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Issue No.

BUSINESS OF FASHION

August 2017

Volume XVIII // No.8 // ₹ 100
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- // LEADER TALK
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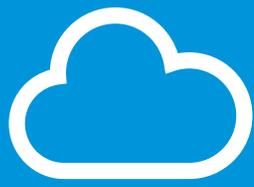
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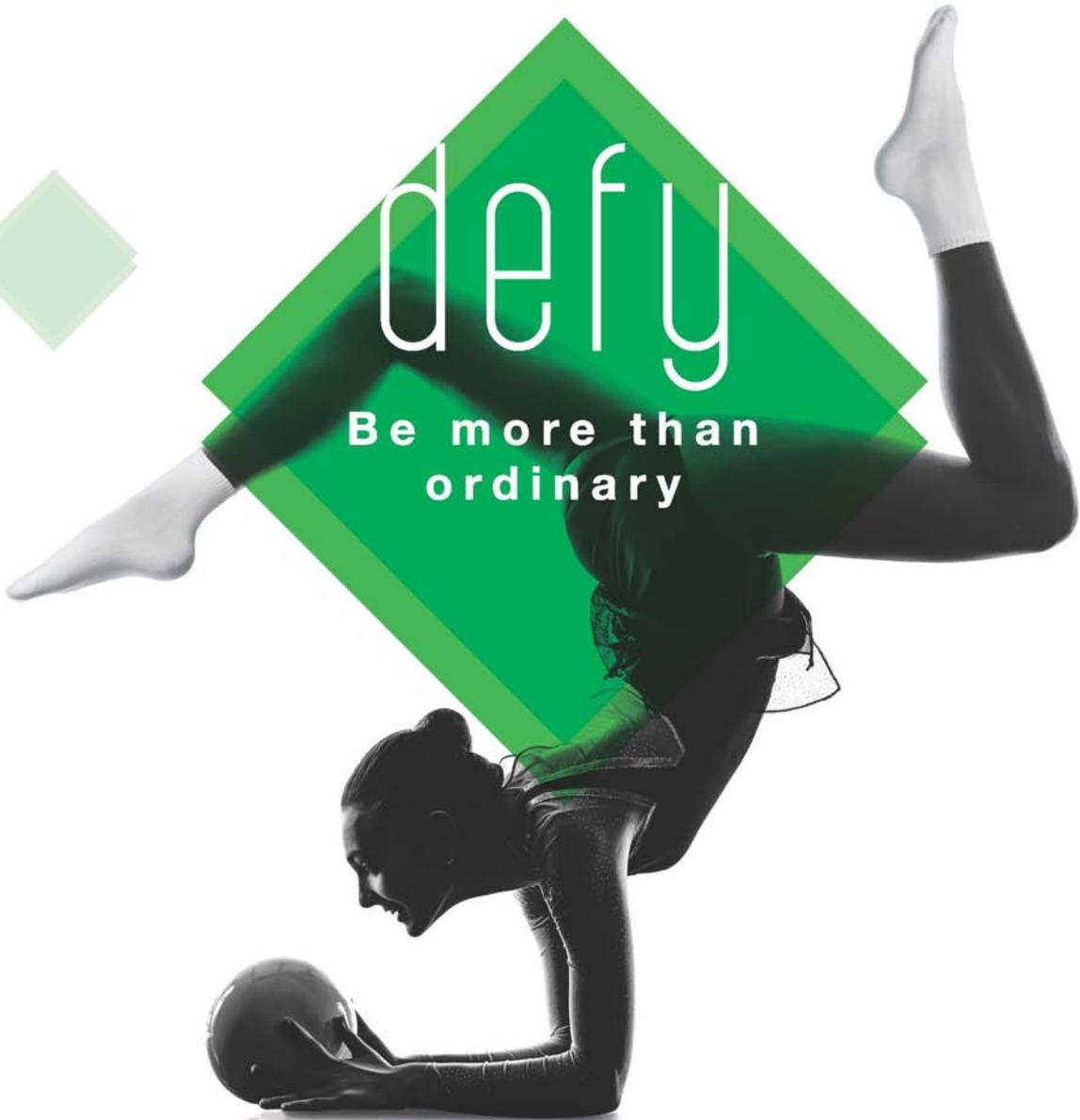


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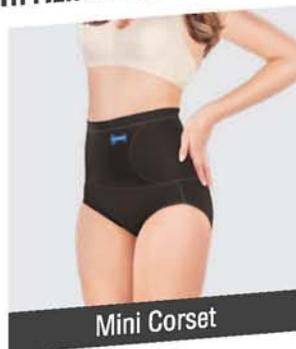
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Dear Friends,

As this season's trade shows end, we are sure the industry is looking positively towards a great Fall/Winter 17-18 season, with all expansion plans in place. This the *August 2017* issue is an *Innerwear Special*, and innerwear is a category that Indian retailers must watch much more closely.

Our research shows that the innerwear market is growing at a CAGR of 9.7 percent which is higher than the average rate of growth of the overall apparel business. Indians are clearly spending more on innerwear than ever before. This category has evolved from a basic commodity to comfort, fashion and even designer wear; and it is these value-added categories that are showing the maximum interest and expansion.

There is seemingly an endless array of innovation and experimentation in the category. Issues of privacy and reach have been tackled efficiently by the growth of e-retail. Players today operate with extreme sensitivity and discretion. The advent of global brands has also catalyzed the development of superior products and service standards in India. commerce.

Considering the massive evolution of the category and how this has led to the branching out of several sub-categories meant that creating a meaningful innerwear issue was a challenging task. Apart from the innerwear market sizing, segment definition, and discussion on key market

trends of the sector in totality, we also delve deeper in many other ways.

You will, therefore, also find in this issue independent articles focused on men's, women's and kid's innerwear; and how innerwear is operating on-line in India. As well as an array of articles on several emerging sub-categories and allied categories—shape wear, sleep and lounge-wear, yoga wear, beachwear, thermals, socks, etc. Each one of these articles explores the major drivers of each sub-category, their target segments, presents the top running trends, and what the future holds for that segment.

In the *Fashion Creation* section Manohar Samuel, President - Marketing, Grasim Industries Ltd., explains the criticality of great ingredients in innerwear. Veteran fashion columnist Meher Castelino reviews the trendy innerwear being introduced by the designers and the new vistas it explores today. We also report on other celeb trends. The *Fashion Business* section showcases recent brand launches and extensions, acquisitions, and key store openings.

All this and more. We hope you enjoy going through the issue.



Amitabh Taneja

>

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LETTERS TO THE EDITOR

I have been a regular reader of the Images Business of Fashion magazine. The July 2017 issue featured a detailed interview with Ram Sareen from Tukatech Inc. It was a great read with lots of insights for the Indian fashion market. Its nice to see that companies like Tukatech are working so hard in order to expand its working spheres in India.

- **Varun Budakoti, Manufacturer, Vadodara**

Denims are a must-have wardrobe staple for men as well as women. Firstly, I loved the July issue for being extraordinarily detailed and engaging. Secondly, the articles on the trending designer pieces in denim fabric, trends in denims among the celebrities and most importantly, denims trend forecast for Spring/ Summer 2018 by Trend Council, was very interesting.

- **Aakriti Polekar, Mumbai**

Denims are the most in demand all over the world for its durability and fashion quotient. But denims are, at the same time, causing maximum harm to the environment. In such times, appreciating the sustainable and ethical practices followed by the denim brands in order to prevent the hazardous impact on the environment is laudable.

- **Shivani Arora, Delhi**

The quality and the design of Images Business of Fashion makes it stand out among the rest of the B2B magazines. The strong editorial content and consistent business insights make it an important monthly read for me.

- **Sumedha Gehlot, Udaipur**

I am an interior designer and design for retail spaces and stores. I loved the article by Lisa Mukhedkar from Restore. She has done a tremendous work while designing the Roadster store. Such write-ups really inspired me for better work. I hope to read similar articles on stores and store designs/ interiors in your other issues too.

- **Sukriti Kesarwani, Lucknow**

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The Donear Group announces the acquisition of Grasm Bhiwani Textile Limited (GBTL), the poly-viscose suiting fabrics subsidiary of Grasm Industries.

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INDIA ENTRY

Bestseller Brings Selected Homme To India

Bestseller launches Scandinavian men's wear brand Selected Homme in India with the opening of two exclusive stores in Mumbai.

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LAUNCH

United Colors Of Benetton Launches Activewear In India

UCB introduces its first activewear collection in India which is positioned within its 'Undercolors' portfolio.

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CAMPAIGN

Bally's First Asia Pacific Spokesperson

Bally has enlisted leading Chinese actress Tang Yan as their first ever Asia Pacific spokesperson. Launches her in the brand's new Autumn/Winter 2017 ad campaign.

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CAMPAIGN

Gritstones Ropes in Amit Sadh As Its New Brand Ambassador

Gritstones, the online men's fashion brand ropes in Bollywood actor Amit Sadh to acquire a more youthful imagery.

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INFRASTRUCTURE

Howrah To Have First Ever 'Hosiery Park' In India

WBHA in association with WBSCIDC has acquired 125 acre land in Howrah district to develop a Hosiery Park.

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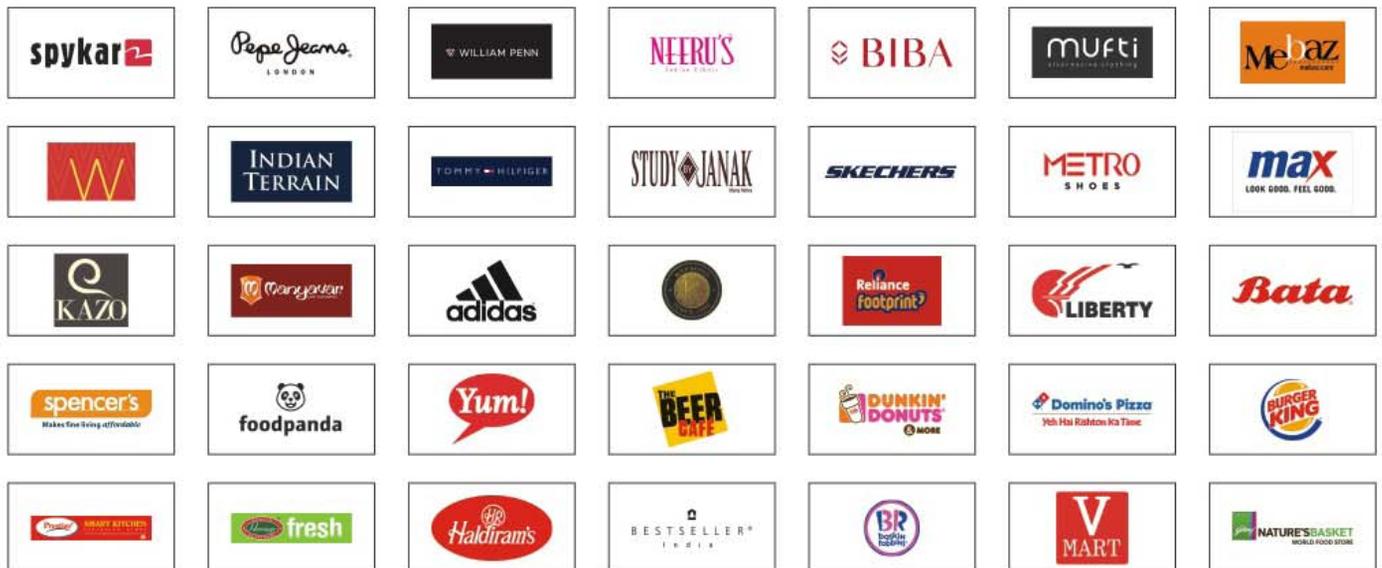


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GRISHTI

Collection: Grishti is a manufacturer of ladies scarves. The newly opened kiosk offers a huge range of creative scarves and designer stoles to its customers.

Store Theme: The new kiosk has a classy and joyful ambience with bright coloured scarves giving it a lively picture. The rough wood with copper fittings give it an ethereal look and the screen at the side makes it come alive, guiding the customers about the latest trends in scarves.

Store Interior: The kiosk is a spacious trend-setting showcase of the elegant and classy collection of scarves. The walls are made of rough wood and the flooring is done with wooden pallets. The copper brackets and channel shelves add an extra star to the overall look.

Store Designer: The kiosk was designed by Chaalo designs (Sujan Singh Guller).



BRAND:

Grishti

PROMOTER:

Girish Ramchandani

LOCATION:

Celebration Mall, Udaipur

SIZE OF THE KIOSK:

70 sq.ft.



BODYCARE

WOMEN'S INNERWEAR

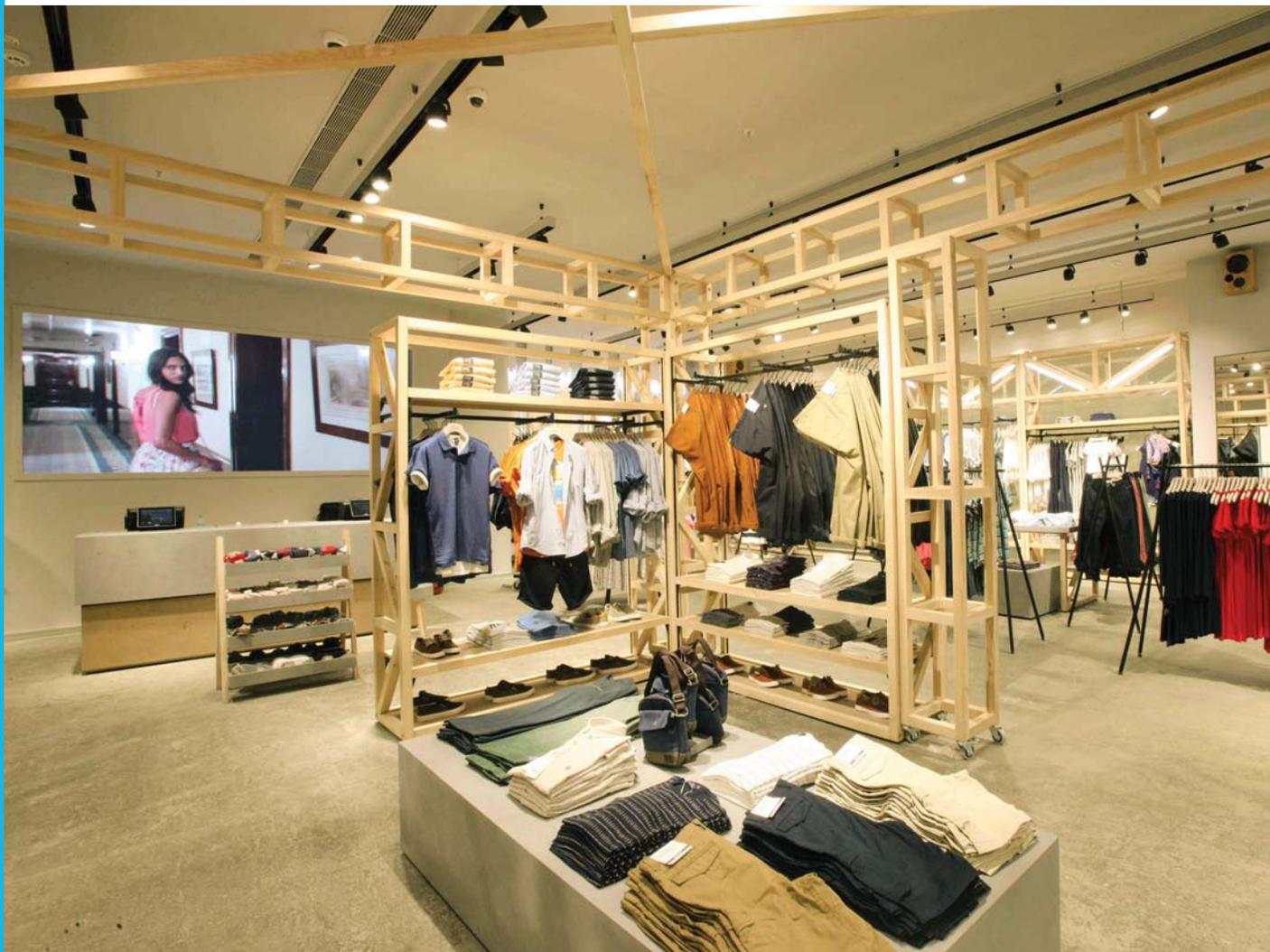


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SPRINGFIELD

Collection: Springfield is an international fashion/casual wear brand for both men and women who are looking for urban casual and trendy wear. The brand's latest summer collection explores the theme 'casual spirit with big splashes of colour' and features a wide range of collections including *Ethnic Vibes*, *Say it with Colours*, *Let's Get tropical*, *Block Colours*, *Soft Jungle*, *IndigoBlue* and *Daily Smart* for both men and women.

Concept of the Store: Urban

Store Interiors: The store's micro-cemented walls flaunt a classic colour scheme in grey and white, which is further intensified by clear LED light sources. The inside polished concrete flooring further brightens up the ambience while giving it a rustic flavour. The merchandise are neatly placed in fixtures of wood and iron. The store also encompasses an attractive visual display window that displays the SS and FW collections.

Store Designer: Grupo Cortefiel Franchise Development and the VM team.



BRAND:
Springfield

PROMOTER: Tablez India
(Master Franchise for brand owner Grupo Cortefiel in India & Sri Lanka)

LOCATION:
Phoenix Market City Mall, Whitefield

SIZE OF THE STORE:
3,000 sq.ft.



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WOMEN'S SECRET

Collection: The Women'ssecret innerwear collection is exquisite, seamless and sensuous which ensures no visible lines, and features a special range of bridal lingerie. With a strong youth connect, Women'ssecret targets a wide spectrum spanning those in the age bracket of 25-45 years and offers a stunning variety of options for all to choose from.

Theme/ Concept of the Store: Women'ssecret stores are easy, feminine and creative. Designed from the heart, it's a place for women to feel at home and is adaptable to many layouts. The store's unique concept has a personality that best reflects the brand's philosophy – pretty, comfortable and sexy.

Store Interiors: The debut store's walls feature a fresh mint colour scheme against white rustic bricks and pink. The ceramic tiles and copper joints perfectly compliment the wood, iron and copper shelves and merchandise placement fixtures. The windows (visual displays) change regularly according to the in-store display and collections.

Designer: The brand's internal visual merchandising team is in charge of its store's design concept.



