and our cold shoulder bodycon denim dress made in super stretch cotton denim, combines the two top trends this season. Calf cropped wide legs with open hem details, not only match up with international trends but also have a breezy comfort fit that have become a favourite this summer.”

Gautam from Bestseller India shares his take stating that denims with a hint of embroidery, doodles, patch and badge work are very popular among shoppers as they give a very distinct touch and denims with open and unfinished hems are also gaining popularity. He adds, “Sequined denims have been adding the much needed spark to the wardrobe as well.” The other embellishments



No Error

include lace-up, patchwork, beads, studs, rhine stones, swarovski, rivets, foil prints, statement graphics and thread-work. Popular colours include, light blue, medium blue, dark blue, ice blue, midnight blue, black indigo, medium stone blue, carbon, tinted and grey. Gupta from Jealous 21 shares, “We have been very successful with all our three fits for every waist size that address the unique curves of the Indian body type.” Jealous 21’s three hip sizes are, Hottie for the slim hips, Hour Glass for the regular hips and Bootilicious for the curvier hips.

In washes, it is the ripped acid wash, dip dyed wash, ice bleach wash, dark indigo wash, tint, stone, clod and medium blue wash and dark blue (resin) wash that are popular. Moving over to fits, skinny fit is always in when it comes to women’s denim along with ankle, straight, boyfriend and boot cut. Kuruba (Focus Jeans) agrees, “Acid wash, over-dyed and other premium washes like velvet finish are in-trend in denims. While in effects, whiskers, scrapping, spray,

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“Stretch is a consideration for both the genders but for women, it might be of more concern as women usually wear body hugging denims.”

– Sameer Patel,
Founder & Chairman, Deal Global Fashion Pvt. Ltd.



“Jeggings provides an extension to the denim wear market, to engage with potential customers.”

– Rahul Gupta,
Vice President, Jealous 21



“Acid wash, over-dyed and other premium washes like velvet finish are in-trend in denims.”

– Yogesh Kuruba
Proprietor, Focus Jeans

tugging and other dry process are being loved; crystals, pearls, studs and embellishments are popularly accepted elements in women’s denims. In terms of fits, pencil fit, ankle length and boot cuts is setting in and are gaining popularity among the customers.”

Saying it with Stretch

A stretchable denim is a must have for any woman keeping in mind the variation in body types of a woman which makes ‘one style fits all’ an impossible for a brand to achieve. Patel explains, “Having the ability to conform to your body shape each time you put them on, stretch is a consideration for both the genders but for women, it might be of more concern as women usually wear body hugging denims and stretch plays an important role in flaunting their curves while men are usually comfortable in regular pair of jeans.” Gautam from Bestseller India adds, “Stretch is more popular among women as they seek for comfort with a feminine look. Men prefer denims with straight and relaxed fit as it looks masculine.” Patel (Deal Jeans) shares the growing prominence of leggings and jeggings stating, “Leggings and jeggings are offering an exceptional

level of comfort due to the softness and unparalleled stretchability of the material. Jeggings are a huge hit in the market for resembling jeans with comfort. The brands are now bringing designer jeggings with washes and embellishments which are gaining much preference over jeans by women consumers in the Indian market.” According to Hetal Kotak (Lee Cooper), they are really hot on the radar especially among college students and they have been instrumental in making the ‘skinny’

fit denim even more popular. However, Gupta from Jealous 21 maintains that jeggings is a great product for introducing the customers to the larger denim category but at the same time, he says, “For all the technical limitations, jeggings cannot take away from the aspiration of denim wear. It provides an extension to the denim wear market, to engage with potential customers.”

Future Fashion

According to Deal Jeans’ Patel, the future for denims as part of women’s wear is going to get only more interesting with patches in contrast fabrics adding pattern to plain jeans, vetements style, embroidery designs, lazered impression, vintage wash and mom jeans attracting more women to opt for denims. Vineet Gautam (Bestseller India) shares the emergence of over the top embroidery, high-low hemlines, distressed denims and cropped kick fare. Lee Cooper’s Kotak concluded with the future 5 trends being - embellished jeans with embroidery, sequins and badges, colour blocked denims (through wash treatments), faux leather denims, high waisted zipper denims and anti-fit denims.

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NO MORE KIDDING WITH THE **TRENDY KIDS DENIMS**

The denim market in India has been evolving fast with introduction of more styles, colours and some distinct trends in the product offering. The extension of denim brands onto kids' rack is part of the larger trend of marketing pervading nearly every corner of the consumer marketplace. We talk to leaders from renowned denim brands in kids category about the trends, opportunities and market positioning of this segment.

By Bharti Sood with inputs from Gurbir Singh Gulati



Toonz

A few years ago children just grew up wearing clothes passed on by their elder siblings or from those purchased from local neighborhood markets. But today, increased awareness, growing brand consciousness, rise in disposable income of consumers, increasing number of nuclear families, influence of media and western culture is propelling growth for kids apparel market in India and kids are moving towards denims in a big way. Kids want to wear what their parents wear and parents want their children to wear comfortable, skin friendly yet trendy clothing. Thus kidswear, especially the denim segment is creating a huge demand not only in larger cities but in tier-II and -III markets as well.

Key Influencers

Kids' denim is mostly influenced by the trends running in adult clothing, with a slight twist here and there in styling and colours. Sharing his views on the factors influencing trends in kids denims, Oliver Kaye, Business Head, Gap India, explains, "Matching adult denim stories/styling and pop culture icons fascinate kids the most. For example, having patterns with their favourite super heroes, forms the most predominant influence." He adds, "For us, at Gap, the focus besides styling has also been on product quality. We've developed our denim as the softest, stretchiest and most comfortable one, which the kids can wear everyday. And our denim offering starts from babies to kids up to the age of 12-14 years. Our kids' denim range is stylish and trendy."

Toonz

Latest characters in kids movies, sports personalities, super heroes – all influence children and they want to dress up like their favourite heroes. Highlighting this aspect, Sartaj Singh Mehta, Vice President- Design, Pepe, states, "Trends in the kids segment are very different from adults. Kids primarily look for style, colours and comfort. Boys and girls of the same age have very different sensibilities. The mindset of 4-8 year olds is very different from kids in the 10-12 years range. They identify with sportspersons, celebrities and super heroes which are the major factors that influence or drive trends in the kids segment.

Attitude and individualistic style is also an essential component of kids clothing." Agrees Sharad Venkta, MD & CEO, Superyoung/Wowmom of Toonz, "Kids are generally icon followers. They follow their icon and try to mimic their styles. Icons may be celebrities, their elders or their favourite characters.

Thus, major trend influencers in kids denims are celebrities, adult fashion, media and trends on hype."

G. Satyanarayana, Head Sales and Business Development, Rookies, shares, "We have recently ventured into the kids' denim category after seeing a Gap in the kids' category for international niche fashion denims. Our kids denim is a replica of the men's trends and the walk path is on the same lines. After testing the kids range market, we felt that initially the market was not ready to accept this trend. But we have slowly nurtured this and are gradually expanding the category. We hope to be established as a full fledged category by summer 2018."

Top Selling Styles and Trends

Children now-a-days have become brand and style conscious. They have their own choices when it comes to selection of clothes and colours. Denim being long lasting and hard wearing, is one of their favourite choices.

Shedding light on the current trends, Oliver Kaye (Gap) shares, "Skinny Jeans have been a huge denim trend for kids for a while now. Destroyed denim, jeans that look old or destroyed are also very popular. Colourful denims are quite appealing for the kids and one can get a vast variety in colours." According





“Kids fashion to some extent mimics adult styling, and indigo wash is a staple.”

— Sartaj Singh Mehta,
Vice-President- Design, Pepe Jeans India



“Boys generally like smileys, animal badges and bold texts on their denims. While girls are more fond of flowers and embroideries.”

— Sharad Venkta,
MD & CEO, Toonz Retail Ltd.

to Mehta from Pepe, “Hot shorts and dungarees for girls and 3/4th pants and dark blue denims for boys are the top favourite denim styles for kids.” Good shades and co-ordinated colours which can easily go with t-shirts/ tops are the top denim styles as per Sharad Venkta of Toonz. “Trendy jeans with embroidered badges and characters and smileys and comfortable stretch fabric jogger style jeans which are fashionable as well as day-to-day wear are preferred the most,” he adds.

Talking about washes in trend, Oliver Kaye from Gap India says, “Kids fashion to some extent mimics adult styling, and indigo wash is a staple. But we find lighter colours also occupying some of the basket space.” According to Mehta (Pepe), enzyme wash, river wash, acid wash, bleach wash, stone wash and micro sanding are the top trends. As per Venkta (Toonz), dark wash also known as denimex, which gives a rich blue colour with dry process for the texture are quite popular now-a-days. Heavy bleached wash also known as cloud wash, which makes the denim light in colour with blue patches is also appreciated. He also emphasized that the distress effect which give unique/ torn look to jeans was gaining huge popularity and cloud effect was another trend which was popular because of its cool light colour. Further, a lot of effects are available in kids denims. Informs Gap India’s Oliver Kaye, “We’ve done an exclusive range of denim through Disney collaboration which we find has done very well. This includes Mickey/ Minnie mouse prints transferred in different colours onto denim for a unique styling moment.”

Embellished denims too has been a great craze in recent times. As per Oliver Kaye (Gap India), patchwork, embroidered denim, frayed denim, beads and prints are the popular



elements used for kids. Embroidered denim is particularly popular currently. Toonz’s Sharad Venkta opines, “Boys generally like smileys, animal badges and bold texts on their denims. While girls are more fond of flowers and embroideries.”

Among top selling colours or shades, Mehta (Pepe) finds grey, blue (dark and light), black and navy blue as the most preferred colours. According to Venkta from Toonz, blues are still in fashion. Dark blue, light blue, indigo colour, cloud effect (dark blue), cloud effect (light blue) are quite popular. “Girls are experimenting with shades of pinks, peaches and printed denims,” he shares.

Parent’s Preferences

While buying kidswear, parents are more particular about the style and the quality. Even though the kids are encouraged to express their choices, but the buying decision still vests with the parents.

Talking about parent’s preferences, Oliver Kaye (Gap India) points out, “Comfort is always in style. Parents look for denims with stretch to allow easy movement for their kids. Skinny



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“Parents are accepting very clean denims for their kids, with good washes and a distressed look.”

— G. Satyanarayana,
Head Sales and Business Development,
Rookies



and slim denim styles are always in demand.” G. Satyanarayana (Rookies) believes that the kids denim market is vast and the tastes change as per requirement. “Parents are accepting very clean denims for their kids, with good washes and a distressed look,” he adds.

Mehta (Pepe) underlines the preference for icons and characters, “Denims with cool and quirky badges, popular cartoon characters and denims with funky prints are preferred choices.”

While Sharad Venkta (Toonz) feels that, “Parents prefer all round elasticated waist joggers, which are comfortable as well as trendy. These styles are easy to wear and carry.” He feels that though organic/hygenic fabrics are important, but as the market is price sensitive, it will take time for universal acceptance in India. Not many parents ask for it yet.

Recent market growth

The overall Indian kid’s denim market has been witnessing tremendous growth in volumes as well as sales, because of the high population base of children and the growing exposure of both parents and children towards fashion trends. Some of the other key factors driving the growth are influence of media, growing disposable incomes and availability of vast variety of styles and choices. The category remains the fastest growing category as both children and parents consider denim fabric and styles more fashionable as well as wearable.

Elucidating how kids’ denim market has grown in recent times, Mehta (Pepe) says that today’s kids are well aware of the current trends and are fashion savvy. He feels that media has played a big role in changing the mindset of kids who have become very demanding now-a-days and have also started influencing purchase decisions. He adds, “Shopping for kids clothes is no

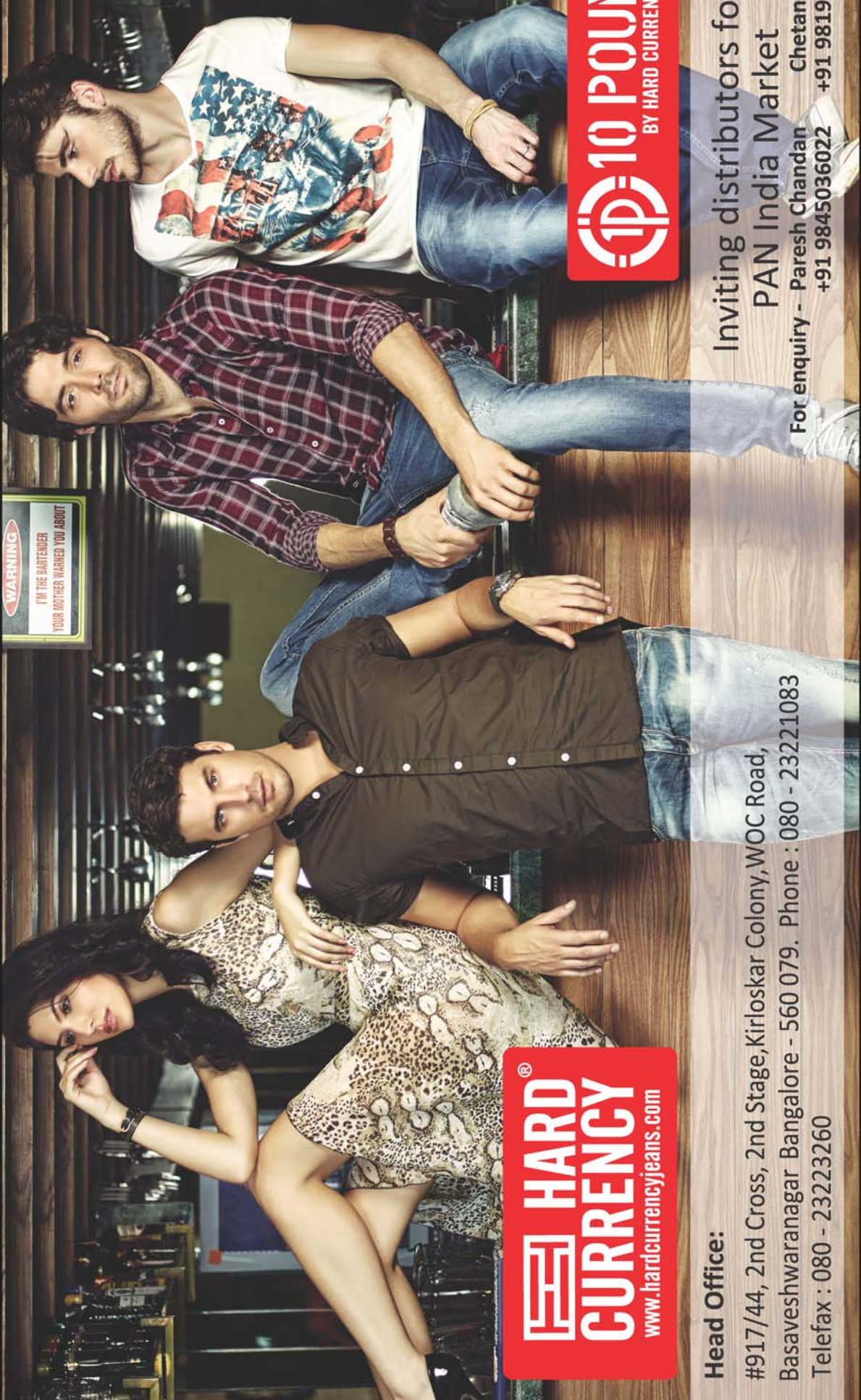


more a birthday or a special occasion affair. Growing disposable incomes of parents, coupled with exposure to international trends have further fuelled the growth of denims in the kidswear category.” Talking about the initiatives taken by Pepe, Mehta elaborates, “This season, the growth of denims has been exceptional because of our promotional offers. Besides, our collection also showcased prints on denim along with fun badges, which kids now-a-days want. In the last 2 years, there has been a tremendous growth in sales of kids wear denim at Pepe. In the year 2015, we had a retail space of 7,000 sq.ft. and our goal was to further expand this due to the increasing demand. By next year in 2016, we acquired a total retail space of 37,560 sq.ft., which was almost 5 times bigger than the previous year. So growth this season has been phenomenal, one of the key factors for the expansion and our collection.”

Oliver Kaye (Gap India) agrees that kids denim has been growing at a good rate. He shares, “In particular, our baby’s first denim sells very well since



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“Patterned denim fabrics such as floral prints, patterns, stripes have been quite popular for a while with the adults and are expected to grow in the kids section as well.”

— Oliver Kaye,
Business Head, Gap India

customers love the outfit on their kids. These include elastic waistbands for comfort fits in shorts/cargos, super soft overalls, stretch jeggings for baby girls in the ‘my first jeggings’ range.”

G. Satyanarayana of Rookies has just ventured into the market and feels that the kids’ denim wear category has immense potential. According to Sharad Venkta (Toonz), there is an upward trend in denims. With new styles and washes available for kids, the consumption has increased immensely. He feels now-a-days, parents/kids are more aware of uniqueness in denims in terms of comfort, washes and fabrics.

Future trends to watch for

Oliver Kaye from Gap India foresees printed jeans for girls as the new upcoming trend. “Patterned denim fabrics such as floral prints, patterns, stripes have been quite popular for a while with the adults and are expected to grow in the kids section as well,” he appraises. The denim or chambray shirts, which has been very popular with the adults, is also gaining popularity in

the kids department. “It is versatile and can be worn in so many different ways. These will have motifs, applique and other style elements, which have been popular with men and women,” shares Oliver Kaye. Another trend will be cuffed denims for boys. These jeans have a relaxed, classic vibe that is roomy and trendy. “Cropped jeans are very trendy for women this year and will probably emerge as a girl’s denim trend too. These jeans are versatile, cut straight through the leg and flare out gently at the bottom,” says Oliver Kaye. He also feels that the classic denim jacket is expected to hit the kids denim department too. Mehta (Pepe) sees striped denims, camo prints and coloured denims (green, maroon) becoming popular in the coming months. Whereas, Venkta from Toonz anticipates to see more of flayer jeans, denim on denim look, vintage wash denims, denim dungrees, mix and match of denims and other fabrics in future.





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EMERGENCE OF CUSTOMISATION FOR THAT **PERSONALISED DENIM**

'Bespoke' has emerged in the Indian market in a big way. With an increasing number of customers gravitating towards perfect fits and designs in accordance to their personality, the trend of customisation is slowly picking up in India, especially in the denim wear segment. However, whether the trend has taken over the Indian market or has the ball just started to roll, is a question that still remains unanswered. We talk to the leading brands in the segment to find out.

Bharti Sood and Shivam Gautam

Bespoke denims are the next big thing in the world of customised fashion in India. While individual tailors were offering bespoke services in denims since years, the entry of organised sector offering these services has created an altogether new wave among denim fashion enthusiasts. Now you have the option to customise your favourite branded denims the way you like it. Many denim brands have started offering bespoke services. Emphasis is being laid on personalisation to offer absolutely detailed denims that suit one's personality and style.

Industry reports suggest that the denim market is going to be valued at an astounding ₹54,600 crores by 2023. In India itself, the denim market in the last 5 years has undergone a huge transformation. Says Neha Shah, Head-Marketing, Pepe Jeans India, "When it comes to customisation, there are several players that offer customisation services. Recently, customisation in denims has seen tremendous demand. The term coined by social media 'street style' has become popular the world over and has majorly influenced denim wear. It's a sizeable market and growing by the day. It also is an important market as it helps a brand achieve a connection with its customers. This is a big enough

space where people can explore their creativity and brands can identify the hidden potential of this segment.”

According to Hitesh Sodiwala, Proprietor, Custom Jeans India (CJI), “Customisation of clothes in India is a very common thing. You can find many tailors in each city, be it a metro city or a small town. But denim customisation is different. Not all tailors can make a good pair of jeans from denim fabric. Making jeans using customers’ own measurements is also a tough task. I think the denim customisation segment is still in infancy stage and hasn’t grown yet. About 90 percent of the people know only about readymade jeans. They get surprised when someone tells them that jeans can be tailored too and can give the same readymade look. Jeans need a special enzyme wash treatment to get the readymade look. Very few players in the custom jeans segment apply these treatments and we are one of them.”



numbered ensuring traceability. Says Shyam Sukhrmani, Founder, KORRA™ Jeans, “KORRA™ is leading the way to crack the customisation bubble for a premium jeans wearing audience. Customisation or having clothes made to your specification is a hidden gene suppressed by the alpha readymade spiral. This is changing with the audience looking for meaningful experiences in their choices and the custom market will surface in the mainstream consciousness soon.”

Significance of Customisation in Denim

Denim today has become more of a lifestyle product than just a casual wear option. And those who cannot find the right fitting on readymade racks opt for customisation. The satisfaction one gets in custom made jeans can never be imagined in mass manufactured jeans.

According to Hitesh from CJI, most important part of customisation of denim is the fitting. “All customers come to our shop or visit our website for the perfect fit of their jeans. Wash treatment is second most important aspect, to get the soft feel and the desired shade. For people who cannot find their jeans on readymade garment racks, we the numero uno choice. Brand is not as important, because in this field, the workmanship speaks.”

While Shyam from KORRA™ feels, “Customisation is highly aspirational with customers realising all they want are brands that are able to deliver on their promise. It’s a highly loyal space with the long-term value being the electromotive force.” Apprises Pepe’s Neha, “Internationally, denim customisation has taken hold of every cuff, collar and back pocket worth its grommet and buttonhole. There is a

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Aditya Singhal, CEO, IML Jeans, who make completely bespoke jeans and shirts for men and women feels that customised denim market is a very nascent market and needs a lot of penetration within India to become a more significant segment. Customers need more awareness and production ecosystems need further development. According to him, “The customers are generally favourable of this segment and so it is certainly an exciting segment to be in. For IML, customisation in the premium and luxury segment is a proposition that works for a certain customer segment who value quality and personalization to the core.” At KORRA™, each pair of jeans is made from the start to finish by a single tailor. Each product made is marked with the tailor’s signature and



“For a customer, it’s about creativity and personalisation. For a brand, it’s about giving the customer a unique and one-of-its-kind experience.”

– Neha Shah,
Head-Marketing, Pepe Jeans India.



rise of bespoke prints, monograms and personalised patches. For a customer, it’s about creativity and personalisation – about creating a bespoke piece. For a brand, it’s about giving the customer a unique and one-of-its-kind experience.”

At Jeanuine, all buyers can create jeans on the website and then await delivery of their very own custom denim. Not only can buyers select the material, finishes, lengths and styles, they also get a monogrammed pocket, so the jeans belong to them alone. Customers may not have the chance to sew the jeans themselves, but they can be a part of the process from start to finish. Says Julien Tripet, Founder & CEO, Jeanuine, “We give access to videos and text updates so that the buyers can watch their jeans being made from start to finish. The ability to stay involved means customers are happy to wait while their clothing is created. And when those jeans arrive, you can be sure they’ll take precedence over any readymade jeans in the closet.”

Jeanuine has also recently started offering a one-stop-shop solution to the established brands as a private

label. “The brands can now offer fully integrated e-commerce and retail customised denim using the power of their brand without need for any intricate development. Jeanuine takes care of the entire offer from sourcing to manufacturing to app management,” shares Julien.

Target Segments

Customers who opt for customised clothing are the ones who want to upgrade their personal style. They are experimental, trendy, prefer exclusivity and are very particular about the fit. Aditya of IML Jeans explains, “The main segments are HNI men and women who value fashion, style and personalisation.”

According to Hitesh (CJI), people who cannot find the jeans of required fitting are the biggest segment of customised jeans industry. “Also, people who like to wear traditional jeans or off the fashion jeans are our big customers. Many people like to wear boot cut jeans even if the trend is of narrow bottom jeans and they are thoroughly satisfied to approach us. Same goes for high waist jeans lovers too,” he adds. Shyam of KORRA™ feels that the main consumer

segments of customised denims are definitely the fringe customers who don’t fit due to typical size curves and the curious folk who are seeking new and interesting experiences.

Price, Fashion and Customisation

Fashion and customisation go hand in hand, according to Neha (Pepe). “India is a price sensitive and value driven market; and therefore it is important to have a strategic mix of all the three elements mentioned,” she says. Hitesh of Custom Jeans India opines that when a girl goes to shop for jeans, fashion is the first important part for her and then comes the price. Getting jeans customised at times can be costlier than the readymade jeans. But it all depends on the brand you wear in readymade jeans. “Many find customised jeans cheaper than the readymade segment and some find it costlier. But in a customised jeans shop, people at least get the desired styles and fitting,” says he. While talking about the importance of price, fashion and customisation, Aditya (IML Jeans) ranks customisation, fashion and then price.

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“A custom service is bound to bring in new customers who have been tired of trying to find stuff that meets their expectations.”

– Shyam Sukhramani,
Founder, KORRA™ Jeans



“Customisation is not really expensive. It depends on the nature of customer. If she really loves to customise the garment, she will never find the customised garment costly.”

– Hitesh Sodiwala,
Proprietor, Custom Jeans India



Shyam of KORRA™ feels that price and fashion are not agnostic to customisation. At KORRA™, their intent is to offer contemporary clothing at affordable premiums.

Does customisation Attract Customers

Customers who opt for customisation are the ones who prefer exclusivity and perfect fit. As pointed out by Neha (Pepe), customisation is a value added service that fashion forward brands offer. Having a first mover opportunity will surely help with customer acquisition. Aditya (IML Jeans) feels that customisation does attract customers for the brand. It spreads more awareness of the product, body shape and overall fashion.

Affirms Shyam of KORRA™, “A custom service is bound to bring in new customers who have been tired of trying to find stuff that meets their expectations. It also adds to the portfolio for the current base of customers.” Shares Hitesh, “Customisation in a big brand shop is more costly than us. They provide an additional choice for fitting, if the client is not satisfied with the stock on the rack.”

The Process

Denim is a unique fabric and to make a garment, it has to go through a string of process. It takes nearly 10 to 15 days for a brand to create a customised jean. At IML Jeans the entire process takes about 10 working days. They take the measurements, fabric and wash selection and trims choices. The customer can then choose a trial piece or the final piece, which is then delivered accordingly.

KORRA™ takes about a week to turn around an order. They also offer express next day delivery as a premium service. One has to just walk-in to any of their studios or ping them online to start the process, which entails trial or sharing of measurements.

At Custom Jeans India, the process of making a good pair of customised jeans starts with the choice of fabric, according to fit and style selected. Then, they take measurements, which is most challenging. The drafting and cutting on raw denim fabric is done, followed by stitching which requires





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“In-house algorithm based on morphologic data allows us to simplify measurement taking.”

– Julien Tripet,
Founder & CEO, Jeanuine

good workmanship for a fair look of jeans. After all these processes, the jeans are sent to the wash department for desired shade and look. Once ready, the product is sent for delivery. It takes around 15-18 days to get a ready pair of jeans.

For players who customise denims, the process is comparatively easier and less time consuming. The Pepe Jeans custom studio allows the customers to step into the design seat and customise their denim in a few easy steps.

Customers can pick the laser print to be tattooed on the denim, choose the fastenings – be it buttons, rivets or tacks, select the brush of the garment and where exactly one wants it and lastly, choose the colours one wants the print to be in. The entire process can take about 1-2 hours depending on the design.

Jeanuine has created a simple process allowing the customers to get tailor made jeans without the need to get measured. Explains Julien, “In-house algorithm based on morphologic data allows us to simplify measurement taking. Everyone owns at least 1 pant (not necessarily jeans) which fits. We simply copy the measurement of such pant and reproduce the same individual pattern for the client.’ Jeanuine’s fully integrated chain of production to allow fabrication of quality and artisanal jeans means that every pair is unique.

A dedicated Jeanuine staff member monitors each stage of creation and guarantees the superior fabrication of the jeans. This level of service requires approximately 1 month between the validation of the creation and delivery. During this period, customers receive email alerts and videos inviting them to follow the evolution of the production in real time.