IMAGES Business of Fashion

BRAND:

Women'ssecret

PROMOTER:

Tablez India (Master Franchise for brand owner Grupo Cortefiel in India & Sri Lanka)

LOCATION:

Phoenix Market City Mall, Whitefield

SIZE OF THE STORE:

1,000 sq.ft.



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DONEAR GROUP ACQUIRES GRASIM'S PV SUITINGS FABRICS BUSINESS

In a strategic move, the Donear Group has announced the acquisition of Grasim Bhiwani Textile Limited (GBTL), the poly-viscose suiting fabrics subsidiary of Grasim Industries. The acquisition will significantly enhance its profile and will give the Mumbai-based Donear Group a strategic edge in global textiles business in terms of world-class production capabilities to market products and access to the marquee customers globally.

GBTL is one of the largest manufacturer of PV and PW Suitings in India. It sells its products under the "Grasim" and "Graviera" brands in India and 25+ countries outside India. The biggest strengths of GBTL are its quality-conscious trade partners and global customers, who have been associated with them for a long time. GBTL caters to international fashion houses in the US and the UK, supplying fabric to them for making garments. These garments are available in some of the largest retail chain stores. The Donear Group aims to build further on GBTL's existing strengths.

Talking about the acquisition, Rahul Rajendra Agarwal, Director, Donear Group, said, "The GBTL acquisition is driven by our desire to expand our business both pan India as well as in global markets, and progress towards our strategic goal to become the recognized leader in products and services we offer and increase our market share. This GBTL acquisition will utilize strengths of both partners in terms of infrastructure, manpower and product portfolio."



Rajendra Agarwal, Managing Director, Donear Group; Rahul Rajendra Agarwal, Director, Donear Group; S Krishnamoorthy, Managing Director, GBTL

The textile-focused Donear Group has been scouting for a larger addressable market with additional product categories. The terms of the transaction have not been announced yet, and will be disclosed at appropriate forums. The acquisition has been funded by the promoters of Donear and there is no plan to bring in any strategic investor – Indian or foreign – on board as of now. However, there are plans to bring in strategic stakeholders in due course of time.

S Krishnamoorthy, Managing Director of GBTL, appointed by Donear Group, said, "Existing market conditions offer abundant opportunities for companies with robust infrastructure and in-house manufacturing capacities, different types of product categories, good customer base, speed to market and absolute focus on textiles as their core business. In India, huge opportunity exists for fabric in Over-the-Counter (OTC), Readymade Garments (RMG) and exports segments. Taking on the vision of "Make in India", both

Donear and GBTL will maintain their individual identities and will stay committed to offer best products and services to their valued customers as one team."

Talking about the management of the two units post acquisition, Agarwal said, "The GBTL plant will be run by existing unit management with additional benefits of expert advice from the Donear promoters."

Post-acquisition, in the medium term, both entities will continue to focus on their respective brands like Grasim Suiting and Graviera Suiting (GBTL) and Donear and Royal Classico Suiting (Donear) in India as separate teams. The management will continue its efforts to strengthen and utilize their combined product basket to serve to its customers. Donear will continue its focus on the OTC segment while strengthening its network pan-India and will expand its product portfolio in domestic and international market.





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BESTSELLER BRINGS SELECTED HOMME TO INDIA

Bestseller, the Danish clothing company which operates brands like Jack & Jones, Only and Vero Moda, has now launched Scandinavian men's wear brand Selected Homme in the Indian markets. The company recently opened two exclusive outlets of the premium men's fashion brand in Mumbai at Palladium and Phoenix Market City. Selected Homme has further plans to open more than 15 exclusive outlets throughout the country.

"We are looking forward to expand the business for Selected Homme in India. Globally, we have seen a very promising growth for the brand and hope to replicate the same here. For the coming year, we have planned to add around 15 shopfronts in multiple markets," said Vineet Gautam, Country Head, Bestseller India.

The fashion-forward Scandinavian brand launched its store at Palladium in the presence of a power packed audience that consisted of eager consumers and media and also Bollywood's ever stylish father-son duo Anil Kapoor and Harshvardhan Kapoor.

Selected Homme is present in 15 countries through more than 2,500 sales points worldwide. Its India operations are also carried out through e-commerce websites like Jabong and Myntra.



The Brand

Trying to reflect the way of living of the everyday man, Selected Homme is introducing an ease into the ritual of getting dressed. Instead of telling him what to wear and how to be season after season, the brand is meeting his requirements and shifting back to its roots. Committed to create essentials for his everyday line-up, Selected Homme refined its DNA and designed a collection that slip seamlessly into his weekday rotation.

The Expansive Collection

Selected Homme prides in its expansive range of premium men's wear — Identity, Heritage and Indigo.

Paying homage to great craftsmanship, the *Identity* line centers around classic tailoring and offers a great selection of versatile wardrobe staples with a comfortable yet contemporary fit. Incorporating upgraded textures, high-count yarns, and refined wool fabrics, the collection's garments have been infused with an element of low-key luxury, challenging the crisp, cool autumn breeze. Turning to classic camel and bottle green for a lasting palette, all the while introducing a large-scale Prince of Wales check, every piece is surely a fail-safe investment.

Interpreting the modern utility trend with design details like straps, raised collars and large pockets, the *Heritage* line perfects classic work wear staples, turning them functional. Stepping up the compulsory new-season layering game, the brand has upgraded its fabrics, offering an all-weather, chill-ready collection with an utterly distinctive heritage feel. Proportions are once again challenged, re-introducing voluminous bottoms and tapered tops, all coloured in seasonal shades of dark burgundy, red and vibrant camel, reflecting a deep autumnal glow.

As the temperatures ruthlessly drop, the *Indigo* line opts for flexibility, paying a tribute not only to form but to function. Giving extra life to the garment that everyone loves with some very clever detailing, the Indigo man won't want to hook his look around anything else than denim. Mixed with embossed statement leather, the look of autumn is one of attitude! Mimicking the natural progression of the season, the colour palette presents one-tone fading stories with dusty green and vintage burgundy, blending flawlessly in with the brand's re-interpreted indigo shades.





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UNITED COLORS OF BENETTON LAUNCHES

ACTIVWEAR COLLECTION IN INDIA

Leading Italian fashion brand United Colors of Benetton has introduced its first activewear collection in India. This is being launched within the 'Undercolors' portfolio, which is a strong focus for the brand. Keeping in mind the growing need for adding fitness casual wear, the brand introduced its collection, which will offer high octane styles to match a higher intensity workout.

The whole range is very lightweight keeping in mind all the functional and thermal considerations that are required to make an activewear comfortable. The range comprises of seamless leggings, sports bras, hoodies, shorts, tees and body shorts for men and women respectively.

Commenting on the occasion, Sundeep Chugh, Managing Director and CEO, Benetton India, said, "We are delighted to launch the first activewear collection in India. The brand continuously endeavours to adapt with the consumer's changing lifestyle. Benetton, with this latest range of activewear, has made a conscious approach to bring inspiration and innovation in the world of smart working out, truly building itself as a leisure brand. With the launch of the collection, we would also like to announce the launch of our first two exclusive Undercolors stores in Gurgaon and Kolkata by end of this year." Benetton's range of activewear has consciously used new fibres developed specifically for odour reduction, sweat-wicking, stretch ability to conform to the body's shape; breathability to allow air in and out, yet not compromising on the fashion front.

The active wear collection by Benetton is a perfect balance between fit and being fashionable. The collection seamlessly incorporates modern style elements with pop colours and textures to exude a very trendy and effortless look. The collection is priced between ₹699- ₹1,899 and will be available in all leading stores across India.

Benetton Group is one of the best-known fashion companies in the world, present in the most important markets with a network of about 5,000 stores.



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BALLY INTRODUCES TANG YAN AS ITS FIRST ASIA PACIFIC SPOKESPERSON



Bally has enlisted leading Chinese actress Tang Yan as their first ever Asia Pacific spokesperson, launching the collaboration with the brand's new Autumn/ Winter 2017 advertising campaign. The collaboration with Tang Yan for the next two advertising campaigns provides Bally with a prominent platform to continue to develop its presence and build on its strong momentum within China, a market with huge potential for the brand. The brand entered the market in the 1980s and today has 60 retail stores within mainland China and a new e-commerce website launched to great reviews earlier this month.

The Chinese actress is known for her roles in movies such as *'Waking Love Up'* and *'Assembly'*. The 33-year-old actress is also in the process of designing a handbag range for Bally, with details to be announced later this year. She maintained, "I am truly honoured to be Bally's first Asia Pacific

spokesperson. Bally is an iconic brand built on a long history and exquisite craftsmanship. Its origin was a romance itself, as it was a gift of love given by Carl Franz Bally, the brand's founder, to his wife. I really enjoyed working with the highly professional and inspirational Bally team during our campaign shoot in London and I am very excited to be working on my first handbag collection with a brand that I really admire. I want to thank Frédéric de Narp and his very talented teams for the opportunity and I look forward to further helping to raise the profile of this timeless brand in

the future." The campaign was shot in London in May by New York-based fashion photographer Briana Capozzi. It showcases a bold and confident aesthetic embodying the new direction of Bally. Tang Yan is shot in a minimal white studio alongside upcoming male model Antoine Duvernois.

Bally CEO Frédéric de Narp said, "We welcome Tang Yan as the first Asia Pacific spokesperson for Bally. With her elegance, immense talent and astounding reach within China and the surrounding markets, Tang Yan is the perfect partner to continue the growth and elevated positioning of the Bally brand within these key regions. We very much look forward to working with her over the coming season."

Bally is a Swiss luxury brand established in 1851, anchored in an exceptional heritage of shoemaking. Today, the brand offers unique and vibrant designs across shoes, accessories and ready-to-wear.

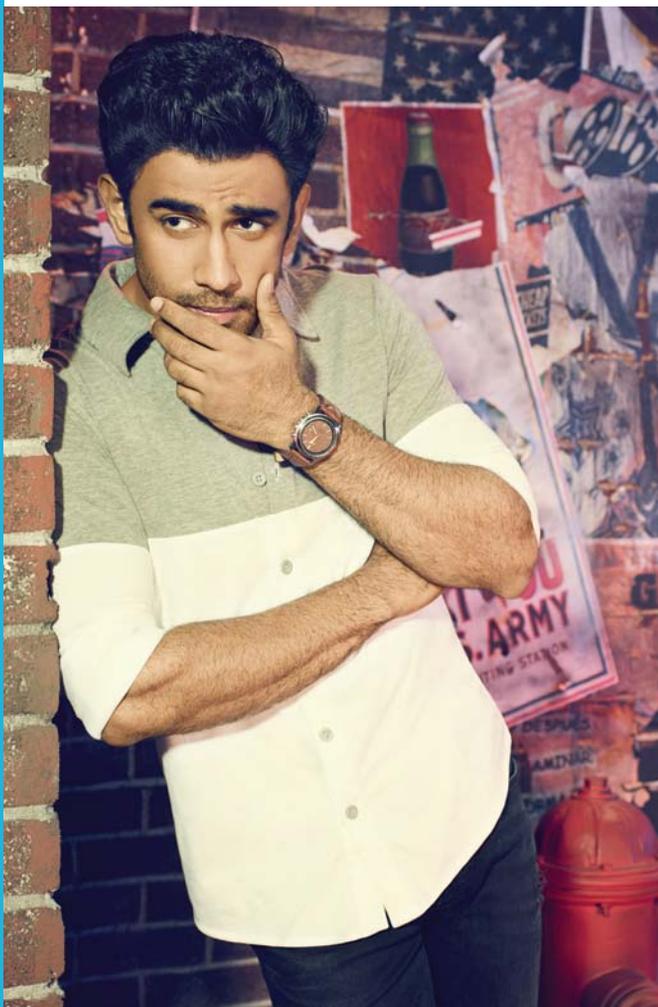


araaliya'....

*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



GRITSTONES

ROPES IN AMIT SADH AS ITS NEW BRAND AMBASSADOR

From its inception 5 years ago, Gritstones has been creating an ensemble in the world of men's fashion. With customers' support and positive acclamation, Gritstones have been touching heights with its abundance presence in the online shopping market. Its association with bollywood promotions and presence has formed a complete new picture for the brand. To make the picture more youthful and attractive, Gritstones have roped in Bollywood actor Amit Sadh as its brand ambassador.

Amit Sadh, is stylish and is a popular name among the people, with a good fandom. Being a versatile actor, Amit is ready to face new challenges and be part of new experiments and innovations. Similarly, Gritstones has also been evolving with a passion to grow and expand their fashion ranges in multiple shopping stops. At present, the brand is widely and easily available at top online fashion shopping portals like Amazon, Flipkart, Jabong, Snapdeal, Voonik, Myntra and Limeroad among many others. It also has its own e-commerce portal www.Gritstones.com.

"I genuinely feel that the clothes are very comfortable and very stylish. It has a lower east New York Jamaican vibe about it. The fitting is amazing and the styling is unique and I feel really sexy being in Gritstones. I have grabbed the latest collection of Gritstones and its time you guys grab it soon," says Amit Sadh.

Amit Sadh also started as a beginner without any godfather in the film industry and established himself as a brand by taking up television soaps and then film acting as a career and became popular among people with his bold and mesmerising acting skills and dialogue delivery, Similarly, even Gritstones was launched online without thinking of the risk of failure or dissonance from the customers and is now one of the most trending and followed brands in the industry. Gritstones has always been developing according to the changing dynamics of the industry and has formulated itself as the most promising brand among the customers.

Gritstones has bagged the award for "Most Trusted Fashion Apparel brand in India in Quality and Service" on Flipkart Marketplace for year 2016-2017.

Owned by DB Creations Private Limited, Gritstones is a casual fashion apparel and lifestyle brand which signifies raw and stylish look for men's wear. The brand works to bring out the real raw inside you. Gritstones is a customer's brand, catering to all age groups between 17-50 years. Their product range falls between ₹399- ₹1,399.





Sabhyata products at a glance

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



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HOWRAH TO HAVE FIRST EVER 'HOSIERY PARK' IN INDIA

The hosiery industry has been growing at a rapid pace over a period of time, and has been subsequently demanding better infrastructure and more space. This was the idea behind building up the first Hosiery Park of India. Since the space in Kolkata city was neither economical nor available, the park had to be set up in Howrah, which is adjacent to the city area.

West Bengal Hosiery Association (WBHA) has formed SPV, i.e., Special Purpose Vehicle West Bengal Hosiery Park Infrastructures Limited in association with WBSIDC (West Bengal Small Scale Industries Development Corporation) and has acquired 125 acre land in Howrah district of West Bengal to develop the Hosiery Park comprising of 170 units for a total cost of ₹1,500 crores. All the plots in the park have already been sold out.



BD Kothari, Board Member, Hosiery Park by WBHPIL



KB Agarwal, Managing Director, Rupa; and Pradeep Arora, Board Member, Hosiery Park by WBHPIL



The project is supported by the central government as well as the state government. Lots of major hosiery brands including Rupa, Lux, Amul, Dollar, Kothari, TT, Zero, Simply, etc. have taken up space there. The park is expected to increase the domestic production and export to the tune of ₹4,000- ₹5,000 crores in the next 4 to 5 years time. Once the park is fully operational, Howrah will be the major producer of hosiery products in the country. As of now, West Bengal is No.1 in producing 100 percent cotton hosiery garments for kidswear. Anybody in India who wants to sell kidswear in knitted fabric (cotton) will have to buy from Kolkata.

Pradeep Arora, Board Member, Hosiery Park by WBHPIL (West Bengal Hosiery Park Infrastructure Ltd) said, "Kolkata has the best processing units in India. We have world class knitting machines, i.e., Mayer & Cie and Tarrot. This park will create the infrastructure to accommodate setting up of new units in knitting, cutting, stitching, printing, etc. The handover of the land will start in a couple of months for construction."

"Since the nature of the industry is fragmented, i.e., knitting, processing, cutting, printing, stitching and packaging – all are done by separate setups, thus we had to make this park in such a way that the entire section of the industry could be accommodated within a specified space. This will help the production to be smooth and economical. This park will give direct employment to 8,000- 10,000 people and around 20,000 people indirectly. Hence, the central government and state government are helping the infrastructure company to set up the park as soon as possible," he further added.

BD Kothari, Board Member, Hosiery Park by WBHPIL (West Bengal Hosiery Park Infrastructure Ltd.) also reiterated, "For the growth and modernization of the hosiery industry, we are creating infrastructure for expansion of the domestic market and exports."



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FASHION RETAIL



74

LEADER TALK

INSIDE THE INNERWEAR INDUSTRY

Growing at a CAGR of 9.7 percent, it seems that Indians are spending on innerwear more than ever before. Images BoF talks to some of the leading innerwear players in India about the industry, its growth dynamics, current trends and future prospects.

Pg No. 74

MENS INNERWEAR! SPOTLIGHT

MEN'S INNERWEAR: THE CHANGING LANDSCAPE

Men's innerwear has always been bold and never shy to advertise using Bollywood stars. Images BoF tracks the current dynamics of the men's innerwear industry.

Pg No. 84

WOMEN INNERWEAR! SPOTLIGHT

GETTING BENEATH THE WOMEN'S WARDROBE

The women's innerwear category has transformed majorly into a fashion indulgence. Already almost twice as big as the men's category, we talk to experts on the latest trends.

Pg No. 88



KIDS INNERWEAR! SPOTLIGHT

KIDS INNERWEAR

Experts from the kids' innerwear industry talk about the tremendous growth and the influences on this burgeoning market segment.

Pg No. 126

ONLINE INNERWEAR! SPOTLIGHT

A WISH COME TRUE: ONLINE INNERWEAR

E-commerce has helped the whole innerwear segment in India progress like never before, especially the women's side. IMAGES BoF takes a look.

Pg No. 132

SHAPEWEAR! SPOTLIGHT

SLIMMING THE WAY AHEAD WITH SWEE SHAPEWEARS

Vijay Patel, Managing Director, Swee, talks about the shape wear category and its scope in India.

Pg No. 144

THERMALS! SPOTLIGHT

BEATING THE CHILL WITH THERMAL WEAR!

IMAGES Business of Fashion explores the current dynamics in the thermal wear industry in India in terms of acceptance, demands and trends.

Pg No. 148

BEACHWEAR! SPOTLIGHT

THE RISING POPULARITY OF BEACHWEAR

Harshad Daswani, Founder, The Beach Company, shares about the recent developments in the sector, including how the young gen has started to prefer bikinis and mod dresses over casual wear which has long been the beach staple in India.

Pg No. 150

YOGAWEAR! SPOTLIGHT

AS YOGA GETS YOUNGER: THE YOGA WEAR MARKET IN INDIA

Recent developments have boosted the popularity of yoga, and seen the emergence of a new fashion trend called yoga wear. IMAGES BoF delves deep to study this phenom.

Pg No. 152



RESEARCH

INNERWEAR MARKET IN INDIA

The innerwear category has evolved from a basic commodity to comfort, fashion and even designer wear. Experts from Technopak analyse the market size and key trends.

Pg No.66

SLEEP&LOUNGE! SPOTLIGHT

THE EMERGING SLEEP WEAR & LOUNGE WEAR MARKET IN INDIA

Lounge wear and sleep wear has become more than a trend in consumers' lifestyle. Images BoF takes a look.

Pg No. 160

SOCKS! SPOTLIGHT

SOCKS MARKET IN INDIA

Socks brands are focussing on styling and innovative designs that resonate with the modern consumers of today. We take a look at socks as an independent market segment.

Pg No. 170

ATHLEISURE! SPOTLIGHT

GROWING ATHLEISURE ACCEPTANCE IN INDIA

The widespread focus on health and fitness has seen the rapid emergence of activewear and its softer fashion manifestation-athleisure.

Pg No. 182

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INNERWEAR MARKET IN INDIA





THE INNERWEAR ISSUE

The innerwear category has broadened from basic requirement of commodity wear to designer wear with emphasis on styling and comfort. The Indian innerwear market holds immense growth potential and is slated to grow phenomenally over the next 5 years. Amit Gugnani, Senior Vice President - Fashion, Technopak, analyses the market size and trends in the segment for men, women and kids.

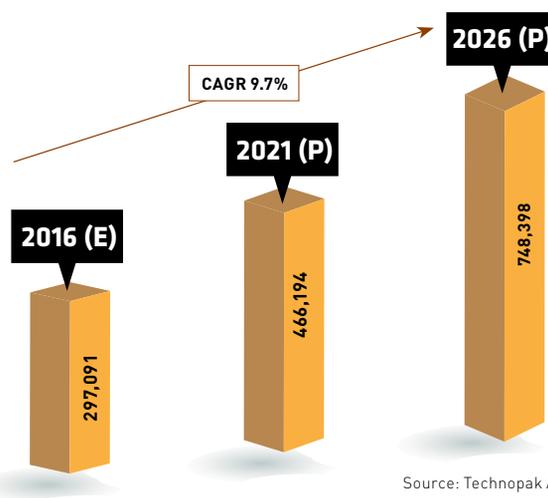


Pic Courtesy: Candyskin

DOMESTIC APPAREL MARKET

Indian fashion retail market currently estimated to be worth ₹2,97,091 crores (USD 46 billion), is envisaged to grow at a promising CAGR of 9.7 percent to reach ₹7,48,398 crores (USD 115 billion) by 2026.

TOTAL APPAREL MARKET-2016 (INR CR)



Source: Technopak Analysis

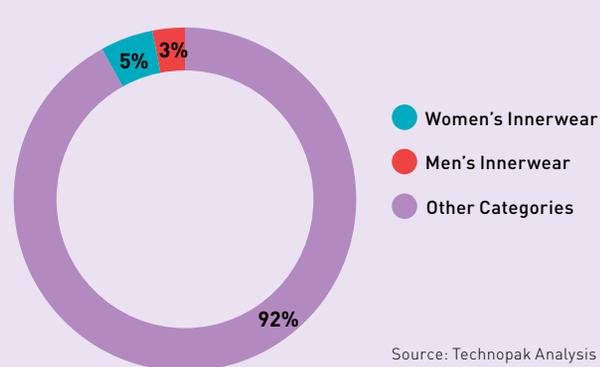
INNERWEAR CATEGORY

The innerwear category, currently estimated to be worth ₹25,034 crores, accounts for 8 percent of the total apparel market in 2016.

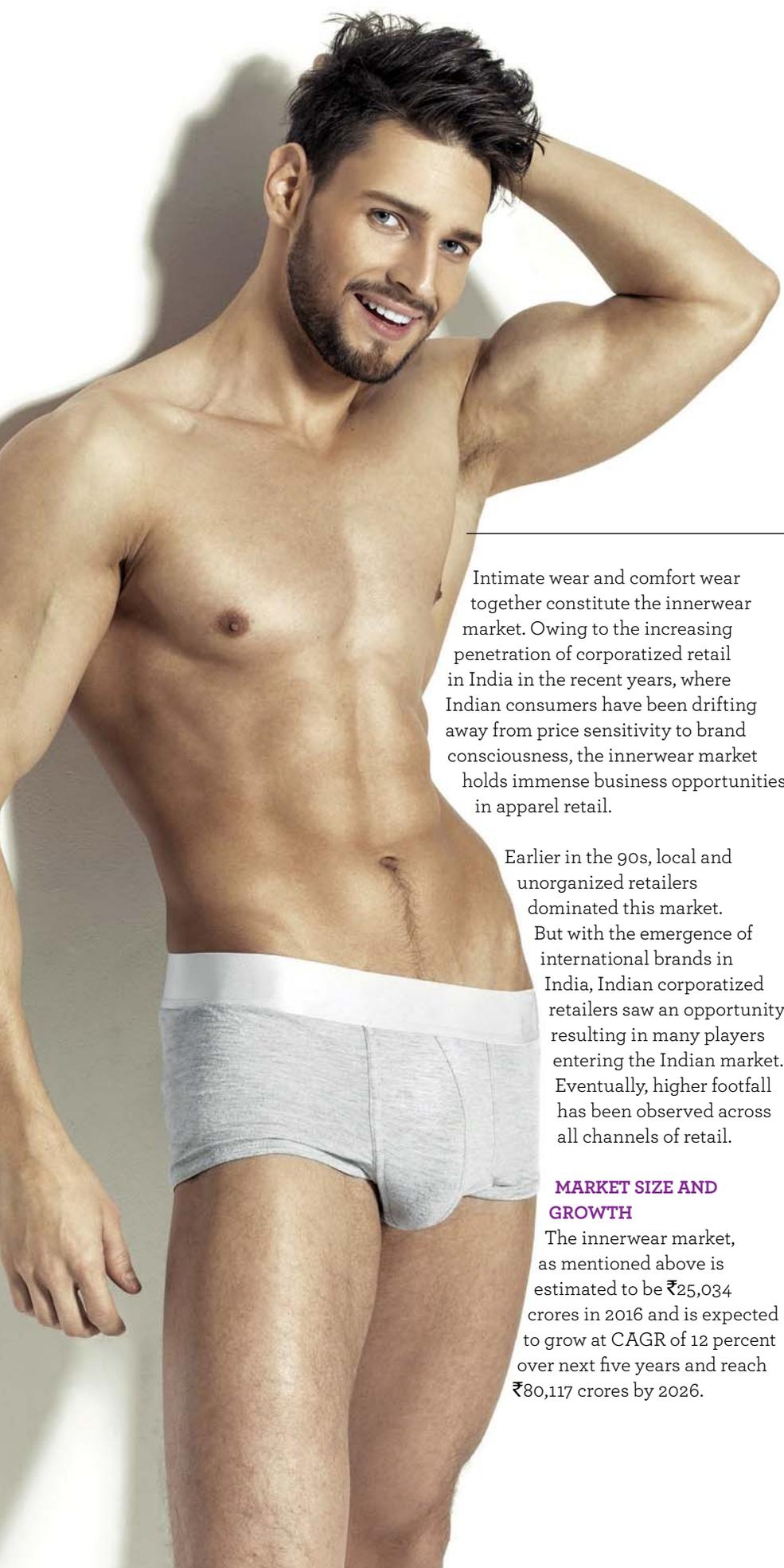
In recent years, the women's innerwear segment has grown consistently and estimated to be worth ₹16,259 crores in 2016 and accounts for 5 percent of the apparel market.

The men's innerwear market, that is estimated to be worth ₹8,775 crores in the year 2016 is estimated to grow at a CAGR of 8.5 percent to reach ₹19,840 by 2026. In the year 2016, it accounted for only 3 percent of the total apparel market.

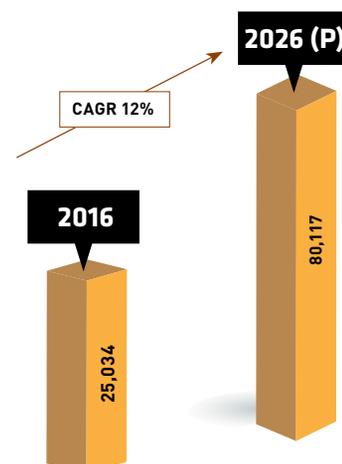
SHARE OF INNERWEAR CATEGORY WITHIN APPAREL MARKET (2016)



Source: Technopak Analysis



INNERWEAR MARKET, 2016 (INR CR)



Source: Technopak Analysis

Intimate wear and comfort wear together constitute the innerwear market. Owing to the increasing penetration of corporatized retail in India in the recent years, where Indian consumers have been drifting away from price sensitivity to brand consciousness, the innerwear market holds immense business opportunities in apparel retail.

Earlier in the 90s, local and unorganized retailers dominated this market.

But with the emergence of international brands in India, Indian corporatized retailers saw an opportunity resulting in many players entering the Indian market. Eventually, higher footfall has been observed across all channels of retail.

MARKET SIZE AND GROWTH

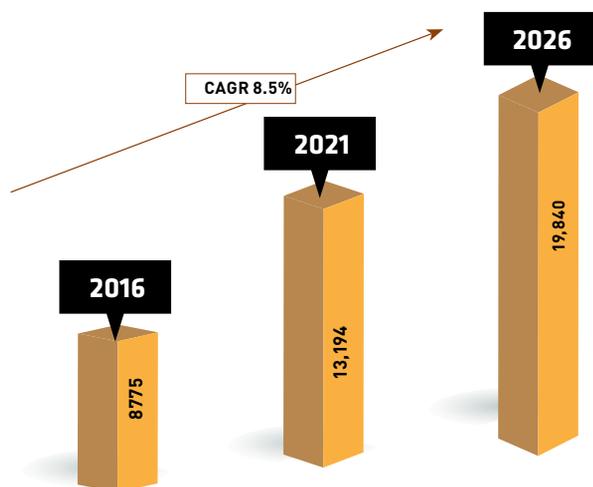
The innerwear market, as mentioned above is estimated to be ₹25,034 crores in 2016 and is expected to grow at CAGR of 12 percent over next five years and reach ₹80,117 crores by 2026.

The Indian innerwear market is primarily segmented into men's and women's. Currently, the women's segment dominates the market by accounting for 65 percent of total market share. Kids' innerwear market is primarily unorganized. Local MBOs and regional players are known for catering to kids' segment of the innerwear market. Although there are some brands for teens' innerwear, they don't have a large assortment.

Despite the fact that the unorganized retailers dominate the corporatized ones, smart pricing of comfort wear categories offered by mid-segment brands in comparison to the unbranded market is increasingly finding acceptance from consumers for kids comfort wear products.

With the rise of the Indian middle class and young working population, both men and women in urban India started prefer branded innerwear. They seek a combination of aesthetics and comfort that matches their changing lifestyle.

Over the course of next five years, men's segment is expected to grow at CAGR of 9 percent, while women's segment is expected to grow at CAGR of 14 percent.

MEN'S INNERWEAR MARKET IN INDIA (INR CR)

DEGREE OF BRANDING-MEN'S INNERWEAR


Source: Technopak Analysis

The innerwear market, as mentioned above is estimated to be ₹25,034 crores in 2016 and is expected to grow at CAGR of 12 percent over next five years and reach ₹80,117 crores by 2026.

MEN'S INNERWEAR MARKET

Men's innerwear contributes 7 percent share of the total men's apparel market in India. This innerwear market is worth ₹8,775 crores and is expected to grow by 8.5 percent to reach ₹19,840 crores from 2016 to 2026.

Men's share of branded innerwear products currently range about 50-55 percent and is expected to reach 55-60 by 2021.

Men's innerwear comprises of product categories like briefs, vests, casual tees, shorts, etc. Briefs and vests contribute more than 80 percent of the total men's innerwear market, and represents 83 percent of the branded pie.

WOMEN'S INNERWEAR MARKET

Women's innerwear market holds 15 percent share of total women apparel market in India. Various product categories in women's innerwear are - brassieres, camisoles, panties, tees, nighties, shorts, etc. Brassieres and panties contribute 85 percent of the total women's innerwear segment.

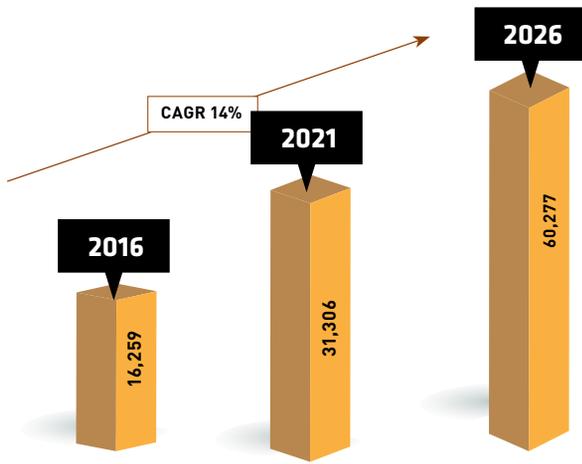
In 2016, this segment was estimated to be worth ₹16,259 crores and is expected to reach ₹60,277 crores by 2026.

Branded innerwear contributes to 35-40 percent of the total women's innerwear market and is expected that the branded share will account for 40-45 percent of the total market in 2021. Panties and bras contribute to 82 percent of the total branded share. The evident shift towards premium and high-premium segment is responsible for the expected increase in the branded share.

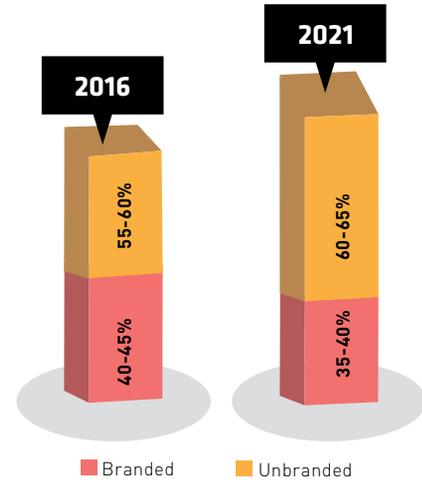
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WOMEN'S INNERWEAR MARKET IN INDIA (INR CR)



DEGREE OF BRANDING: WOMEN'S INNERWEAR



Source: Technopak Analysis

GROWTH AND TRENDS

India has a young working population with higher disposable income, who wants to spend on comfort. Well travelled men and women in urban centers are highly aware of fashion trends worldwide, thus become more brand conscious and trendy. The affinity towards variety of designs, colours, fabrics and styles available at retailers and brands has made innerwear a promising segment of Indian apparel retail. The definition of innerwear has broadened from basic requirement of commodity wear to designer wear with emphasis on styling and comfort.

Innerwear is no longer considered just a necessity but also caters to functional needs. In women's wear, occasion specific products like seamless bras, strapless bras, padded bras, bralettes, etc. are also being sought. Rise in demands for designer apparel and designer innerwear go hand in hand. Functional features that add value to the innerwear such as sweat and odor resistance, crease resistance, softer fabric and bacteria resistance are expected to be of greater demand in men's segment. There has been a rising demand for functionality based women's innerwear like shapewears and tummy tuckers for woman desiring a slimmer look; non-wired brassieres for woman facing comfort issues after prolonged use of wired ones; and workout bras suitable for physically active woman.

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The innerwear segment, unlike the apparel category, has witnessed high brand adoption from the mass segment. Many renowned branded players offer innerwear products in mass segment and have received wide acceptance among the consumers. Further, wider distribution network of corporatized players along with availability through online channels allows easy availability and reach even within the smaller Indian cities. Even consumers from tier -II and -III or semi-urban cities with limited access to brick and mortar stores opt to shop online for their desired size, fit, design and colours. Sizing constraints in woman's intimate wear, especially brassieres, have been reduced with the improved support by virtual sizing system adopted by e-tailers. Not only just e-tailers but, customer assistance provided by sales representatives in the physical stores of innerwear brands has made shopping easier for Indian woman.

The brands have also ensured that they live up to the increasing requirements of the consumer by increasing the product offering and incorporating various colours and designs which are attractive.

CONCLUSION

The current market structure is very promising for the growth of the innerwear category. The changing needs of the consumers and the efforts by the brands to meet the needs is providing a significant impetus to the growth of the market. The infusion of international brands and the increasing availability of the products through various channels are also assisting in the growth of the market. While, the product innovation is a continuous process, the brands with their efforts on providing better designs, fabric finishes and choices of fits are providing a conducive environment for the growth of the market.



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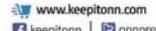


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LEADER TALK:

INSIDE THE INNERWEAR INDUSTRY

Innerwear is literally the second skin that a person wears. And being a skin with choices unlike the skin we are born with, makes it much more intriguing. With more disposable income and exposure to international trends and lifestyle, Indians are seen more open to spending on their innerwear than ever before. We talk to some of the leading innerwear players in India and take a look at the innerwear industry, its growth dynamics, current trends and future prospects.

-By Zainab S. Kazi with inputs from Gurbir Gulati



“Among the core apparel categories, innerwear appears to be the fastest growth category in the branded segment. The growth of this category is centered around urban India.”

– **Abhishek Tibrewal**,
Director, Crusoe



“With the influx of many brands, and growing consumer awareness for quality products, the per capita consumption has increased.”

– **Vivek Mehta**,
Chief Executive Officer, Amanté



“Growing number of working women, changing fashion trends and increased levels of information have given the women's innerwear industry a new dimension.”

– **Radhika Goenka**,
Founder, Be Mine

The innerwear growth story in India is at its most promising phase ever. Not only are international brands seen eyeing a pie in the market share, but domestic and national brands too are seen pulling up their ‘socks’, or should we say ‘underpants’, and offering stylish, sensuous and premium innerwear for both men and women. Sharing his views on the current market dynamics, Sandeep Seksaria, Director, Amul Macho, opined that the innerwear market is poised to grow at a higher speed in times to come. He shares, “Initially, the innerwear market had been mostly unorganized but the current days have seen it growing as a more organized one. Two factors that have been contributing this growth are: Higher disposable income and the fashion trends in innerwear as a segment.”