What’s in vogue in India

As per Aditya (IML), the main elements considered by consumers during customisation are fits, fabric choices, wash selections and trim selections. Beyond this, personal emblems, monograms and subtle requirements too come from time to time. Shyam from KORRA™ reveals that embellishments are the main drivers of customisation, besides fit, functionality and exclusivity. Hitesh from Custom Jeans remains sceptical about the future but maintains, “The present is very bright for the customised jeans industry. More and more people are visiting our website to place their orders for custom jeans. We feel proud when customers visit our website for repeat orders. We have a regular set of customers in India and abroad, who place their orders regularly.” At Pepe’s custom studio, denim distressing/ripping is most widely requested. Adds Neha, “It wholly depends on the

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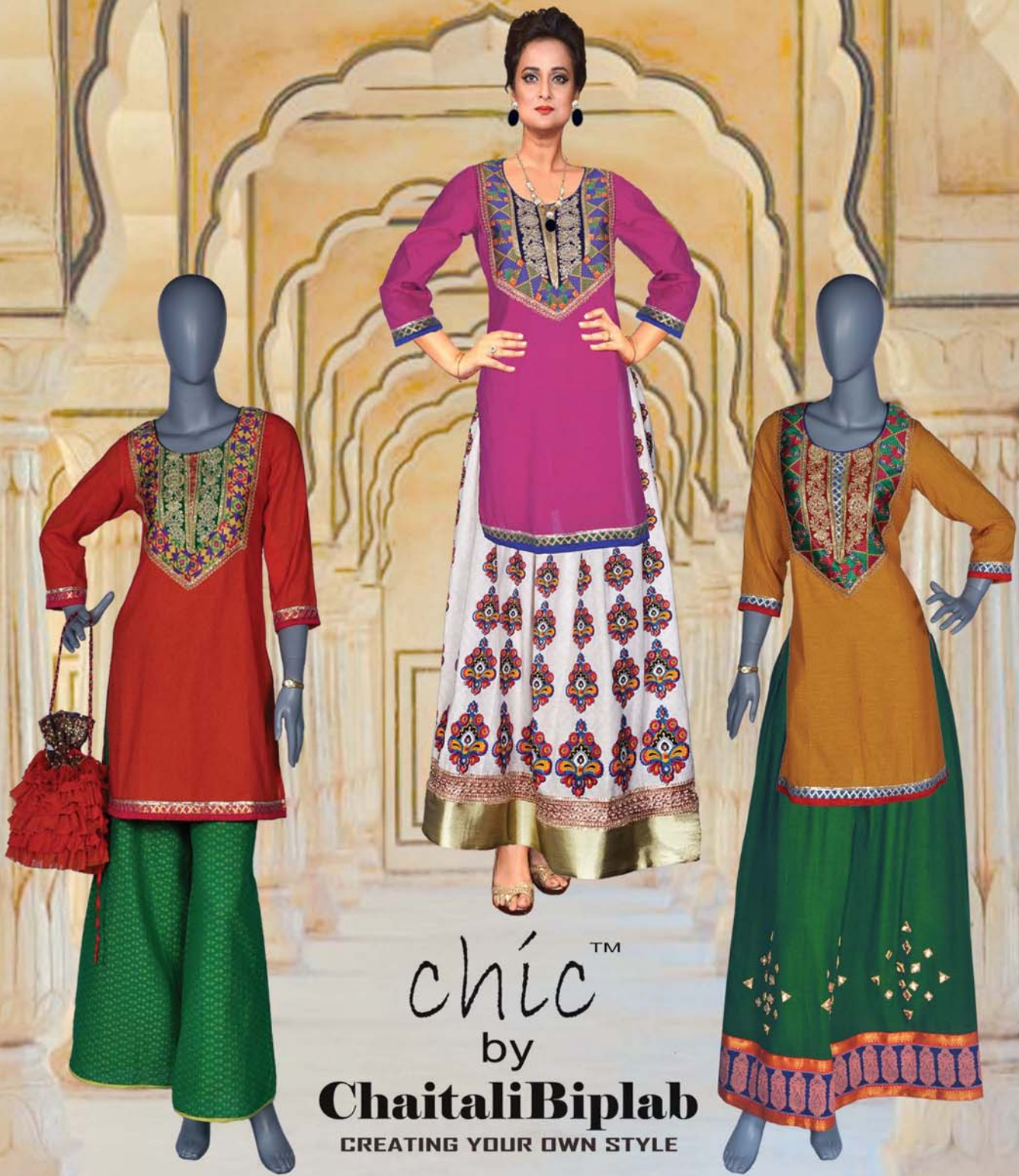
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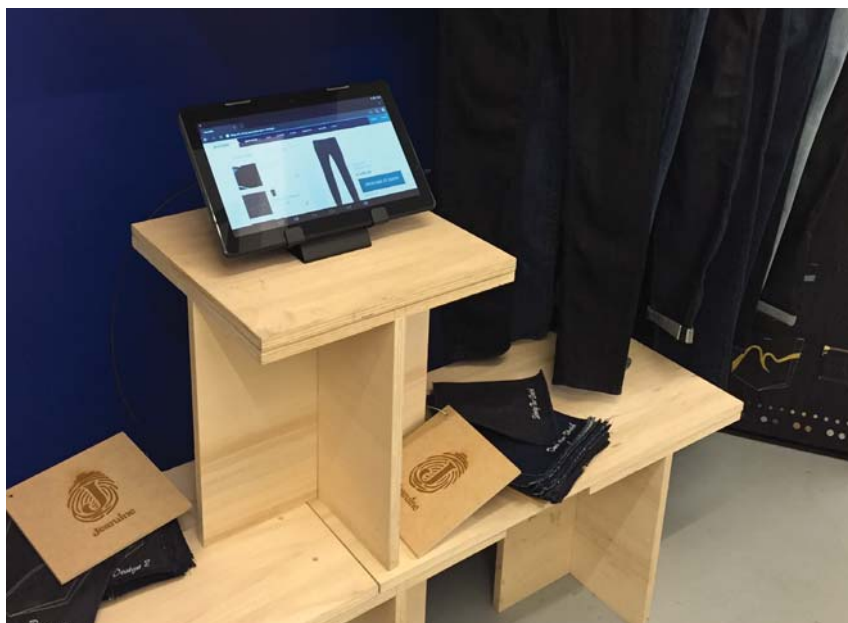
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evolved with their shopping choices, they are very fashion conscious and with the e-commerce boom, we have to be ahead of the curve in understanding the new generation consumers.” Adds Aditya from IML, “The international market is also accepting customisation. It is actually a bit behind India due to the higher cost of labour and lack of smaller laundries required for jeans washing. The international market is however more quality focused and fashion conscious and so is still more demanding than the Indian market.”

At the same time, Hitesh (CJI) feels that international market is better than the Indian market in terms of price. “In India, people really don’t respect customised garments. Whereas in the western countries like USA and Europe, people value customised jeans. A pair of jeans for more than US \$100 in USA is easily acceptable, while Indian people find jeans priced for even ₹2,400 costly. But since last 4 years, people are getting aware of customised garments and they are ready to pay for quality. We can say that the market is growing.”

According to Shyam (KORRA™), “The international market is pegged at USD

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customer as to how they want to design their denims. Denim badges, which can be either pinned up or stuck with heat are also quite popular amongst teenagers and girls in early twenties. In future, 3D designs will be in great demand.”

Global Market Trends

Earlier denim was worn during the weekends as a casual wear but now-a-days, people even wear it to go for work. It has become a new symbol of power dressing and corporate dressing all over the world. USA constitutes the largest denim wear market, followed by Asia Pacific and then China.

Apprises Neha (Pepe), “Customised denim are having a moment the world over. A DIY trend that’s been seen on international runways are patches and edgy studwork. We are a global brand, a lot of inputs we put in our strategy come from our in-house designers who work very closely with the global teams, so we are able to work on trends and keep up with the fast moving culture. There are two parts when evaluating - one is global and the other is Indian. Our Indian target group is almost at par with the global consumers. They are lot more



“The international market is also accepting customisation. It is actually a bit behind India due to the higher cost of labour and lack of smaller laundries required for jeans washing.”

– Aditya Singhal,
CEO, IML Jeans



\$3 billion. India is very nascent at the moment.” Julien from Jeanuine feels that customization options are still very less in India. He says, “Larger denim companies are all adding customised denim to their product offering such as Levi’s Tailor Shop program and Pepe Jeans’ custom studio. But the limited agility of such giants means customisation options are very narrow in India. The original idea behind Jeanuine was to reconcile the want-it-now with the innate desire to customise that is trending in the fashion industry.” He further adds, “Digital technologies and the emergence of millennial customer segment fueled the current trend in customisation whose ultimate objective is to offer a more personal shopping experience. Custom and bespoke garment is a fast-growing market and several products are immensely popular (shoes, shirts, suits, chinos pants, tee-shirts). Though the market has seen the emergence of very successful companies such as NikeID, Warby Parker, iTailor, Indochino, Bonobos, very few are offering denim”.

Reach

When asked if customisation services were restricted to metros and tier-I cities, Hitesh of Custom Jeans



India affirmed in negative. They has customers from small towns in Assam, Mizoram, Sikkim and Meghalaya. As per him, the percentage of customers from metro cities is around 60 percent.

Aditya of IML feels that customized services were restricted to metros and tier -I cities. “With the market evolving, it should penetrate into the smaller cities as well,” shares he.

For KORRA™, the service are primarily available only in tier -I cities. Pepe claims to have launched their custom studios in Mumbai, Delhi and Bengaluru currently.

Is Customisation Expensive?

Creating individualized patterns can be time-consuming and expensive but many customers are prepared to pay

more as customisation gives them the power to create what they want to wear. Aditya (IML) explains, “A proper bespoke and custom made jeans is expensive as each and every process takes it’s own time. Hence, it is highly labour intensive and that too skilled labour. A very good bespoke jeans takes about 5 times longer to make than the regular ready-to-wear premium jeans. If a customer wants his personal emblem on the jeans, a designer has to first convert it into a workable design before final embroidery. With multiple thread or button options, the craftsmen have to spend more time on each machine. All of this requires multiple levels of skills working together over a period of hours.” Shyam (KORRA™) also felt the same. “Customisation is indeed expensive, more so it is intensive in every aspect of the supply and service chain. Relatively higher costs are incurred in resourcing, technology and customer servicing, not to mention up-skilling staff,” he says.

Neha at Pepe apprised that once a customer buys a pair of jeans or denim jacket, they can avail the customization service at the store (currently available at select stores only). “At Pepe Jeans custom studio, we charge ₹250 for each customization service, that is, laser printing, colour, stud work or distressing.”

While Hitesh (Custom Jeans) differed in his view. According to him, “Customisation is not really expensive. It depends on the nature of customer. If she really loves to customise the garment, she will never find the customised garment costly. But in general, we can say, that customised garments are not much expensive as compared to the average price of the readymade garments.”





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7TH SIN

The brand 7th Sin was launched in the year 2010 as a jeansmith for the trailblazer, the dreamer, the pioneer, the individual- the one! As per its philosophy, the brand looks at denim as a canvas for personal style rather than a universal fabric. In line with this, 7th Sin is pushing the boundaries and paving a new way for denim lovers all over the country. As a connoisseur of washes and an authority on fit, the brand is famed for putting its own spin on the classics; producing coveted styles and washes that are weathered, worn and personal – scrupulously developed to look and feel like they have been owned for years.

Target Group

The brand's core target audience are teenagers, who like to stand up, be noticed and celebrate their personal culture.

Top Selling Collection

Although all the collections enjoy excellent demand, the denim collection under the theme Denimology has proven to be the best selling for 7th Sin.

Latest Collection

The brand's latest collection is called Revenge of Bulls.

Product Expansion Plans

As of now, the brand is not looking into expanding its product range; it is looking to further work on the existing products. It has plans to work on washes to give a loud look to the new collection.

Key Markets and Expansion Plans

Although a relatively young brand, 7th Sin has already established its strong hold throughout the country. The brand's strongest markets include cities like Mumbai, Ahmedabad, Surat, Rajkot, Ranchi, Kolkata and Patna. Presently, the brand retails in 12 Indian states and plans to venture deep into the Indian market soon.



BRAND UPDATE

- > City and country of origin: **Mumbai, India**
- > Year of launch: **2010**
- > Total number of MBOs: **550**
- > Total number of cities present in: **About 120**
- > Total number of states present in: **12**
- > Website: **www.7thsin.in**

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AFOX

A brand is what, which withstands the fierceful market competition and ultimately manages to gain an outstanding position, which can be measured by the customer satisfaction and their affection which brings them back again to the brand. Afox was started as a fashion brand in 2007. In the initial years, the brand was dedicated to experimenting with cotton trousers and were successfully setting trends. A few years down the line, in 2010, the brand ventured into designer trousers and denim bottom wear. The chic and high quality products were met with good response, cementing the brand's reputation as a leading bottom wear player of the country.

Target Group

The brand's target consumers range from the age 18 years to 50 years who are aware of modern fashion trends and are product and quality conscious.

Product Basket

Afox's denim range occupies about 25 percent of its overall product portfolio and encompasses a wide range of basic and fancy denims that enjoy unprecedented demand.

New Collection

For this coming season, the brand plans to keep aside the conventional blues and blacks and would be experimenting with coloured denims. The collection includes a range that plays with unique colours and with blends of new patterns and cuts. The brand also has employed numerous innovative techniques to enhance the products and differentiate the same from others in the market.

Market Expansion Plans

The brand plans to expand its footprint aggressively in the next few years. In line with this, Afox is planning to increase its production rate so that it could cover the other remaining states of India soon.



BRAND UPDATE

- > Country & city of brand origin: **Ahmedabad, India**
- > Number of countries present in: **India**
- > Year of brand launch: **2007**
- > Total sales turnover in India as (FY16-17): **₹16 crores**
- > Total number of MBOs: **More than 500**
- > Number of states present in: **15**
- > Number of cities present in: **25**



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BRAND UPDATE

- > Country & city of origin: **Ahmedabad (India)**
- > Number of countries present in: **India only**
- > Year of brand launch: **1997**
- > Number of states present in: **12**
- > Number of cities present in: **12**
- > Number of distributors: **12**

AWAACS

Awaacs, from the house of Mehta Clothing, was launched in 1997 in Ahmedabad. As an experienced bottom wear player with a long standing existence, Mehta Clothing was quick in noticing the need of the Indian denim market back then — a denim brand that adhered to the philosophy of quality at affordable prices. Thus, Awaacs was born to fill the void in the Indian market. In the initial days, success was slow but steady and within a few years, the brand succeeded in establishing itself as a discreet player in the Indian denim market. Today with 12 distributors pan India, the brand has carved a niche for itself and has become synonymous with sober and tasteful basic denims.

Target Group

The brand targets the middle class who wants comfortable denims for daily wear. Hence, the brand is also

significantly popular among the 35+ age bracket.

Product Range

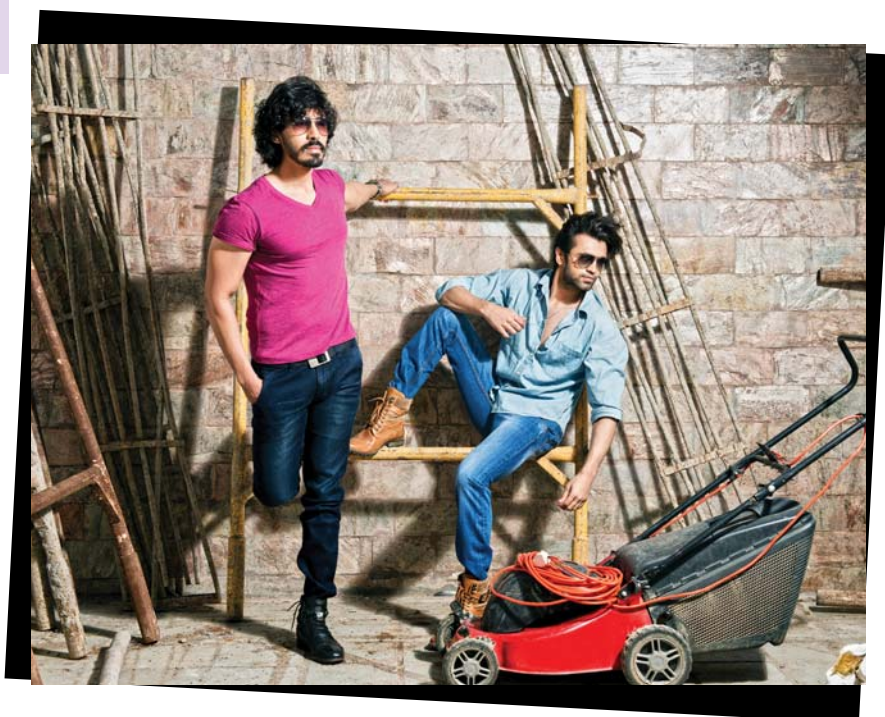
The brand's forte is basic denim. Keeping comfort and fit as utmost priority, Awaacs roll out denims that enjoy demand for its simple yet refined aesthetics.

Top Selling Collections

Owing to its sober aesthetics and comfort, all the collections enjoy equal demand.

Upcoming Collection

Although the brand wants to stick to its forte of basic denim, it is also planning to introduce fashion denims with branded touch ups like narrow fits in the near future.



BEING HUMAN

Being Human, a clothing line with a heart, was launched by Salman Khan in 2012. The brand is globally licenced by The Mandhana Retail Ventures Ltd., and has its footprints in over 15 countries with over 700 points-of-sale. 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 brand's combined ethos of celebrity, charity and fashion has been a catalyst in taking its reach to 700 points-of-sale across the globe since its inception in 2012.

Target Group

Being Human's customer base has people who believe in international fashion and follow the latest trends. However, they believe in doing good too by helping the brand's initiatives in healthcare and education. Hence, they "Look Good and Do Good" philosophy.

Product Basket

Denim occupies close to 65 percent in bottom wear and about 18 percent overall in the net product basket of the brand. Apart from jeans, the brand's denim line includes a big range of shirts which include indigo checks, prints and structures. In terms of style, the line ranges from western and work wear inspired to more clean modern versions. The brand also has hoodies, denim caps and track pants in indigo as part of its collection.

Top Selling Collection

Being Human's top selling jeans style are the classic vintage washed ones in dark and mid tones followed by vintage wash combined with heavy distress and repair. Grey tones also work very well for the brand and every season it shells out about 8 to 10 options in grey.

Upcoming Collection

For AW 17/18 season, the brand is concentrating on premium fabrics with refined washes, and a few new fits like slim straight and tapered skinny fit. Another key styling is the cross pocket style where the brand is increasing the number of options.

Category Expansion Plans

The brand is planning to launch its range of denim jackets soon.

Key Markets

Being Human Clothing currently operates 55 exclusive stores across 43 cities in India including Ahmedabad, Ajmer, Aurangabad, Bengaluru, Bhilwara, Bhopal, Chandigarh, Delhi NCR, Gwalior, Hyderabad, Indore, Kolhapur, Kolkata, Lucknow, Mumbai, Varanasi and Vijayawada amongst others. The brand's primary market is the West and the North region.

Top Retailers

Ahmedabad One, Palladium (Mumbai), Viviana (Thane), VR Mall (Surat), and DLF Promenade (Delhi).

Market Expansion Plans

Being Human is aiming to open at least 20 stores per year. The brand has outlined that 70 percent of the stores will be launched in tier -I, -II and -III cities given the demand it has witnessed so far and is aiming at 20 percent year-on-year growth. A few of the cities on the roadmap are Patna, Bhubaneswar, Jamshedpur and Raipur, amongst others.

Online Presence

Presently, the brand does not have an online selling website of its own. Although it retails on some of the biggest online partners such as ABOF, Flipkart, Fynd, Koovs and Myntra. Approximately 15 percent of the



brand's total sale is driven by its online presence.

Omni-Channel Presence

The brand is in discussions with partners that will help it align its online and physical stores in a seamless manner, that will help the brand to fulfill online orders via physical stores. The brand is also looking forward to launching its online retailing website very soon.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **14**
- > Year of brand launch: **2012**
- > Total sales turnover in India (FY16-17): **₹220 crores**
- > Total number of doors, the brand is present in India: **319**
- > Total number of EBOs: **60**
- > Total number of SISs: **259**
- > Number of states present in: **22**
- > Number of cities present in: **68**
- > Total retail space across EBOs & SISs: **74,479 sq.ft + 45,199 sq.ft. respectively**
- > Average sales per sq. ft. per month (April 16 to Mar 17): **₹1,894**
- > Average bill/ ticket size (April 16 to Mar 17): **₹2,500**
- > Same store sales growth rate: **8-10%**
- > Website: **www.beinghumanclothing.com**
- > Share of sales from on-line: **Approx 15%**



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BUTTON NOSES

Button Noses, a brand new venture launched by Spark Clothing, offers an entire range of girls clothing. The brand offers a complete range of premium denims with all new washes, fabrics and a whole new version of denim accessories. With a passion for denims and appreciation for new fashion, Button Noses aims at bringing the international trends in the Indian markets. With this, Spark has become a one stop fashion destination for both little girls and boys. The brand's USP is its denim wear segment. The premium brand offers merchandise at an affordable and reasonable price, without compromising on the quality of the products.

Target Group

The brand targets little girls in the age bracket of 0-14 years.

Product Basket

The kidswear brand offers an expansive range of clothing for little girls. Button Noses offers a range of premium denims with new washes, fabrics and also a new version of denim accessories.

Retail Presence

Button Noses is present in Delhi, Mumbai, Bengaluru and Punjab and retails through approximately 100 MBOs.

Retail Expansion Plans

Button Noses is currently present in 6 states and is planning to expand in all the 32 states of the country. The brand is planning to target metro cities and also B and C category cities across the country.

Online Presence

The brand has recently started retailing through e-commerce portals.

Total number of MBOs: 100 +



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CDF COLUMBIA

Established in 1990, CDF Columbia is a brand which has stood with times and is known for its class, style and comfort. The brand is a lead runner in innovations in crafting a perfect pair of jeans. The brand focuses on men right from the teenagers to the mid age fashion savvy customers. It is one of the exclusive brands in plus size denims in Asia.

Target Group

The brand targets sophisticated youth along with working individuals from the middle and upper middle class.

Product Basket

The brand is known for its range of denims that are specifically tailored for plus sizes. The brand is also known for its range of jog denims which is hosiery based denims available in 6 to 7 varieties.

Top Selling Collection

The brand's strongest selling line is its lycra based denim collection with perfect fit and wash. The other collections of the brand also enjoy good popularity amongst its consumers.

Upcoming Collection

CDF Columbia strives to come up with new and innovative products every year. The brand's endeavours are concentrated towards coming up with products that align with the latest trends but has a distinct flavour of its own. The brand's upcoming collection encompasses a variety of lycra denims in a plethora of innovative styles and washes.

Key Markets

The brand has a very strong presence in the markets of Maharashtra, Tamil Nadu, Kerala, Andhra Pradesh, Telangana, Karnataka, Gujarat and Goa.

Top 5 Retailers

The brand's top retailers are the Topsy Topsy Group, J.C. Retail India, Mitlon Group, and the Gaysons - The Fashion Look Group.



BRAND UPDATE

- > Country & city of origin:
Mumbai, India
- > Number of countries present in:
4
- > Year of brand launch:
2004
- > Number of states present in:
11
- > Total number of MBOs:
800+



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COURTYARD AND KRABURS

Courtyard has been specifically designed for men and Kraburs for women. Established in 2015 by Artex Creation, both the brands focus on denim as well as cottons. Although new, the brands have established a powerful positioning in the highly competitive jeans market which repletes the grade of this modern and contemporary denim brand. The company started with a humble beginning; from a few pair of jeans to a few thousands in just six months. Today, their products have been highly appreciated in the market among dealers, retailers and the end consumers. The brands have served their consumers with the best product offerings at competitive prices.

Target Group

The brands target all age groups, with special focus on teenagers within the age group of 16 to 30 years, preferring sober designs and superior quality at reasonable price for both males and females. The brand's products are designed to meet the requirements of both high-end customers and common goers alike; hence it enjoys the patronage of people from all walks of life.

Product Basket

Of the 90 percent that bottom wear dominates in the brands' overall product basket, 70 percent is denim. The brands' denim collection features a wide range of jeans that delivers the same quality, comfort, appearance and style that most other luxury brands do, albeit at a much affordable price.

Top Selling Denim Collection

The brands' premium collections with variety of washes, including faded, ripped garments, studded garments enjoy the strongest demand.

Upcoming Collection

The brands are coming up with more collections in the premium segment after the success of Courtyard Premium, a collection that was launched last year. The new collections will offer a variety of washes, like ball wash, cloud wash, star studded jeans

for females and basics for the middle aged.

Category Expansion

The brands are also planning to add ripped denims, spray denims, and new ranges of colour denims, along with different styles of denim bottoms with the concept of accessorising.

Key Markets

The brands' primary retail market comprises of West Bengal, Bihar, Assam and Jharkhand. It is now exploring Uttar Pradesh, Chennai, Karnataka and Andhra Pradesh.

Top Retailers

Shree Shoppers Ltd., Kolkata; Citi Choice, Sreerampur; Take Chand and Grandsons, Balurghat; Mega Sale Market and Bazaar Style Pvt. Ltd. in Kolkata.

Market Expansion Plans

The brands are looking forward to expand pan India, building brand value. It also aims to establish its presence in LFSs like Pantaloons and Shoppers Stop.

Online Presence

Although new, online sales are picking up for both the brands. The brands are available at leading portals like Flipkart, Snapdeal, Paytm and Amazon. It also has its own e-commerce portal.



Advertising and Promotion

Both the brands bank heavily on social media for promotion and hence have active presence across all social networking sites like Facebook, Instagram, Twitter and Youtube. The brands also advertise via sms, WhatsApp, e-mails, magazine adds, hoardings and newspapers.



BRAND UPDATE

- > Country & city of brand origin: **Kolkata, India**
- > Number of countries present in: **India**
- > Year of brand launch: **2015**
- > Total number of EBOs: **4**
- > Total number of SISs: **8**
- > Total number of MBOs: **315**
- > Number of states present in: **6**
- > Number of cities present in: **10**
- > Name of own on-line store: **www.courtyardjeans.com/www.kraburs.com**
- > Share of sales from on-line: **8%**



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DARE JEANS

It all started in 1992 when Paresh Dedhia, a complete newcomer to the field of garments, put in all his energies and ventured into garment manufacturing. He made a humble beginning with just three people but very soon realized the immense scope for branded garments and thus launched his very own bottom wear brand Dare in the year 1995. Dare does a complete justification for men's bottom wear. It explores formals, casuals and jeans. To ensure the best quality, the fabrics are sourced from reputed mills such as Raymond, Arvind Mills, Vardhaman, Ashima, etc. Standing by its service, stock and quality principles, Dare has developed a wide spread network.



Target Group

The brand's core audience are men from the age of 30 years and above. Its target customers are well settled working professionals.

Product Basket

The company manufactures bottom wear products for men including denims, cotton trousers and blended trousers.

Product Expansion Plans

Dare Jeans is working on manufacturing denims with more cleaner and sophisticated look with bright colour tones and different blends of indigo.

Retail Presence

Dare Jeans is strong footed in the state of Maharashtra and Tamil Nadu. In the near future, the brand is focusing on expansion in the northern sector.

BRAND UPDATE

- > Country & city of brand origin: **Mumbai/ India**
- > Year of brand launch: **1995**
- > Total Sales Turnover in India as in FY16-17: **₹27 crores**
- > Total number of MBOs: **1,000 +**
- > Number of states present in: **16**
- > Name of own online store: **www.darejeans.com**
- > Share of sales from online: **2%**



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DEAL JEANS

Deal Jeans, a retail venture of Deal Global Fashions Pvt. Ltd., is a fast fashion women's western wear brand that believes in bringing fresh fashion from every fashion-forward corner of the world to the trend seekers out here. The brand has an experience of over 16 years in the market and is now offering 14 exclusive product categories in around 2,500 artistic styles crafted every year. Deal Jeans believes in empowering every girl or woman's personality with its clothing, making her much more attractive than the rest of the crowd.

Target Group

Deal Jeans targets women in the age group of 18- 35 years and girls under the age bracket of 6- 16 years, who are mainly fashion seekers with a lot of style, attitude and flair.

Product Basket

Deal's SS'17 collection is a blend of designer denims, stylish summery tops and party dresses. Around 2,500 artistic styles are designed in captivating colours every year. Taking the trends in consideration, styles are then designed to meet the consumers' fashionable desires blended with trends followed across the globe. Having a strong hold on craftsmanship of denim wear, 32 percent of the brand's collection comprises of designer denims.

Top Selling Products

This season's trending styles for Deal Jeans are patch designs played with contrasting blue colours and lace-up jeans having lace embellishments on both sides. Also, studded shorts in rips have been trending this season.

Upcoming Collections

For the upcoming season, the brand feels that embroidery is reigning high. Intricately embroidered floral patterns on denims will give a feminine edge to this wardrobe staple.

Product Expansion Plans

For the coming season, the new denim product range by Deal Jeans would have various new washes, embellishments, fits - slim and skinny, which would be dominating the collection. The distress and torn effect has worked well for the brand this season, and so it has continued this trend for the next season as well.





BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **2**
- > Year of brand launch: **2000**
- > Total sales turnover in India as in FY16-17: **₹110 crores**
- > Total number of EBOs: **13**
- > Total number of SISs: **223**
- > Total number of MBOs: **1,300+**
- > Number of states present in: **29**
- > Number of cities present in: **416**
- > Total retail space across EBOs & SISs: **39,950 sq.ft.**
- > Average sales per sq.ft. per month for above: **₹2,200**
- > Average bill/ ticket size for above: **₹3,000**

Retail Presence

Deal Jeans, since its inception in 2000, has grown by leaps and bounds and has a strong pan India presence today. The brand retails through 12 exclusive outlets across India and is available at 1,300+ MBOs, 120+ LFS and all leading online shopping portals. Deal Jeans also has one international outlet. The brand is currently focusing on expansion of exclusive brand outlet in India and internationally.

Top 5 Retailers

Shoppers Stop, Central, Globus and Myntra.

Retail Expansion Plans

Deal Jeans foresees itself as a leading fashion apparel brand with an exclusive positioning in the high fashion market. Deal Jeans has launched 12 exclusive brand outlets in India while the opening of 40 more stores is in plan for the year 2017-18. The brand is retailing through one outlet internationally in Lebanon and plans to add 4 more standalone stores in 2017-18. The brand is aiming for 70 percent growth by the next year and is also planning to create a global presence in future.

Online Presence

The brand understands that online retail has been the next big thing in fashion industry with increasing craze of internet among the millennials. Deal Jeans feels that the growth of online shopping has tremendously helped to establish the brand much faster as there is no geographical boundary anymore. Today, the brand is available at all leading online portals like Myntra, Abof, ShoppersStop and Jabong.

Technology Deployment

The fashion industry is undergoing a significant digital revolution. The use of real-time data technology towards inventory management followed by social media marketing for brand promotion and internet technology which facilitates to sell online in a better manner and is helping to establish the brand much faster, has helped the brand diminish any geographical boundary. Use of technology for superior customer experience and sophisticated CRM is a great opportunity for Deal Jeans.



FOCUS JEANS

Focus Jeans was launched over a decade back with the force of sheer passion – passion for inimitable style, passion for superlative finish, passion for perfect class. From a very humble beginning to being present in more than 3,000 outlets across multiple states, Focus Jeans is today seen not only as one of the most contemporary and stylish brands at par with any international brand but also delivers better value for money. Each style created by the brand is a reflection of the wearer’s attitude, personality and class.

Target Group

Focus Jeans aspires to dress up today’s women – both young and the young at heart. The target audience falls largely in the age group of 18- 36 years but the brand concentrates more on women aged 22- 32 years. They are both brand image and quality conscious, are in tune with the latest trends and seek good value for money.

Product Basket

The brand’s product basket comprises of more than 150 different styles, shades and fits, catering to each and every need and taste of a woman. The product range is classified into 6 different categories as per style and price segments. They are classified as: Classics, TrueBlues, Premium, Jeggings, Cottons and Hotties (Capris). The product line consists of basic jeans, trendy jeans, ankle lengths, capris, shorts, jeggings and cottons.

Upcoming Collections

Apart from its entire range of Classic Jeans – probably one of the largest ranges available in the market, Focus Jeans launches a new collection every season that captures the flavour of the season and the rising new trends. The brand’s experienced stylists indulge and play with amazing shades, washes and fabrics to create some of the best pair of jeans every season – which usually not just gets acknowledged for the style or fit but also for their feel, finish and effects.

Product Expansion Plans

Like every year, Focus Jeans will keep on offering new product line ups, introduce new seasonal styles and finish and increase the width of its price segment on the top as well as the bottom wear.

Retail Presence

The brand is present in mini metros and large and small towns. Focus Jeans retails through more than 2,500 retail outlets and also have a good mix of MBOs and LFS.

Retail Expansion Plans

Focus Jeans is planning to be present in almost 4,000 to 5,000 outlets across the nation within a couple of years. The brand is also looking for distributors and agents nationwide who will partner in its growth for long term.





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FORCE DENIMS

Force Denims from the house of Dollar Industries Ltd., is a part of the company's diversification into outer garments. Targeted towards the youth, Force Denims consists of jeans, corduroys and cotton trousers. The brand's designs are new and have the latest trends in terms of style and fit. Innovation and insight are the ways of life at Dollar and they are minutely followed for Force Denims too.

Target Group

Force Denims targets young population who thrives for fashion and comfort at the same time.

Product Basket

The brand offers regular, slim and narrow cut jeans, cotton trousers and corduroy pants.

Top Selling Products

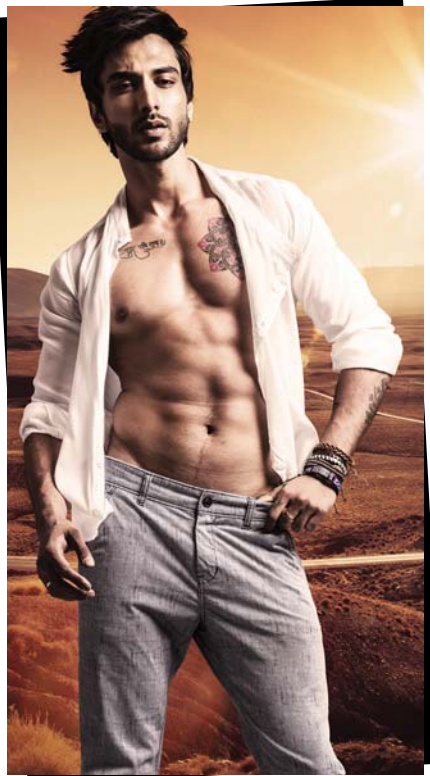
Slim fit and narrow fit jeans are the most selling denim styles of the brand.

Product Expansion Plans

Force Denims is planning to launch its denim range for women. The brand will also add bermudas and shorts in its men's category.

Retail Presence

All tier -I and metro cities are the primary markets for Force Denims. The denim brand has presence in 26 states and is planning to open its exclusive store soon. Force Denims retails through almost 1,000 MBOs in states like Rajasthan, Chhattisgarh, Bihar, West Bengal, Odisha and Jharkhand.



Technology Deployment

Dollar Industries prides in being the first innerwear company with fully integrated manufacturing unit. The state-of-the-art new processing unit is located at Sipcot, Perundurai - Erode district in 5 acres of land. The unit is well equipped with the latest processing technology with Sclavos and MCS dyeing machines and the top most finishing range like Bianco Padder, Strahm Padder, Strahm Dryer, Monfong's Stenter, Lafer compacting machines to produce finished raw material dyed in any possible colour. The company is also a proud owner of a spinning unit situated at Vedasandur, Dindigul district. The unit is spread over 26 acres of land with all facilities. The unit is run in a very organized way and the company complies with all the labour laws and standard quality system.



BRAND UPDATE

- > Country & state of brand origin: **West Bengal, India**
- > Year of brand launch: **2010**
- > Total number of MBOs: **1,000**
- > Number of states present in: **15 states approx.**
- > Number of cities present in: **300**

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GAP

The first Gap store opened in 1969 with a simple idea – to make it easy to find a good pair of jeans and based on a commitment to do more. Over the past 46 years, the brand has grown from a single store to a global fashion business, present in 90 countries worldwide.

Gap entered the Indian market at the right time, when the demand for international brands was growing. Since its introduction to the country 2 years ago, the brand has opened 11 stores in 6 cities. With the launch of Gap on nnnow.com and Amazon, Gap is now available in multiple geographic locations in the country.

Target Group

The iconic American brand stands for an individual who likes to express his/her personal sense of style, while being on-trend. Gap's primary audience would comprise millennials and young families.

Denim's Share in the Product Basket

Gap is a clothing and accessories brand and denim contributes to about 20-25 percent of its core business. Denim bottoms are fast movers for the brand, both across men's and women's categories.

Top Selling Collection

In the men's category, the top selling styles are skinny, slim and straight. These styles come with varied levels of stretch allowing ease of movement. Within the women's category, high waist, skinny, and girlfriend denim styles sell particularly well.

Upcoming Collections

Staying true to the American style, this Fall '17 women's collection focuses on sculpt jeans, which offer impeccable



BRAND UPDATE

- > Country & city of brand origin: **San Francisco, Usa**
- > Year of brand launch in India: **2015 in India**
- > Number of countries present in: **49**
- > Total number of EBOs in India: **11**
- > Number of Indian states present in: **5**
- > Number of Indian cities present in: **6**
- > On-line store: **www.gap.nnnow.com**

fit and style, true Skinny and leggings that come in different colours and prints. For men, the concentration is on performance denim which includes stretch jeans, fit jeans and active jeans.

Primary Markets

Gap's primary key markets are in the metros – Delhi, Mumbai, Bengaluru, Chennai. The newly launched stores in Indore and Pune are also catching up fast.

Retail Expansion

Gap continues to strive towards its five year plan of growing the number of stores in the country to 40. The brand already has launched stores in tier-II cities such as Pune and Indore and are only looking forward to growing in store count.

Online Presence

After the launch of 11 stores, the brand launched itself on gap.nnnow.com. It also has made its collections available on Amazon.in to make shopping easier and more accessible to its customers.

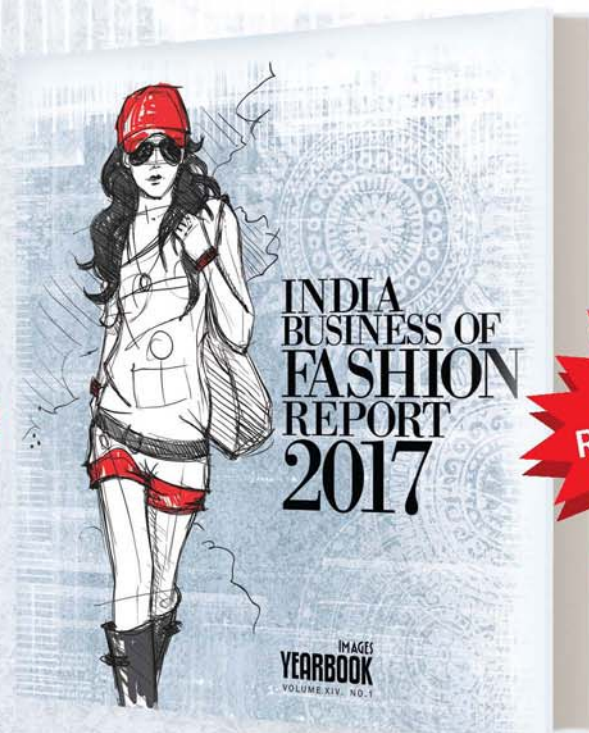
Omni-Channel Presence

Gap's online store on nnnow.com provides the option of click and collect in store, or any preferred delivery address within 48 hours. In-store customers can now indulge in the luxury of endless aisle and order products from other stores in case of stock out or size out. This allows the customers unparalleled access to all Gap stores from one location.



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PAST IBOFR ISSUES:



HARD CURRENCY

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

Target Group

Hard Currency primarily targets the middle income fashion conscious customers who appreciate quality products. The brand's customers fall under the age group of 16 to 50 years.

Product Basket

Primarily known as denim makers exclusively for men, Hard Currency has recently started exploring jeans for boys and women as well. Moreover, the brand has also ventured into making semi-casual cotton trousers recently but denim still continues to dominate 80 percent of its production.

Core Selling Collections

Considering that the market has increasingly become price sensitive, Hard Currency's economic denim brand '10 Pound' has registered the highest demand.

Upcoming Collection

For the forthcoming season, the brand has introduced a range of basic fashion denims targeted towards the classic fashion denim lovers, with more focus on fabric and wash and minimalistic designing.

Category Expansion

The brand is exploring in boys' and women's denim wear under the brand name '10 Pound'. The first collection has already been launched.

Key Markets

The brand's primary markets are Kerala and Karnataka. The brand specially witnessed noteworthy demand from tier-II and -III cities.

Retail Expansion

Hard Currency has already started business in many new regions this year. Along with expanding geographically, the brand is also vying to penetrate the existing markets with its new product portfolio.

Technology Deployment

The brand has installed systems and software that record all stocks at every stage of operation. Apart from this, Hard Currency has also changed many methods and systems internally to maximise utilisation of resources through a system called Gandhian Servant Leadership (GSL).

×

BRAND UPDATE

- > Country & city of brand origin: **Bengaluru, India**
- > Number of countries present in: **2**
- > Year of brand launch: **1995**
- > Total sales turnover in India (FY16-17): **₹16 crores**
- > Total number of MBOs: **450+**
- > No of Indian states present in: **13**



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HOFFMEN

Hoffmen, the iconic Indian denim brand was launched in the year 1991, when the country harboured only a handful of denim brands. Back in the day, Hoffmen wanted to make basic essential jeans that could turn the much talked about 'denim with western origin' into a product that is accessible and becomes part of the daily fashion essentials for the discerning Indian consumer. For over 30 years now, every product that is made at the Hoffmen factory adheres to strict quality checks, to ensure that every piece of Hoffmen apparel is beyond customer's expectations in terms of quality and style. From fabric to stitch, the brand takes care of every detail with utmost sincerity and precision, to produce a fine piece of garment, which can justify its existence as the respective consumer's very own zone of comfort and personal style statement.

Target Group

The brand targets the fashion forward, typically in the age group of 21- 40 years.

Product Portfolio

In bottom wear, denim occupies a share of 60 percent and in upper wear, it occupies close to 20 percent of Hoffmen's total product mix. Overall denim occupies a share of at least 40 percent of the brand's sales.

Top Selling Collection

Drill fits with cloud wash and worn out effects mainly in medium indigo shades are the highest selling products of the brand.

Upcoming Collections

Joggers and knitted denims are the main areas of focus this season. Drill fit remains strong among all other fits. Knitted denim with 2 way and 4 way stretch with cloud wash and tearing look in various shades of blue gives ultimate comfort as well as sporty look.

Product Expansion Plans

The brand strives constantly to give a fresh look to its denim products with new innovations every season at every aspect, be it different fabric weaves, styling concepts, fits, washes and accessories.

Key Markets

Hoffmen's key markets include Kolkata, Durgapur, Asansol, Bhubaneswar, Guwahati, Jamshedpur, etc. The brand is available through 67 EBOs spread majorly across eastern India.

Market Expansion Plans

Currently, the brand is in the process of launching EBOs in UP, Chhattisgarh, etc. In future, it aims to penetrate further into the Northeastern states through EBOs.

Online Presence

Hoffmen started selling through its own portal www.hoffmenonline.com in January 2016. Today, the brand is also available on Flipkart, Amazon, Snapdeal, Paytm, Jabong, etc.



BRAND UPDATE

- > Country & city of brand origin:
Kolkata, India
- > Number of countries present in: 2
- > Year of brand launch: 1991
- > Total sales turnover in India (FY16-17): ₹65 crores
- > Total number of doors, the brand is present in India: 550
- > Total number of EBOs: 67



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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 Europe's leading producers of men's wear with more than 1,000 stores in 38 countries and also 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 craftsmanship, quality and design of jeans. Over the past few years, Jack & Jones, through its marketing activities, has acquired a perception of being a disruptive, rebellious and edgy brand.

Brand USP

The brand has different target groups and expressions, but the fact that every piece of clothing can be easily combined with a pair of jeans is the main USP of the brand. Jack & Jones denim lines reflect current trends with innovative treatments offered in cool designs and fits for the fashion forward guy. The brand also offers denims in new waist sizes with multiple lengths for the perfect fit.

Target Group

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

Product Basket

Denim is regarded as the backbone of Jack & Jones' business. The brand's product portfolio encompasses a range of products in a variety of fits like comfy fit, skinny fit, super skinny, slim fit, regular fit, anti-fit, loose, etc.

Retail Mapping

The brand currently has 71 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.

Online Presence

The brand is present at online portals like Myntra, Jabong, Snapdeal, Flipkart, Koovs, Amazon, etc., apart from its own site.

Latest Marketing Campaign

With its latest marketing campaign 'Don't Hold Back', the brand communicates a 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.

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.

Sustainability factor

As a company, Jack & Jones continues to partner with world class and compliant manufacturing units across the world with the intent of offering eco-friendly products to their customers.



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 online store: **www.jackjones.in**

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JEALOUS 21

Jealous 21 was created to address the fashion needs of the young Indian girl in the denim wear space. There was an increasing need to create jeans that fit the young Indian body type that is unique and distinct. The brand is a pioneer in creating 3 distinct fits that cater to the different hip to waist ratio, to ensure that every pair of jeans flatters the different body curves and provides almost a sense of perfect customised fit.

Target Audience

The brand's core audience are young girls between the age group of 18- 25 years who are bold, confident and fashion conscious. It is a brand for the young fashionista of today who has multiple wardrobe needs and is well connected with global fashion trends. Her fashion vocabulary is not restricted to celebrating fashion, but a desire to project fashion in her sense of individual style.

Product Basket

The brand's product portfolio addresses the wardrobe needs of the young fashionista and allows her to mix and match to create her own style statement. Denim being the core of Jealous 21's product offering, it comprises 60 percent of the total product portfolio. It also offers a line of other products to create look with like tops, tunics, dresses, jackets and graphic tees.

Top Selling Collection

The brand's 3 hip fits for every waist collection (Hottie/Hourglass/ Bootilicious) has been the most recognised and top selling collection. Its Miss Universe collection has also been a favourite with the young customers along with the recently launched Boho Chic collection with distressed denims and laser printed jeans.

Upcoming Collection

Jealous 21 focuses on innovation in denims and works very closely with

its business partners to create new fabrics and value additions every season. This season, the brand would be introducing a special range of jeans with extraordinary stretch flexibility and strength along with the luxurious feel of softness and femininity. Apart from the innovation in denims, the brand will also be launching its lifestyle collection, of tops, tunics and dresses to pair up with the jeans.

Category Expansion

Jealous 21 has already expanded its denim portfolio beyond jeans to create more lifestyle categories like tops, tunics, dresses and other fashion wardrobe essentials.

Retail Presence

The brand is available in all potential markets and would continue its journey to reach every possible Indian youth with a desire to flaunt her fashion quotient.



Top Retailers

Jealous 21 is available with most of the top retailers in the country including Central, Brand Factory, Pantaloons, Reliance Trends, etc.

Online Presence

The brand is present in almost all the leading e-tailers of the country including Amazon, Myntra, Flipkart, etc. Having been available online for a considerable period, the brand sees great promise in the online space, specially considering that the youth customer is predominantly available in this channel. The brand has been consistently engaging with the youth customers online and has been able to establish a strong connect with a large number of customers.



BRAND UPDATE

- > Country of brand origin: **India**
- > Total number of doors, the brand is present in India : **350**
- > Total number of EBOs: **30**
- > Total number of SISs : **320**
- > Number of states present in: **22**
- > Number of cities present in: **95**
- > Same store sales growth rate: **35%**
- > Share of sales from online: **4%**



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KILLER

Incorporated in 1989 and based in Mumbai, Kewal Kiran Clothing Limited today is one of the biggest fashion houses in India. The designs of the power brand, Killer are synonymous with the rebellious streak of youth. In 2002, generation gaps were lowered and so were the waist lines. Killer introduced low rise jeans followed by Shreds' jeans in 2004 for the first time ever in India. Bleached, brushed, ripped, torn and even ridden with bullets, denims were moulded beyond imagination to give a whole new character to them. An authentic denim lifestyle brand, Killer is referred to in the market as a denim authority, known for its best in class products and award winning advertising campaigns like 'Water Saver Jeans' and #TogetherAsOne. Today, KKCL has over 308 stores in 183 cities. The group has also won many awards over the years like IAA Olive Crown Awards 2013, India EFFIE Award and so on.

Target Group

The brand caters to men in the age group of 16- 24 years, from Sec AB. Killer targets men who are rebellious in nature, with an attitude.

Product Basket

Killer's product basket comprises an expansive range of apparel, eyewear, footwear, innerwear, time wear, travel gear, personal care and accessories.

Top Selling Products

Killer has been at the forefront of innovation and research thereby offering unique concepts to the denim world. Jeans has been a great success this year for Killer, which is a mix of chinos and jeans for great comfort.

Online Presence

Online portals are a new channel of sales for Killer and it has delivered handsomely for the company in terms of increasing the reach of the brand to its core target group, also delivering sales at the same time.

Technology Deployment

Laser technology which entails huge setup costs is being extensively used at KKCL which helps tremendously in saving water required in the denim manufacturing processes. This is the company's way of giving back to the society in a significant manner.



#TogetherAsOne
KILLER 
this is us



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Countries present in: **India, UAE, Afghanistan and GCC Countries**
- > Year of brand launch: **1989**
- > Total Sales Turnover in India as in FY16-17: **Revenue from Operations - Net of Taxes ₹492.39 crores (as reported to Stock Exchange)**
- > Total number of EBOs: **370+**
- > Total number of SISs: **700+**
- > Total number of MBOs: **8,000+**
- > Number of states present in: **Pan India**
- > Number of cities present in: **1,300+**
- > Total retail space across EBOs & SISs: **50,000+**
- > Same store sales growth rate (in % for EBOs): **over 15%**
- > Name of own online store: **www.klounge.com**
- > Share of sales from online: **5%**

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LEE COOPER

Lee Cooper is an authentic British denim brand which was founded in 1908 by Morris Cooper and established itself as a leading maker of workwear, providing uniforms for the British Troops in WW1 and WW2. Soon it emerged as the preferred denim brand in the UK where, out of every 10 denims sold, 8 were from Lee Cooper. Creating specialist cuts and innovative new styles has always been at the core of the brand thereby generating a great fan base in more than 100 countries across the globe. 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. The brand entered India through a license agreement with Future Lifestyle Fashion Ltd. in 2007.

Target Group

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

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 efforts in design, washes, cuts and fits have started showing results helping the brand to be one of the most acceptable brands across men's, ladies and kids portfolios. Denim is the clear forerunner across all product ranges in men's, ladies and kids portfolios contributing to nearly 90 percent business in bottom wear and around 50 percent in top wear.

Top Selling Products

The brand's range of lazer and ozone treated denims and bi-stretch denims have been very well appreciated by Lee Cooper's male customers. Lee Cooper's women customers too have been very excited with the range of 'Hemotion' denims and lazer washes.

Upcoming Collections

For the forthcoming season, the brand's customers will have an exciting and wide range of denims in an array of colours with several wash options in each of them. The upcoming collection of 'Coated Denim' and 'Biker Denim'

will be extremely exciting to the male customers. While the women customers will fall for the new range of 'Rip and Repair Denims', 'Hemotion Denims' and 'Colour Blocked Denims'.

Product Expansion Plans

For the next season, Lee Cooper is planning to launch a complete range of classic fashion, on-trend fashion and high fashion denims to ensure that its customers— both men and women find their favourite pick as per the occasion of usage. For women, Lee Cooper have introduced more than 10 silhouettes in denim tops.

Retail Presence

Lee Cooper boasts of an extensive presence in more than 100 countries. In India, the denim brand has a very strong presence in more than 150 cities with its primary markets in Mumbai, Bengaluru, Kolkata, Hyderabad, Pune, Delhi and Chennai. Lee Cooper sells through all key retailers including Central, Lifestyle, Reliance Trends, etc. with majority of its business coming from department stores. The brand has a SIS presence of more than 1,200 doors.

Top 5 Retailers

National department chains like Lifestyle, Central, Reliance Trends, FBB, Shoppers Stop, are the brand's key retail partners.

Retail Expansion Plans

Lee Cooper had initiated pilot of EBOs in smaller towns over past 1 year and now, the brand plans to rapidly grow its presence of EBOs across select markets.

Online Presence

Lee Cooper understands that the fashion aspiration in tier -II and tier -III towns is continuously growing and to cater to their needs, the brand has recently strengthened its presence on various online portals like Jabong, Myntra, Amazon and Flipkart.

Technology Deployment

Lee Cooper strongly believes that technology has been playing a pivotal role in meeting the demands of the consumer while being 'environment friendly'. It has recently introduced its ozone washing technology that replaces harmful chemicals with alternative 'drop-in' chemicals which creates a similar garment effect, while significantly reducing water and energy consumption making it sustainable for the environment. Lee Cooper's lazer technology too has helped tremendously to replicate the look of the traditional denim with minimalistic human effort and time.



BRAND UPDATE

- > Country & city of brand origin: **United Kingdom, London**
- > Number of countries present in: **100+**
- > Year of brand launch: **1908**
- > Total sales turnover in India as in FY16-17: **₹500 crores approx.**
- > 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: **3,00,000 sq.ft. approx.**
- > Same store sales growth rate (in % for EBOs): **more than 50%**
- > Share of sales from online: **5%**





LEEGEND & CAESAR

Leegend and Caesar are brands of Charchit Apparels Private Limited that was started in 1992 in Ahmedabad. The company has very humble roots in the beginning; it started operations with only 10 sewing machines. But over the years, the brand has bloomed into a reputed name in the denim market in India because of its quality assured product. Today, the brand is armed with a manufacturing unit that houses 200 sewing and 50 special machines.

Target Group

Leegend and Caesar target the educated middle class that is very extremely conscious about both quality and price.

Product Portfolio

Both the brands are bottom wear brands and denim comprises of 50 percent of each of its product range.

Top Selling Denim Collections

Both Leegend and Caesar produce garments with designs and quality that do not fade with time. Hence, almost all the collections that these two brands produce enjoy equal demand.

Upcoming Collections

The company believes that the fashion element in denim has gone down tremendously and contemporary trends are increasingly leaning towards cleaner finishes and looks. In line with this, 70 percent of the production features simple denim with neat looks. Indigo is a staple colour and both Leegend and Caesar offer about 5 choices in colour in the indigo family.

Key Markets

Kolkata, Gujarat, Bihar, Uttar Pradesh and south Indian states are the strongest markets of the brand.

Top 5 Retailers

Vishal Mega Mart, Bazar Retail, Chennai Silk, Pothys Garments and Anil Trading Company.



BRAND UPDATE

- > Country & City of brand origin: Ahmedabad, India
- > Number of countries present in: India and South West Asia
- > Year of brand launch: 1992
- > Total sales turnover in India (FY16-17): ₹25 crores
- > Total number of MBOs: 250 +





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MEXICO

Mexico is a family-owned company producing quality denim for men for nearly a decade now. It started its business when the concept of fashion was just entering this category and the market was flooded with basic jeans. Jeans were being produced mainly in blue with a bit of black. There were just three fits— comfort, slim and straight. The brand quickly caught on the fashion concept and introduced new fits, fabrics and innovative washes. Today, Mexico is a must-have for those who seek perfect fit and unmatched contour from their jeans. The brand gives the fashion savvy yet cost-conscious customers the latest styles and best quality. The brand also unveiled its range of denims for women in 2016.

Target Group

Mexico caters to fashion audience between the age group of 18- 35 years. Their basic range targets consumers from the age of 35-60 years. The brand makes 60 percent fashion and 40 percent basics.

Product Basket

The brand makes denims for men and women in two distinct categories— Basic and Fashion. Both the lines encompass a range of chic and trendy denim wear that promises quality, comfort and style in vogue.

Top Selling Collection

The brand's basic range is its top selling collection across both men's and women's wear.

New Collection

The brand's new collection caters to the need of both the young and the young at heart. The new collection has a combination of slim, straight and comfort fit with low waist. In basic

denims, they showcase some 15 colours like olive, beige, fawn, brown, green, blue, etc. The fashion range comes in two colours.

Key Markets

The brand is well placed in Tamil Nadu, Delhi, Andhra Pradesh, Haryana, J&K, Himachal Pradesh, Assam, Nagaland, Manipur, Punjab and Maharashtra. They are present in around 800 MBOs.

Market Expansion Plans

The brand is planning to enter Karnataka, Bihar and West Bengal very soon.

International Markets

The brand exports to Dubai, Qatar, Sharjah, Bahrain, Jeddah and Doha.

Online Presence

As of now, Mexico is present at Myntra and plans to start its own online retail venture soon.



BRAND UPDATE

- > Country & city of origin: **Mumbai, India**
- > Number of countries present in: **4**
- > Year of brand launch: **2004**
- > Number of states present in: **11**
- > Total number of MBOs: **800+**

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NO ERROR

No Error, one of the leading denim brands in India was established as a trading firm. Eventually, as the brand market in India took shape, it graduated into a brand that has long been associated with utmost quality and reliability. With lucid understanding, the brains behind the brand combined the best of all worlds to bring forth a range that stood tall in terms of comfort and fit. The brand has today become synonymous with women's wear in India and enjoys the trust of an ever growing list of consumers.

Target Group

No Error's main target group is women. The brand targets the modern women between the age group of 16-40 years, who are fashion savvy and keep a tab of the latest trends.