Abhishek R Tibrewal, Director, Jagannath Textile Company Ltd., reiterates, “Among the core apparel categories, today innerwear appears

to be the fastest growth category in the branded segment. The growth of this category is centered around urban India with market spread across top cities comprising metros, mini metros, tier -I and -II cities.” Adding to this, Srikanth Ram, Business Head – Fashion Accessories, Raymond Ltd., shares, “Innerwear is growing faster than the rest of the apparel market making it an important category. Men’s wear comprises about 35 percent of the market at ₹8,775 crores, women at 65 percent share of the total current ₹25,034 crores market in India. Growing at ~9.7 percent CAGR, this market is expected to touch ~₹80,117 crores by 2026.”

While for men, innerwear comprises of basic banyan and underwear, it is the women’s category that is giving the brands an opportunity to play with designs, cuts, colours, styles, etc. Keeping in mind the growing fashion consciousness amongst women, the choice of their innerwear too has seen a mammoth change. Shares Vivek Mehta, Chief Executive Officer, Amanté, “The women’s innerwear market is estimated at about ₹16,259

crores with 35 percent being organized players. Bras and panties are the primary categories with 50 percent share. The organized segment is growing at about 20 percent with the premium segment growing highest at 40 percent.”

Understanding the Growth

Industry experts and spokespersons shared their opinions on the primary factors leading to the growth in the category. Radhika Goenka, Founder, Be Mine, says, “Growing number of working women, changing fashion trends and increased levels of information have given the women’s innerwear industry a new dimension.” According to Rajnish Agarwal, Brand President, Rupa, besides the reasons shared above, the other reason for growth of the overall category of innerwear, irrespective of it being for men or women is also the influx of international brands. Vivek Mehta reiterates, “With the influx of many brands, and growing consumer awareness for quality products, the per capita consumption has increased.





“The major segmentation of the consumers in Indian innerwear sector is based on their buying behaviour and attitude towards the products.”

– **Rajnish Agarwal,**
Brand President, Rupa



“Growing consumer aspirations and willingness to pay for brands and fashion has been the reason for growth of innerwear category.”

– **Sanjay Jain,**
Managing Director, TT

Also, the varied choice of clothing in the modern woman’s wardrobe has increased the need for the right match in lingerie.” Amrit Sethia, Associate Vice President, Soie, highlights another interesting reason that is to do with the quest to experiment amongst the youth. This does hold true as youngsters are very much open these days to trying new things available in the market rather than sticking to their usual brands and styles.

Elaborating on this, Sanjay Dawar, Founder and Managing Director, Bodycare, says, “Awareness of new things, the reach of organized retail and the growing popularity of social media together have constituted to the growth of this category along with an educated middle class, easy availability of brands on e-commerce platforms and the promotion and marketing initiatives undertaken by brands for image building. People born in 70s and 80s have now reached their mid-ages and are also the one’s driving the market besides obviously the upcoming youth. They are all educated and image conscious. The value added innerwear products have become popular with them. Women are increasingly conscious about even the brands and styles for their intimate wear. In fact, this changing preference is no longer restricted to just the metros, but has spread to mini metros, tier -I, -II and -III cities.” Sanjay Jain, Managing Director, TT, adds, “Growing consumer aspirations and willingness to pay for brands and fashion has been the reason for growth of this category.”

According to Vivek Mehta, women are buying more than before and constantly upgrading product choices to better quality products, and this is fueling consumerism.

Price vs. Growth

Considering innerwear brands cannot be as much overtly flaunted like other apparel brands, the pricing does make a difference when it comes to purchasing of innerwear.

Rajnish Agarwal elaborates on the criterion for segmentation stating, “The major segmentation of the consumers in Indian innerwear sector is based on their buying behaviour and attitude towards the products.” According to him, there are 4 major categories. The first is based on men and women who have high disposable incomes, high aspirations and clear preference for top branded innerwear; the second category consists of high earning consumers, who consider a number of factors including convenience of purchase, style, quality, easy availability, etc. before making a purchase; the third category includes





“Brand advertising plays a vital role in the selection of a brand. A lot of brands and varieties are available to the customers in the market, so building a brand impression is the utmost important thing.”

– Sandeep Seksaria,
Director, Amul Macho

consumers from tier -I, -II and -III cities longing for a metro-like lifestyle and this group is mostly experimental with their purchase and prefers aspirational brands; and the fourth group consists of individuals with low disposable incomes and this group despite having high aspirations, prefers price over brands.

According to Dawar, more than price, it is the quality that demarcates the product categories. He shares, “If you get different quality products, the price is definitely going to vary along.” Sandeep Goenka, CEO, Wacoal, strongly feels that it is the price first and then the quality that attracts the customers. To hear it from the spokesperson from Lux, “The segmentation in our field is principally due to positioning brands and price. Quality does play certain role here, but we think it is just a perception.”

Commenting on the most accepted price points, Radhika Goenka shares his take on the women’s innerwear category. “When it comes to price, the women’s innerwear market is dominated by products in the mid-price and economy segment ranging from ₹300 to ₹1,200 which is 80 percent of the market and the remaining 20 percent comes from the premium and super premium segments,” he says. Dawar adds, “The innerwear market is a highly segmented one with different players dominating different markets. The entry and economy segments are dominated by various players whereas the mid and premium segments are led by us at Bodycare. You may find products priced as low as ₹35 per piece for entry level, ₹50 for economy, ₹100-₹120 for mid-premium segment and the super premium products have different price points altogether. One cannot ascertain a fixed price point.” The spokesperson from Lux shares inputs based on the research undertaken by the brand stating



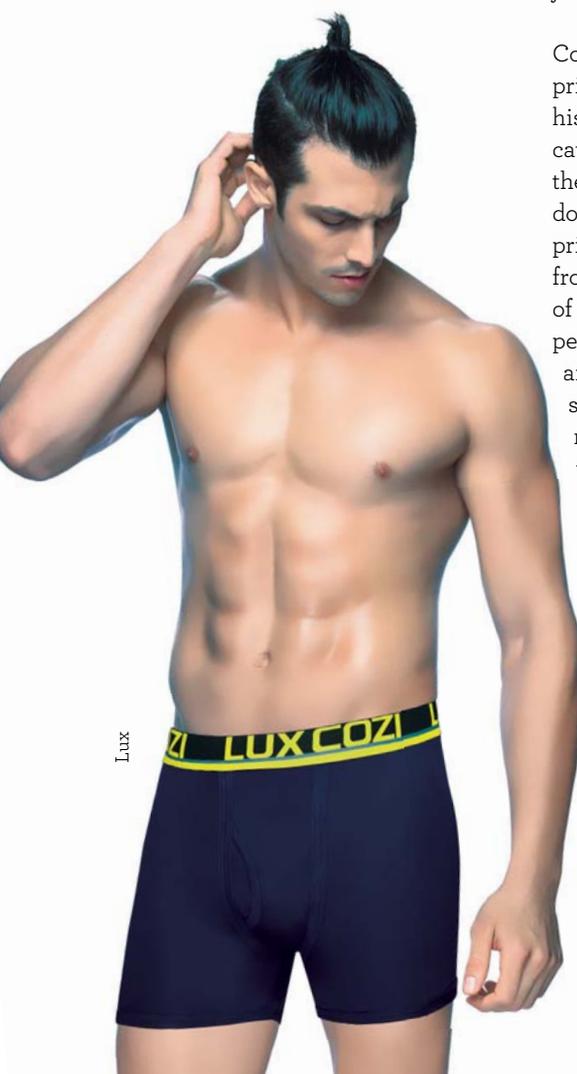
Bodycare

that there are basically 4 categories or price points in the innerwear market where the basic range is less than ₹100, the middle range comprises of products between ₹100 to ₹200, the premium range includes products priced above ₹200 and the super premium range embraces products costing more than ₹450.”

Reaching Out: Communications & Channels

Where earlier, it was only the men’s innerwear category that boldly advertised its products, today it isn’t uncommon to see models in sensuous lingerie in advertisements in magazines and newspapers. Besides print, many brands have a fantastic social media reach and of course not to forget their standalone stores with eye catching branding. Sandeep Seksaria, Director, Amul Macho, shares, “Brand advertising plays a vital role in the selection of a brand. A lot of brands and varieties are available to the customers in the market, so building a brand impression on the customer is the utmost important thing.” Vinod

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Lux



“Though we see innerwear as a wardrobe staple and a necessity to survive in a civilized world, but educating the audience on the types and designs becomes important.”

– Sanjay Dawar,
Founder & MD, Bodycare



Park Avenue

Be Mine



Kumar Gupta, Managing Director and CEO, Dollar, agrees, “Mass media and advertisement play an important role. Today, consumers change their preferences pretty fast. They prefer styling than comfort.”

Srikanth Ram highlights the importance of other media over the print stating that besides the conservative way of advertising such as television and hoarding, there are other many effective ways to reach out to the consumers, that need to be explored. The spokesperson from Lux elaborates, “Beside conventional medium like print, electronic and OOH today, digital advertising is growing substantially in India and we believe that this is the best medium to reach out to the youth, because today it is the youth who write the success of any brand.”

Dawar wonderfully explains the need for effective advertising, stating, “Though we see innerwear as a wardrobe staple and a necessity to survive in a civilized world, but educating the audience on the types and designs becomes important. Availability is also a concern for the consumers. They must know what is available where.” Adding further, he shares the importance of reaching the right target audience, “Imagine a men’s underwear brand ends up being more visible to women, the objective is already defeated. Similarly, telling a

man about the benefits of shapewear or push-up bras, will make the effort go in vain. With marketing and advertising strategies, you are well equipped to face the competition. Innerwear is a highly competitive market dominated by Bodycare in some categories. We have reached where we are today because of a unique marketing and advertising strategy.”

On the distribution and marketing system dynamics, Rajnish Agarwal shares, “The innerwear industry is experiencing a gradual shift from traditional medium to online media for marketing and advertising of its products. The industry is also exploring new retail formats and e-commerce, for reaching out to the consumers and serving them in the best possible manner.” Vinod Kumar Gupta talks about the system in place at Dollar, “Our business channel partners are distributors and wholesalers. We are present in major cities and towns of 26 states. In e-tailing, we are growing well; apart from our own online store, we are selling our products in all major e-commerce platforms.”

Sharing the traditional approach in place, Seksaria from Amul Macho, explains the route being either Brand to Distributor to Semi Wholesalers to Retailer to Customer; or Brand to Distributor to Retailer to Customer; and in case of LFSs, it is direct



“Distribution has consolidated to departmental stores and mom and pop stores.

— Sandeep Goenka,
Member Board of Directors, Wacoal

Brand to LFS. He adds a point on the last system that is catching momentum, “There have been some recent developments where we are witnessing growth in the large format store channel as well as in growing e-commerce.” Amrit Sethia too reiterates the increasing penetration of innerwear in large format stores when he shares, “Although the basic network still remains the same for the MBOs via regional distributors, I think there has been a huge increase in sales via LFSs and online portals.”

Sanjay Jain shares his observation, “Basically, it had a wholesaler distribution system, which has slowly changed to a distributor system and now e-commerce and organized retail channels are increasing their share.” Sandeep Goenka is of the opinion that the distribution has consolidated to departmental stores and mom and pop stores. He adds, “Only a few international players are opening exclusive stores.”

Attracting Footfalls

As we have clearly read above, large format stores have started investing in having a dedicated space for innerwear/ lingerie today. Women are no longer uncomfortable buying lingerie in the open today unlike earlier where they wouldn't be seen holding a brassier in their hand to feel the texture and observe its cut thoroughly before buying. Vivek Mehta from Amanté, shares, “This has been the category with the highest growth rates for all retailers in last few years, and we can see that with the increased space provided for our brand. Today, no new store is planned without the innerwear category, which was not a case earlier.”

Sanjay Dawar additionally shares, “Retailers are soon realizing that to enhance the beauty of any garment, shapewear and value-added innerwear are equally important. They have begun to give the kind of space that innerwear needs in the retail outlet.



The taboo of talking about women's innerwear in a hush hush voice has also been long broken. When the wearer is not shying away from flaunting their priced possessions (fancy innerwear), why would the retailers? Although, the leading brands like us are focusing more on having exclusive retail outlets for innerwear. Then of course, we are also making the most of the e-commerce.” The spokesperson from Lux feels that the credit for attracting modern retail formats towards this category goes to international brands. He shares, “Due to the advent of premium and international brands, more aggressive advertisement and ensuing demand, the retailers are now willing to give more and more space share to the innerwear section.”

The Online Game

E-commerce has been a game changer for this category as well. With complete privacy in front of their mobile/ laptop screen, the consumption most certainly has grown multi-fold. Majority of the times, many customers select the style and brand online and visit their local lingerie store or any of the large format store to have a first-hand experience and then buy if it suits them. Vivek Mehta shares, “Internet sales portals have a huge scope. Since the past few

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Wacoal





“Due to increased purchasing power in India, lot of global brands have become very active in the country which have given tough competition to Indian brands but definitely it is the consumer who has won.”

– Srikanth Ram,
Business Head - Fashion Accessories,
Raymond Ltd (Park Avenue)



“Mass media and advertisement play an important role. Today, consumers change their preferences pretty fast. They prefer styling than comfort.”

– Vinod Kumar Gupta,
MD & CEO, Dollar

years, a huge percentage of customers have shifted to this platform for the convenience it offers.” Sanjay Dawar accentuates the privilege online buying offers for women who are shy, giving an example of a to-be-bride who wants to buy herself some very sensuous lingerie but isn’t comfortable going to the market and letting others know of her buying decision. A lot many brands have gone ahead to have a tie up with online players like Flipkart, Amazon, etc. and a lot many have also gone ahead to launch their exclusive online portal to sell innerwear.

International Tag

In India, as much as we may not want to accept it, the ‘Made in India’ tag is yet to attract Indian buyers when given a choice of opting for international brands in the similar price range. So, when it comes to innerwear, a pertinent question is whether Indian brands can command the same price as that being commanded by international brands? Amrit Sethia minces no words, “I doubt. Sadly, if a consumer has the capacity to spend more, they would prefer to go to a foreign brand.”

But this view is not shared by most of the players who sound optimistic that when it comes to innerwear, customers are willing to pay more if they find value in their purchase. Sanjay Dawar from Bodycare, shares, “Consumers don’t see brands as domestic or international. They perceive them as something that has been there for decades in their local market and something that has newly arrived. For them, it is the reach that is important. I am talking about the masses. Domestic leading brands like Bodycare are present everywhere and easily available and have been around for years. The loyal customers never think twice before paying for the trusted quality. Indian consumers are driven by trust to a great extent. Trust factor is higher with domestic leading brands like Bodycare as they know that we are aware about their requirements and needs better than an outsider.



Please note that we have consumers of our products back home. They are as similar to any other Indian consumer as you are to your neighbour. People coming from same place bond better than those from different place. Need I say more! This (jaan pehchan) is all an Indian consumer vies for.” Vinod Kumar Gupta adds, “Indian market is full of young consumers, growing middle class, which has a great sense of luxury. And they are absolutely ready to pay for higher quality products offered by domestic brands.”

Radhika Goenka feels that global brands have created an impact on the quality consciousness and have changed the market landscape. She shares, “People are exposed to better quality at competitive price. The international brands have brought along with them the fashion and innovation in the category.” Srikanth Ram summarises on behalf of consumers stating, “Due to increased purchasing power in India, lot of global brands have become very active in the country which have given tough competition to Indian brands but



“Nylons are increasing in acceptance. Organic cotton in India still does not have acceptance when it comes to paying a small premium for it.”

— Amrit Sethia,
AVP, Soie



Dollar

definitely it is the consumer who has won by having so many options at all the price points to choose from.”

Sanjay Dawar however confidently bats for Indians brands in this context stating, “Any new entry is seen as a healthy competition that drives our team to better our best offers. We have already been offering innovation and comfort through our products. Competition always favours the consumers and this is a good thing. If you speak about the overall innerwear industry, certainly it has witnessed both growth and innovation with them entering our market.”

Fabric and Technology

Of late, we have seen a craze for everything that is organic! For innerwear, cotton has been the king. But we are also seeing a good growth for other fabrics including organic cotton. Amrit Sethia from Soie, shares, “Nylons are increasing in acceptance. Organic cotton in India still does not have acceptance when it comes to paying a small premium for it.” Sandeep Goenka sees a good market for organic when it comes to women’s panties. Vivek Mehta talks about the growing preference of micro-fiber keeping in mind that it provides a smooth finish and is more durable, and thus services important needs of a modern woman. Advocating the

relevance and prevalence of cotton as the most preferred fabric for innerwear in India, Sandeep Seksaria shares, “No fabric other than cotton have the potential for mass importance as India has a humid climate and no other fabric is suitable for being innerwear. The concept of organic cotton has been growing at a very slow pace.” Srikanth Ram talks about why cotton would still win over organic cotton, “Cotton is an extremely good fabric to be blended with other fabrics because of the

comfort and hygiene it provides.

Regarding organic cotton, it does not give any extra feel good other than regular cotton but definitely is a bit high on pricing and hence is a question to be fit for mass usage.”

Highlighting the advancement in technology, style and fabric, Sandeep Goenka shares, “We are witnessing new technology create low to high impact bras depending on the sports activity, in styles it is multi-way bras and in fabric we are seeing a good use of Supplex which has successfully substituted 100 percent cotton bras.” Sandeep Seksaria shares, “There is continuous upgradation in the technology and material used now a days. Seamless garments, quick dry and air circulation fabrics are some of the latest trends.” According to Radhika Goenka, “Velvet, metallic shine fabrics, sheer fabrics, embossed laces and embroidered laces and jacquards are the most sought after fabrics in the year 2017.”

Talking about some path-breaking technology, Srikanth Ram shares, “Smart wearables/ broadcast wearables which come with printed circuits on waist band elastics that are integrated with your phone to track real time muscle movement, calories burnt, etc. As for new fabrics, cotton blends preferably cotton/ elastane, cotton/ modal/ elastane, polyester/ polyamide are making their way in.”