Product Basket

The brand's product basket encompasses a trendy range of denims and jeggings for women. All products are made from the finest of fabrics, utilising cutting edge techniques and machinery; hence they are unmatched in terms of quality and comfort.

Top Selling Collections

Although all the collections of the brand enjoy equal demand, its range of ankle length and cropped length denims deserves special mention as it is the most sought after range of the brand.

Upcoming Collection

No Error is known for its innovation. The brand has always been a frontrunner in bringing new styles, cuts and fabrics to the market. This season the brand plans to introduce a line of new fits and washes.

Top Retailers

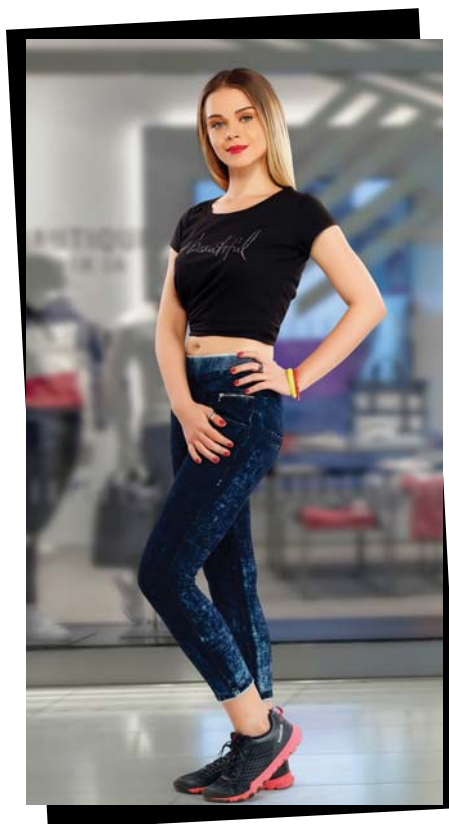
Carron in Bengaluru, Sagar in Mumbai, Shree Shivam in Raipur, Okantam in Sirsa and Favourite Shop in Bengaluru.

Retail Expansion Plans

The brand believes in expanding through exclusive brand outlets and plans to launch 10 EBOs by early next year.

New Markets

No Error plans to establish itself in the markets of Bihar, Tamil Nadu and Andhra Pradesh.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **India**
- > Year of brand launch: **2005**
- > Total sales turnover in India (FY16-17): **₹10 crores**
- > Total number of doors, the brand is present in India: **1,100+**

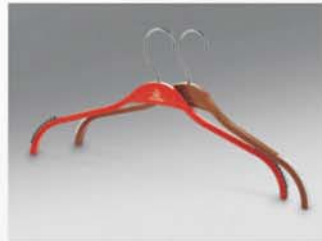


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PARX

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

Target Group

Youth are the helm of Parx's target customers with its core audience being in the age group of 25- 30 years. The brand targets males who are aware of the latest trends, are trendy, confident, fashionable and brand driven. Parx offers affordable fast fashion for a young, high spirited individual who takes initiatives, wants something better and is ready to face the future.

Product Basket

Parx offers all day casual wear solutions aimed for young audience. Shirts are the top selling brick for the brand followed by knits, denims, trousers, etc. Denim wear contributes to about 10 percent of the overall product category of the brand.

Top Selling Products

The top selling denim collections by Parx include ranges like stay black which have high colour fastness, peach finished denims which have a soft hand feel, slim tapered fit which are best selling products and most loved for their fits.

Upcoming Collections

For the forthcoming season, Parx has plans to launch its hybrid denims, which are a mix of knitted and woven denims.

Product Expansion Plans

Denim is the fastest growing category in the product mix of Parx and the brand expects the momentum to continue for the times to come. Parx is focusing on expanding its range and

is banking on capitalising the latest technological and style related trends that market has to offer.

Retail Presence

Parx has an expansive presence in Uttar Pradesh and West Bengal. The brand also retails through its TRS and MBO network in these states and is now focusing on opening its EBOs across tier -II and -III cities in these states.

Top 5 Retailers

Central in 14 cities; Reliance Trendz in 20 cities, Bindals in UP; Chunmun in Delhi-NCR; Kalyan Silks in South India and tier -II cities; Pothys in Tamil Nadu.

Retail Expansion Plans

Parx intends to enlarge its presence across tier-II and -III markets in India. The brand also has plans to expand its presence via EBO or trade expansion.

Online Presence

The brand is present across all major retailers in the country both vertical and horizontal. Additionally, Parx also retails through its own in-house e-commerce portal, Raymondnext.com

Technology Deployment

Technology has helped in evolving Parx's denim category immensely. With innovations brought on table by companies like Lycra, Lenzing, etc., the category has evolved immensely. Laser technology and similar developments has also helped in ways more than one.



Omni-Channel Presence

Parx is in pursuit of developing omni flow channel by which it intends to connect the TRS, LFS, EBOs and online channels and services for its customers.



BRAND UPDATE

- > Country & city of brand origin: **Thane, India**
- > Year of brand launch: **1999**
- > Total number of EBOs: **13**
- > Total number of SISs: **139**
- > Total number of MBOs: **410**
- > Number of states present in: **Pan India**
- > Number of cities present in: **250**
- > Total retail space across EBOs & SISs: **36,747 sq.ft.**
- > Same store sales growth rate (in % for EBOs): **10%**
- > Name of own online store: **www.raymondnext.com**
- > Share of sales from online: **5%**



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For Trade & Distribution Enquiry Contact: Mohan Prajapati, Mob-9321477780

PEPE JEANS

Founded in 1973, Pepe Jeans is a brainchild of the Shah brothers from Kenya— Nitin, Arun and Milan Shah who revolutionized London's fashion scenario by creating stylish and trendy jeans unlike the customary ordinary looking denim available in those days. In 1989, Pepe entered India and quickly captured the imagination of fashion starved consumers across the country. Pepe Jeans India manufactures a wide array of chic casual wear for men, women and kids. Jeans is the core product of the brand and comes in a variety of fabrics, washes, fits and colours. The brand's product portfolio also includes a range of casual wear, woven merchandise and accessories.

Target Group

Pepe Jeans is for the young at heart. The brand caters to the fashion forward who desires stylish and trendy denims that fit well and are pocket friendly. The quality, fabric, fit, colour, wash, price, feel, etc., together influence the customer's purchase decision.

Product Basket

Jeans is the brand's core product and is very popular and sells extremely well. Jeans come in a variety of fabrics, washes, fits and colours. The brand's product portfolio also includes t-shirts, flat knits, sweaters, sweatshirts, jackets as well as woven merchandise and accessories.

Top Selling Products

This season dungarees, denim shorts, denim top wear, distressed denim and denims with funky badges are the most in-demand pieces.

Upcoming Collections

In the upcoming collection, both men's and women's denim wear will consist of interesting washes with stylish fits. In men's wear, Pepe has created classic denim pieces that can be worn everyday. In terms of colour, deep dark blues return with blue tones. Patchwork, dots and flower decorations dominate the denim category in women's wear. Denim jackets have fuzzy collars which further add to this unique and fashion-forward collection.



Retail Presence

In India, Pepe Jeans retails through 214 exclusive brand stores, 371 LFSs and 931 MBOs.

Retail Expansion Plans

Pepe Jeans is currently in the process of opening multiple stores in key tier-II and -III cities such as Bikaner, Shimla, Siliguri and many more. The brand plans to increase the number of stores in both metro cities and growing tier-II and -III cities with an increased focus on brand outlets.

Technology Deployment

Pepe Jeans is leveraging technology in a variety of ways, both in terms of front-end and back-end. In the front-end, there is customization that Pepe Jeans



BRAND UPDATE

- > Country & city of brand origin: **Portobello Market, London**
- > Year of launch in India: **1989**
- > Total number of EBOs: **214**
- > Total number of SISs: **606**
- > Total number of MBOs: **931**
- > Number of states present in: **13**
- > Number of cities present in: **21**
- > Total retail space across EBOs & SISs: **3,52,730 sq.ft. (December 2016)**

started in October 2015, becoming the first brand in India to introduce denim customization services. Pepe Jeans Custom Studio allows customers to step into the design seat and customize their denim in a few easy steps. Currently, the custom studio is available at 4 locations across India.

In terms of back-end, Pepe Jeans has tied up with Style Lumia, a fashion analytics site that helps the brand in decoding consumer buying needs. With this tool, Pepe Jeans has been able to tap crucial information to predict current fashion in a better way to get the right kind of merchandise and to understand the global trends.

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POISON

Poison began its journey in 1980 with primary focus on men's basic denims. It was indeed a modest beginning but over the years, the company has evolved immensely owing to its commitment to quality and exclusivity. Today, Poison is counted among India's fastest growing denim companies, with a reputation for providing formidable value and international style across an aesthetically rich range of fashionable and trendy denims for men. Their core vision is simple — to give the buyer the best in fashion and consumer trends. They are dedicated to shelling out pocket-friendly world class products and become a leader in the booming apparel industry of India.

Product Basket

Poison targets the young part of the population and it wants to be recognized as the preferred brand in the domain of men's denim wear.

Product Basket

The brand is home to a complete range of men's denims that come in a variety of fits, styles and colours.

Top Selling Collection

The brand's core selling collection is the recently launched range of coloured denims.

Upcoming Collection

Considering denim is the backbone of the brand, it keeps on refreshing its denim collection every season. In the upcoming denim collection the brand has concentrated on colored denims than the basic blues. Tailored using the best fabric and innovative techniques, the collection features chic styles, detailed cuts and a variety of contemporary fits. The brand is also planning a complete new range with new materials and different shades and washes.

Primary Markets

Poison's primary markets are Maharashtra, Andhra Pradesh, Gujarat, Tamil Nadu, Madhya Pradesh, Uttar Pradesh, West Bengal.

Top Retailers

Jai Hind and C'lai in Pune; Chermas, JC Brothers and RS Brothers in Hyderabad; G3 in Surat; and Pothys in Tamil Naidu.

Marketing & Promotion

The brand plans to explore new markets by creating awareness about the brand via TV ads, e-commerce, hoardings and other resourceful media.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **3**
- > Year of brand launch: **1980**
- > Total number of SISs: **175 approx**
- > Total number of MBOs: **700**
- > Number of states present in: **19**
- > Number of cities present in : **70**



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PUFF

Incorporated in 1989, Mehta Garments Pvt. Ltd. was started by Sumermalji Mehta and today it is amongst the few large branded apparel manufacturers in India. It was one of the few companies in Ahmedabad which had started the revolution in the ready-to-wear garment business. In 1989, the company introduced “Puff” the first denim brand created in India. Innovation has been the hallmark of Mehta Garments Pvt. Ltd. A marriage of design and technology, the company has constantly introduced new fits, finishes and fabrics. The company’s own R&D team working strongly with designers is continually innovating — creating an electrifying array of product lines in a variety of fabrics, washes and cuts, using the latest technology and processes. The company’s own manufacturing and processing set up enables it to have a speedy ‘go-to-market’ time frame, from design to production.

Target Group

The brand is targeted at men between the age group of 18 to 50 years.

Product Basket

The brand is known for its range of basic denims that come in a variety of fits and washes. In denims, rather than indigos the brand has a lot of pastel colours. Denim commands a share of about 25 percent of the total product portfolio.

Upcoming Collections

Innovation has been the hallmark of the brand since its launch. The brand has constantly introduced new fits, finishes and designs. For the forthcoming seasons too, Puff’s design team is working strongly on creating an electrifying array of product lines in a variety of fabrics, washes and cuts, using the latest technology and processes.

Retail Presence

With a distribution network of 16 distributors and over 700 retailers and chain stores, Puff has incomparable penetration into the domestic market.

Key Retailers

Puff’s key retailers include Pothys, Charmas, etc.

Market Expansion

Puff is currently expanding its distribution network in East India, Punjab and Haryana.

Online Presence

The brand is yet to launch itself in the online space.

Marketing Strategy

The brand takes a 360 degree view in terms of its marketing and promotion. It utilises outdoor hoardings and other forms of advertising. Puff also indulges in door-to-door marketing to reach out to its prospective customers in a particular region.



BRAND UPDATE

- > Country & city of brand origin: **Ahmedabad, India**
- > Number of countries present in: **India**
- > Year of brand launch: **1989**
- > Total number of MBOs: **700+**
- > Number of cities present in: **135+**

AN IMAGES GROUP PRESENTATION

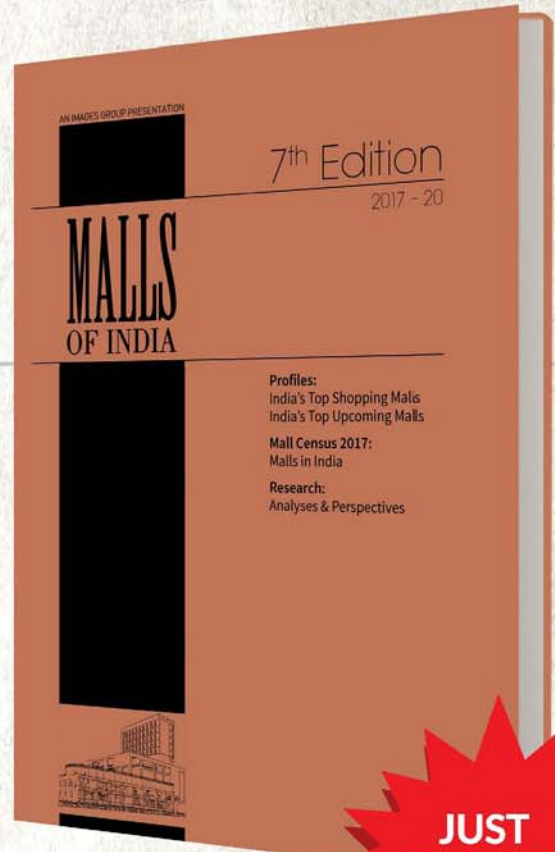
7th Edition

2017 - 20

MALLS OF INDIA

IMAGES Research presents the **7th edition of Malls of India**, the comprehensive report on the retail real estate industry in India. Along with documenting the current status of the shopping centre industry, the voluminous report also presents detailed analyses and perspectives on the growth of and trends in retail, leisure and entertainment spaces in India.

A veritable collectors' edition study, Malls of India contains pan-India, zone-wise profiling of operational as well as upcoming malls, offering Indian and global retailers an in-depth view of the quantum and quality of modern shopping centre spaces across the country. Already available with leading book sellers across the country, the report can also now be ordered directly from IMAGES Group.



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RICADO

Launched in 2007, Ricardo is one of the fastest growing brands in the recent times. Ricardo has three lines under the brand, viz., core (contributing approximately 40 percent of the turnover), mid-fashion (contributing approximately 50 percent of the turnover) and the recently introduced premium fashion (contributing approximately 10 percent of the turnover) thus catering to all kinds of people across various price categories. The brand currently has over 1,000 points-of-sales along with a significant online presence across players like Amazon, Flipkart, Snapdeal, Myntra and Jabong.

Target Groups

Ricardo is a much bigger brand in the B and C towns because that is where the real aspirational customers are. The brand also focuses on capturing and spreading itself in A towns too.

Product Basket

Ricardo is a men's wear brand and denim occupies about 70 percent of its product portfolio. The brand's denim line encompasses trendy and stylish denims that resonates perfectly with the contemporary generation.

Top Selling Collection

Torn denims, denims with basic pocket designs and heavy washed denims are the top selling products of the brand.

Latest Collections

The newest Ricardo product series, Lot 700, is made of stretch denim that is designed to flatter, hold and lift. A noticeable change is the stitching, which is now more subtle comparatively. Skinny, straight leg and slim-cut jeans styles are fashionable right now and are in trend. The brand also has a line of innovative denims including jeans made using comfortable fibers like Dyneema, jeans with flexible coatings and the ultra mobile and durable commuter jeans.

Category Expansion

A men's only brand as of now, Ricardo is in the process of introducing a line for boys aged between 6- 16 years. The pricing will be in the mid-segment. The

brand is already in advanced stages and the launch is scheduled for the beginning of the next year. Also, the brand is continuously working towards offering more width in the collection for each category.

Retail Operations

Ricardo has hitherto been primarily operating in the business to business (B2B) space. But now, the brand is expanding in the business to consumer (B2C) space through various retail channels by early next year.

Online Presence

Ricardo is present on leading e-tailers like Amazon, Flipkart, Snapdeal, Myntra and Jabong. Online retail contributes to approximately 15 percent of the total revenue.



BRAND UPDATE

- > Country & city of brand origin: **Ahmedabad, India**
- > Number of countries present in: **4 (India, GCC, Sri Lanka, Africa)**
- > Year of brand launch: **2007**
- > Total number of doors the brand is present in India: **1,000**
- > Number of Indian states present in: **21**
- > Number of Indian cities present in: **180**
- > Name of own on-line store: **www.ricardo.in**

Market Expansion

Ricardo continues to explore new markets in tier-II and -III cities to achieve constant growth for the brand.

Marketing Campaigns

Ricardo's marketing campaigns are continuously adapted to ensure relevance to its target audience. Usage of social media platforms for brand communication has helped the brand to connect with its audience in a better way. At the same time, the brand is striving to ensure that its products reflect the core of the brand, which it believes will differentiate its products from competing brands and establish an indelible brand recall amongst the consumers.





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Email: Sagarclothing2015@gmail.com**

ROOKIES

Rookies was established in 2009 by Finesse Fashion Pvt. Ltd., offering men's premium denims as the core product category. The brand has since then expanded by putting fashion in the context of the larger world of denims. Pushing the boundaries continuously, experimenting innovations and product development with a young team had led to a strong following of the brand. Distinct attitude with an iconic style is the creative vision of Rookies. The inspiration for the brand's jeans are drawn from rich and dynamic environment over time, which refines a sense of style that gains character with age and use. Rookies products are of high quality, are well crafted and fashionable and the craftsmanship involved goes beyond mere technical quality. It is by people with skilled hands and brains, but, most importantly, Rookies is made with love of doing it.

Target Group

Initially, the brand was targeted at youth and youngsters who crave for international fashion wear but over the years, the acceptance is seen across all age groups.

Product Basket

Currently, denims and cargos are the brand's strength and Rookies has also added shirts and t-shirts to complete the wardrobe. The fashion brand is slowly and steadily creating its own exclusive space and increasing its share in the retail arena.

Top Selling Products

Rookies is known for its jog/ knitted denims and distressed denims, through which it has created a name in the denim industry.

Upcoming Collections

Rookies have ventured into new fits as per the market requirement. Sprinsteen and Zeppelin are the brand's new collections for the upcoming season.

Product Expansion Plans

Denim joggers and style pants are creating its own space in the youth fashion category. Rookies is looking forward to adding new fits and also elite range for matured customers.

Retail Presence

Rookies has a wide presence in markets of Mumbai, Gujarat, Punjab, and Upper North, Delhi, West Bengal,

Chhattisgarh and AP. The brand is slowly and steadily nurturing other states as per its capacity to supply.

Top Retailers

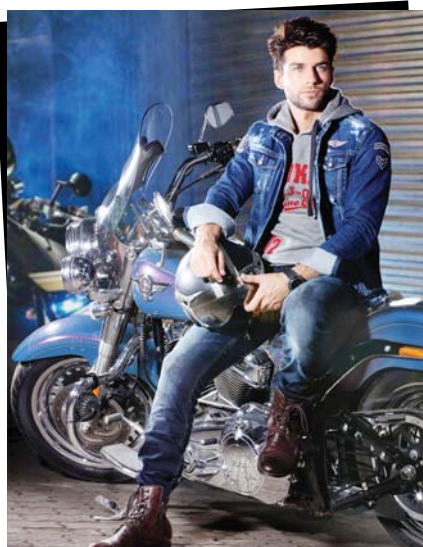
The fashion brand has presence in Lifestyle and all other major retailers across India.

Retail Expansion Plans

Rookies has a design philosophy to create contemporary interpretations of denim, which ultimately builds its vision of the perfect fit, feel and appearance. The brand is majorly looking forward to provide these perfect pieces of denims to tier -II and -III cities, which are slowly catching up with international fashion.

Online Presence

Rookies have not been very aggressive with the online retail, but are present in major e-commerce portals.



BRAND UPDATE

- > Country & city of brand origin:
Mumbai, India
- > Number of countries present in: 5
- > Year of brand launch: 2009
- > Total Sales Turnover in India as in FY16-17: ₹25 crores
- > Total number of SIs: 100
- > Total number of MBOs: 750+
- > Number of states present in:
Pan India



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SPARK

Spark, a leading manufacturer and exporter of kidswear, started its journey in 1983 from central India. The brand believes that its job doesn't end by just making the garment look good, but the work continues until it makes the product feel good. A highly efficient and trained team of technicians ensure that not even a single millimeter of thread is out of place and the garment is exactly to specifications. The brand has in-house screen and computer embroidery facilities, which assist in not only keeping high quality control but also cut down costs and minimise supply time. These facilitate the brand in experimenting on new styles, thereby making it the very first to get the new trends to its customers.

Target Group

The brand caters to children in the age group of 1-14 years. Though kids are the end customers, but parents are major influencers in the buying process. This makes increasingly important for the brand to provide all the varieties in the segment, under one umbrella.

Product Basket

The brand deals in a variety of kidswear clothing. Spark offers fashion t-shirts, basic t-shirts, cargos, trousers and lowers as separates. Other offerings also include infant sets, trouser sets, textile sets, denim sets and three piece sets.

Retail Presence

Spark has been winning markets in metro cities of Delhi, Mumbai, Chennai, Bengaluru, Hyderabad, etc. The brand also has presence in many smaller cities like Amritsar, Ludhiana, Udaipur, Kanpur, Jaipur, Cochin, Coimbatore and Calicut. Spark is available in a number of large format stores across India. The brand believes that with the mall culture fast catching up everywhere in the country, large format stores are the anchor stores which bring in the most walk-ins. The brand has also made in-roads in the fiercely competitive markets of the

UAE and other Gulf countries and is doing considerably well there.

Retail Expansion Plans

The brand is on the verge of making its foray into the European and American markets and is confident that its products will gain popularity in these international destinations too. Spark also has plans to penetrate in varied markets for business expansion.

Key Infographics

Year of launch in India: 1983

Total number of MBOs: 250 approx.



araaliya'....

*flower of the temple tree,
The tree is the exquisite
gift of nature.*

*The delicately coloured
petals are a vibrant
symbol of life, joy and
hope which inspires this
line of clothing.*

araaliya

STRANO JEANS

Strano Jeans was launched in the year 2016. A youth oriented brand, Strano Jeans is edgy, modern, and brings in fresh design elements to its discerning consumers' wardrobes. The brand is a mix of technology and creativity. The in-house research and development team ensures that the brand sets itself apart from other brands through fresh designs every season. Although a young brand, Strano Jeans has overgrown significantly in the past year and has embossed its name as a distinct denim player in the Indian market.

Target Group

The brand targets the youth between the age of 18-30 years.

Product Range

Dominating 50 percent share in the overall product basket, Strano's denim collection offers a wide range of chic and trendy styles that enjoy excellent demand in the domestic market. The brand also strives to improve its products and introduce new designs on a regular basis.

Top Selling Collections

The brand's highest selling collection is the basic denim collection. The fashion collection also enjoys good patronage.

Upcoming Collection

The brand constantly tries to innovate its product range and come up with new fabrics, washes, patterns, designs, styles, etc.



Key Markets

As of now, the brand has a strong presence in the states of Maharashtra, Delhi, Punjab, Haryana, etc. The brand has plans to expand into other states gradually.

Top Retailers

Sagar Selection, Avanti Nx, Ashish Creation and Om Prakash Sushil.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **India only**
- >Year of brand launch: **2016**
- >Total number of MBOs: **450-500**
- >Number of states present in: **9**
- >Number of cities present in: **100-150**



KIVON  SHIRTS

SUNNEX JEANS

Sunnex Jeans is one of the pioneers in the denim industry. Established in the year 1980, the brand has grown steadily over the years, and has a very strong presence in the domestic south and west markets. Sunnex Jeans has a dominant presence in the Gulf region with consumer loyalty leadership in countries like UAE, Oman, Qatar, Bahrain, Saudi Arabia, etc. The brand's USP lies in providing international fashion trends to the consumers at pocket friendly prices.

Target Group

The denim brand caters to men in the age group of 20- 35 years.

Product Basket

Sunnex Jeans offers a wide range of options in men's fashion denims, basic denims, cotton trousers and shirts.

Upcoming Collections

Knit fabrics in denims as well as dobby are in-trend right now. The current season trend is of light coloured and pastel coloured denims. Sunnex has incorporated both these trends in its collections.

Also, Sunnex Jeans has now segregated its denim offerings in three distinct ranges to cater to all the possible customer preferences. These are: *Rebel* range, where it caters to the high fashion customer; *Core* range, which caters to the customers who prefer classy and sober fashion; and *Basics* range, which is purely basics focusing mainly on the fabric and fit, and caters to a few of the brand's dominant markets.

Product Expansion Plans

After a tremendous response over the years in the international market, for the next season, the brand is introducing its casual shirts range in the domestic market. Going ahead, Sunnex Jeans has plans to get at least 25- 30 percent of its revenue from the shirts category.

Retail Presence

In India, Sunnex Jeans has a strong presence in states like Maharashtra,

Tamil Nadu, Kerala, Gujarat, Madhya Pradesh, Rajasthan, Andhra Pradesh, Uttar Pradesh and the Northeast. In the international markets, the brand has a very good presence in countries like UAE, Oman, Qatar, Bahrain, Saudi Arabia, etc. in the middle east region.



Retail Expansion Plans

The denim brand has actively involved itself in increasing its reach geographically in North as well as East India. Sunnex Jeans is planning to focus aggressively on reaching to new territories in the next 3 years. The brand's target cities in the times to come are Chandigarh, Ludhiana, Delhi, Bhubaneswar, Cuttack, Kolkata, Raipur, Patna, etc.

Online Presence

Sunnex Jeans considers e-commerce as the potential channel for establishing a good retail presence. The brand retails

through major online fashion retailers like Myntra, Jabong and Flipkart. Going ahead, the brand is in talks to introduce special collections that shall be available only online on these very platforms.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Total number of EBOs: **2**
- > Total number of MBOs: **700- 900**
- > Growth percentage: **15 % YoY**



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TARAMA

In the year 1988, Prem Gupta started India's first women's wear denim brand Jealous which went on to become a highly admired brand winning awards and accolades. Later, the brand was sold to the Future Group and rebranded to Jealous 21 as it is popularly known today. To keep up with evolving times, rapidly changing market trends, advent of online markets, the company also launched Tarama in 2015.

Target Group

The brand's core audience comprises of the urban young social divas in their 20s who have individual style needs and are ambitious, independent, cash rich but time poor.

Product Basket

The brand's product basket includes a wide range of jeans, shorts, skirts, dungarees, dresses, jumpsuits, shirts, and jackets. In bottom wear, denim comprises of almost 90 percent and in upper wear it commands a share of 50 percent of the total product portfolio.

Top Selling Collections

Tarama's white mom fit in high rise, cold shoulder bodycon denim dresses made in super stretch cotton denim, and calf cropped shorts with wide legs and open hem details are the core products that enjoy the demand. Also in the list is the brand's collection of dungarees that lends a functional aspect to style and have steadily gained popularity.

New Denim Collections

Baggy is the key look next season and Tarama's collection includes a diverse range from low rise boy fits to high rise mom fits, wide-legs, etc. Other highlights of the collection include de-constructed two tone denims, re-constructed look with un-even hems and waistlines in destroyed washes, functional denims in jogger fits accentuated with ribs and draw cords.

Category Expansion Plans

The brand plans to launch a new brand called Miss Tarama soon.

Retail Expansion Plans

The brand, as of now, is mostly selling through online portals but it plans to establish its physical retail footprint through SIS format very soon. Also, keeping with the fast fashion trend of today, the brand wants to introduce new collections every month and is vying to tie up with retailers who think in the same way and are ready to forget the traditional template of seasonal booking.

Technology Deployment

The biggest challenge today is sustainable garments. In line with this, the brand is trying to find ways to reduce the consumption of water required for jeans processing by using laser technology and new enzymes which can drastically cut down on water.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **3**
- > Year of brand launch: **1980**
- > Total number of SISs: **175 approx.**
- > Total number of MBOs: **700**
- > Number of states present in: **19**
- > Number of cities present in: **70**

TEXAS JEANS

Detail Clothing Limited, popularly known as Texas Jeans was established in year 1992, offering the best in lifestyle fashion, with products ranging from denims, trousers, shorts and casual shirts. In short span of time, the brand has made its products available in 18 states with more than 900 multi brand outlets across India.

Target Group

The brand offers a plethora of fits and styles. Hence, its products enjoy equal demand from everyone – be it an 18 year old college student or a retired sexagenarian.

Product Basket

The brand's denim collection comprises jeans, denim shirts and shorts in a variety of fits, washes, colours and styles. Denim occupy almost 70 percent of the brand's total product basket.

Top Selling Range

Texas Jeans' line of colour denims that are available in a multiple fabric and look options is its best selling range. These denims give the look of classic chinos along with the comfort of denims.



Upcoming Collections

The brand's upcoming collection features a multitude of options in classic shades like grey, olive green, cream and so on.

Brand Motto

The brand follows the simple philosophy of providing fresh looks and quality products at the most affordable prices possible.

Top Markets

The brand has a very strong demand across the states of Kerala, Andhra Pradesh and Goa, with presence in almost all the top-end shops.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **3-4 countries**
- > Year of brand launch: **1992**
- > Total sales turnover in India (FY16-17): **₹15 crores**
- > Total number of doors, the brand is present in India: **900**
- > Total number of EBOs: **4**
- > Number of states present in: **18**
- > Number of cities present in: **70-80**
- > Total retail space across EBOs & SISs: **2,000 sq. ft.**
- > Average sales per sq.ft.per month (FY16-17): **₹700**
- > Average bill/ ticket size (FY16-17): **₹1,200**
- > Same store sales growth rate (in % for EBOs): **5%**

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TOONZ

BRAND UPDATE

- > Country & city of brand origin: Mumbai, India
- > Number of countries present in: 6 countries
- > Year of brand launch: 2012
- > Total Sales Turnover in India as in FY16-17: ₹50 crores
- > Total number of EBOs: 81
- > Total number of SISs: 11
- > Number of states present in: 15
- > Number of cities present in: 50
- > Total retail space across EBOs & SISs: 1,200- 2,000 sq.ft.
- > Average sales per sq. ft. per month for above: ₹700
- > Average bill/ ticket size for above: ₹1,200
- > Same store sales growth rate (in % for EBOs): 35%
- > Name of own online store: www.toonz.in
- > Share of sales from online: 1,000 transactions per month

Toonz started its operations in the year 2012 and from there, it's been a great learning curve for the company. Toonz has evolved being better with each year in terms of designs and quality and has kept the highest benchmark. The company lives with a vision to be the ultimate one stop shop for all the kids requirements. Toonz retail is the only store format which satisfies all needs of kids from day 1 to year 12. The brand has two in-house apparel brands - Wowmom and Super Young.

Target Group

The brand caters to kids in the age group of 0-12 years. Toonz is a perfect solution for all the parents who desire the latest styles for their kids without compromising on the comfort while wearing that apparel.

Product Basket

Every year, Toonz launches exclusive range under the banner 'Denim Diaries'. Its denim current portfolio includes denim pants, shirts, skirts, shorts, jumpsuits, dresses and baby wear. Current contributions to overall bottom wear is nearly 60 percent in winters while the contribution of denim in upperwear is approximately 15-20 percent.

Top Selling Products

The top selling products of the brand are stretch denims with high lycra content, cloud wash denims with tearing and denims with badges.

Upcoming Collections

Under its concept of 'Denim Diaries', Toonz is trying to connect with its target group, making it a fun and engaging brand. This year, Toonz introduced new fits, emoji highlights and innovative packaging with DIY features.

Retail Presence

The brand has presence in states like Delhi, Rajasthan, Uttar Pradesh and Karnataka, where it has maximum presence and have plans to expand its retail presence.

Top Retailers

The top retailers of the brand are located in Delhi, Rohtak, Allahabad, Jaipur and Bengaluru.

Retail Expansion Plans

Toonz is planning to concentrate on expanding its presence in smaller towns where the customers are aspirational.

Online Presence

Toonz is currently selling with major online retailers like Jabong, Flipkart, Amazon, and also has presence in online kids speciality websites. The kidswear brand has also launched its own website www.toonz.in.

Omni-Channel Presence

Toonz is gradually moving towards omni-channel model and have initiated its system upgradation to facilitate the same.



IMAGES

Art of Fashion



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Ph: 2827 0425 | info@caainfo.in



URBAN NAVY

Incepted in 2009 in Gujarat, Urban Navy is a fashion forward brand that offers super quality, competitive prices, for the fashion savvy customers who desire to flaunt his individual style statement. The brand is aimed at the young at heart.

Target Group

Urban Navy caters to the quality, fashion and value conscious youth, both men and women. Its target customers fall in the age group of 20-40 years.

Product Basket

Urban Navy is a 100 percent denim brand and offers only jeans. The brand's product portfolio includes men's jeans and denim shorts, jeans and capris for women.

Top Selling Products

The brand's women's line is the top performing category, contributing a total of 70 percent share in its total business revenue. Urban Navy is presently working on premium fabrics with good washes on them.

Upcoming Collections

For the coming season, Urban Navy is experimenting with new washes. The brand believes that heavy distressed look will be in demand and thus are offering collections in the same line.

Product Expansion Plans

Urban Navy is planning to get into women's shorts and skirts category from 2018 onwards. The brand had witnessed a tremendous potential in men's denim shorts segment in the last season, but had made limited designs in them. For the next season, the brand is also planning to add new styles and a large collection for the SS'18.

Primary Markets

The fashion brand gets its majority sales from the markets of Gujarat,

Maharashtra, Karnataka, Tamil Nadu and NCR.

Online Presence

Urban Navy is gaining great response through its online retail. The brand has moved away from the unorganised markets and has gained strong presence in the e-commerce space.



BRAND UPDATE

>Country & city of brand origin:
Ahmedabad, India

>Year of brand launch: 2009

>Total number of MBOs: 20

>Number of states present in:
Pan India

>Name of own online store:
www.urbannavy.com

>Share of sales from online: 90%

A Showcase of The Season's Collection ...



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URBAN TOUCH

Urban Touch is a men's casual wear brand established in 2006. A division of Urban Clothing Company, the brand has been conceptualized to represent the iconic spirit and courage of the style-conscious urban man. Focusing mainly on work wear casuals, the brand offers fresh, light-hearted styles that are designed to appeal to the modern youth as well as to the mature, contemporary man. The unique designs are skilfully crafted to reflect the intelligence, creativity and individuality of the clientele. The brand is today available over 37 EBOs and about 137 MBOs across 50 plus Indian cities.

Target Group

The brand targets young entrepreneurs and professionals within the age group of 25-35 years. The products are priced strategically to cater to tier -I, -II and -III cities, which is an important market of the brand contributing 70 percent of its total sales.

Product Basket

Denim plays a major role in Urban Touch's business turnover by the way of cross selling and contributes about 20 percent in total and 75 percent in bottom wear. The brand's denim collection offers clean denims which are clearly defined away from streetwear.

Top Selling Products

The brand's clean denims with stretch are well accepted by its clientele and is a perfect choice to look smart during work and travel.

New Collection

Urban Touch is working on a core range of denims which will be available throughout the year. About 30 percent of the collection will adopt the trend of the season. The brand's upcoming collection focuses more on towel wash, coatings, tinting, etc.

Category Expansion Plans

Denim has been a classic for over many years and Urban Touch believes that it would continue its presence in a refined appearance in all seasons. The brand is

extending denim usage in shorts and jackets for this winter. Denim washed shirts and printed denims are also key for the season.

Key Markets

The brand has expanded through the South and has a very strong market. The brand also has made its availability across the country through its online presence which has taken the brand to hitherto unexplored geographies.

Top Retailers

Lulu Hyper Market (Cochin), Phoenix Market City (Chennai), Hilite Mall (Calicut), Fashion Retail Corp (Vizag), Unistyle Corp. (Telangana).

Market Expansion Plans

The brand especially aims to concentrate on tier -II and -III markets in India and plans to make its presence in over 20 states by 2020.

Online Presence

Although the brand's online presence is as low as a beginner, its newly implemented systems will help it improve its presence online, both in its own e-shop and with other leading e-tailers.

Technology Deployment

Urban Touch has adapted major tech support in ERP, POS and Central POS in the recent years. The new technologies aid the brand in keeping a tab of its processes in a micro level to assess and analyse for better decision



making. The softwares also help the brand to manage and share the inventories for both online and brick and mortar market, leading to growth in sell-through.



BRAND UPDATE

- > Country & city of brand origin: **India**
- > Number of countries present in: **4**
- > Year of brand launch: **2006**
- > Total number of doors, the brand is present in India: **240**
- > Total number of EBOs: **37**
- > Total number of SISs: **28**
- > Total number of MBOs: **175**
- > Online: **Myntra, Jabong, Flipkart, Amazon, Paytm and Snapdeal.**
- > Number of states present in: **8**
- > Number of cities present in: **50+**
- > Total retail space across EBOs & SISs: **23,000 sq.ft.**
- > Total sales turnover in India (FY16-17): **₹32 crores**
- > Average sales per sq. ft. per month (FY16-17): **₹850**
- > Average bill/ ticket size (FY16-17): **₹3,000**
- > Same store sales growth rate: **5% (Average)**
- > Name of own online store: **www.urbantouch.in**
- > Share of sales from online: **2%**

WERT

Wert was founded in 2009 and since then, it has branched out to creating jeans to create a lifestyle revolving around youth-centric products. The journey began in 1998 when Sabu Joseph, the Director of Famous Fashions started manufacturing for reputed brands like Pepe, Lee Cooper, Spykar, etc. In next to no time, Joseph was churning out the best quality jeans for these brands. Later in 2009, Joseph decided to launch his own brand, a brand that would not just sell clothes but would create a cult of style trendsetters. And thus, Wert was inception. The company runs with a mission to offer stylish, trendy and value-for-money clothing and accessories.

Target Group

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

Product Basket

Currently, Wert is into denim wear and also offers cotton trousers for men. The brand is planning to venture into the ladies denims category soon.

Top Selling Products

The USP of the brand being innovative washes, exemplary fits and exclusive fabrics, luxury denims are the fastest selling category.

Upcoming Collections

For the forthcoming season, Wert is planning to launch *Shine*, a range of over-dyed denims which are available in 11 colours. The print collection is also on the anvil apart from the skinny fit, which will also be introduced this season.

Retail Presence

Wert has a strong presence across all leading MBOs in the country and is growing every season. The brand is also planning to venture into LFS and EBOs shortly.

Top 5 Retailers

Wert is doing good sales with its presence in most of the esteemed LFS across India like, Chunmun, Pothys, Jayalaskhmi, R.S Bros, J.C Bros, Cillai, Top Shop, etc.

Retail Expansion Plans

The denim brand is looking forward to expanding to newer markets with channel partners of strong repute (financial standing) and expertise of handling national brands. Wert is also looking forward to tapping the eastern markets this year.

Online Presence

Wert retails through major online portals like Amazon and Flipkart.

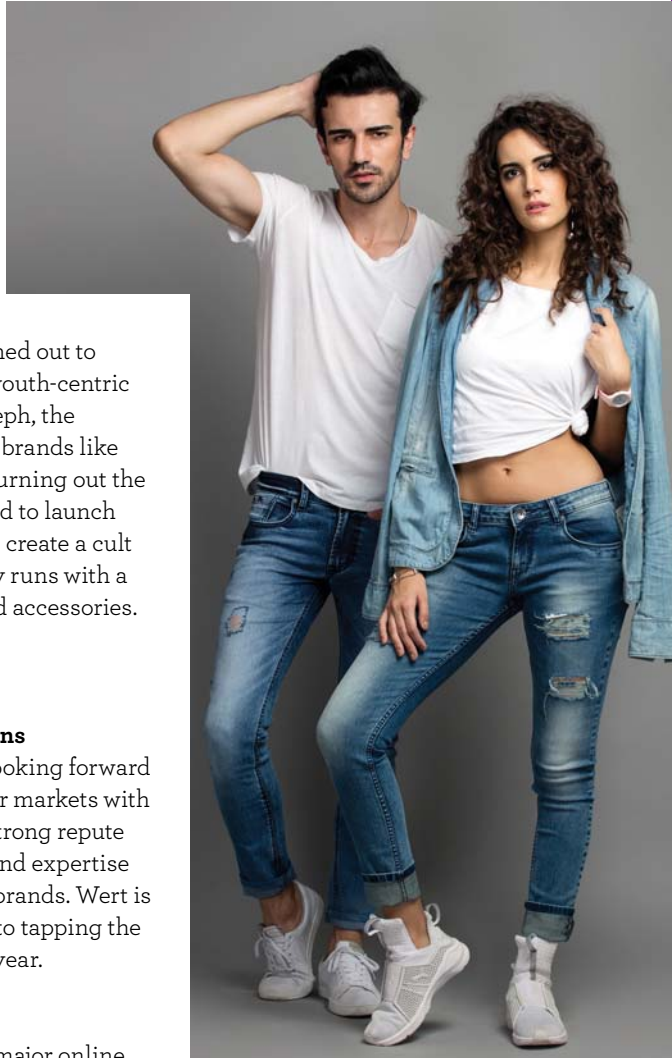
Technology Deployment

The brand has been constantly working on the implementation process of new technologies as Wert understands that technology and sustainability are the two key formulas of success for any brand in the trade.



BRAND UPDATE

- > Country & city of brand origin: **Mumbai, India**
- > Number of countries present in: **3 (India, Sri Lanka, Middle East)**
- > Year of brand launch: **2009**
- > Total Sales Turnover in India as in FY16-17: **₹24 crores**
- > Total number of SISs: **4**
- > Total number of MBOs: **750**
- > Number of states present in: **15**
- > Number of cities present in: **150**



THE NEW WAVE: THE RISE OF ECO FRIENDLY DENIM

Collated By Bharti Sood

AG JEANS, AMSTERDAM

Launched in 2000 by Yul Ku, a pioneer in the denim industry, AG makes all of their denim in vertically integrated manufacturing facilities, which gives them the ability to carefully monitor and control their production process.

Production facilities at AG utilize ozone technology, which cuts water consumption by 50 percent while minimizing the use of chemicals and energy. Their production utilizes sustainable fibers such as Tencel® and Modal®, which are entirely natural and biodegradable.

AG also takes great care to reduce the amount of waste that is generated. They cut their patterns in a way that maximizes fabric yardage and keeps the amount of leftover materials at a minimum. Excess scraps are collected for recycling on a weekly basis.



Being fashionable, natural and durable, denims are now a global wardrobe staple. The great demand has also spawned many ways of making jeans all over the world. There is wide-spread adoption of quick and wrong solutions, and we have to sadly admit that jeans haven't been the best thing for the environment. However, what is good news is that across the world, concerned brands are taking sustainable measures to prevent hazardous impact on the environment. These conscientious brands are employing various greener methods like use of organic cotton, adopting recycling and up-cycling methods, cutting on water consumption and minimizing use of chemicals and energy to protect the environment.

Images BoF presents a few ethical denim brands the world over, who are pushing the limits of eco-friendly manufacturing and are building products that last. This is just a representative short note and many more are doing great work in the area.



MONKEE GENES, UK

Monkee Genes was launched in 2006 to offer something fresh, vibrant and youthful to the denim market. They've rallied their customers around the mantra 'No Blood, No Sweat, No Tears' and every pair of their denim is sold with a tag that reads, "Everyone involved in the garment has been paid a decent living wage". This unabashed commitment to ethics is paired with a renegade style that brings a range of colour styles and fabrics to their denim palette. In today's fragile environment, Monkee Genes is the independent label to watch: on trend, affordable and with an eco and ethical conscience.

NUDIE JEANS, SWEDEN

Nudie Jeans is a Swedish clothing brand originating in Gothenburg and a subsidiary of Svenska Jeans AB, founded in 2001 by Maria Erixon. Their products are made with 100 percent organic cotton denim. Their denim is about as cool as it gets and they match their modern look with modern ethics. They report the origination and the organic contents of every pair of denim they sell. Nudie strives for sustainable consumption patterns by offering free repair service, re-selling second hand products and re-cycling worn-out products.



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www.donandjulio.com



MUD JEANS, HOLLAND

MUD Jeans works completely according to the principles of the circular economy, where waste is seen as a source of growth to make something new. They do not use conventional cotton, but use recycled cotton in their jeans and knits, that has the least impact on the environment and allows farmers to have a living wage. Their denims are not touched by any chemicals at all. The worn in effect is achieved by a combination of laser, ozone and stonewash. They also do not use any leather labels but use printed logos and on their knits they use buttons made out of recycled cotton.

MUD Jeans are also building on an innovative concept where jeans are leased instead of purchased. The customer pays a monthly membership for a pair of denim that is intended to last one year. At the end of that period, the consumer can choose to keep their jeans for another 4 months or return them in trade for a new pair. The model allows MUD to fully recycle the material and give it new life in another pair of denim.



DL1961, NEW YORK

With a focus on technologically advanced fabrications, this New York based brand uses innovative eco-friendly fibers in their line of men's and women's denim, which require half the dye, half the water and half the energy. Their pieces incorporate TENCEL® and ProModal® to increase the durability and sustainability. Each pair is expertly sanded, distressed, ripped and repaired before it receives the DL1961 seal of approval.



KUYICHI, AMSTERDAM

Kuyichi introduced the first pair of organic denim into the market in 2001 and they've been leading the industry in ethics and transparency ever since. With an aim to make its collection as sustainable as possible, Kuyichi uses close to 100 percent sustainable materials. Kuyichi works directly with farmers who supply their organic cotton, and even encourages them to become shareholders in the company. In addition to their organic cotton, Kuyichi constantly experiments with new concepts and uses sustainable materials like recycled cotton, polyester from discarded water bottles, tencel, spare denim and hemp.



SOURCE DENIM, USA

Source Denim was created with the mission to eliminate harmful chemicals used in the denim dyeing process. They discovered that all indigo requires chemical fixing agents and treatments to dye denim blue, a lot of which ends up in surrounding water ecosystems. To solve this, Source discovered a dye process that replaces these chemical agents with a natural, biodegradable material made from crab shells! This material, a by-product of food processing, allows the cotton to be woven and dyed with 50 percent less chemicals, 60 percent less water, and 40 percent less energy than conventional denim. The cotton in Source comes from the Better Cotton Initiative in Africa, which promotes improved agriculture livelihoods for cotton farmers.

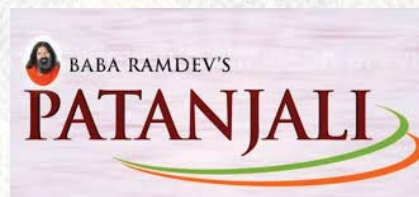


11 11 ELEVEN ELEVEN

A khadi denim line made from lightweight selvedge denim uses 100 percent organic cotton and celebrates the human touch and traditional artisan processes. Each hand-stitched product is signed, numbered and dated by the artisan, exquisitely finished, and sent to the consumer in its own khadi case.

SWADESHI JEANS BY PATANJALI

Swadeshi jeans launched by Baba Ramdev's brand Patanjali, are Indianised in style, design and fabric. The women's range has been kept loose in order to comply with Indian cultural norms and are also comfortable to wear. Patanjali aims to set up 10 mega units, 50 semi-mega units and many small-scale units and compete with multinationals by 'swadeshi-karan' (Indianisation) of products like jeans, other clothes, shoes.



KORRA JEANS

Korra uses natural and recycled materials like organic cotton threads and naturally dyed indigo selvedge denim to custom-made zippers, buttons and zippers. Each pair of Korra jeans is handmade by individual tailors and each product is marked with the tailor's signature numbered ensuring traceability. This helps in bringing the user closer to the maker, and also keeps the maker close to his craft.

SEVEN SENSES DENIM

Based out of Amsterdam but made in India, Seven Senses Denim was founded in October of 2014. It's a partnership between Ecologic Republic's Andriana Landegent and Amit Anurag from KDB Samiti Kattin Dhuniya Bunkar Simiti, an official Indian non-government association working in Bihar. This collaboration has resulted in a collection of high-quality, organic and naturally dyed denim fabrics handcrafted by local Indian workers. Seven Senses aims to revive, preserve and share India's craft traditions with a wider global audience and contribute to the sustainable development of remote Indian rural areas where these artisans live.

At Seven Senses Denim, cloth is handspun and the fabrics are dyed in a completely natural way. Traditional khadi spinning and weaving techniques are re-interpreted to create ecologically-dyed, high-quality denim, which is softer, shinier and has a particular shade of blue derived by natural dyeing of fabrics.



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FASHION CREATION

- 
- »» **THE INDIAN DENIM TEXTILES INDUSTRY: AN OVERVIEW**
 - »» **GLOBAL DENIM FASHION FORECASTS - SS-2018**
 - »» **TOP DENIM FABRIC COMPANIES**
 - »» **WOOL DENIM**
 - »» **KHADI DENIM**
 - »» **RELIANCE BETS ON DENIM MARKET**



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Work : Century Denim ,Village & Post Satrati , Tehsil – Kasrawad, District – Khargone 451 660 (Madhya Pradesh) Tel: 91-7285-255277 / 7285-255281 / 82 / 83 / 84.
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Textiles Study

THE INDIAN DENIM TEXTILE INDUSTRY 2017 : AN OVER-VIEW

The blue jeans has become a wardrobe staple and a fashion essential, and as such the denim textile industry is focusing a lot inward into the domestic fashion market. Images Business of Fashion talks to leaders of some of India's largest denim fabric companies.

Pg No. 276

Fabric Players

ARVIND 286

CENTURY 288

DOTTED JEANS 290

KG DENIM 292

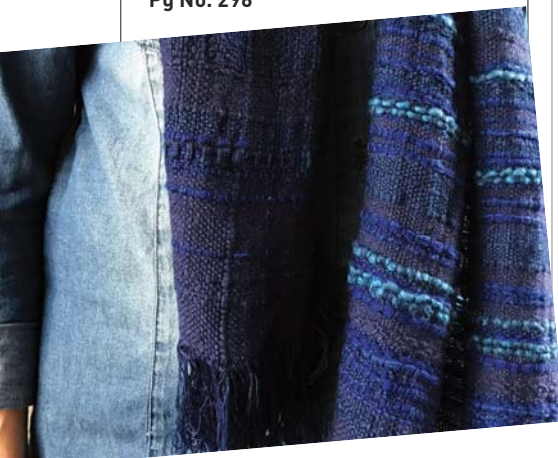
RAYMONDS UCO 294

Innovations

MOOD INDIGO

Wool denim fabrics are a new approach to improve the aesthetics of traditional denim fabric. The Woolmark Company talks about the benefits.

Pg No. 296



Innovations

RELIANCE RECRON

Bets Big on Functional and Performance Denims Team Images BoF speaks to the kings of polyester, Reliance about its plans for the denim industry.

Pg No. 299

Initiative

KHADI DENIM: THE INDO-FABRIC OF THE YOUTH

Khadi Denim, a hand-spun and hand-woven soft-feel fabric, is the new rage in the fashion world. Team Images BoF speaks to KVIC the apex body that operates with the mandate to promote Khadi.

Pg No. 301



Accessories

TEX ZIPPERS: DENIM MAGIC IN METAL

Tex Zipper is a multinational zipper company that was established in 1987. Team BoF speaks to Mudit Tandon, Vice President, Tex Corp Ltd., to know what is trending.

Pg No. 304

Trends

GLOBAL DENIM

TRENDS - SS-2018

Trend Council presents exclusively for Images Business of Fashion its top Global Denim Trend picks for SS18.

Pg No. 309

Star Trends

JEANS OF THE STARS

The hottest trends and the hot Bollywood heroes that drive them.

Pg No. 326

Stars Distressed

DRESSED IN DISTRESS

Distressed or ripped denim looks edgy, raw and if styled right, sometimes utterly feminine too. It's a favourite amongst Bollywood divas. Hear it from them.

Pg No. 330



Efficiencies

"HOW IMPORTANT IS FABRIC ROLL PLANNING IN THE APPAREL INDUSTRY?"

Understand why roll allocation or roll planning ensuring the least possible number of end bits are left behind is a critical issue.

Pg No. 334



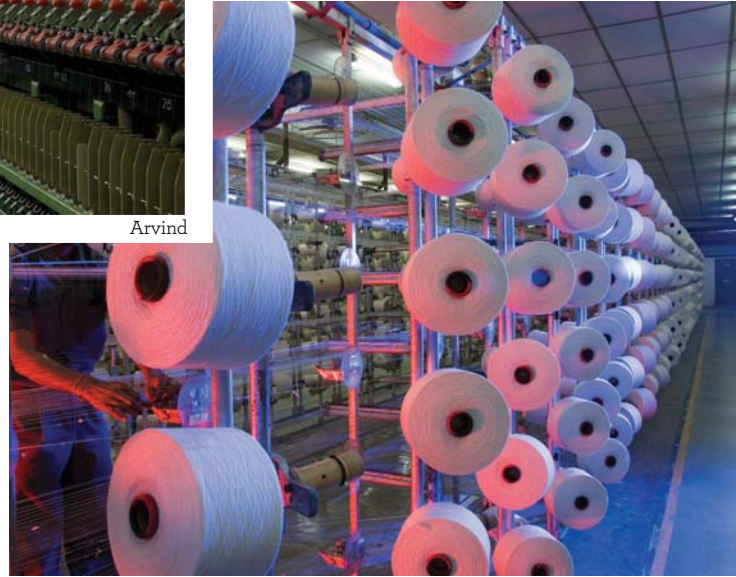


Arvind

THE INDIAN DENIM TEXTILES INDUSTRY 2017: AN OVERVIEW

The denim textiles segment has always been one of the leading segments in the Indian textiles industry. The blue jeans have indeed become a wardrobe staple and a fashion essential, and as such the denim textiles industry is focusing a lot inward into the domestic fashion market. Images Business of Fashion talks to representatives of some of India's largest denim fabric companies to take an overview.

Bharti Sood and Gurbir Gulati



Arvind

Setting the context of the study, Arvind Mathur, CEO, Raymond UCO Denim Pvt. Ltd introduces that, “Globally, the customer segments of denims can be broadly classified as luxury/super premium, premium, mid-market, mass market and economy/value. Within these, the premium and mass market segments are expected to grow more than others globally, however, in India, the economy segment is also expected to gain.” And, speaking upon the current structure of the market for Indian denim fabrics, Rajan Gupta, General Manager, Marketing, KG Denims explains, “Denim fabric industry has expanded its wings across all product lines due to its varying usage in the fashion industry. The industry is divided into the following three categories- RMG (ready-made garment brands), manufacturer-exporters, and home furnishing/upholstery.”

Arvind

According to him, RMG is the brands sector which covers a major share and has good consumption of bottom weight qualities like flat finish, dobby, knits etc., throughout the year, and even more during the festive season. The manufacturer exporter category has seasonal consumption but in good quantum for American Buyers vis-a-vis European labels. Major products in demand are Tencel and its variants, fine count silky in denser reed picks and fine count slubs/cross hatch. The home furnishing/upholstery category – has shown an increase in demand due to extra comfort, less maintenance and versatility of usage in blue variants for mix and match products. Saurabh Samnol,





Chief Marketing Officer - Lifestyle Fabrics Denims, Arvind feels that the denim fabric industry is a constantly evolving industry. "The global and domestic demand for denim is increasing, but yes, there is clearly a pyramid structure. There's a mass market for commoditized denim, a market for fashion denim, and there is also a market for functionality and performance denim. We are playing on the mid-premium part of the market. We focus equally on fashion and performance aesthetics," says he.

Growth of the Indian denim fabric industry

Arvind Mathur from Raymond shares that, "Globally the growth of the denim fabric industry is in low single digit and in India, depending on the source, in the range of 10 - 15 percent." According to the industry experts, the denim fabric industry has been growing at a very healthy pace and particularly in the apparel fabric segment in the domestic market than in the exports. The denim industry still needs to tap its exports potential.

Affirms Rajan Gupta of KG Denims, "The denim fabric industry in India has been growing very fast and in a consistent manner at a rate in between 10 to 15 percent per annum and during the last 2-3 years it has become many faceted. Being one of the most fashionable products, demand for denim across the world has increased from all the sources, not only from the RMG sector but from home-furnishing and other mix and match products as well." According to Saurabh (Arvind) the denim fabric industry is growing at approx. 10-12 percent per annum, but as regards, the domestic denim market,

he feels there is a lot of over-supply. As against the installed the capacity of 1.4 billion, the demand would be close to 700 to 800 million metres. Vikas Khandelwal, M.D, Dotted Jeans, also feels that the denim fabric industry is increasing rapidly every year and various fabrics are now available and are increasing for lending a different feel and look. "In the last two years the demand for denim fabrics has increased at a fast speed and with it has increased the competition. At this rate, the industry also needs to improve at a very fast rate," he said.