The In-Thing

From a basic brassier to one specially designed for a t-shirt, blouse, etc., to sports brassiers, the category is expanding. Similar is the case for panties. From low waist to mid waist to boy shorts, we are witnessing new sub categories both for men’s as well as women’s innerwear segment. Shares Vivek Mehta, “With the modern woman becoming more fitness conscious, sports bras are becoming an important part of everyone’s lingerie wardrobe. Fashionable lingerie like racerbacks and bralettes which are

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shown off as part of outerwear are also growing.” Sandeep Goenka adds, “For women innerwear, sleeping bra, beginner’s bra, sports bra, etc. are catching attention.” According to Radhika Goenka, the longline bras, bralettes and multiway bras are making an upwards trend.

The kids innerwear market too is witnessing a lot of interest and showing good growth as well. According to Vinod Kumar Gupta, “Kidswear segment is growing almost at the rate of 15 percent per annum. Character licensing is another growing trend in the kidswear space. We took this opportunity and got the official license of Chota Bheem to print this character on our product.” It is believed that kids’ innerwear constitutes of close to 20 percent of the innerwear market share in India.

Looking Beyond Metros

Accentuating the growth in tier -II and -III cities, Amrit Sethia shares, “We have been having a lot of online orders from tier -II and -III cities which clearly shows that there is a large market.” Vivek Mehta adds, “The growth in these cities is higher than some of the bigger cities as the aspiration of these markets is higher. They will fuel the future growth for the brands in this category.”

To conclude, Sanjay Dawar rightly sums up the growth opportunity beyond metros when he says, “It is only a matter of reaching them. Otherwise the consumer across the nation is the same. With the advent of internet and social media, each consumer has become aware of the brand and the product. The potential is immense, only waiting to be tapped.”



GST and its Impact on Innerwear

“Overall, GST is good for the industry and will help in eliminating cascading of taxes. We are hopeful that this will help in passing the benefits to the consumer and increase consumption overall.”

-Vivek Mehta, CEO, Amanté

“There should not be a change in pricing to the consumer as well unless you are buying a very expensive lingerie.”

-Amrit Sethia, AVP, Soie

“Too early to conclude, but should be positive.”

-Sandeep Goenka, CEO, Wacoal

“The GST Council’s announcement of rates for the textiles industry came as a relief. The council announced a tax of 5 percent for yarn and cotton and ready-made garments below ₹1,000 mark. Although prices of garments over ₹1,000 will rise marginally. Getting the entire value chain under the tax net is a landmark move. The rates will remain static in the lower price category of garments, with increase of a percent or two in the higher category. For

garments above ₹1,000, the tax rate has been fixed at 12 percent. Most companies will be able to absorb the impact. Some are not too happy with the 12 percent tax on garments above ₹1,000. GST is expected to bring in greater convenience for the e-commerce sector as it promises standardization for online marketplaces.”

-Sanjay Dawar, Founder & MD, Bodycare

“The rate is 5 percent, hence the impact is neutral. However, GST rate of 18 percent on job work has increased working difficulties in a big way and a lot of working capital will be blocked in refunds.”

-Sanjay Jain, Managing Director, TT

“The impact of GST will be absolutely positive on the segment. There will be a decrease in overall pricing by 2-3 percent.”

-Sandeep Seksaria, Director, Amul Macho

“Lingerie products are essentials and therefore, we do not see GST impacting this sector much.”

-Radhika Goenka, Founder, Be Mine

“After the implementation of GST, the purchase cycle of the mid and small retailers has been reduced resulting in loss in sales temporarily, but in the long run there cannot be any negative impact.”

-Abhishek R Tibrewal, Director, Jagannath Textile Company Ltd.

“GST is slated to have a positive impact on the innerwear industry, especially for the organized players, as the new tax regime is expected to reduce the manufacturing, warehousing and logistic cost. The organized players are also expected to take input credit on marketing, logistic and outsourcing expenses.”

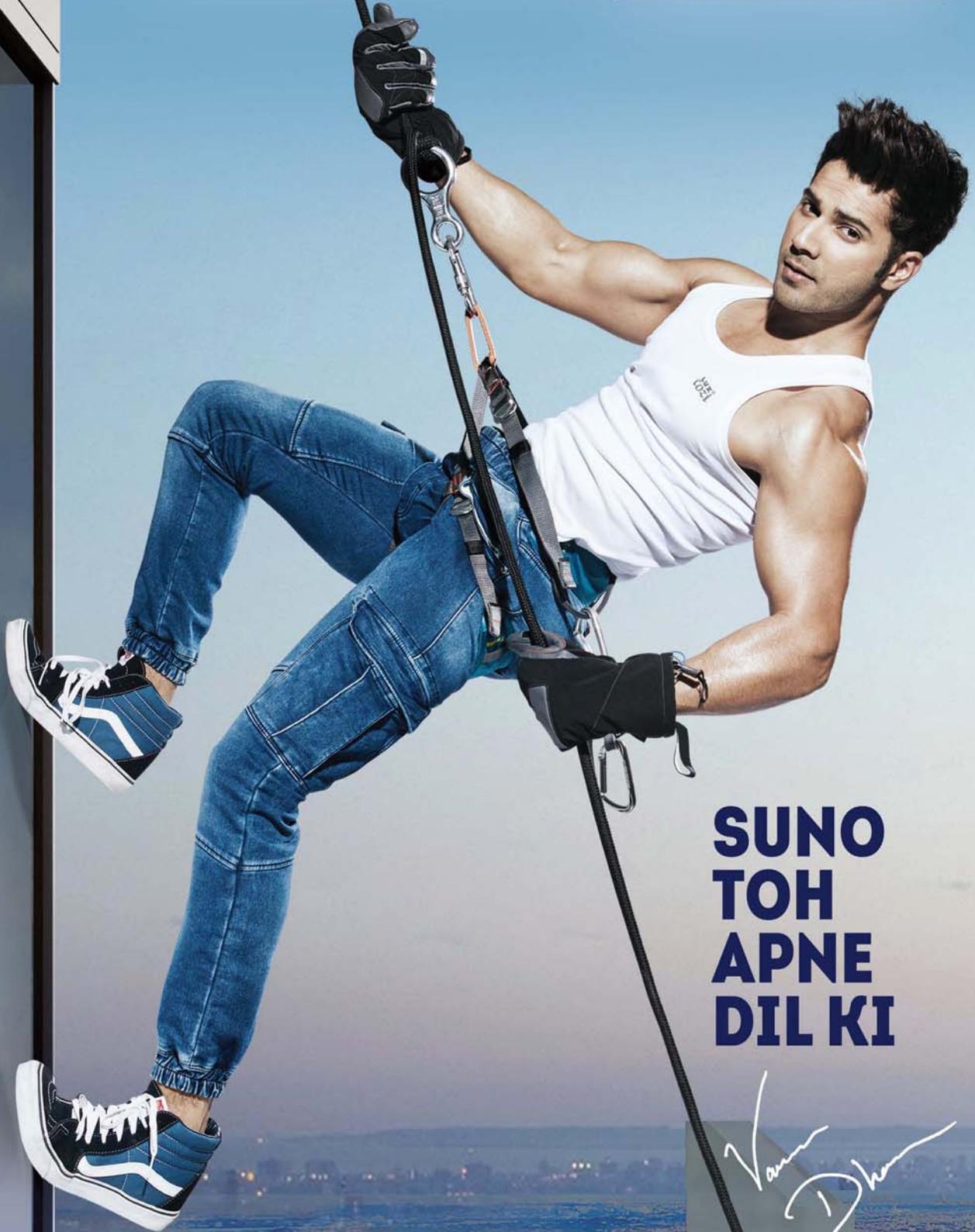
-Rajnish Agarwal, Brand President, Rupa

“The impact on GST is Neutral. There is no increase on prices for us.”

-Srikanth Ram, Business Head – Fashion Accessories, Raymond Ltd.

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INNERWEAR



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The first thing that comes to mind when we think of men's innerwear is the tagline of a famous commercial of a men's innerwear brand - 'Yeh Andar Ki Baat Hai'. Men's innerwear has always boldly been an out of the closet category and the brands have never been shy to advertise their range using faces of Bollywood stars. We track the dynamics of the men's innerwear industry.

Zainab S Kazi with inputs from Gurbir Gulati

MEN'S INNERWEAR

THE CHANGING LANDSCAPE

With changing fashion dynamics, the simple innerwear has now been revolutionized into a mainstream fashion category.

Elaborating on this, Vineet Gautam, Country Manager, Jack & Jones shares, "The men's innerwear segment is growing at an exponential. Today, numerous international brands are coming to the country and fuelling the growth of innerwear. Also, established fashion brands have launched dedicated sub-brands in men's innerwear."

Reiterating on the growing fashion consciousness for innerwear, Mohini Tillu, Senior Manager - Modern Trade, FCUK, adds, "While Indian consumers have historically cared more about outerwear brands and less about innerwear brands, this is gradually changing. Consumer behaviour with respect to their innerwear is changing from 'foundation to fashion plus comfort plus function'. Tillu points out that for both segments, innerwear purchase is need based but is expected to grow substantially due to increase in volume penetration and value growth. Adding further, Tillu says, "For the men's segments, adoption of higher priced premium brands and the trend of consumers

engaging with mass brands shall be the key drivers. Men's segment tends to reflect a higher branded skew compared to the women's segment."

Yet, the man's segment in the Indian innerwear market is marginally smaller than the women's segment. Srikanth Ram, Business Head - Fashion Accessories, Raymond Ltd., highlights how in spite of being so bold with their advertising, the category is still lagging behind that of women's innerwear category. "Men's wear comprises 40 percent of the market at just a little more than ₹8,000 crores, still lagging behind the women's segment. It however is showing a decent growth from the last 5 years wherein a lot of established brands have entered the market."

The Changing Market Dynamics

From a basic banyan and underwear, the category has seen a good extension to include sports innerwear, swim wear and even slounge wear (sleep+lounge wear). Gautam elaborates, "Active wear, sleep wear and lounge wear collectively contribute to the growth of the innerwear segment. All these categories are catching up with the trend and address to the contemporary lifestyle." Ram points out that category extension owing to high price points at times reduces the chances of wider acceptance amongst Indian men.

Explaining further, he says, "As performance wear uses synthetic (polyester, polyamide) blends, acceptance of those blends is niche and comes with high price tag too." On the acceptance of all the sub-categories under the men's innerwear category Tillu shares, "Indian customers do not prefer the styles like thongs, jock



straps, tanga briefs, string bikinis as these styles are with very minimal coverage and Indian customers look for full covered hip."

Moving over to what is trending in the category as of now, according to Tillu, the top 5 trends in innerwear for men are, sports stripes which are updated with minimalist designs, bright colors combined with white in micro patterns, skater-style prints, combinations of natural and technical materials with details and fusion of sports and lounge wear into a hybrid category termed as slounge wear. Tillu adds, "Combinations based on comfort with extra finishes on fabric and details that create relaxed and versatile pieces that can work inside and outside the home as well as for post-workout periods. There is continuous focus on softness and comfort with emphasis on natural texture."

Gautam shares his views based on the market dynamics stating, "Camouflage print is a key trend for this year. This will be adapted across categories like

>

Crusoe





“For the men’s segments, adoption of higher priced premium brands and the trend of consumers engaging with mass brands shall be the key drivers.”

– Mohini Tillu,
Senior Manager-Modern trade, FCUK



“Standard bold colors are the ones doing well. Indian men do not want to experiment too much with colors.”

– Abhishek R Tibrewal,
Director, Crusoe.



“As performance wear uses synthetic (polyester, polyamide) blends, acceptance of those blends is niche and comes with high price tag too.”

– Srikanth Ram,
Business Head - Fashion Accessories,
Raymond Limited



active wear, lounge wear, etc. One of the key trends of the past several seasons is grey marl. Use of textures in mélange to create pieces that transition from casualwear to sleepwear.” He adds on how loose woven, cotton checks or printed boxers are all time favourites along with quirky prints in vibrant colours that add fun to this category.

Fabric and Color Play

Cotton blends, preferably cotton/ elastane according to Ram are all time favorites and have a wide acceptance. Reiterating this, Tillu shares, “The most preferred fabrics for innerwear would be 100 percent cotton, cotton/ elastane, cotton modal and elastane, micro modal elastane, organic cotton, tencel or lycra.” Gautam adds on the growing acceptance of organic cotton, “Apart from cotton which is the most sustainable, comfortable, soft, breathable, best-fitting, versatile and durable option, microfiber fabrics seem to have good potential. Organic cotton is gradually getting accepted with increasing awareness on sustainability.” In designs, it would be the stripes, colour blocks, solids and

prints that do well for men’s innerwear. Commenting on the color play, Abhishek R Tibrewal, director, Crusoe shares, “Standard bold colors are the ones doing well. Indian men do not want to experiment too much with colours.” Elaborating on the color preference, Gautam shares, “Classic black and whites do well. Apricot tan colour will be on trend for 2017 and 2018 particularly in summers. We shall also witness some interest in chalky hues with matte feel, stone and khaki hues, bronze and browns.” According to Tillu, “For SS18 season the top colors for men are red chambray, burgundy, aqua greens, yellow blast and silver metallics.” Ram shares his observation, “Royal blue, mint green, jade green, burnt oranges and heather/melange colors) are well preferred.”

Future Calling

Like all categories, men’s innerwear too is in for a rock solid transformation with bold prints, colors and category extension coming into picture. According to Ram, “We shall see the swim wear for men being inspired by stripe and styling and for fitness



“Camouflage print is a key trend for this year. This will be adapted across categories like active wear, lounge wear, etc.”

– Vineet Gautam ,
Country Manager, Bestseller India
(Jack and Jones)

wear there would be a prevalence of soft knits with technical qualities. Sport inspired IW(Running tights and cycling shorts inspire this direction.” Ram points out how smart wearables/ broadcast wearables that would have printed circuits on waist band elastics integrated with your phone to tracking real time muscle movement, calories burnt etc. are going to be in the in thing in the near future.

According to Tillu, there is continuous focus on softness and comfort focusing on natural texture. She shares the top 5 emerging trends as - innerwear with minimalist designs, bright colours combined with white in micro patterns, broad elastic waistbands for fashionable approach, combinations of natural and technical materials with details and fusion of sports and lounge wear into a hybrid category termed as slounge wear. Gautam points out that nautical stripes and tropical flora and fauna prints are going to be in vogue across categories like lounge wear,

underwear etc. He further adds, “The cross-over between gym wear and lounge wear, with gym pieces styled as casual outfits and vice versa. We shall also see a good interest in innerwear with contrast waistbands with simple details, branding.”

Tillu concludes with encapsulating the category growth and transformation over the years not just in terms of style but also with regards to fabric revolution stating, “Innerwear development has progressed by leaps and bounds over the past few years with creation of new shapes and styles aided by a variety of finishes and technologies. Some of the key innovations in the category are fabrications with special washes and properties, contouring of pouches and defining shapes, better fit and comfort with multiples usages, moisture wicking properties aided by silver technologies which help the fabric stay odorless and retains the fabric finishes.”







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GETTING BENEATH THE WOMEN'S WARDROBE

Women's innerwear market in India has seen interesting changes over the years. Designer lingerie, two-piece bikinis especially when it comes to resort and beachwear, etc., accentuates the fact that the category has transformed from being just need based to a fashion indulgence. We track the changing landscape of the women's innerwear category in the country.

Zainab S Kazi with inputs from Gurbir Gulati





Candyskin

Social media has been forcing people to look their best 24x7. Ask a woman if she is comfortable under her skin and chances are that you will catch her silently wishing for the bulges around her to disappear. This has given an unprecedented rise to shape wear and lingerie that makes women look slimmer. Citing the trends in vogue, Smita Murarka, Head-Marketing, Amante shares, “The latest trend dominating the innerwear industry is to providing body sculpting lingerie, like Minimizers, and contouring bras. Need for seamless bras and panties are gaining importance as women are choosing more fitted garments.” Sandeep Goenka, Chief Executive Officer, Wacoal talks about the emergence of comfort bra, sleeping bra, nursing bra and mastectomy bra. On the styles, Richa Kalra and Riya Kalra, Founders, Candyskin share, “Women are seen opting for seamless bras that vanish under tight fitting clothes. Also, seamless panties as visible panty lines can be very unappealing. We are also witnessing a growing demand for invisible straps that give you the backless effect. There is a good demand for sports bras that can be worn under tank tops to make a fashion statement and then of course we have the minimizers and push-up bras that are tailored for women who are heavy chested and to give them that extra oomph!”

Soozie Jenkinson, Head of Ddesign for Lingerie, Active and Swimwear, Marks & Spencer throws light on the fact that with health consciousness catching up, sports bras are in huge demand. She elaborates, “There is a big spotlight on health, wellbeing and fitness. This includes innovative sports bras that include stretch fabrics that offer high support and comfort for working out in.” She further talks about lounge/night wear stating, “You can also never underestimate the importance of a good night’s sleep – pajama’s are the star player with super soft fabrics. Softer silhouettes and the bralette are key for a contemporary lingerie wardrobe. Prints are also a big trend for the season from artisanal to stars through to florals.”

On the panties/knickers and other lingerie essentials, we have Radhika Goenka, founder, Be Mine who shares, “High waist knickers, trendy lacey shapewear and body suits, midwear shaping lingerie, fashion sports bra and botanical prints are trending currently.”

Murarka aptly talks about the changing dynamics in trends based as per the need of a modern Indian woman stating that as the apparel choices of the modern Indian

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“High waist knickers, trendy lacey shapewear and body suits, midwear shaping lingerie, fashion sports bra and botanical prints are trending currently.”

– Radhika Goenka,
Founder, Be Mine



“Recent years have witnessed a sea change in the innerwear industry with the emergence of comfort bra, sleeping bra, nursing bra and mastectomy bra, etc.”

– Sandeep Goenka,
CEO, Wacoal

women widens, with more fashionable silhouettes being worn, she will need lingerie to support her wardrobe. She shares, “Styles like multiway, seamless bras are new-age must haves.”

Fabric, Color and Design Play

Where cotton brassieres are best suited for India’s climatic condition, we have the modern Indian women opting for different materials of her innerwear to suit her outerwear. Micro fibre is catching momentum for everyday innerwear and sharing reasons for this, as Murarka explains, is because of the fact that it provides a smooth finish and is more durable, and thus services important needs of a modern woman. “It can be molded in any way and thus suit varied designs.” Radhika Goenka shares, “Velvet, metallic shine fabrics, sheer fabrics, embossed laces, embroidered laces and jacquards are the most sought-after fabrics in the year 2017.” Though she also makes it a point to highlight, “cotton and polyamide” as the most preferred fabrics for innerwear globally. Adding to this the Kalras share, “The preferred fabrics for innerwear are cotton hosiery/Lycra, Modal and micro fiber (nylon spandex).”