Price movements

Talking about the price movement, Vikas Khandelwal of Dotted Jeans was of the view that prices have been moving upwards since the past few years. Saurabh Samnol highlighted the widespread input cost rise and shares that "There's been a dramatic increase in cost over the last one year as cotton moved from 31,000 level to 42,000 level. Obviously, there's also upward movement in dyes and chemicals as well; overall costs have gone up."

Arvind Mathur shares that there has been a constant pressure on prices despite rising raw material costs and strengthening of domestic currency. And as a solution, he states that, "New innovative products are regularly launched to counter this.

Rajan Gupta from KG Denim however feels that, "Not as such majorly in spite of major fluctuations in the raw material prices but because of the change in government policies from time to time." As a price outlook for the future, RC Panwar, Joint President - Marketing, Century shared that, "the price movement within existing GST structure will decide the future market strategy."



"There's been a dramatic increase in cost over the last one year as cotton moved from 31,000 level to 42,000 level."

- Saurabh Samnol,
Chief Marketing Officer - Lifestyle Fabrics Denims, Arvind



"In the last two years, the demand for denim fabrics has increased at a fast speed and the industry also needs to improve at a very fast rate."

- Vikas Khandelwal,
M.D, Dotted Jeans

>



Arvind



The 'stretch' factor

Consumers today really like to experiment and have become more receptive of fit and feel. One of the key innovations has been stretch denims which are more comfortable and functional. According to Arvind Mathur (Raymond) the trend has been moving towards super stretch and soft touch in International markets. Whereas in India, knit look is the dominating force. He adds, "As we all know denim was traditionally rigid but after the success of stretch denim for women, the men's comfort stretch were introduced. The stretch-ability over a period has graduated from jeggings and super stretch to hyper flex. All through without compromising on other performance parameters like shrinkage and recovery." KG Denims also offers a basket of stretch products and are quite successful for providing



"The stretch-ability over a period has graduated from jeggings and super stretch to hyper flex."

— Arvind Mathur,
CEO, Raymond UCO Denim Pvt. Ltd

quality products not only for bottoms but for light weight shirts also. Their fabrics are known for their quality in terms of skew/shrinkage and other performance parameters.

So, what has exactly been trending lately

Saurabh Samnol from Arvind finds a lot of focus being laid on controlled parameters, stretch, recovery and growth. He states that the definition of stretch percentages has changed, with high-stretch, multi-blend fabrics coming in. The market has evolved from being 100 percent cotton to almost 95 percent stretch. "The domestic market has a very robust demand for the MUTANTS™ category, which is our woven knits", says he. Vikas from Dotted Jeans also feels that the trend is moving towards doobby and knitted fabrics.

RK Dalmia, President, Century, elaborates that denims have always been looked at as a fashion statement and manufacturers have been striving hard to introduce niche product innovations day in and day out. "Popular denim trends currently are light-weight denims, coated and



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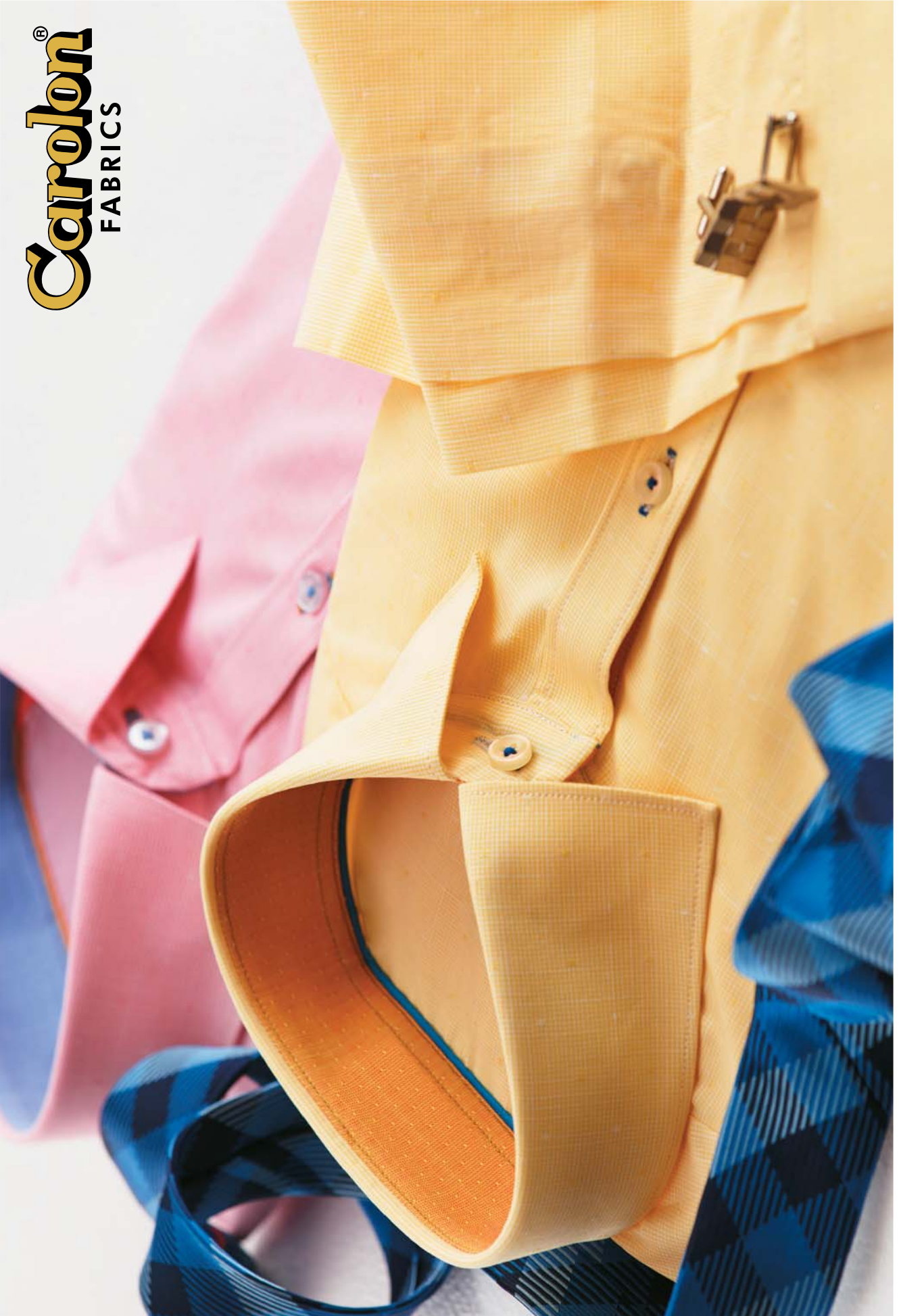
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mercerized denims with multiple wash effects and clean optics. New introductions like - colored over-dyed jeans, blue-black sulphur tops, chlorophyll wash, herbal wash, oxy-jeans, color changing jeans due to thermal effect, etc. are also in trend," he adds.

KG Denims has witnessed great demand for Tencel qualities. In fact, they were the first ones to introduce Tencel products in India and have been quite successful in offering a variety of products in a big way.

Importance of domestic retail market and its preferences

Domestic retail market plays a very vital role for every Indian denim manufacturer. Explains Rajan (KG Denim), "One can divide the domestic retail market into two categories - i.e. having a product mix for feeding to commodity mass scale domestic brands being serviced through distributors and the other one for high quality labels being serviced mainly directly by the mills in terms of presentations, seasonal sampling, shortlisting and to some extent by the distributors just for financing. However, it fluctuates from season to season due to festive approach". Saurabh of Arvind also felt that the domestic retail market was extremely important and was evolving very quickly. He stated that

with the advent of more international brands coming to India there has been an expansion in the organized retail. Tier -II and -III cities and towns in India have become more fashion conscious and denim has become a way of life in India. He said that we have a huge population to cater to, so domestic retail is extremely important. Denim fabric varieties in India versus western markets

Referring to the most preferred denim varieties in India as compared to western markets, Rajan (KG Denims) pointed out that the market has become very aggressive and proactive for developments and prefers fancy varieties at most competitive prices. He felt that the trend comes in from the West and they work one year in advance as far as fashion was concerned. While Arvind of Raymond felt that the tastes of the Indian consumer have also evolved over the years. Even Saurabh of Arvind was of the similar opinion and stated that India had its own aesthetic sensibility for denim, although it is more inspired by the European designs rather than the American ones. RC Panwar of Century shared that western market denim fabrics are being made used majority 3/1 right hand twill. Both Lycra and non- Lycra. And prefers

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"Popular denim trends currently are light-weight denims, coated and mercerized denims with multiple wash effects and clean optics."

— R K Dalmia,
President, Century



"The denim fabric industry in India has been growing very fast and in a consistent manner at a rate in between 10 to 15 percent per annum and during the last 2-3 years it has become many faceted."

— Rajan Gupta,
General Manager, Marketing, KG Denims





effects as fashionable products with refined varieties. Viscose and Tencel applications relate to operational segment of some individual producer. Offering good quality of stretch denim fabrics and better product innovation resulted in profitable and sustainable business in Indian domestic market.”



“Offering good quality of stretch denim fabrics and better product innovation resulted in profitable and sustainable business in Indian domestic market.”

– R C Panwar,
Joint President, Marketing, Century

making Garments by all different techniques with value addition.

Recent innovations

Rajan Gupta of KG Denim in forms that laser printing, special finishes like coatings (gel/pigment/foam, etc.), brushing, peaching, etc.in bottom wear; and linen in shirtings are the latest innovations. Arvind Mathur (Raymond) highlights that variations in knit looks, denim in terms of structure, stretch and colours are trending. According to Dalmia of Century, knitted double cloth at moderate prices were a new innovation. Also, different kinds of modified weaves, heavy structures and various kinds of sandwich shades too have been introduced. Saurabh of Arvind felt that “the domestic denim market is more fashion oriented than before, so, rather than innovations, there was a greater focus on value-additions such as finishes, hand-feel, etc. Products like MUTANTS™ (woven knits) by Arvind, had taken the country by storm, due to its higher stretch ability feature.” RC Panwar, Joint President, Marketing, Century, elaborated more in detail, “Along with the traditional ways, new experiments are continuously being done, to produce a variety of innovative denim fabrics. We must focus on the changing product development in denims like dobby, structured weaves, basically indigo ranges in different colours by using different casts like SBIT, IBST, NBBIT, YBIT, GBIT, BBIT, (in different shades) and superior die-size finishes with special

Emerging preference trends

Providing insight into to top predictions on denim fabric preference trends for the coming seasons, Rajan Gupta from KG Denim believes that the knit look was very promising in bottom wear and should remain in fashion for another two seasons. In shirting, he felt that Lyocell and its blended variants are going to do well in the coming years. Arvind (Raymond) felt that since the trend was primarily driven by comfort and performance, stretch as a product category would grow. Bi-stretch, soft super stretch, sustainable and performance denims would be in the limelight. He felt that knit look would continue in the domestic market. Stressing again on stretch denims, says Saurabh (Arvind), “If we could predict fashion so precisely, we would sell more than everybody else. The macro trend still remains the same – stretch denims; it is not moving back to rigid, we see a trend towards lighter weight fabrics; there is a trend towards functionality and performance.” Dalmia (Century) predicts preference for the knitted fabrics, tinted denim with sulphur colours, over dyed tinted denim, double cloth knitted with attractive shades and peach finishes, both side different colours with localised look and super finishes with fancy look.

Challenges faced by the denim fabric industry and the way ahead

Saurabh from Arvind shares that, “From an export perspective, India

does not have a preferential trade agreement with anybody, so we are still focused on shipping our fabrics to the neighbouring countries from where they are converted into garments. There are a lot of non-tariff barriers and very strong competition from Bangladesh and Pakistan due to which the overall exports are suffering. In the domestic scenario, there is an over-supply situation, which is pulling down the pricing capabilities and overall, if you see, the margins are under tremendous pressure as the cost of raw materials are expanding very quickly. The scope for innovation in classical denims is very limited, so now we need to challenge the limits of jeans-wear sensibility.” Saurabh suggests focusing on the ability to innovate and to have preferential trade agreements for the country.

Rajan Gupta of KG Denims finds varying of duty structure from acquiring of raw materials to the end-product internationally, imposition of various taxes on finished products without increase in MRP as great challenges. He further expressed that the mark-up for RMG too had been reduced from international labels due to FDI imposed by the Indian government for single foreign outlets and multi-brand outlets. He felt that the government should allow FDI for multi-brand outlets of foreign brands to create more competition and a healthier approach within the Indian brands. Secondly, they feel that the government should remove the burden of additional taxes and curtail duties on raw materials so as to have better mark-up for the Indian players. Vikas Khandelwal, M.D, Dotted Jeans felt that the prime challenge for the denim industry is to rapidly change its technology to make a large variety of differentiated and high-fashion denims which include ring denims.

The experts from Raymond and Century felt that over-capacity was a huge concern area. As were the intense price competition, high raw material costs and strong exchange rate (for exporters). Panwar from Century urgently emphasized upon the introduction of new innovative range of products by Indian textile mills and reduction in the cost at all stages.

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JAPAN

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Gents Bulb Face 4 - Glossy Black

PKB 3 (A-ALT)

Gents & Ladies S Dummy

GTR 1

L 88 Bulb (RA-ALT)

G 2 Bulb & SM 7 Bulb

G 27 Bulb (B) 35 Arms

SL 7 (H-ALT)

L 34

Kids Dress Forms

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ARVIND

A textile giant whose history can be traced back to more than a century, Arvind is one of the largest denim manufacturers in the world. The company started off making fabrics for the domestic consumption – cambric and voiles and in 1982-83 ventured into denims. This foray into denims was also a turning point and eventually reinforced the company’s reputation as a forerunner of denim in the global arena. Its growing presence in the domain of readymade garments – jeans, shirts and knits – has further placed Arvind on the top as a one-stop solution provider for leading global and domestic apparel brands. The company’s most recent and aggressive ventures in the branded apparel, retail and fabric retail businesses, infrastructure and the initiative of growing cotton the organic way have consolidated its presence throughout the apparel value chain.

Product Portfolio

Arvind’s present product categories range from rigid denims to stretches, knits, woven, top and bottom weights, available as JELT 2.0, Azurite, BOOMERANG™, MUTANTS™, NEO CORD, NEOBUBBLE™ and several others.

Manufacturing Capacity

The company’s current capacities for bottom weights denim is about 110 million meters per annum along with a 30 million capacity for indigo shirting. Put together, its about 140 million meters. The company’s focus is primarily on augmenting capabilities than on expansion.



Ratio of sales in OTC Fabric Retail Versus Denim RMG Manufacturers

Arvind is primarily in the B2B space, where about 55 percent of the business comes from exports and another 45 and comes from the domestic market.

Top Domestic Clients

VF India, Spykar, Mufti, Killer and Jealous 21 are among the top denim brands that Arvind works with.

Top International Clients

A few global bigwigs that serve as the company's partners are Gap, H&M, Zara, Levi's and Marks & Spencer.

Retail Presence

Arvind is the largest brand owner in the country, with 39 brands under its belt. In terms of the number of doors, the company is the second largest after ABFRL.

Upcoming Products

The company is introducing Azurite (indigo by indigo collection), wool denim, flip denim, 360° MUTANTS™ and XL MUTANTS™ along with faux leather to the Indian markets. Arvind has intellectual property rights with Azurite and is also sensitising the Indian market space about the whole concept of IPR.

Market Expansion Plans

In India, Arvind's reach is increasing to the national and second tier brands in India, because organized retail is on an up. Internationally, the company has clearly defined its way to work in US and Europe with a narrow and deep focus.

Progress Through Online Retail

Arvind Internet, established in 2013, is the company's effort to build India's first omni-channel fashion shopping experience — seamlessly integrating clicks with bricks. Arvind Internet kicked off with custom clothing platform Creyate in 2014, and launched the omni-channel retail platform NNNOW in the summer of 2016.

Growth Rate

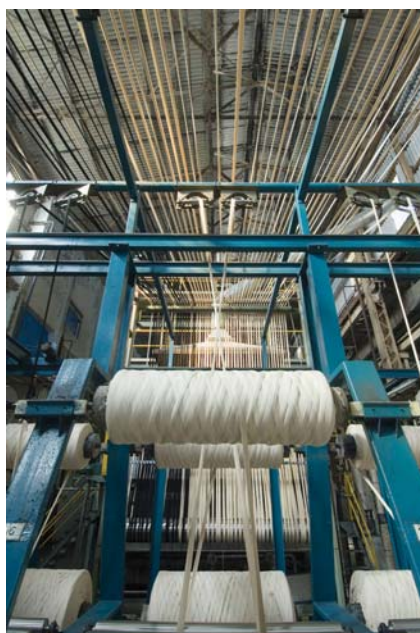
In terms of volumes, Arvind's CAGR has capped at around 2-3 percent and the company expects it to remain at similar levels as there is a major thrust in value-addition in its products. The brand is not investing in capacity building at the moment.

Current and Expected Turn Over

In the past financial year, the company registered a turnover of ₹1,900 crores and it expects to see around ₹2,000 crores in the coming fiscal, with a 6 percent growth rate.

Future Plans

Arvind plans to take a lead on its core principles of design, innovation, and sustainability, with resolute focus on augmenting capabilities. The company is now trying to move very quickly on an innovation pipeline. At the same time, environmental and socio-economic sustainability is an important area of focus for Arvind.



CENTURY DENIMI

Century Denim, a division of Century Textiles and Industries Ltd., Mumbai was incorporated in the year 1897. The company had only one industrial unit, the cotton textile mill till 1951. Since then, the company has made rapid progress in widely diversified fields. In 1997, Century Denim, a vertically integrated plant from blow room to packing and equipped with high-tech machinery was set up. Located at Satrati village in Madhya Pradesh, the ultra-modern plant is comparable with the best in the world. The plant is equipped with BARCO hardware and functionalities and boasts of a biological effluent treatment and reuse plant with zero discharge. Century Denim is capable of producing 21 million metres of denim fabric per annum with a market share near to 2 percent.



Grace, style, finesse and quality beyond expectations



Spinning and production output

Product Portfolio

Century Denim's current product portfolio includes basic denims, chinos, stretch denims and dobbies (knit look) with modified stretch and special finishes.

Upcoming Products

The brand's upcoming products feature fabrics made using different kinds of yarns with a variety of shades and other special finishes. The brand is also planning on a new collection of fabrics with different looks on both sides, which it hopes will give a niche look in the finished products. As a whole, the company exercises continuous efforts on a daily basis to stay abreast with the market demands. Accordingly, the technical team innovates and works round the clock to come up with new products as well as improved versions of the existing range.

Manufacturing Capacity

Century Denim is capable of producing 21 million metres of denim fabric per annum, with a market share near to 2 percent. The plant has state-of-the-art machinery and consumes 14 million kg of cotton annually. The plant is equipped with 8,400 ring spindles with fascination, 1,920 rotors with slub attachment and 112 Airjet and Rapier looms. The open-end spinning frames are capable of producing S yarn in the count range of 6s, 7s, 9s, 12s, 16s and 20s and the ring spinning frames in the yarn count range of 6s, 7s, 8s, 9s, 10s, 12s, 16s, using a variety of conventional cotton.

Ratio of Sales in OTC Fabric Versus RMG Manufacturers

The company's majority sales account for brands and the RMG sector.

Top Domestic Clients

The company's top domestic clients include Sin Brands, Levi's, Myntra, Madura, Live-in, Killer, Globus, Oxemberg, Vintage Blue, etc.

Top International Clients

The company is currently supplying to Walmart, Simba Fashion, Lee and Nostrum, to name a few.

Turnover for FY (16-17)

Century Denim registered a turnover of ₹195 crores in the last fiscal.

Retail Model

A majority of the denim fabric manufactured by the company is supplied through distributors. A fair share is also supplied directly to the brands.

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DOTTED JEANS

Dotted Jeans was established in the year 1996. During this decade, there was a sharp increase in denim manufacturing capacity in India and was also characterised by an increase in the spending power of the Indian consumers and rapid growth of retail. The company has since then been manufacturing and selling denim fabrics and has been growing every consecutive year.

Product Basket

The company offers different varieties of denims, which are classified as:

- *Blue Denim*, which are denim dyed again after washing;
- *Blue Black Denim*, which are blue denims dyed black with washing;
- *Coloured Denim* with coloured wrap yarn;
- *Comfort Fit* which are wide comfort denim jeans; and
- *Cotton*, which is a very skin friendly fabric and are really comfortable to wear.

Production Capacity

Dotted Jeans gets a huge demand from its customers and the company is working hard to satisfy all demands.

Top Retailers/ Brands

The company's retail presence is really strong and it has a long term business relations with one of the best retailers of India including The Chennai Silks, The Unik Bazaar, The M Bazaar, RG'S Fashions, V2 Mart, etc.

International Presence

Dotted Jeans has presence in international markets of Sri Lanka and Dubai.

Upcoming Collections

Dotted Jeans has worked on high fashion denims with a little difference in overall fit. The company has used a lot of concepts in accessorising and will improve it further more in the times to come. The company's designers in production team are continuously working on different concepts for improving the accessorising in jeans as well as giving it a new and enhanced look.

Retail Expansion Plans

The jeans manufacturing company is continuously working and organising events and participating in different exhibitions and fairs in order to improve its visibility and work. Dotted Jeans is also advertising on social media as well as on other platforms like display ad boards in public areas and giving ads in newspapers as well, for a better outreach.



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KG DENIM

KG Denim started almost two decades ago and has had a very successful journey. The company has commanded a strong positioning right from its inception both in bottom and shirt weight qualities covering all segments even when there were only a handful of denim players in the industry. The company has lately diversified into shirt and top-end bottom denim fabric products which are cost effective and value for money. Today, KG Denim is regarded as one of the main players in the domestic denim fabric market.

Product Portfolio

Present product varieties comprise flat finish, knit -look dobby, structured dobby with special finishes like coating, tinting, etc., under different colour variants. It also has a shirt denim fabric portfolio where it has Tencel and its blends, stretch, dobby in fine counts silky with/without slubs/ xhatch, etc.

Production Capacity

KG Denim presently has an annual capacity of 30 million meters (26 lacs meters/month) and has plans to add up one more dyeing range of 10 million



meters in years to come. It also plans to add specialized machinery in laser printing which will enable them to have in-house pigment khadi/discharge printings, foam coating machines, yarn dyed (indigo dyed) shirting machines.

Top Domestic Clients

Top denim brands in the domestic market that are clients of KG Denim include Lee, Killer, Mufti, Pantaloons, Wrangler, Pepe, G&J, Numero-Uno, Cantabil, etc.

Top International Clients

KG Denim's international clients

include Target, Belk, Nordstrom, JC Penny, A&F, Tommy Hilfiger, Marks & Spencer, C&A, Next and Debenhems.

Upcoming Products

The new collections being planned by the company for the upcoming season include laser prints in bottom weights like tencel and its blends with linen/ cotton and cotton/tencel.

Product Expansion Plans

The company has plans to offer something different in its product lines which are difficult to be imitated and have unique usage keeping in mind of Indian climatic conditions.

Market Expansion Plans

Currently, the company doesn't have major plans to locate new markets in India or overseas. The brand believes that a company can be omnipresent with quality and innovation in products, without investing in advertising and promotions like exhibitions or fashion shows.

Turnover for FY 16-17

The company registered a turnover of approx. ₹350- ₹400 crores and it aims to reach ₹450- ₹500 crores in the next 2-3 years.





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RAYMOND UCO

Raymond UCO Denim Pvt. Ltd. is a 50:50 joint venture between Raymond Ltd. and UCO NV - Belgium. It is a formidable combination of advanced manufacturing and global market reach. Raymond UCO entered the denim world in 1996 with an Italian collaboration. The joint venture with UCO NV of Belgium was formed in 2006. Strategically focussed on top-quality, innovative, value added denim fabrics and jeans, the business has state-of-the-art, highly versatile and flexible facilities with an annual global capacity to manufacture up to 50 million meters of denim fabric and about 2.5 million pieces of garments.

Product Portfolio

The company is largely focused on fancy and multi-count yarn fashion denims primarily made of cotton and cotton-lycra. It produces denim with other branded fibres as well. The range also includes sustainable denims with BCI cotton, fair trade cotton, organic cotton, recycled cotton, recycled polyester and their blends. Raymond UCO also produces limited editions of printed, jacquard and selvedge denims.



Manufacturing Capacity

The company's fabric manufacturing facilities are located in Yavatmal, Maharashtra and Romania (Europe). Yavatmal is at the heart of central India's cotton belt and the fabric manufacturing plant is spread over 163 acres of land. This fabric manufacturing facility is fully integrated, covering manufacturing operations ranging from spinning, yarn dyeing, weaving, finishing and fabric inspection and packing. Annual capacity of all plants taken together is nearly 50 million meters.

Garment manufacturing is taken on lease from a 100 percent subsidiary of Raymond Ltd. in Bengaluru. Garmenting business is engaged in designing and production of premium jeans for the top fashion brands.

Top Domestic Clients

Levi's, Wrangler, Lee, Pepe, Jack & Jones, Killer, H&M, Spykar, Parx, Mayoral, Scotch & Soda, Benetton, Tommy Hilfiger are some of its key customers in the domestic market.

Top International Clients

Levi's, GAP, Zara, Wrangler, Lee, M&S, Ann Taylor, Pull & Bear, Jack & Jones, C&A, H&M are some of its key customers in the international market.

Retail Presence

The brand is present globally, from America and Europe to Asia along with a very strong presence in the domestic market.

Upcoming Products

Keeping in mind fashion, performance and commercial aspects, the products are conceptualised and executed to meet the customer requirements. Sustainability is in focus for most of the brands. Use of post consumer waste cotton and polyester along with clean indigo dyeing process will have less impact on the environment. The other important concept is the soft touch denims where a variety of fibers with special spinning technique in conjunction with balanced fabric construction and new finishing processes gives the right hand feel. The brand aims to continue to surprise the customers with its super stretch and hyper flex products with excellent recovery properties.

Market Expansion Plans

Considering its present reach in both the domestic and global markets, the brand's emphasis will be on going deeper than wider.

Growth and Future plans

Raymond UCO's fabric capacity expansion project undertaken in FY'16 has now stabilised. Over the next 3 years, turnover of Indian operations is expected to grow at a healthy CAGR.

The brand plans on accelerated product development and innovation and growth using asset light model. It also seeks to strengthening its full package and continuing collaboration with top denim brands in the near future.





MOOD INDIGO

Wool denim fabrics are a new approach to improve the aesthetics of traditional denim fabric. A report highlighting the latest offerings by The Woolmark Company and their benefits.

From your favourite pair of denim jeans, to stepping out in double denim, there's no denying the fact that this traditional indigo fabric is a staple in anyone's wardrobe. For a long time, denim was a fabric used by sailors and jeans were worn by the working class looking for tough protection. During the mid-20th century, jeans became popular in American pop culture when they became a garment symbolic of a protest against conformity. It was during the 1960s that the traditional blue jean started to become acceptable and by the 1980s, 'designer jeans' and denim took to the runways of the world.

It was only a matter of time, then, before brands began incorporating a high-performance fibre such as Merino wool into their denim. From tailored wool denim suits by Ermenegildo Zegna and Indian favourite Raymond Ltd., to contemporary luxury fashion by Max Mara, and even a German sports and outdoor brand weaving wool denim

Wool denim fabrics are proving to be extremely popular in the industry for their increased warmth, breathability and elasticity of Merino wool and structured aesthetics of traditional cotton denim.



Photo Rami Riccardo Studio
Handloom & Indigo dyed scarf courtesy of Arteviva

into the mix, an increasing number of global brands are looking at additional ways to use wool.

“Wool denim fabrics are a new approach to improving the aesthetics of traditional denim fabric, whilst highlighting the natural benefits of Merino wool such as increased warmth, breathability and resistance to odour,” explains The Woolmark Company’s General Manager, Processing Innovation & Education Extension, Julie Davies.



Photo courtesy: @Peter Sjo/Unsplash.com

“Each volume of The Wool Lab Denim showcases the very latest technical developments for application across a wide range of products. The Wool Lab Denim, unveiled in January, is already proving to be extremely popular in the industry. To date, we have received more than 800 swatch requests from brands looking to work with wool denim fabrics, across all fashion segments including high-end fashion and sports brands.”

Technical details

Denim is traditionally a twill fabric made from a dyed cotton warp and an undyed weft yarn. It is probably the most popular trouser fabric in the world because of its value for money and

relaxed appearance.