According to Jenkinson, breathable fabrics such as Modal are popular as they help to regulate body temperature and stay cool. Talking about her preference, she shares, “I also love working with silk and lace as part of the Rosie for Autograph collection, we work



with the best ingredients on offer and our clever technical team have made them machine washable too!”

On the style and design front, according to Goenka, it is the basic, push-up, mold, cut and sew, functional, seamless bra and panty, nursing bra and comfort bra that are doing well. Radhika Goenka adds, “Double cup bras, fancy back, feathery edges, sheer camisoles, outdoor slips and long sleeves lace body have been the most popular designs.” According to Jenkinson, the padded plunge shape is a firm favorite and comes in a variety of colors of designs. She adds, “Our best-selling fashion knicker shape is the Brazilian, with over 6 million a year sold across the world.”

One would think that the choice for colors would be restricted to black, white and beige when it comes to innerwear, but surprisingly, floral prints, shades of blues, pink and red are a hit amongst women when it comes to choosing their brassieres and panties. Murarka shares on the change in preference based on the seasons. She





“Women are seen opting for seamless bras that vanish under tight fitting clothes. Also, seamless panties as visible panty lines can be very unappealing.”

– Richa Kalra,
Co-Founder, Candyskin



“Along with minimizers and push-up-bras there is a good demand for sports bras that can be worn under tank tops to make a fashion statement.”

– Riya Kalra,
Co-Founder, Candyskin

says, “As the season transitions from summer to autumn, the hue would become darker, richer and more festive to match outerwear.” Radhika Goenka gives a sneak peek into the colors she thinks would do well in 2018, “Fresh and fizzy urban pastels, warm Indian colors like red and orange, jungle and electric lilac, dual toned and urban darks are the upcoming colors of the 2018 lingerie market.” Lace has been the eternal favourite to

add sensuality to women’s innerwear but there is a wide range available to choose from. Murarka opens the treasure

trove of the widely accepted laces as being that of floral, shimmery, mesh and crochet. For their brand, she shares, “Apart from lace based on the fashion trends we have used crystals, jacquards, shimmer, laser finishes and other such trendy designs on our products.”

Radhika Goenka stresses on the preference of crochets as well and adding on to the preferred elements and embellishments, she says, “Belt closures, embroidered motifs, lace frills in the bras and the adjustable

straps at the waist for panties are seeing a good demand.” According to the Kalras, women are not shying away from spending on their innerwear and are seen opting for innerwear with Swarovski for a flirty, sexy and naughty look. Bows according to them add to the femininity aspect hence remain an all time favorite and there is a good demand for the ones with motifs and aloe vera finish.

The sight of bra straps peeking through the top is no longer a taboo or something women need to feel ashamed of considering studded and colorful straps have been introduced by lingerie brands. According to Goenka, along with transparent straps that widely available, the market has now expanded to catch the fancy of women with the introduction of studded and colorful straps as well. He also points out on the growing demand for lingerie with diamond danglers.

Emerging Trends

Elaborating on the segmentation and corresponding demand, Radhika Goenka shares, “The women’s



Wacoal



“A more natural silhouette is emerging which has meant that non-wired bras and softer, more casual styles are a growing category.”

— Soozie Jenkinson,
Head of Design for Lingerie, Swim & Active, M&S



“Apart from lace based on the fashion trends we have used crystals, jacquards, shimmer, laser finishes and other such trendy designs on our products.”

— Smita Murarka,
Head- Marketing, Amante

innerwear market is classified into 3 segments – lingerie essentials, nightwear and shapewear. In lingerie, the longline bras, bralettes and multiway bras are making an upward trend. There is also an increasing demand for fashion plus size bras.”

Throwing light on the emerging trends, according to Murarka, the key ones are shape wear with women wearing more fitted garments. She points out that swimwear too is undergoing a transition with the rise in the acceptance of different silhouettes with travel gaining importance. The growing health consciousness is also giving a rise to women opting to have at least one sports bra as part of their wardrobe.

Another category that is witnessing a rise is Bridal lingerie and nightwear with more women becoming conscious of what they wear as they enter a new phase of their life. Bras with detachable straps and multiway bras will be a significant contributor as well. Jenkinson adds, “A more natural silhouette is emerging which has meant that non-wired bras and softer, more casual styles are a growing category. The bralette has been a real star player within this, offering customers a contemporary and comfortable alternative to a padded style.”

Richa and Riya Kalra point out that we would see growing emergence of period panties and also lingerie that you show off. Adding on to this, Radhika Goenka shares, “Cap sleeve and embroidered strap details that add a decorative touch to the shoulder.” Innerwear which is a basic necessity for any human has been witnessing a good R&D from brands. It is little surprising that we are witnessing good innovations taking place in terms of fabric, design and styles.



Be Mine



M&S

According to Murarka, “Wearable technology, fabric innovations and solution providing innovations like back smoothing, strap cushions etc. are some of the innovations in the innerwear industry.” Goenka talks about how mastectomy bras have given a relief to women who have fought breast cancer. The Kalras talk about air bras standing out to tall to be one of the best sellers in the lingerie category.

Unlike the men’s innerwear category, the women’s innerwear category is open to a lot of experimentation in when it comes to design and style and with customers now willing to experiment with their wardrobe, brands are leaving no stone unturned to catch on the bus and be ahead of their customers offering them with options that are tempting and irresistible.



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ABFRL FORAYS INTO MEN'S INNERWEAR & ATHLEISURE

India's fashion powerhouse, Aditya Birla Fashion and Retail Limited, unfolded a new chapter in the Indian retail landscape by foraying into the ₹7,000 crores men's innerwear and athleisure market. The company introduced its new range of Van Heusen men's innerwear and athleisure wear in Bengaluru, Chennai and Hyderabad markets with localised distribution model.

Puneet Malik, COO - Trade Sales, Planet Fashion and Innerwear Business, Madura F&L, Aditya Birla Fashion and Retail Ltd., said, "Aditya Birla Fashion and Retail's expansion into the two new categories is a strategic progression of the brand, thereby offering complete fashion solutions to the Indian men. The new segment is based on the ethos of fashion, innovation and performance as we want to offer stylish, trendy and new age products to our consumers. We see big business opportunities in the growing innerwear and athleisure segments and this will significantly contribute to the leadership position of the company."



With this new initiative, ABFRL aims to expand into the new segment and has plans to bring a differentiated product range to the Indian customers. Innerwear sales in India are growing at the rate of 13- 14 percent a year and the premium segment of the market is growing even faster, wherein the market has lot of potential for growth in the coming years.

The new innerwear range priced upwards of ₹135 up to ₹599, comprises four collections – Classic, Platinum, Signature and Active. The classy wardrobe essential offers features like all day fresh and colour fresh. The Platinum range offers sophisticated styling and elevated comfort with Pima cotton. Signature is a fashion innerwear range with flexi stretch feature for a body defining fit. While Active is a true sports innerwear with a swift dry feature. The collection will be available across 300 Van Heusen exclusive stores, 300 Planet Fashion stores and premium multi-brand outlets and also in leading departmental stores and e-commerce sites.

The company is also foraying into developing a fast growing category

of athleisure wear comprising of a multipurpose wear that ranges from gym to street to couch. Their Athleisure collection is crafted with elevated fashion and new age fabrics. It also comes with a smart-tech feature that offers benefits like quick dry, stain release and anti-stat, making it a true cross over between fitness and fashion.

Ever since its inception in 2016, Van Heusen innerwear and athleisure wear has created a strong presence across 1,700+ outlets and 80+ towns in South India, with its premium and innovative collection. The brand aims to be present pan India with the collections.

Puneet Malik further apprises, “Van Heusen’s innerwear and athleisure business follows a localized distribution model, which has been well received by our business partners across South India. We are delighted that our consumers have hugely appreciated this range. We will continue to create stylish, trendy and new age products for our consumers, as we expand into new markets across India, thereby offering complete fashion solution to the Indian men.”

The company has also introduced the Metropolis Athleisure collection that elevates the customer with garments that have features like quick dry, easy stretch and media pockets while on the move.

Van Heusen is today regarded as India’s No.1 premium lifestyle brand for men and women. It is not only the most preferred work wear brand, but also effortlessly straddles the entire spectrum of occasions like casuals, ceremonial and party wear. The brand embodies the positioning of ‘Power Dressing’ and caters to corporate leaders for whom elegance and style are not just fads, but a philosophy. ABFRL hosts India’s largest fashion network with over 7,000 points of sale across 375 cities and towns, which include more than 2,000 exclusive ABFRL brand outlets.

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Van Heusen's new innerwear and athleisure collection is crafted with elevated fashion and new age fabrics. The athleisure collection also comes with a smart-tech feature that offers benefits like quick dry, stain release and anti-stat, making it a true cross over between fitness and fashion.



AMANTÉ

Launched in India in 2007, Amanté is an international intimate wear brand, which offers comfort, fashion and sensuality to the modern Asian woman. With a vision to be the leading premium lingerie brand in the Asian region, Amanté believes that a fashionable and confident woman deserves a product that is modelled to fit her silhouette and made to suit her surroundings. The brand embodies the 25 years of excellence in lingerie manufacturing that it inherits from its parent conglomerate.

Core Strength: Amanté is a part of MAS Brands, which is a subsidiary of MAS Holdings, South Asia's largest supplier of niche market intimate wear. The brand has a fully integrated supply chain and design offices in New York, London and Hong Kong, which offer premium products set to the latest international trends and styling.

Target Group: The brand's target audience comprises of women in the age group of 22- 40 years, who are more mindful of international fashion trends and value quality.

Product Portfolio: Amanté aims to provide a complete world of intimate wear with premium lingerie, sleep wear, activewear and swimwear to its customers.

Share of Innerwear: Innerwear comprises of 80 percent of Amanté's total product portfolio.

Latest Innerwear Collection and Theme: The brand's latest collection 'Wanderess' features a range of styles, including trendy designs such as front

open and lace racerback bras. The collection plays with a lot of textures and prints. Amanté has also launched the latest fashion silhouette, the bralettes, which are easy slip-on styles with the magic of lace.

Latest Product Innovation: Bodycraft is the latest ingenious range of body sculpting bras including a minimizer for full figured women, which gives a guaranteed 1 inch reduction in cup size. Also, in this range are bras that help in body contouring and support, with features such as seamless wings that smoothen the bulges.

Product Expansion Plans: The intimate wear brand's innovation teams and design houses are always working to get the latest designs and technology products to the Indian consumer.

Primary Markets: Most of Amanté's business comes from metro and mini metro cities, but the next phase of growth for the brand is tier-II cities. It is now focusing at a pan India presence. The brand retails through over 1,500 outlets across India and is amongst the top premium lingerie brands.

Retail Expansion Plans: Amanté is working on strengthening its exclusive



store network, a complete intimate wear destination offering all categories of lingerie, swim and activewear. It is looking at opening 25 stores within 2 years to be present across all metros and major tier-II cities.

Online Presence: Online has been a major catalyst for Amanté to gain market share and SOV amongst competition.



BRAND UPDATE

► Name of the company:
MAS Brands India Pvt. Ltd.

► Year of launch: 2007

► Headquarter: Bengaluru, India

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹445- ₹1,995
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AMUL MACHO

One of the highest selling and fastest growing innerwear brand in the country, Amul Macho has established itself as a house-hold name in India. This is an exceptional achievement for a brand that has been in business for just 10 years considering the cut-throat competition in the innerwear category. Today, Macho is the leader in the mid-segment innerwear market thanks to its quality, innovation and path breaking communication.

Core Strength: The brand's core strengths are quality, price range and the variety in terms of colour, design and patterns. Over the years, the brand has steadily continued its development in product innovations to make it stand out in the fast evolving fashion industry in terms of variety and comfort.

Target Group: Amul Macho focuses on the middle and upper middle class consumers from tier-I, -II and -III cities.

Product Portfolio: The brand's current product portfolio encompasses a wide range of vests and briefs in a variety of designs, colours, patterns, fabrics, etc.

Share of Innerwear: Amul Macho is a dedicated innerwear only brand.

Latest Innerwear Collection and Theme: The brand's new collection comprises an exhaustive range of innerwear. The theme is completely youth and fashion oriented in terms of vibrant colours, patterns and designs.

Latest Product Innovation: Amul Macho is propelled by an aspiration to continually renovate its products in order to stay ahead of its peers in the market. Every product of the brand has some unique proposition which makes it different from other products and competition.

Product Expansion Plans: After successfully creating a niche for itself in the innerwear industry, the brand

plans to expand into casual wear and thermals very soon.

Primary Markets: Amul Macho has a very strong market in the North and the West.

Market Expansion Plans: Apart from further strengthening its markets in the North and the West, the brand also has plans of exploring the South and the East markets.

Online Presence: Amul Macho is available on almost all the leading e-tailers in India including Amazon, Flipkart, Snapdeal, Paytm, etc.

Annual Turnover: The brand's turnover for the last fiscal was in surplus of ₹500 crores plus and it aims to reach about ₹1,000 crores in the next 2-3 years.

CAGR Over the Last 3 Financial Years: Amul Macho has registered a CAGR of approximately 20 percent for the last 3 years.



BRAND UPDATE

► Year of launch: 2005

► Name of the company:
JG Hoisery Pvt. Ltd.

► Total no. of MBOs: 1,00,000

► Total no. of LFS: 15

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Men's range

Vests: ₹90- ₹150 | Briefs: ₹90- ₹170

► Kids' range

Boys range: ₹60- ₹100





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BE MINE BY LINGERIE SHOP

Lingerie Shop is a one stop shop, offering a range of all categories, be it sexy lingerie, shapewear, bras, panties or sleep wear, Lingerie Shop has you covered, with its in-house brand Be Mine. Woven from the finest fabrics, offering premium quality, the brand's products are crafted to inspire the chic and sexy. Its design range features six categories that cater to every body type, from petite to abundant. Its team of designers have a suave sense of fashion, which easily reflects in its designs, unique patterns and colour palette.

Core Strength: Be Mine is created with the sole purpose of delivering style and comfort to every woman. It is about making every day sexy for them.

Target Group: The brand targets women in the age group of 23- 45 years.

Product Portfolio: Lingerie Shop launched its brand Be Mine which has around 59 styles at the moment and is looking at adding another 60 styles by this year end. The brand offers different styles in bras, panties, shapewears, etc.

Latest Innerwear Collection and Theme: Be Mine is an inspiration from 'Fifty Shades of Grey'. The idea was moulded to create women's inner desire, to look and feel sexy within and the all-women's favourite— colour

IMAGES Business of Fashion



black was introduced. Lingerie Shop created the collection in competition with latest trends of silhouette and cuts. The lingerie design world was briefly studied to create the styles and inspirations were taken from European concept stores. The collection currently targets the younger Indian audience. The material (laces, fabrics, mesh, elastics) used are premium in quality, to ensure the best workmanship and deliver the expectation the brand promises.

Latest Product Innovation: The entire collection has been created with a lot of thought and each of the pieces are unique in themselves.

Product Expansion Plans: Lingerie Shop is planning to launch its next sub-brand *Hello Sugar* by end of next

month. The idea is to keep delivering newer experiences to the customers and keep innovating with products. There are 6 sub-brands under Lingerie Shop and the brand will unveil every collection in due course of time.

Online Presence: Lingerie Shop retails through its own website the Lingeriешop.com and have also tied up with Nykaa.



BRAND UPDATE

► Name of the company: **Verement Pvt. Ltd.**

► Year of launch: **2017**

► Headquarter: **Mumbai, India**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

₹499- ₹4,999



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CANDYSKIN

Candyskin is India's first premium lingerie brand made for women and by women. Launched in January 2017, the brand stands for luxury and comfort at its finest. The brand's aim is to transform lingerie shopping for the Indian women into an experience. The brand's products are conceptualised after in-depth research on sizes and fits and hence guarantee unmatched comfort and fit.

Core Strength: Candyskin boasts of a variety of vibrant and pop colours as well as sexy styles that are crafted to fit every body-type.

Target Group: The brand's core customers start from a tender age of 16 years right up to the age of 35 years.

Product Portfolio: Candyskin offers premium colourful bras and a variety of panties in different styles. The brand also has a select range of lace bodysuits to shape and flaunt those curves.

Latest Collection and Theme: The brand's latest innerwear collection focuses on the padded, non-wired bras which is part of its Fall/ Winter collection.

Top Innovations: Candyskin's top most innovative products are its Swarovski, Demi and Unlined bras. Innovations in the panty collection includes thongs, boy shorts and briefs.

Product Expansion Plans: As part of its product expansion plans, Candyskin intends to design cool and fashionable maternity wear as well as a modern, chic and trustworthy sportswear.

Online Presence: Along with its own e-commerce website candyskin.com, the brand is also available on TataCLiQ and Nykaa. It also plans to make its products available on Amazon and Jabong.



BRAND UPDATE

► Name of the company: RVK

► Year of launch: 2017

► Headquarter: Mumbai, India

► Total no. of MBOs: 25

► LFS: Central

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹799- ₹1999

Panties: ₹500- ₹650

Others: ₹2,499



CHIC CARISSMO

Avon Enterprise has been manufacturing ladies panties since 1986 in hosiery fabric. The company launched the brand Chic which specialized initially in making panties using 100 percent cotton jersey material. Comfort and perfect fit being the epitome of the brand, Chic has its own in-house designing and production team churning up new patterns every month. Recently, the brand underwent a huge metamorphosis and renamed itself Chic Carissimo and launched fashionable styles in cami tops and stylized panties.

Core Strength: Chic specializes in offering a range of full fit and slip bikini panties. The brand also prides in its in-house designing and production team which churns up new patterns every month.

Target Group: The brand's core customers are the chic women who need comfortable wear in performing their role with ease.

Product Portfolio: The brand offers ladies panties, t-shirts, pyjamas and gym wear for its customers.

Share of Innerwear: Innerwear comprises of 90 percent of Chic's total product portfolio.

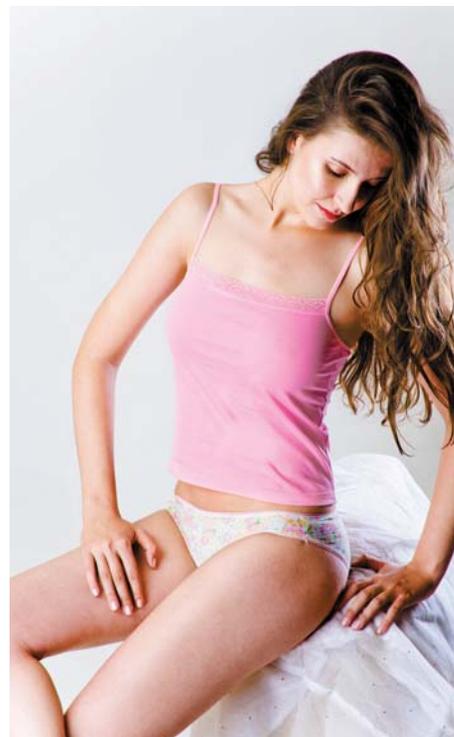
Latest Innerwear Collection and Theme: Chic is a pioneer in creating 100 percent cotton panties in plains and subtle prints for the chic woman. The latest collection offers a range of trendy stripes, gutsy colour based prints, yuppy and colourful elastics. Accessories and fabrics make Chic innerwear stand out among all others in the industry.

Latest Product Innovation: Chic is basically a panties brand since 1987. Within this, the brand is constantly creating a range of quality and fashionable styling.

Product Expansion Plans: The brand may add on knitted bras, sports bras and camisoles in its product basket. Chic is also looking forward to add comfortable sleep wear line for the age group of 18-19 years.

Primary Markets: The brand has strong presence in Mumbai, Kerala and Gujarat. Since Chic's office is also in Delhi, the brand also retails in Delhi/NCR, Punjab and Utttar Pradesh.

Top Retailers: The innerwear brand primarily retails through



stores like New Sunita (Mumbai), Chermas (Hyderabad), Naidu Hall (Chennai), Seematti (Ernakulam) and Indraprasthas (Delhi).

Market Expansion Plans: Chic is focusing on expanding its presence in tier-II states like Uttar Pradesh, Rajasthan, Uttarakhand, Assam and Madhya Pradesh by the end of 2018. The brand feels that these markets have a tremendous potential and there is great scope in these areas.

Online Presence: The brand has presence in e-commerce websites like Amazon, Flipkart and Paytm.



BRAND UPDATE

- ▶ Name of the company: Avon Enterprises
- ▶ Year of launch: 1987
- ▶ Headquarter: Thane, India
- ▶ Total no. of MBOs: 1,500

PRICE RANGE OF THE CATEGORIES AVAILABLE...

- ▶ Women's range

Panties: ₹100- ₹150

- ▶ Kids range:

Girls range: ₹65- ₹90

CRUSOE

Launched in the year 2009 from the house of Jagannath Textile Company Limited, Crusoe is a premium innerwear brand. Jagannath Textiles is one of the leading manufacturers and exporters of yarn, woven and knitted fabrics in India with an annual turnover of ₹350 crores. The company has one of the largest single-location yarn manufacturing units in India, the most modern machinery, world class infrastructure, a dedicated work force of over 1,000 and is situated in an environmental friendly campus. Crusoe has a wide presence in over 4,000 MBOs including some of the major large format stores and features as many as 85 styles that offer skin-friendly comfort.

Core Strength: The company's garment wing has a huge in-house manufacturing and storage infrastructure. This infrastructure can be easily scaled-up based on the market requirements. The core strength of the brand is its unique and trendy designs with admirable contrasting colours and made out of best quality fabric. All the products by Crusoe are made of 100 percent cotton fabrics which are made from its own yarn manufactured at its premises.

Target Group: Crusoe is positioned as a lifestyle product in the premium segment and the brand identity has been designed around 'adventure' appealing to the youth, targeting men and women in the age group of 16- 35 years.

Product Portfolio: Crusoe offers innerwear, leisure wear and sportswear in men's category and activewear, innerwear and leisure wear in women's segment.

Latest Innerwear Collection and Theme: The brand's latest collections are athleisure wear. Since the trend of wearing athleisure wear in everyday life has become popular, it has introduced styles like yoga pants and workout pants for men and women.

Primary Markets: Crusoe's primary markets are in South India, especially Tamil Nadu and Kerala. The brand has exclusive stores in Coimbatore, Kolkata, Kochi, Puducherry and Thrissur. It also retails through all leading lifestyle stores.

Online Presence: The brand is present in all the leading e-commerce portals and also retails through its own portal www.crusoeworld.com.



BRAND UPDATE

- ▶ Name of the company: Jagannath Textile Company Limited
- ▶ Year of launch: 2009
- ▶ Headquarter: Coimbatore, Tamil Nadu, India
- ▶ Total no. of MBOs: 5,000
- ▶ Total no. of EBOs: 6
- ▶ CAGR (last 3 years): 40%

PRICE RANGE OF THE CATEGORIES AVAILABLE...

- ▶ Men's range
 - Vests: ₹129- ₹45
 - Briefs: ₹125- ₹36
- ▶ Women's range
 - Others: ₹175- ₹769

DOLLAR BIGBOSS

Over the years, Dollar Industries Limited, through its range of premium products, have focused on achieving global excellence in cost, quality and productivity. The styles introduced by Dollar always stay in tune with the latest fashion. Today, Dollar ranks among top hosiery and garments manufacturing giants in India. Dollar has evolved as an umbrella brand for the firm and it has launched a collection of successful sub-brands like Dollar Bigboss Premium Innerwear, Dollar Club, Dollar Club Myme, Dollar Club Hutch, Dollar Club Midas, Dollar Lehar, Dollar Comfort, Interlock, Dollar Missy, Kids Care, Winter Care, Dollar Footprints (Socks) and more.

Core Strength: Along with trendy designs, the brand's main strength is its pop colour, quality products that are available in affordable price points.

Target Group: Dollar Bigboss targets the family segment with income of ₹10,000 and above. It's core consumer group comprises of Indian males who aspire to wear branded garments but do not have money to buy international brands.

Product Portfolio: Bigboss range includes men's premium innerwear, which includes Bigboss premium vests, sports vests, fashion trunks, premium trunks and premium briefs. A new range of gym vests has also been introduced for the fitness conscious youth.

Latest Innerwear Collection and Theme: The brand has launched its range of trendy trunks, that are made of micro modal fabric available in a slew of new and unconventional shades like

mesa rose, orange, air force blue and so on.

Top Innovative Products: Innovation and style go hand in hand at Dollar. The brand continually comes up with new and improved versions of its product range every season on the basis of global fashion trends and customer demand.

Primary Markets: Dollar Bigboss mainly targets the urban cities along with the rural markets of India.

Market Expansion Plans: As of now, the brand is present all over India. It is now consolidating its endeavours in exploring the rural markets more aggressively.

Online Presence: Apart from its own e-tail site dollarshoppe.in, Dollar Bigboss is also available on all other online sites like Snapdeal, Amazon, Flipkart, eBay, Voonik, etc.

Annual Turnover: The brand registered a total revenue of ₹906 crores for FY (16-17) and is targeting to reach the ₹1,000 crores mark in the coming financial year.



BRAND UPDATE

► Name of the Brand: Dollar Bigboss

► Name of the company: Dollar Industries Ltd.

► Headquarter: Kolkata, India

► Total no. of MBOs: 85,000

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Men's range

Vests: ₹104- ₹121 | Briefs: ₹95- ₹120

► Women's range

Leggings: ₹300- ₹399 | Panties: ₹110- ₹280
Camisole: ₹175- ₹300



FCUK

Launched in 2008 in India, FCUK has opened around 55,000 sq.ft. retail space over the years. FCUK underwear is a premium underwear brand that builds on the cutting edge style and design aesthetic of the parent apparel brand. The brand is continuously working on expanding its presence internationally and Oban Fashions Pvt. Ltd. has acquired rights for Sri Lanka, Bhutan, Nepal, Pakistan and Bangladesh in 2013. Driven by innovation and change, the brand's strength lies in balancing new and exciting ideas with the basic promise of quality and affordability. Throughout this expansion and diversification, the principles have remained the same.

Core Strength: The core strengths of the products by FCUK are the quality, the fun, audacious prints and brand images and of course the perfect body contouring fits.

Target Group: Discerning style conscious consumers are the brand's focus. While the brand targets the price points between the mass and super premium category, that is, ₹400- ₹1,200, the designs and styles are meant for those who appreciate fashion even in their underwear.

Product Portfolio: FCUK's current portfolio comprises of men's wear range consisting of briefs, trunks, vests, boxer shorts, sleep shorts, sleep tees, basic tees, sleep shorts and pyjamas.



Latest Innerwear Collection and Theme:

The latest collection for the season Spring/ Summer 2017 is inspired from various themes reminiscent of modern take on traditional prints, ethnic themes like paisleys, ikats, block prints and water colour effects. Varsity theme catering to college attractions such as sports inspiration colour blocks based on comfort with stretchable looks and feel. The collection also includes geometric themes with both bold and minimalistic designs. Further, in the new nautical theme, nautical influences is being transferred to geometrical patterns and sailor prints. The range comprises colours and trends from the selected season trends and palette is based on an amalgamation of selected fabric, quality, comfort and fit.

Latest Product Innovation: The innovations in the product come from the technology used in the products such as, the finishes given to the ranges of bold, graffiti and England which use lock in new technology. The brand also uses the innovation of ultra soft waistbands. Further innovations are in process with different fabric

structures, finishes, washes which are different and outstanding from common innerwear products.

Product Expansion Plans: FCUK is expanding its product range in sleep/ lounge wear with knit pants, shorts, sleep tees.

Primary Markets: the brand's primary markets are metro cities, state capitals and the union territories. The brand retails through a number of MBOs, all the national large format stores and its exclusive stores as well.

Top Retailers: FCUK's top retailers are Lulu Mall (Kochi), Bachoomal Collections (Agra), A One (Delhi), Khubsoorat (Delhi) and Behind Scene (Bengaluru).

Market Expansion Plans: FCUK being a premium brand, the expansion plans is based on demand spike from particular regions which will indicate whether the market is ready to accept such a premium brand.

Online Presence: The brand has presence in all the key online websites like Amazon, Flipkart, Myntra, Jabong, Koovs, Snapdeal, TataCliq, Paytm and Ajo. The brand is getting adequate traction in the online space and is aligning its strategy keeping in mind the strength of each retailer.

BRAND UPDATE

▶ Name of the company: Oban Fashions Pvt. Ltd.

▶ Year of launch: 2011

▶ Headquarter: Mumbai, India

▶ Total no. of MBOs: 500

PRICE RANGE OF THE CATEGORIES AVAILABLE...

Men's range

Vests: ₹349- ₹99
Briefs: ₹249- ₹649

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GROVERSONS

Groversons is one of the oldest lingerie manufacturers in the country and was established in 1953 by Late C.L. Grover. The company first branded its products under the name Paris Beauty which became the flagship brand of the company. Today Groversons Group, under the guidance of current Managing Director, Rakesh Grover, has achieved many milestones, and its sales graph has registered growth every year. Groversons is the first lingerie company in India to get ISO9001:2008 certification. The group claims to be one of the largest manufacturers of lingerie and intimate apparel in the country, having state-of-art facilities. The company owns brands like Paris Beauty, Miss T, Winta and Sunaina.

Core Strength: Groversons prides in its production capacity, distribution network and also the quality and fitting of the product.

Target Group: Groversons has a wide range of brands and products targeting discerning women between age group of 18- 50 years.

Product Portfolio: The company has an expansive range of products under different brand names. Paris Beauty offers products ranging from 100 percent cotton brassiere to knitted and fashion bras, slips, camisoles and panties. Miss T also offers a premium range of bras and panties. While Winta's product basket comprises of thermal wear for men, women and kids, Sunaina focuses on economy fashion women's innerwear options.

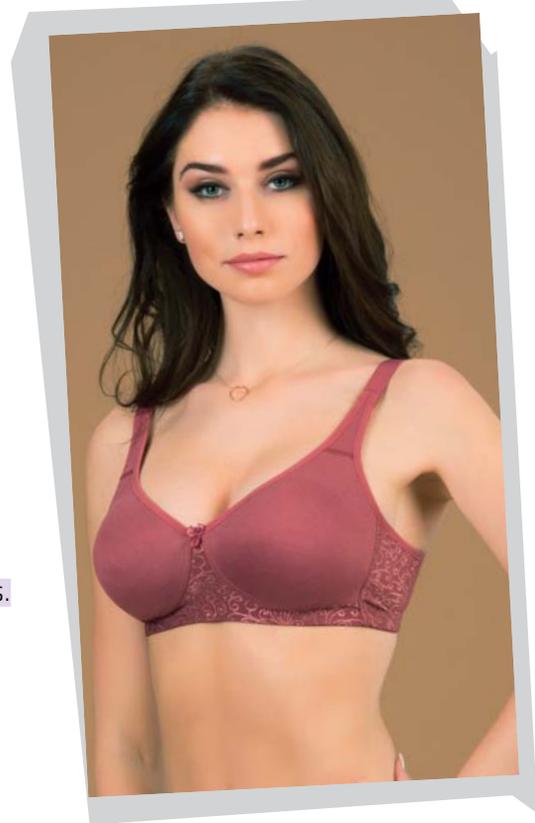
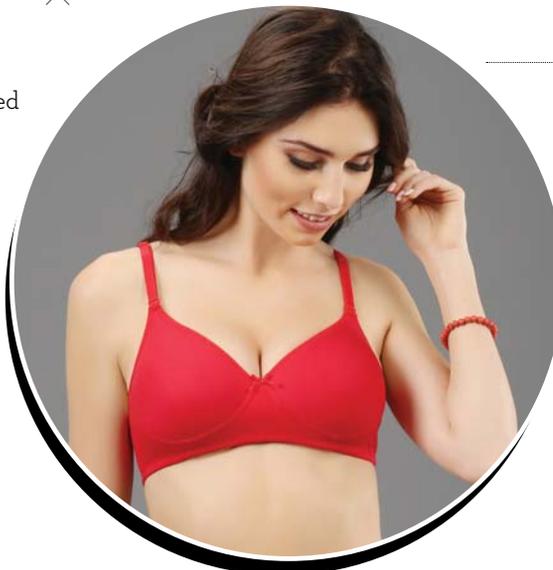
Latest Collection and Theme:

Groversons has launched a new padded collection in a wide range of solid colours and prints. The company has introduced new sportswear range which are apt for gym, yoga, running or other sports activities. Groversons has also launched a range of plus size collections with cup sizes ranging from B to G and wide options in colours and lace designer products which have got

huge acceptance from its customer base. In panties range too, Groversons has introduced a new fabric which is being liked by its consumers.

Top Innovations: Groversons has few specialized cups and fabrics which are yet to be launched in the market. The company has also brought in few technical advancements in its multi-way style, which can be worn in a number of ways.

Market Expansion Plans: The innerwear company sees a huge opportunity in the south Indian market as the product acceptability is high and feels that there is a gap in the category in the south and Groversons can fill that gap.



BRAND UPDATE

- ▶ Name of the brand: **Groversons**
- ▶ Year of launch: **1953**
- ▶ Headquarter: **New Delhi, India**
- ▶ Total no. of EBO: **15**
- ▶ Total no. of MBO: **16,500**
- ▶ Annual turnover FY (16- 17): **₹15 crores**
- ▶ CAGR over last 3 years: **20-25 % approx.**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

▶ Men's range

Vests- thermals: ₹400- ₹800
Others: thermal lowers: ₹400- ₹900

▶ Women's range

Brassieres: ₹200- ₹700
Panties: ₹100- ₹300

▶ Kids range

Boys range- thermals: ₹200- ₹350
Girls range- themrals: ₹200- ₹350



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HILLMAN HOSIERY

Hillman Hosiery, incorporated on 29 March 2014, is a family run business, with manufacturing units in Kolkata and Tirupur. Over the years, Hillman Hosiery has built a great brand image in the hosiery market. With growth in hosiery market, the brand is constantly expanding and innovating its products and production techniques while maintaining an uncompromising stance on comfort. The brand has been popular for its winter wear products for quite some time now.

Core Strength: The brand's USP lies in ensuring complete satisfaction and utmost comfort for every consumer by creating top notch products.

Target Group: Hillman Hosiery targets semi-urban and rural markets including towns from tier -II and tier -III areas.

Product Portfolio: The brand offers a wide range of men's, women's and kids' innerwear, casual wear and winter thermal products.

Share of Innerwear: Hillman Hosiery is basically an innerwear brand and the category comprises of almost 80 percent of the brand's product basket.

Latest Innerwear Collection and Theme: Keeping in mind the latest trends, the brand has recently launched bright colours and various cuts in men's innerwear and various patterns in men's gym vests. Hillman Hosiery has also introduced joggers for men as well as women.

Latest Product Innovation: The brand has launched lots of new trunks, out of which lycra based trunks would invite a lot of appreciation.

Primary Markets: Hillman Hosiery has a pan India presence, out of which North and West regions are its strongest markets.

Market Expansion Plans: Expansion is the idea of every business. Strengthening in existing and exploring newer markets can only help industry grow and the brand is planning to follow the same. Hillman Hosiery has plans to come up with a range of casual wear to widen its reach and penetrate deeper in the market.



BRAND UPDATE

- ▶ Name of the company: Hillman Hosiery Mills Pvt. Ltd.
- ▶ Year of launch: 2014
- ▶ Headquarter: Kolkata & Tirupur, India
- ▶ Total no. of MBOs: Over 5,000
- ▶ CAGR (last 3 years): 8- 10%

PRICE RANGE OF THE CATEGORIES AVAILABLE...

▶ Men's range

Vests: ₹70- ₹200
Briefs: ₹100- ₹250
Others (tracks, shorts, t-shirts, etc.): ₹300- ₹1,000

▶ Women's range

Panties: ₹60- ₹120
Others (camisoles, tracks, capris, t-shirts): ₹75- ₹150

▶ Kids range

Boys range: ₹40- ₹70
Girls range: ₹40- ₹80

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 with products being sold by thousands of wholesale partners all over the world. In India, Jack & Jones was introduced in the year 2008. Styling of innerwear in Jack & Jones is adapted to suit the brand's fashion identity. From quirky prints to unconventional cuts with interesting logo details, the innerwear collection is an exciting addition to Jack & Jones product portfolio.