In years gone by, wool and cotton have been blended together intimately into yarn to produce wool/ cotton blend denim fabric. Yet production developments including the use of machine washable wool yarns have led to a more cost-effective way to produce wool denim without having to intimately blend wool with cotton.

In 2014, The Woolmark Company worked with development partners to produce a wool/ cotton denim blend fabric which used exactly the same warp yarn as traditional cotton denim, but replaced some, or all, of the weft yarns with machine-washable wool. The fabrics were finished the same as traditional denim, so style wasn’t compromised, plus it gained the natural benefits associated with wool.

As demand continued to rise for wool denim from both consumers and brands, it put pressure on manufacturers to remain at the forefront of innovative fabrics and yarns. Helping to bridge the gap between suppliers and brands, The Woolmark Company unveiled The Wool Lab Denim, with two distinct guides for designers to use.

The first component of The Wool Lab Denim includes mainly wool denim woven fabrics in wool-cotton blends, intimate blends, cotton in the weft or even 100 percent Merino. Important innovations in this area are the use of natural indigo dyes for the wool denim fabrics and machine washable fabrics and yarns for easy care.

“The second component highlights the denim/ indigo look in knitwear, felt and special finishings such as needle punching.”

The most recent update for The Wool Lab Denim, dedicated to the upcoming Autumn/Winter 2018/19 seasons, offers wool denim fabrics for trousers, suits, jackets knitwear and shirts, along with a denim effect achieved by digital printing on lightweight circular knit fabrics. Machine washable jersey in wool cotton blends with stretch, which makes the fabric suitable for activewear, is also a key highlight this season.





Wool Denim heavily features in Max Mara's latest winter collection. PHOTO Jason Schmidt.

Wool Denim for Max Mara

The Woolmark Company has collaborated with Max Mara ahead of the brand's Autumn/Winter 2017 collection, unveiled as part of Max Mara's Wool Week in flagship stores across the world. Celebrating the inherent, natural benefits and innovative properties of Australian Merino wool, Max Mara has cleverly incorporated wool denim into its already wool-rich new collection range, offering consumers a luxury alternative to traditional denim apparel.

Max Mara has utilised innovative 100 percent wool denim fabrics that replicate the look and style of traditional denim, but have added benefits thanks to the natural qualities of Merino wool, including increased

softness and warmth. Using ecological dyeing recipes that imitate natural indigo, the wool denim pieces are fade resistant. Wool denim features in the form of a double-breasted long-line coat and tailored pants and jacket.

"The way women dress today is for comfort, an effortless look, and denim has always been a fabric with these features," explains Laura Lusuardi, Max Mara's fashion director. "However, this material is still too casual for the Max Mara collection and so we needed to find something that was easy to care for but sophisticated at the same time. Wool denim not only fulfils this need, but it's also a fabric that allows us to dress up different women in different occasions," she adds.



The Wool Lab Denim

The Woolmark Company has released an exclusive sourcing guide specifically for wool denim. The Wool Lab Denim showcases a wide range of the world's best, commercially available wool denim fabrics, connecting designers directly with manufacturers.

Wool denim fabrics are a new approach to improving the aesthetics of traditional denim fabric. New technologies allow fabric to be naturally dyed indigo. The main benefits that come from wool denim is that it offers all the warmth and elasticity of Merino wool with the structured aesthetic of traditional cotton denim.

- **Warmth:** Wool in the weft yarns ensures there is wool on the inside of the fabric. This adds an extra element of warmth even in the coldest of winters and takes the initial chill out of putting on regular denim jeans.
- **Moisture management:** Wool fabrics can absorb approximately twice as much as moisture as cotton fabrics, which means that wool denim fabric can feel drier on the skin and more comfortable than 100 percent cotton.
- **Odour resistant:** Wool fabrics are naturally odour resistant, so this is also a property of wool denim.
- **Machine washable:** Specially treated wool is used to ensure you can wash and dry your jeans as per normal.

<http://www.woolmark.com/the-wool-lab-denim>



ABOUT LISA GRIPLAS

Lisa Griplas has more than ten years of experience in the media and communications industry. A journalist by trade, she spent a number of years working at a daily newspaper before moving to The Woolmark Company to take up the role of Editor, a title she holds today.

RELIANCE RECROB

BETS BIG ON FUNCTIONAL AND PERFORMANCE DENIMS



Reliance is the world's largest integrated polyester producer with 'Innovation for Life' as its guiding philosophy, the success of Recron® and its various sub-brands speaks for itself. Today Recron® stands for the highest quality, differentiated and speciality polyester fibres and yarns. Tanya Krishna, Images BoF, speaks to team Reliance Recron.

Tell us about Reliance and its leadership in polyester.

Reliance Recron (RR): Reliance Polyester is the largest integrated producer of polyester fibre and yarn in the world, with a capacity of 2.5 million tonnes per annum. Reliance polyester is part of Reliance Industries Ltd., the largest private sector enterprise in India.

Reliance's famous backward and vertical integration story has held us in good stead when it comes to market fluctuations. Reliable and quality supply of raw material has enabled us to strengthen our polyester manufacturing.

Our ability to offer a complete range of fibres and filaments specially designed for Woven and Knitted applications gives us a preferred status with the leading spinners and composite mills. Owing to our ongoing interaction, understanding and constant dialogue with our entire value chain including our primary, secondary and tertiary customers, Reliance Polyester portfolio is among the most diversified in the world. Our polyesters are highly differentiated and have several functionalities for delivering value-added performance.

Reliance polyester is produced in four sites: Hazira (Gujarat), Patalganga (Maharashtra), Hoshiarpur (Punjab) and Barabanki (UP). Reliance Technology Center (Patalganga), Reliance Testing Centre (Coimbatore), Recron® Innovation Centre (Coimbatore) and Reliance Fibre Application Centre (Patalganga) constantly develop and introduce innovative products for the textile industry.

Our supply chain is extremely efficient and we are able to serve our customers through a digitally-enabled, real-time monitored logistics system. Having invested significant amounts on R&D in the polyester sector, our Reliance Technology Centre, Reliance Testing Centre and Reliance Fibre Application Centre constantly develop and introduce innovative products for the textile industry.

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What is Recron?

RR: Recron® is the flagship brand name of Reliance Polyester. The finest variety of innovative specialty Recron® staple fibres offers great value to customers and desired functional requirements to satisfy the ultimate consumers. Be it apparel, home, industrial or technical textiles.

What are the key attributes of polyester denim?

RR: Polyester in denim adds extra performance. It enables Easy Care jeans that require little effort to launder, iron and maintain. Various treatments, looks and fashion features are made easily possible by polyester in denims. Polyester component also helps control the growth of the jeans that increases the garment life. Additional inherent functionality such as anti-microbial or moisture management can be added through our speciality polyesters

How substantially does polyester effect the pricing of the denims?

RR: Originally polyester made inroads in the denim industry because of its cost effectiveness. However with the introduction of functional and high performance polyesters, there is a significant increase in premium denim category.

Does polyester in denim adversely effect the comfort factor of the denim for the wearers?

RR: No, not at all. On the contrary, polyesters, used in the right proportion and incorporated with proper aesthetics and feel, enhance the wearer's experience and comfort.

How are polyester denims being accepted in India? Will there be an increase in demand or otherwise?

RR: Denim has been a wardrobe staple and a fashion essential for decades. The trend towards polyester is gaining pace because of various fashionable possibilities it provides in line with changing trends and consumer expectations through colour, weaves or textures. Value in use with Polyester through better working efficiency and product flexibility are the other contributing factors.

Globally and in India, consumers are looking for higher performance and functionality with optimal sustainability quotient like easy care, longer life, better protection etc. These needs can be served easily through performance polyesters.

Which top denim brands or manufacturers are you supplying to in the domestic/ global markets?

RR: We supply our performance polyesters to most of the leading fabric manufacturers and through them to a significant number of brands in global and domestic markets.

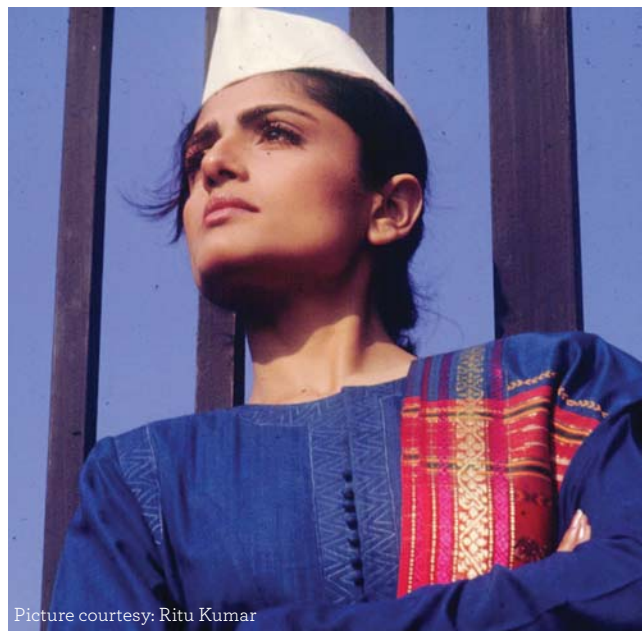
What are the top recent innovations you have seen being made in denim fabrics in India?

RR: Some of the few innovations for the denim industry are 4 way stretch, Eco-made performance Denim, Hybrid Denim, Body Shaping Denim etc.





Picture courtesy: Rajesh Pratap Singh



Picture courtesy: Ritu Kumar

Khadi Denim, a hand-spun and hand-woven soft-feel fabric, is the new rage in the fashion world. Khadi Denim being handmade has a special appeal and excellence that goes beyond mechanical perfection. Its smooth texture and softness is higher than the regular denim. And, further being eco-friendly, skin-friendly and having the special Indian appeal, Khadi Denim is a great sensation amongst today's youth.

KHADI DENIM

THE INDO-FABRIC OF THE YOUTH

The Khadi & Village Industries Commission (KVIC), the apex body that operates with the mandate to promote Khadi, spoke to Bharti Sood of Images BOF about the initiatives being taken to promote Khadi Denim as a symbol of pride of the youth of India.

How popular is khadi denim wear among India's youth today?

Hand-made denim fabrics, garments and made-ups are the in-thing in fashion today. KVIC has developed complete range of environment-friendly, socially responsible khadi denim products exclusively for today's youth. The denim fabric is handcrafted, eco-friendly and offers a smooth texture and softer feel than other denims. The product range consists of jeans, jackets, dresses made in Khadi Denim fabric. Khadi and Village Industries Commission (KVIC) offers these unmatched offerings by adopting a holistic approach taking into account the entire life cycle of an apparel, from its carbon footprint to the livelihood of the spinners and weavers producing it.



What are the attributes of Khadi Denim as a fabric? Why should the user buy Khadi Denim instead of just denim?

Firstly, to understand the relevance of Khadi, it is very important to go beyond the fabric. Khadi is not merely a piece of cloth. It is a symbol of empowerment, of pride, of history. Hand spun, hand woven, purity and elegance are the attributes of Khadi. As a fabric, it has truly evolved and come a long way from its traditional form “Khaddar” to very fine and comfort “Khadi”. Khadi is also symbolic of Indian self-esteem, self-efficacy and self-reliance. It stands for uniformity and simplicity. Khadi denim is an initiative to revolutionize traditional Khadi wear into a fashion fabric that appeals to the youth and competes in line with popular brands in terms of quality and cost effectiveness. By buying Khadi Denim the user not only enjoys the attributes of Khadi as a fashion fabric but also contributes to the society in terms of providing sustainable employment opportunity to millions of poor spinners, weavers and other artisans associated in crafting the fabric.

What efforts are being made to promote Khadi Denim as a symbol of pride of India, as a trendsetter for India’s youth? What efforts are being made to create the awareness?

Today denim as a fabric is very popular as a casual dress around the world. Although denim wear is mostly regarded as a fashion garment, but they are still worn more by different sections of the society due to their high durability, as compared to other common fabrics. Similarly, handspun, hand-woven and processed Khadi Denim is more durable as compared to other contemporary fabrics and this is its USP. Various efforts are being made for creating awareness amongst youth through advertisements, fashion shows, exhibitions, expositions, audio



कामये दुरवतप्रानाम्।
प्राणिनाम् आतिनाशनम्॥



video presentations, participation in international trade fairs like IITF, direct interaction with student groups in colleges, universities, etc.

How many stores and outlets does KVIC have as on date and out of these how many stores showcase the khadi denim range?

Denim Khadi has been launched by KVIC all over the country. KVIC has seven flagship departmental sales outlets called “Khadi India” situated in New Delhi, Mumbai, Kolkata, Patna, Ernakulum, Bhopal and Goa. Khadi Denim is available in all these sales outlets. Other than these there are 7,050 institutional sales outlets managed by individual Khadi institutions across the country and Khadi Denim is also being made available at these sales outlets.

Has the ministry introduced any special schemes to promote Khadi Denim?

Yes. The Khadi Reform and Development Programme of the Ministry of MSME through financial assistance of Asian Development Bank has been very instrumental in research, production and promotion of Khadi including Khadi Denim.

What initiatives is the Ministry taking to tie up with major brands in India for Khadi Denim?

KVIC has already signed an MOU



with M/s. Raymond Ltd., and Khadi by Raymond fabrics has already been launched. Further new tie up initiatives have been made with M/s. Arvind Limited, India’s largest denim manufacturer. Arvind Ltd. is a key player in bringing innovative Khadi Denim to the market, having invested in R&D and understanding the commercial, social and marketing angle that fits in with East-West narrative. Another tie up arrangement with M/s. Aditya Birla Ltd., is also in the offing.

Do you have any plans to tie up with international brands to promote Khadi Denim?

Yes, Khadi would like to have direct tie up arrangements with international brands like Levis, Lee and Wrangler in the future.

What is the benefit of your regular association with designers?

Today, marketers are increasingly leaning on designers for business ranging from signature lines to special ranges to attract new class of young and ambitious consumers who are happy to pay premium to stand out in the crowd. Since the designers have



a specific style, and create a fusion of Indo-western designs that fit in brilliantly for inspirational products, tying up with them is the real in-thing today.

Do you have any plans for selling Khadi Denim through online stores?

KVIC already has a tie up arrangement with M/s. PayTm for online marketing of KVIC products through e-commerce initiatives. Proposals are in the pipe line for e-commerce initiatives with online marketing platforms of M/s. Amazon.com, Flipkart.com, Snapdeal.com, etc. to market KVIC's range of products, including Khadi Denim.

What is being done to increase the production capacity of Khadi Denim?

In a bid to increase production of Khadi, KVIC is planning to upgrade its six cotton sliver plants under the Khadi Reform Development Program (KRDP) this year. The plants' production capacity will be increased by 40 percent from current four million kgs. to 5.6 million kgs. a year. The commission is to spend ₹35- ₹40 crores on the upgradation of the plants. In the first quarter of the next financial year, upgradation will be commissioned in all the six plants. The commission

is also considering setting up new sliver plants to increase the production capacity by 40 percent. Apart from the above, the Department of Economic Affairs, Ministry of Finance has tied up funds from Asian Development Bank (ADB) amounting to US\$150 million for implementing comprehensive Khadi Reform Programme worked out in consultation with ADB and KVIC. Under this reform package, it is proposed to revitalize the Khadi sector with enhanced sustainability of Khadi, increased incomes and employment to artisans and increased artisan's welfare.

What efforts are being made to improve the quality of the Khadi Denim products?

To improve the quality of Khadi Denim products, great emphasis is laid on implementing the latest production techniques and on use of perfect indigo dye amalgamation with Khadi fibre. Steps are being taken to tie up with national and international textile experts like NITRA, CITRA, NIFT, NID, SASMIRA. Consultations with corporates like Raymond, Birla Group, Arvind etc., are also done on regular basis. Since Khadi Denim is quite a technical product and requires specific treatments for indigo to react to the fibre. It also needs to be woven in a certain way with a certain weight hence all technical inputs are being synergized to match Khadi with denim technology.

How big is the potential for denim Khadi? Do you regard it as a revolutionary product? And how will you promote its sales further?

Yes, Khadi Denim is indeed a revolutionary product. In a bid to popularize indigenous products among India's youth and generate new employment opportunities in remote areas, KVIC is adopting new measures to promote Khadi wear in India in the form of denims, for both men and women by launching

a unique range of khadi denim wear at its departmental stores. The main aim of this initiative is to promote youth-specific indigenous products like Khadi Denim. To encourage the youngsters to experience Khadi Denim as the product of their nation and buy the same, as it was better than the average denim wear available in the market. KVIC is sending messages to the youngsters to experience Khadi fabrics as it is India's own product and the pride of India, the symbol of our country. The Khadi Denim fabric has a smooth texture and is a little softer than regular denim. It is eco-friendly and skin-friendly. The design of these garments, which are hand-spun and hand-woven, reflects a strong Indo-western flavour and is especially crafted to cater to the style needs of India's youth. KVIC is planning to promote this exclusive range across its sales outlets in India.

KVIC's Khadi Denim is produced by KVIC's Khadi Institutions and our mandate also includes creating "maximum employment opportunities" in remote areas by this initiative. And as KVIC is a body of providers and not traders and KVIC has no competition in the market because only KVIC can produce skin/eco-friendly fabrics. KVIC is to soon launch franchise schemes so that Khadi Denim is available at all local and premium markets.

KVIC had recently launched a range of jeans and jackets for both men and women in Khadi Denim. Have you introduced any more products recently?

KVIC has made tie up arrangements with international designers of repute like Ms. Ritu Beri. More attractive range of Khadi fabrics, apparels, ready-mades, designer wear in new designs and styles are being introduced on regular basis.





TEX ZIPPERS: DENIM MAGIC IN METAL

Tex Zipper is a multinational zipper company that was established in 1987. The company today has manufacturing facilities in India, Bangladesh and Vietnam. It also has a metal buttons manufacturing unit in Bangladesh where it makes shanks, rivets, snaps and other metal trims so that garment manufacturers can have a one-stop solution for zippers and metal buttons, perfectly matched in colour. Tanya Krishna, Images BoF, talks to **Mudit Tandon, Vice President, Tex Corp Ltd.**, to know what is trending.

Tell us about your core consumer base.

Mudit Tandon (MT): Our customer base has two broad categories — the first category is the fast fashion industry. Our USP is speed, and this is critical for the fast fashion industry. The second category of customers are large global brands who need large capacities. Tex's capacities in each of the countries we operate in are deep, and capable of handling large as well as small orders. We are the zipper of choice where lead time is of importance.

Tell us about the product portfolio that Tex has for denims.

MT: Denims are designed to be rugged. They need to withstand the heavy chemical wash program plus the rough & tough usage by the end consumer.

Tex has two product technologies specially for the denim market — Tex metal zippers with the proprietary Defender coating provides superior protection against abrasive chemicals. Tex also has a product specially for denim applications called the DN+ zipper. This zipper is much stronger than regular metal zippers and is apt for usage in denims.

We have a special team which takes care of customers of denim products. You can mail that specific team at denim@texzipper.in and they will get back to you with recommended products for your application.

What are the top innovations done for denims? Tell us about some of the most creative developments in the segment.

MT: India has a unique problem in denim — the country's industrial washing is largely unorganized, which results in poor control on standardization of wash precautions. This causes more zipper breakage in India than is seen in other parts of the world during industrial washing. To specifically tackle Indian wash conditions, Tex has launched a range of zippers called DN+, which is specially for denim applications. This zipper uses a patent-pending technology called Uniform Stress Distribution (USD), which eliminates point loads on zipper teeth and evenly distributes stress across the profile of the teeth. This significantly reduces garment wastage during washing by keeping the zipper intact.



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Tex's DN+ zipper is a uniquely Indian zipper for the overly harsh Indian conditions in the wash industry.

How do zippers made for denims vary in their make up from others?

MT: Zippers for denim have to have significantly more strength than normal zippers. They also should not run lightly, otherwise they feel flimsy when operating it. The perfect zipper for denim is one that runs tightly but without any jerks, and one which can withstand high amounts of force, significantly more than normal pants.

When purchasing zippers for denim, customers must use zippers which are specially made for that application. Buying normal metal zippers or standard zippers will result in slightly lower upfront costs but will end up costing losses which are orders of magnitude larger because of higher garment wastage. A zipper costs such a small fraction of the garment price, that it really is not worth the risk.

What percentage of your zippers and other hardware are used in denims and are made for this market?

MT: About half of the zippers we make are used in pants and denims.

Also, tell us about the trends in metals and finishes being used for zippers.

MT: The new trend in metal hardware and zippers for high end brands is a distressed and worn finish. A worn finish is different from standard antique finishes – it has more highs and lows, and no two pieces look the same. The trend in metal hardware is moving away from the boring antique brass or OEB colors and is moving towards coppers and oxidized finishes. This trend is here to stay as zippers are a fashion item now, not just a trim.



MILESTONES

- 1987
Tex begins its journey with start of first manufacturing facility at Gurgaon, India.
- 2010
Another overseas manufacturing starts at Bangladesh
- 2013
Tex launches new range of super premium zippers for the luxury segment called, T+
- 2014
Global Design & Development team set up in Tex, Gurgaon
- 2014
Tex Bangladesh starts its first Button factory
- 2015
Another overseas manufacturing starts at Vietnam
- 2015
Overseas sales office set up at Pakistan, Korea, Sri Lanka and U.S.A

Tex has been selling to Kenya, Vietnam, Indonesia, Madagascar, Pakistan, Singapore, Spain, Greece, UK, Belgium, Germany, Egypt, Netherlands, Dubai and Hongkong for the last 20 years.

INNERWEAR SPECIAL ISSUE

With ever increasing fashion awareness, deeper penetration of organised retail, and the growing youth population, innerwear is emerging as a most promising category in apparel retail. In 2015, the innerwear market was estimated to be worth ₹28,133 crore and was expected to grow at CAGR of ~13 percent over the next five years and reach ₹51,913 crores by 2020, and as such it holds immense business opportunities. Simultaneously, the definition of innerwear too has broadened from a necessity commodity to comfort wear, designer wear, and luxe-premium.



The August 2017 issue of Images Business of Fashion is an 'Innerwear Special'. In it, we will present the opportunities and challenges being faced by the segment, new brands, new trends in fabrics, design, finishes, colour choices, new fits, ...and much more.

HIGHLIGHTS OF THE 'INNERWEAR SPECIAL' ISSUE:

- Innerwear market sizing, trends and dynamics
- Innerwear retailing excellence
- Best innerwear stores
- Top innerwear brands
- Emerging specialty brands
- Online sales of innerwear
- Sleepwear and loungewear
- Innovations in shapewear
- Growth of swimwear & beachwear in India
- Emergence of athleisure & yoga wear
- Thermal wear
- Innerwear for kids and teens
- Innerwear design and sourcing
- Latest trends in ingredients and trims
- Use of lace, silk and satin
- Anti-bacterial and organic innerwear
- Functional Trends: Innerwear for kurtis, backless dresses, short dresses, maternity, bridal

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GLOBAL DENIM TRENDS - SS 2018

Trend Council is an affordable subscription based online trend tool for busy designers and fashion professionals delivering expert analysis and design inspiration. Trend Council offers seasonal forecasting runway analysis, colour forecasting and original print downloads. Their team provides a great wealth of consulting services for design needs. Trend Council focuses on the ladies, juniors, men, younger men and active markets. Their analysis is synthesized into key reports identifying items by product category that guide the design process and buying strategies for seasons ahead. Our seasonal Forecasting presents the most important trends for the season with inspirational mood boards, colour palettes, key items, accessories and material call outs providing you tool and insight for your seasonal development.

Trend Council presents exclusively for Images Business of Fashion its top Global Denim Trend picks for SS18. In the following pages you will find the trends that will dominate the world of denim fashion in the immediate future. The collection encompasses Trend Council's forecast for Mens SS18, Young Mens SS18 and also for Women's SS18 and Junior's SS18.

TREND COUNCIL

TREND COUNCIL™

www.trendcouncil.com

AQUAMAN

Aquaman deep dives into the water of indigo blue. Washes of ombre and tie dye mimic waves and reflections of the ocean while patch-worked scales and tangled indigo fringe resemble deep-water fish.



MENS SS18

TRIBESMAN

Tribesman's denim draws from indigenous hand-crafted techniques from a melting pot of cultures with batik and wax relief dye techniques as well as intricate textural patchwork and embroideries from African tribes.





BRITISH RAJ

The British Raj story is rooted in India and we see all the craftsmanship in denim from this region. Yarn dye indigo madras plaids and awning stripes, embroidery and patchwork, as well as traditional Indian paisley motifs.



MENS SS18

RAT PACK

As denim trends continue to play with tailoring we see the Rat Pack trend picking up and embracing it wholeheartedly. Iconic 50's patterns of window-pane plaids and banker stripes are redefined in indigo blues. Base cloth is dark, raw and rigid to handle structured tailoring.



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BREAKFAST CLUB

The 80's inspired **Breakfast Club** captures denim from that time period with acid wash in indigo as well as color being key. Heavy bleached shirting, sherpa lined denim jackets and plaid trims finish off this story.



YOUNG MENS SS18

GREASER

Greaser denim captures the essence of 1950's denim which was void of washes and finishes. Indigo and black denim act as the key base and vintage bowling league and gas station graphics show up as embroideries and patches.





LAHAINA

Lahaina denim is like a trip to a vintage surf shop. Ocean waves, palm trees and tribal blanket motifs are over-dyed, dip dyed and tie dyed. Denim is treated to look sun-baked and heavily worn through sand blasting, nicks and tears.



YOUNG MENS SS18

POPEYE

This trend is full on vintage nautical in dark and medium washes. We see stripes in indigo knits as well as engineered on back pockets and hems. Authentic wax coatings, dip dye and whimsical anchor embroideries finish off this voyage.



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HOT TROPICS

Hot Tropics denim is an explosion of colored denim and tropical printed stretch twill in short and sexy silhouettes. Key here is tie dye effects and heavy bleached denim with brightly embroidered trims and neon tints and ombre effects.

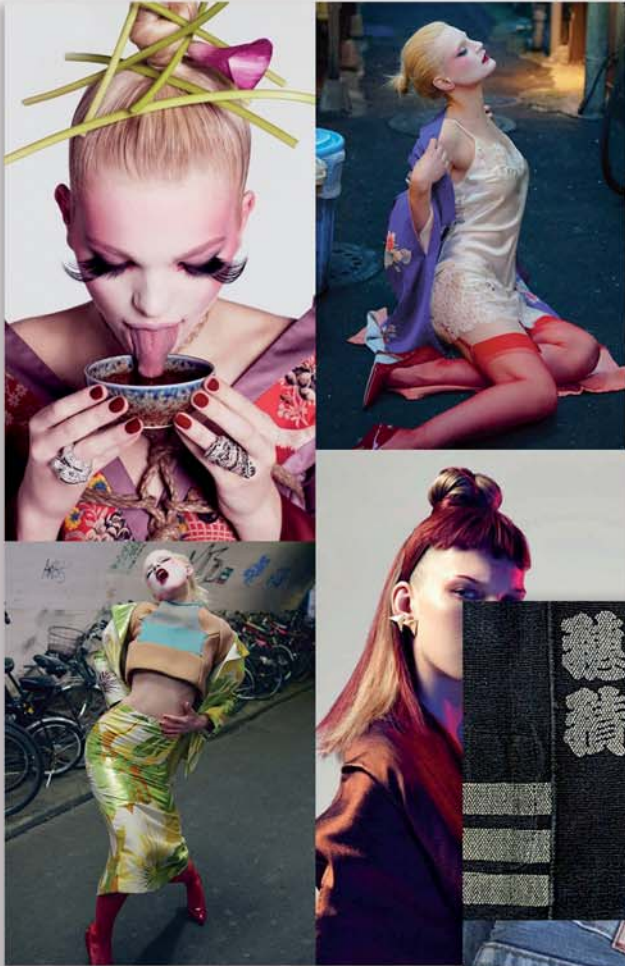


WOMENS SS18

ABORIGINE

Aborigine denim draws from indigenous hand-crafted techniques from a melting pot of cultures with Batik and wax relief dye techniques as well as intricate textural patchwork and embroideries from Western tribes.





URBAN GEISHA

Urban Geisha grabs hold of traditional kimono detail, textiles and embroidery and applies it to denim. There is a graphic nature to this story with jacquard and overprinted Japanese block type as well as geisha girls and koi fish motifs.



WOMENS SS18

DA VINCI

We find delicate and very spiritual messages coming from Da Vinci denim. This theme lends itself to more vintage washes and focuses on gold foil coatings, gold printed floral placements as well as gold studs and hardware. Laser cut denim is inset and overlaid.



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HOLLYWOOD BEACH

We start with dark and medium wash vintage denim, then things get wild. Studs and rhinestones outline silhouettes and add bling to retro airbrush placement screens. Heavy embroidery outline knee cut outs, fill in back pockets. Heavy embroidery outline knee cut outs, fill in back pockets.



JUNIORS SS18

NINA

Nina Hagen denim is glam punk all the way with bleached out and tie dye covered with large scale placement embroideries, leather lace up details and a ton of pins and badges.





GRANDMA'S ATTIC

Grandma's Attic pulls inspiration from the 1950's, pulling nostalgia from a flea market. We find jeans that feel and are made from a McCall's pattern mixed with voile prints. Lace comes in as insets as well as cotton lace and crochet edge trims.



JUNIORS SS18

MISS FIRECRACKER

Bursting with Americana, Miss Firecracker takes vintage denim washes and adds the red white and blue with flag print pockets, schiffli embroidery, cotton lace trims, bandana prints and fringe.



JEANS OF THE STARS

By Aarti Kapur Singh

We think we speak for most men when we say that denim (especially jeans) are going to be the most versatile piece of clothing that we will ever own in our entire lives. They can practically be used anywhere — at home, during work, walking the dog — the possibilities are endless. Denim is a beloved textile for good reason and part of its enduring legacy is due to designers re-imagining it every season. A basic pair of jeans will never get old but seeing it in the form of joggers or an unusual styling makes us fall in love with it over and over again. Much like machismo, denim is forever.

There are two constants in pop culture: denim and celebrities. Indians buy about 200 million pairs of jeans each year. Celebrities help move a lot of those pants, endorsing specific brands by wearing a pair on a paparazzi-laden street or even on their trips between airports. While tried-and-true jeans are a must for any respectable man's wardrobe, there's no time like the present to break away from the norm and try out the latest trends of the season. Let's hear it from some of India's best looking men about how they are shaking up 2017's denim fashion scene.

LIGHT SHADES

From light indigo to sky blue, the market's awash with washes that offer the perfectly pale counterpoint to punchy colour up top. But beware, light washes tend to work best for light men, so stick with medium to dark washes if your thighs are more rugby forward than fashion model.

Trend Ambassador: Ranbir Kapoor, Actor - "I prefer light shades in denims. I think it is a nice way to break up monotony if you pair it with darker shirts or tees. They also tend to have that vintage and worn look that I so like about jeans. So the more faded a pair of jeans is, the more partial I will be to it. Light jeans look really cool with jackets too. I love the fit of Tom Ford, True Religion and Diesel so I tend to buy a lot of my jeans from these labels."





SELVEDGE

Adopted by the fashion elite as an authentic and high calibre alternative to classic stonewashed denim, selvedge or raw denim, is heavier, firmer and darker in hue than regular denim. Featuring a unique edge at the hem that prevents the fabric from unravelling during production, modern selvedge denim is still produced the way it was in the early 1800s: woven on a traditional shuttle loom. For this reason, it is considered a higher quality denim to mainstream stonewash, as the product of an exclusive and storied manufacture process. With an appealing crisp aesthetic when new, once worn-in selvedge denim takes on a protagonist quality of its own.

Trend Ambassador: Akshay Kumar, Actor - "My denims are not just garments or clothes, but they are an extension of my personality. I remember I had forgotten to pack my favourite pairs for an extended outdoor shoot. I actually asked my wife to send them by the next flight. I used to have a fixation for acid washed denims, but now it is more to do with relaxed fit and lightweight denims. I sometimes wonder why people have this 'what to wear dilemma'. Whenever I am in doubt, I just wear blue jeans and a white shirt. I like darker jeans — the dirtier looking, the better. Simply because they look nice with t-shirts and even better with shirts. So the casual to not-so-casual transition is easy to achieve. I have been fond of Levi's even before I started endorsing them."



STRAIGHT LEG JEANS

The straight leg is a traditional, all-American classic. Most often cut straight from hips down the legs with little tapering, straight leg jeans look best on athletic guys — a generous shoulder-to-hip ratio working to counteract the bagginess of the cut. In casual settings, slim men can also pull off the straight leg, albeit in more of a casual, Bohemian sense.

Trend Ambassador: Hrithik Roshan, Actor - "My jeans have to always fit just right — never snug or baggy — and they have to be perfectly distressed. The trick is to pick jeans with fraying in the right place, such as the knees or back pockets and avoid those with frays in odd places like the shins or thighs — they'll look fake. Since I am so particular about my jeans, I prefer those from my own brand, HRX. Armani and Boss are good too."





Trend Ambassador: Navv Inder, Singer - "The big deal about jeans is that there is no big deal about them and that's why everyone likes to wear them. I am no different and I cannot imagine life without my denims. I cannot wear skin-tight jeans at all! I love wearing dark-coloured denims mostly, but I must buy a denim piece whether it is a jacket or a bottom if I see one in the classic denim blue shade. A nice straight black pair, a loose, faded and ripped classic blue and an anti-fit one are three must have pairs every man should have in his wardrobe. Personally, right now I am hooked to ripped jeans. I also like bleached and charcoal grey shades and love pairing my denims with basic tees and check over-shirts. What is important is to wear that perfect fitted t-shirt and break in your own jeans carefully. The secret to pulling off a relaxed fit is to keep whatever you're wearing up top fitted. To nail the ideal up-down balance, pair generously sized jeans with a simple white t-shirt and a bomber jacket maybe. High tops will take your denim look to the next level completely. My favourite go-to denim brands are Diesel and G-Star."

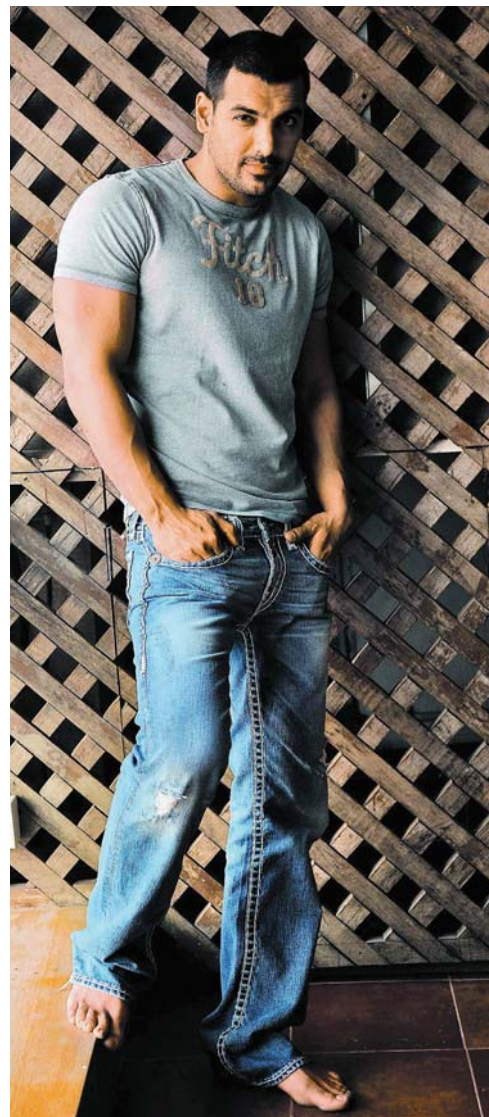


IMAGES Business of Fashion

RUGGED & DISTRESSED

Britches have been getting busted for some years now. If up until now, men's jeans could be neatly divided into two camps: neat, slim, unwashed replacements for smart trousers; and neat, skinny, stretch-heavy replacements for sweatpants; this year's are going back to basics with rips, distressing and raw hems. A raw hem is particularly popular on a slightly cropped jean.

Trend Ambassador: John Abraham, Actor-Producer - "Distressed denims are such a simple way of updating your look. Doing rugged and distressed right is all in the styling, so it is best to maintain its low-key vibe. Raw-hemmed jeans make for quite a grungy look, I always keep the look paired-down with a basic t-shirt. I also think all-over rips look jaded and like you are trying too hard. Henley t-shirts look good if you have a good body. Best to have rips where they naturally ought to be because of the wear and tear of natural fabric — the knees or pockets. My favourite brands, other than my own (JA) are Wrangler, Diesel and J Crew."



LOOSE FIT

Let's get this straight — bootcut jeans are abominations. Also, it's not that skinny jeans aren't a viable wardrobe option; they are — and they're flattering — but not on all men. You wouldn't want your majestic gait compromised by something that is tight and pinches you at various spots. There is a difference, after all, between figure skaters and normal men. Designers are now swapping the sewn-on fits for something roomier. The latest looser cuts as a contemporary take not to be mistaken for 'dad jeans'. (Which are, in their truest form, basically high-rise denim Hammer pants). Once you try a wider leg, you'll instantly feel a sense of comfort and flexibility. That being said, it is important to remember that there is a time and place for everything, including fashion. For example, while wearing overly baggy jeans can be appropriate for a backyard BBQ or a movie night with friends, it's practically forbidden for dates or even semi-formal dos.



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- Promotion of Garment Industry in the state of Telangana & Andhra Pradesh. (Expecting more than 5000 Retailers)
- Fair Venue is having three different zones fully airconditioned and one zone fully air cooled.

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DRESSED IN DISTRESS

It looks edgy, raw and if styled right, sometimes utterly feminine too. Distressed or ripped denim is the best way to bring an edge to your casual look. It can look quirky and effortlessly cool. You can opt for a heavily distressed denims to make a statement or choose subtle ones to tone it down. Ripped denim has been one of the biggest and the most consistent trend so far. It's been trending since aeons and now has a makeover. This style is for anyone looking to step up their denim game. If that's what you want, here's some inspiration you can use. The trend of distressed or ripped jeans emerged in the late 1970s during the punk movement, and was a rage in the 1980s. It has been back on the style radar for a couple of years now. From 2014 till now, distressed denims have been getting much love. Team your ripped denims with a formal white top or a crop top or a ruffled tee – easy, comfy and stylish all at the same time. In whichever avatar, distressed denim never fails to look chic! It's a favourite and hit amongst Bollywood divas. Hear it from them to pick your personal style and incorporate tips to be right on top of the trend charts.

- Aarti Kapur Singh



KRITI SANON,
ACTRESS*

“Oh my Mom is so irritated with my torn jeans! But I love them. Especially when I contrast the ‘rebel’ look with something feminine and goody-goody, such as floral tops. I usually prefer the basic denim blue colour and pair them with ditsy printed tops and shirts. Sometimes I go all out to channel the rock-chic look with jackets or fringes in my accessories. My advice is not to mix and match two different distress denim looks. If you want to appear feminine, use only girly prints or colours to pair your ripped jeans with.”



KATRINA KAIF,
ACTRESS*

“My favourite way to wear torn jeans is with a basic white printed t-shirt. When wearing distressed denims, I keep my makeup glossy and muted to bring out fresh elements.”





“I am a fan of the form-fitting blue jean with rips on the knees. Skinny jeans are the ultimate chameleons of your wardrobe. Dress them up with a flouncy feminine top or go effortless with a simple oversized t-shirt. On my off days, I combine them with a sweatshirt to get my favourite athleisure look.”



“Rocking a pair of distress denim with sequin tops balances the look out by taking it from casual to night out ready! Or a simple white top and sneakers can perfectly finish the chic look making the jeans the statement of your distress denim. In fact, when wearing distressed denim, the key point to remember is that the denim is the focus. Arrange your look around it. That is the mantra I follow.”



“Distressed denims are a wardrobe staple for me! I have lost count of how many I have. I think it is a great way to make a statement about confidence. And contrary to popular opinion, ripped jeans or other denim pieces can also be used for semi-formal wear. The key is to balance the denim with structured pieces like solid crisp shirts and sharp blazers. My favourite way to turn them a little formal is with boots and a leather jacket. I don't restrict distressed denims to just casual looks and wear them very often for appearances or meetings too.”



SONAKSHI SINHA,
ACTRESS*



“When wearing distressed denim, I go for minimalism. Both in the degree of ‘distress’ of the denim as well as how I pair it with other elements of my look. I usually prefer the simplest form of knee slit distress denim with simple tops and minimalistic accessorizing. I usually let the jeans steal the show. I sometimes add a splash of colour to the look by way of brightly coloured accessories - maybe a yellow bag or red sneakers or some other bright accessory. I get so accustomed to my good-fitting distressed denims that I sometimes rip them off completely to get shorts out of them - obviously with frayed edges! ”



DISHA PATANI,
ACTRESS*



“I love the laid back, devil-may-care vibe of torn or ripped jeans. They just look so effortlessly cool. It is a trend most people will either love to hate, or hate to love! I go all out in channelling my inner tomboy when I want to rock ripped denims. I usually prefer them as jeans or shorts and pair them with a basic white t-shirt or tank or an oversized boyfriend shirt knotted at the waist. I never wear jewellery with my torn jeans and prefer a scrubbed-clean natural look in terms of makeup. The only concession I will probably make is by way of high, edgy heels - with studs. ”



ANUSHKA SHARMA,
ACTRESS*



“The ripped boyfriend jean is my favourite! When wearing slashed, ripped or distressed jeans, it is important to remember that it shouldn’t appear as if you are trying too hard, or doing it zabadasti. So it is important that you look as effortless and natural as possible. Since the denim is already frayed or torn, there is no point making it super tight. Keep the fit on the comfortable or loose side. This is why my preferred fit in distressed denims is the boyfriend jean. Also, don’t over-accessorize when sporting distressed denims. It looks very distracting. ”



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HOW IMPORTANT IS FABRIC ROLL PLANNING IN THE APPAREL INDUSTRY?

What is fabric roll allocation or fabric roll planning?

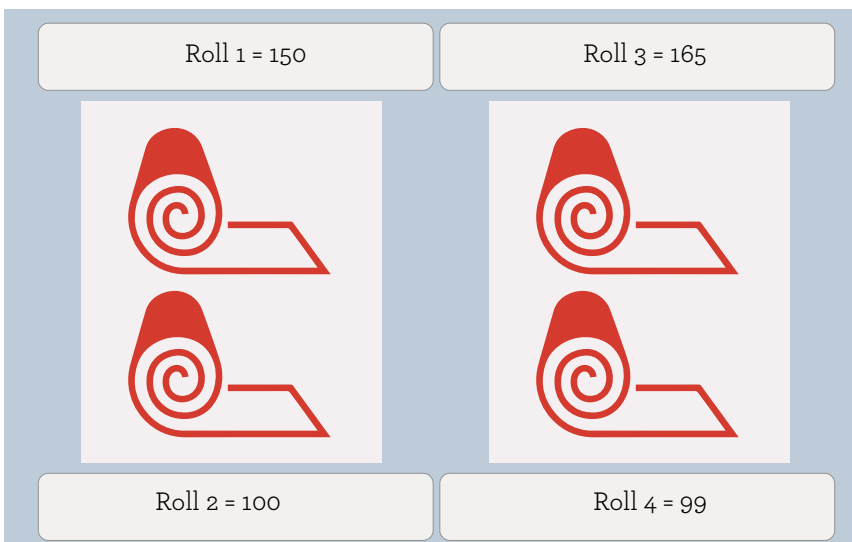
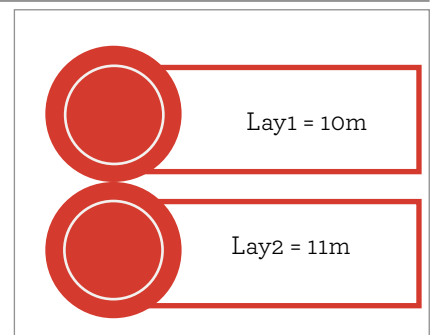
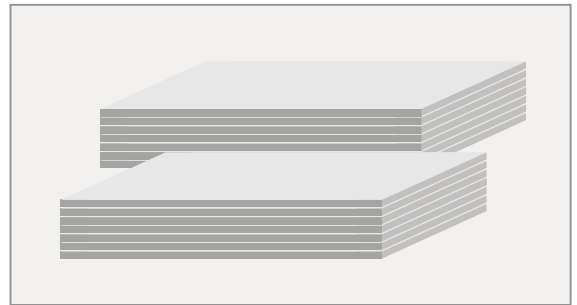
Roll allocation or roll planning is associating fabric rolls to lays ensuring the least possible number of end bits* are left behind.

The main objective of roll association is, to minimize the end bit wastage.

Let us take a practical case to understand this better:

Say, we have 2 lays of 10 m and 11 m respectively, where Lay 1 needs 25, and Lay 2 needs 24 plies.

The fabric rolls used are:



According to the concept of roll allocation, each roll is associated with the lays to minimize wastage.

Hence, calculating the wastage produced by each roll while spreading:

Lay 1 = 10 m				
Roll Length	Roll wise Calculation			Waste
	Plies	Lay length	Used length	
150	Roll 1= 15 x 10 = 150 m			0 m
100	Roll 2= 10 x 10 = 100 m			0 m
165	Roll 3= 16 x 10 = 160 m			5 m
99	Roll 4= 9 x 10 = 90 m			9 m

Lay 2 = 11m				
Roll Length	Roll wise Calculation			Waste
	Plies	Lay length	Used length	
150	Roll 1= 13 x 11 = 143 m			7 m
100	Roll 2= 9 x 11 = 99 m			1 m
165	Roll 3= 15 x 11 = 165 m			0 m
99	Roll 4= 7 x 11 = 77 m			0 m

So, we achieve a roll combination that gives us the minimum possible wastage:

Lay 1		Lay 2	
Roll 1	Roll 2	Roll 3	Roll 4
25 plies		24 plies	

Hence, instead of picking any roll from the fabric store, like the usual process followed, when a certain combination of rolls is selected, end bits wastage is reduced drastically.

What are the benefits of Roll Allocation?

To understand the benefits of roll allocation, let us take a case. This will compare the normal method of picking random rolls for laying with the calculated method of roll allocation.

Using the following cut plan, the total fabric required is 130 meters.

>

We have 2 rolls: R1 and R2 of length 68 m and 62 m respectively.

Marker #	Length	Plies	Total Fabric
M1	10 m	10	100
M2	3 m	10	30 m

Roll #	Length
R1	68 m
R2	62 m

The “general industry trend” is to pick up the first roll and use it till it’s exhausted, and move on to the next.

Following this trend:

For Lay 1 (10 m), we pick roll 1 (68 m). 6 plies can be spread and 8 m fabric will be left in the roll. Now, the second roll, R2, to spread the remaining 4 plies. So, we have 22 m from R2 left at the end of Lay 1.

For Lay 2 (3 m), we can use the 8 m fabric left from R1 to spread the 2 plies, leaving an end-bit of 2 m. Then, using R2, we spread 7 plies, leaving 1 m. After exhausting both rolls we are left with 3 m end-bits and are short of 1 ply in Lay 2.

Marker #	Roll #	Plies	Used	Left		Marker #	Roll #	Plies	Used	Left
M1=10m	R1=68	6	60m	8m		M2 = 3m	R1=8	2	6m	2m
M1=10m	R2=62	4	40m	22m		M2 = 3m	R2=22	7	21m	1m

Marker#2 is 1 ply short
Total End-bit wastage = 3m, 2.31%
Total Fabric needed = 130m + 3m = 133m

So, we have wasted 3 m of fabric and our lay is still incomplete.

Now, taking a look at an alternative approach using Roll Allocation, where, R1 is used to spread 5 plies for Lay 1, leaving 18 m of fabric. Then, using R2, the remaining 5 plies are spread, leaving 12 m in R2.

For Lay 2, the remaining fabric from R1 is used to spread first 6 plies and the remaining fabric from R2 is used to spread 4 plies:

Marker#	Roll#	Plies	Used	Left		Marker#	Roll#	Plies	Used	Left
M1=10m	R1=68	5	50m	18m		M2 = 3m	R1=18	6	18m	0
M1=10m	R2=62	5	50m	12m		M2 = 3m	R2=12	4	12m	0

Both markers are complete
Total End-bit wastage = 0.0%
Total Fabric needed = 130m

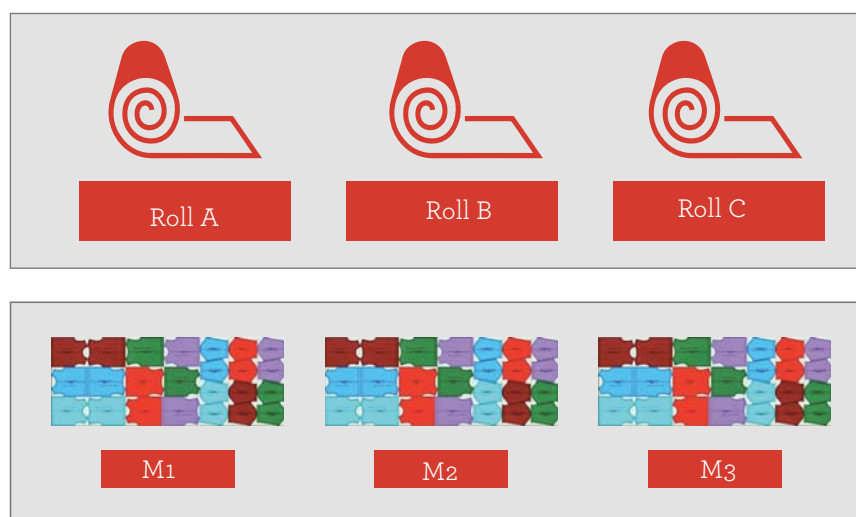
The above calculations highlight that using roll allocation; we completed both the lays with no end bits wastage.

The above case is again a very simple situation. On the cutting floor, the results are further magnified.

How easy is manual roll allocation?

Is manual roll allocation even possible? Manual allocation sounds simple but, is actually a very complicated task. All the permutations and combinations involved in an on-floor situation can be tiresome and prone to errors if done manually.

Let's assume we have 3 rolls (A, B & C) and 3 markers (M1, M2 & M3):



1st Choice	2nd Choice	3rd Choice		1st Choice	2nd Choice	3rd Choice
A	B	C		m1	m2	m3
A	C	B		m1	m3	m2
B	A	C		m2	m1	m3
B	C	A		m2	m3	m1
C	A	B		m3	m1	m2
C	B	A		m3	m2	m1
3!= 6 OPTIONS				3!= 6 OPTIONS		

The total number of roll-marker combinations possible for 3 rolls and 3 markers are 3 factorial times 3 factorial, i.e. 36.

Out of these 36 alternatives, only 1 solution will give the best results minimizing fabric wastage. So the probability of finding the best solution out of these 36 alternatives is just 2.8 percent.

And this example is just a very small case. In actual scenarios on the floor, the number of rolls and markers are immense.

No of Rolls	No of Markers	No of Possible Combinations	Probability of choosing the best combination manually
4	4	576	$1/576 = 0.17\%$
5	5	14400	$1/14400 = 0.007\%$
6	6	518400	$1/518400 = 0.0002\%$

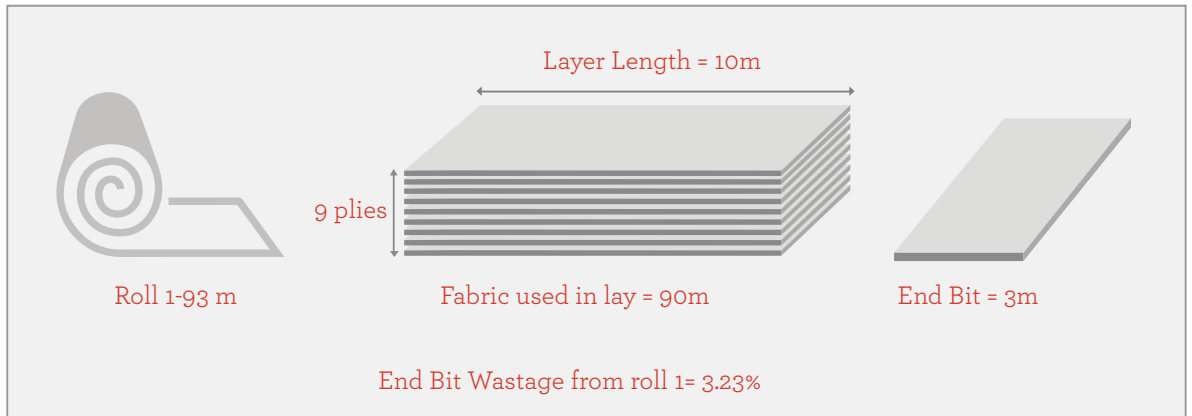
As we can see above, if we increase the number of markers and rolls, the probability of getting the best solution decreases.

What is the need of the hour?

In technology boom, the need of the hour is to deploy automatic systems that can evaluate all the roll-marker combinations and provide the best fit that reduces end bit wastage.

**End bits are the small fabric pieces that are left from a roll post spreading. Being smaller than the lay length, they cannot be utilized in the lay and end up being wasted.*

You can look at the example below to understand how every fabric roll leaves behind an end bit:



End bit wastage is the main reason where the concept of 'Roll Allocation' comes into the picture.



Mausmi Ambastha
Co-founder & COO at ThreadSol

ABOUT MAUSMI AMBASTHA

Mausmi, is an established expert in the garment industry with over 13 years of experience. Mausmi, holds a Masters degree in Fashion Technology from NIFT, Delhi and is also B.Tech in Computer Science. She has written over 20 publications for several leading apparel magazines like StitchWorld and Fibre2Fashion. Mausmi also writes her own apparel blog called Stitch Diary. (www.stitchdiary.com)

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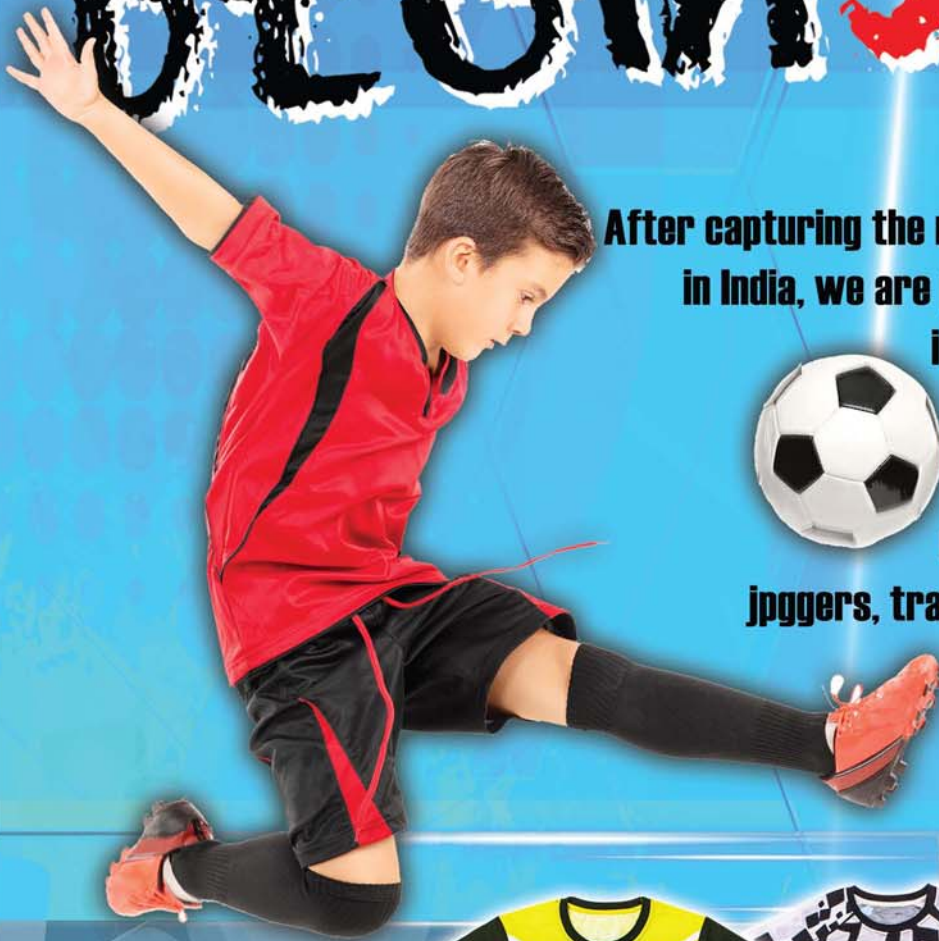
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DELIVERABLES

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

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

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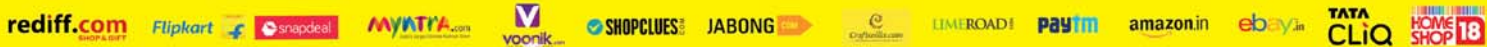
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