Core Strength: Jack & Jones innerwear is known for its young and vibrant prints. It offers funky options in underwear and lounge wear categories at compelling price points.

Target Group: The target audience for the brand is young males between age group of 18- 24 years.

Product Portfolio: Jack & Jones offers a mix of innerwear with other product categories such as sleep wear and lounge wear. The brand has in its portfolio a wide array boxers, trunks and briefs with quirky prints being the main USP.

Latest Collection and Theme: Primarily, Jack & Jones is a fast fashion brand and its collection of innerwear is styled to reflect the same. The brand's latest collection predominantly comprises of prints based on themes such as Oriental, Hawaiian, Gothic, Camouflages, etc.

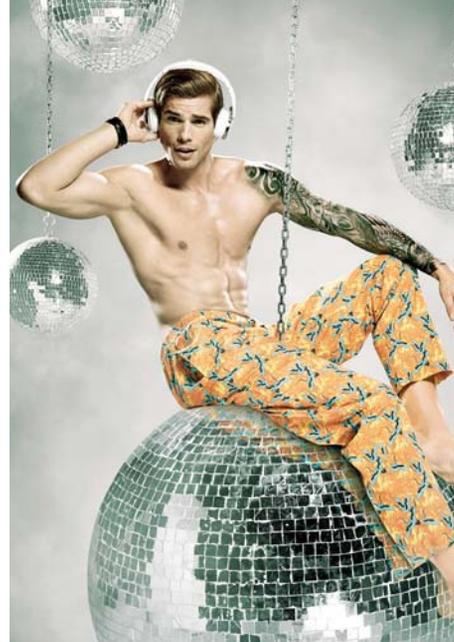
Top Innovation: Brazilian trunks, a brief and trunk hybrid, is quite popular amongst its customers. These are trunks with short legs and a square cut appearance and is ideal for someone who wants a snug fit like a brief but coverage and comfort of a trunk.

Category Expansion Plans: After launching innerwear and lounge wear as a part of the brand's innerwear category, Jack & Jones plans to expand the category further by adding a new product range called comfort wear which would be cross-over between gym wear and lounge wear, with gym pieces styled as casual outfits and vice versa.

Primary Markets: Jack & Jones' innerwear collection is available across 80 cities in the country.

Market Expansion Plans: By the turn of 2018, the brand plans to make its products available in almost all A and B class towns across all the 30 states of India.

Online Presence: Jack & Jones is present in about 10 leading e-tailers in addition to its own e-commerce site jackjones.in. The brand feels that online business for the innerwear category is small but encouraging as it harbours immense opportunity for aggressive expansion of this category and the brand aims to utilise the same.



BRAND UPDATE

- ▶ Name of the company: **Bestseller India**
- ▶ Year of launch: **2008**
- ▶ Headquarter: **Mumbai, India**
- ▶ Total no. of EBOs: **71**
- ▶ Total no. of MBOs: **80**
- ▶ Total no. of online partners: **10**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

- ▶ Men's range
- Vests: ₹399- ₹499
- Briefs: ₹249- ₹1299
- Sleep & Lounge: ₹599- ₹1299

LUX COZI

Lux Cozi is one of the top players in the men's innerwear market with a strong presence in the mid to economy segment. Established in 1957 by Lux Industries Ltd., Lux Cozi is a value for money brand which offers great comfort and style at a very affordable price. The brand functions with a vision to keep creating new benchmarks for quality and comfort, the two fundamentals that lay the foundation of the company and take it to the epitome of success. Lux Cozi's mission is to be recognised as the best Indian hosiery company and to drive the industry towards sustainable growth and development.

Core Strength: The brand believes in presenting uncompromised quality at a very pocket friendly price. From the very beginning, the brand has been providing the best quality products to its customers without making big holes in their pockets. If economical price is one USP, then the pan India distribution network is its core strength which has helped Lux Cozi in achieving the position of market leader. Today, Lux Cozi is one of the most widely distributed and retailed brand in India with their wide presence even in some remote parts of the country.

Target Group: Lux Cozi is a 'people's brand'. Its core consumers are discerning value oriented customers who believe in paying for the quality offered.

Product Portfolio: At present, Lux Cozi proudly boast a product portfolio of 100+ innerwear products catering to men, women and kids. Lux produces

vests, briefs, boxers, spaghettis, thermals and panties represented by some of the most prominent brands like Lux Cozi Innerwear, Lux Bigshot, Lux Venus, Lux Cottswool, Lux Inferno, Lux Classic, Lux Mozze and Lux Karishma.

Share of Innerwear: Lux Cozi is primarily an innerwear brand and 100 percent of its product portfolio comprises of innerwear products for men, women and kids.

Latest Product Innovation: Lux Cozi Glo collection comprising of brief boxers and vests are one of the most innovative products in the overall collection where the company experimented with a new fabric like cotton modal. The range is strikingly modish with modern and unique designs, patterns and cuts. The florescent colour waistline stands out strikingly and the fabric is exceptionally soft on the skin.

Product Expansion Plans: As Indian males are getting more and more style conscious and are looking for varied designs and quality while buying innerwears, Lux is planning to introduce an exclusively stylish new range to match the youth's preferences.

Primary Markets: Lux Cozi enjoys a wide presence in the northern, eastern and western part of the country. The company's dealers, distributors and marketing agents are widely present in these areas to penetrate further in the market. Lux Cozi is one of the most widely distributed and retailed brand in India and is retailed through more than 4,50,000 retailers across the length and breadth of the country.

Market Expansion Plans: Continuous product quality enhancement and improvisation in the promotional activities are few steps with which Lux Cozi is planning to foray into the

southern markets where the brand does not have a strong position.

Online Presence: Online retail is the 'most impactful' medium to connect with generation-Y. This medium is easier and more accessible for new customers and makes a brand more familiar and recognizable for existing customers. In line with this, the company has partnered with all major shopping websites like Amazon, Flipkart, Snapdeal, Jabong, etc. Along with this, Lux Industries has also started its own online store to reach out to its target audience and enhance visibility in the market.



BRAND UPDATE

- ▶ Name of the company: **Lux Industries Limited**
- ▶ Year of launch: **2001**
- ▶ Headquarter: **Kolkata, India**



MARKS & SPENCER

Established in 1884, Marks & Spencer was launched in India in 2001 and currently has 58 stores in India. In April 2008, the company formed a joint venture with Reliance Retail to form Marks & Spencer Reliance India. The company opened its first standalone M&S lingerie and beauty store in Mumbai in April 2014. The second store was opened in Jaipur in 2015 and the third one in Kolkata in 2016. M&S in India is one of the most popular lingerie destinations for customers and takes pride in being special and different. It offers high quality, great value clothing, lingerie and beauty products.

Core Strength: The brand prides in its dedicated team of designers, technologists and product developers in London, who focus on continually identifying new trends and developing stylish, innovative, high quality lingerie for its customers.

Target Group: The Marks & Spencer lingerie range has something for every woman which is why it has 32 million lingerie customers around the world. The brand offers an extensive range of styles and designs so that everyone can find their perfect fit.

Product Portfolio: The brand's product range includes stylish, modern and comfortable lingerie for all women. The product basket comprises of a vast variety of bras from t-shirt bras, maternity bras, push up bras, multi way and memory foam bras to embellished products with silk, lace, embroidered and coordinated collections. Marks & Spencer also sells 60 million pairs of knickers a year and have an extensive sleep wear range on offer too.

Latest Innerwear Collection and

Theme: For A/W '17, the lingerie journey continues a love affair with lighter and softer construction of bras. Non-wired, non-padded and bralette styles are key across soft and plush fabrics with decorative prints and embellished designs.

Latest Product Innovation:

Performance and comfort are key consideration for under layers and the brand has come up with innovations which move with the wearer at every turn so that the underwear keeps up with the customers' increasingly active lifestyle.

Product Expansion Plans: The collections are owned by the brand and are exclusive to M&S. The design and technical team work hand-in-hand to constantly launch new innovations for its customers. Every piece of its lingerie has been carefully selected and developed for the ultimate comfort and fit.

Primary Markets: In India, M&S has established presence in key tier -I cities such as Mumbai and Delhi. The brand also has store presence across 17 secondary cities in India. M&S retails through its 58 stores in the country including 54 stores in leading shopping malls and 4 stores on high streets.



Market Expansion Plans: Through its online presence on Myntra, Amazon and Ajio, M&S is already serving 500 towns and cities across India. The brand will continue to evaluate new markets and open stores in the best locations.

Online Presence: The brand considers online retail as a growth area. Currently, M&S retails through e-commerce websites like Myntra, Amazon and Ajio.



BRAND UPDATE

► Name of the company: Marks & Spencer Reliance

► Year of launch: 1884

► Headquarter: London, UK

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Men's range

Vests: ₹999- ₹1,499

Briefs: ₹999- ₹1,999

Others: ₹199- ₹17,999

► Women's range

Brassieres: ₹799- ₹2,799

Panties: ₹499 (2 pack)- ₹1,299

Others: ₹499- ₹9,999 (winter-wear coats)

► Kids range

Boys range: ₹799- ₹4,499

Girls range: ₹799- ₹3,999

PARK AVENUE

Park Avenue is a brand launched by Raymond Ltd., which has been delivering world class quality products to its customers since its inception in 1925. Park Avenue has now made a mark in innerwear category and with the surge in market growth, it has gone beyond basic product portfolio. The new trendy range of offerings are tailor made to suit the needs of comfort, fit, style and unparalleled quality. The brand offers a perfect blend of superior combed cotton/ elastane that is breathable and extremely comfortable.

Core Strength: Park Avenue's products have a premium connect. The brand ensures using top premium quality in its products. Its products come with a unique bio wash which removes the hairiness and gives a smooth hand feel. The seamless products are in great demand as they snug fit the body and offer extraordinary comfort.

Target Group: Currently, the brand caters primarily to urban, semi-urban men in the age bracket of 22- 35 years, with incomes over ₹50,000 or more. But the important fact about this audience is that it is evolving, with multi-cultural trends and ethnicity reflecting the increasing diversity of the urban population.

Product Portfolio: Park Avenue offers a range of products that not only appeal to one's aesthetic senses but also provide an optimum level of comfort. Its product basket comprises of vests (fashion and staple), briefs (fashion and staple), trunks (fashion and staple), seamless innerwear, slounge wear (sleep+ lounge), sportswear, thermals, hankies and socks.

Share of Innerwear: Innerwear comprises of over 30 percent share of the entire product category.

Latest Innerwear Collection and Theme: Sportif details look new on clean, minimalist silhouettes. The latest look is retro, but placing stripes within waistband elastics has a contemporary fashion attached to it and is perfect for commercial updates. Nautical prints and stripes are updated too on stretch cotton boxer briefs using paired-down elements, large scales and abstract motifs in two-tone colour combinations.

Latest Product Innovation: The brand's new innovation is its seamless innerwear which are light weight, have multi fiber blends (cotton/ polyamide/ spandex/ polyamide/ polyester/ spandex) and articulated rib panel. The four-way stretch fabrication allows greater mobility in any direction while the moisture transport system wicks sweat and dries quickly.

Product Expansion Plans: As the importance of sleep and restorative fitness in performance is better understood, a new genre of activewear emerges. Slounge wear is a fusion of active, sleep and lounge, is designed for



activities, indoors or out. Slounge wear has a luxe feel, combining comforting basics with a futuristic aesthetic. Designed for fitness, sleep or long-haul travel, these transitional pieces focus on comfort and functionality.

Top Retailers: Park Avenue sells through The Raymond Shops in over 350 towns, top multi brand outlets and large format stores like Shoppers Stop and Central (pan India).

Market Expansion Plans: The brand already has presence in major cities through various channels, that is, retail MT, distributors and in various store formats. Its major plans would be to increase distribution strength and spends on ATL.



BRAND UPDATE

- ▶ Name of the company: **Raymond Ltd.**
- ▶ Year of launch: **1925**
- ▶ Headquarter: **Mumbai, India**
- ▶ Total no. of EBOs: **80**
- ▶ Total no. of LFS: **28**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

Men's range

Vests: ₹225- ₹345
Briefs: ₹195- ₹595
Others-LW: ₹899- ₹1,399

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RED ROSE

Since inception in 1977 by the Vora brothers, Red Rose by Sagar Products has carved a niche as a leading brand amongst women's intimate wear. Inspired by women, the brand strongly believes that it all starts with what you're wearing on the inside that projects beauty and confidence on the outside and that every woman is born with that right to beauty. Outstanding performance resulting from ultimate strength, excellent quality and perfect management systems (ISO 9001 certified) has enabled Red Rose to develop and produce fine products that have made it a world-class company.

Core Strength: The innerwear brand boasts of its strengths in identifying consumer need gaps and developing innovative products to fulfill those, ensuring strict quality standards. Also, Red Rose claims to offer an assortment bigger than any other lingerie brand.

Target Group: Red Rose aims two sets of customers; first, the age group of 30 years and above and second, youngsters in the age group of 18 years and above.

Product Portfolio: At any point of time, Red Rose has over 300 designs in panties and over 150 designs in camisoles. The brand also has a wide and colourful spectrum of designs in babydolls, cotton nightwear, maternity wear and pyjama sets. The innerwear brand's portfolio also boasts of several accessories and lounge wear products like leggings, bathrobes, track pants, t-shirts, hot shorts, tummy and thigh shapers apart from several healthcare products like sanitary panties, arm

pads, pregnancy panties, feeding pads, disposable panties, etc.

Share of Innerwear: Innerwear comprises of 80 percent of the brand's total product portfolio.

Latest Innerwear Collection and Theme: The latest range introduced by Red Rose is digital print panties. The best thing in digital prints is the freedom one gets in the designs and colours. One can print absolutely anything in a range of vibrant colours. In its first collection, the focus has mainly been on nature, animals, birds, etc., apart from different graphic prints. Priced from ₹180- ₹250, these are available in sizes from M to 3XL. Every detail from design to packaging and promotions has been worked out to minute details.

Latest Product Innovation: Apart from the digital print collection, Red Rose has several innovative products like pregnancy briefs, period briefs, padded briefs, etc. In fact, Red Rose

was the first to introduce elastic based hosiery briefs in India which became a revolution in the industry.

Product Expansion Plans: The brand believes that innerwear today has moved beyond the commodity segment to a fashion segment and it is imperative to keep adding new styles, shades, prints, etc. to the collection as the consumer keeps on experimenting and has become choosy in their lingerie purchase. Keeping this in mind, the brand's team of designers regularly work on developing new concepts and colour charts for every season.

Primary Markets: Red Rose sells pan India and exports to the Gulf region. The innerwear brand is present in over 6,000 retail counters and the number keeps on growing regularly.

Market Expansion Plans: The distribution network of Red Rose has been steadily expanding to cover most parts of India. Red Rose believes that there is a huge potential in tier-III cities and towns and is thus tapping those markets.

Online Presence: Red Rose retails its products through various online channels like Myntra, Jabong, Flipkart, Amazon, Snapdeal, Paytm, TataCliq among others.



BRAND UPDATE

► Name of the company:
Sagar Products

► Year of launch: 1977

PRICE RANGE OF THE CATEGORIES AVAILABLE...

Women's range

Panties: ₹80- ₹300

► Kids range

Boys range: ₹60- ₹130
Girls range: ₹60- ₹130

RUPA FRONTLINE

Rupa Frontline is India's leading men's innerwear brand housing an array of sub-brands like Expando, Xing, Hunk, Air, Sky, Interlock, Rib and Kidz. For years together, the Frontline range has set benchmarks in the innerwear segment and it continues to do so even today. Made from 100 percent super-combed cotton, the Frontline range is designed to keep men comfortable and fresh throughout the day. Every design in the range is contemporary and stylish, in sync with the latest global trends.

Core Strength: Rupa Frontline's USP lies in providing premium comfort within an affordable price range. These core strengths have been the major drivers for the brand's growth over the years.

Target Group: The brand targets young male in the age bracket of 15- 45 years. Its target group are mainly from the middle income group.

Product Portfolio: Rupa Frontline has a wide range of products on offer. In men's category, it offers a range of vests – Sky, Interlock, Rib extra stretch, Premium, Xing, Air and Hunk gym vests; briefs collection – Front Open, Xing, Expando and Hunk; and in drawers too the collection ranges from JCI, DCI, DCIF, DCIP, DCR, DCRF, DCRFP, Hunk plain long drawer, Hunk printed long drawer, Hunk plain mini drawer and Hunk printed mini drawer. Similarly, the brand also has an expansive range of vests, briefs and drawers for boys.

Latest Innerwear Collection and

Theme: The brand has launched a new collection called FL7, which is high-performance premium innerwear made from the finest thread of spandex cotton for superior comfort.

Latest Product Innovation: FL7 seamless brief, a recent release, is among the most innovative product that the brand has launched. The product is knitted from a single piece of cloth without cutting or stitching.

Product Expansion Plans: As a popular innerwear brand, Rupa Frontline always strives to innovate and launch newer products, in order to cater to the changing needs of the consumers.

Primary Markets: Its primary markets are located in northern and eastern India. However, the brand is also trying to expand its horizon in the western and southern territories.

Market Expansion Plans: The brand has plans to introduce newer products, at par with the latest global trends and

serve its customers with consistent quality, durability and affordable pricing.

Online Presence: Rupa Frontline is fully exploring the online retail platform with its presence across Rupa's online store, eBay, Amazon, Paytm, ShopClues and Flipkart.

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BRAND UPDATE

- ▶ Name of the company: **Rupa & Company Ltd.**
- ▶ Year of launch: **1985**
- ▶ Headquarter: **Kolkata, India**
- ▶ Total no. of EBOs: **3**
- ▶ Annual Turnover (FY'16-17): **₹300 crores**
- ▶ CAGR (last 3 years): **7.5%**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

▶ Men's range

Vests: ₹103- ₹248
Briefs: ₹89- ₹279
Drawers: ₹115- ₹197

▶ Kids range

Boys range: ₹66- ₹117



SOIE

Soie embraces the magic of the possibilities within everyday life. The brand is about 'me'. Soie spearheads a fashion consciousness that defines how beautiful it is to be 'me' for a whole new generation. Each product by Soie is created with this special 'I love me' feeling representing its core identity, which has a mature twist with a focus on feminine strength, self-confidence and style. The brand's goal is to create clothes that make every woman feel confident and stylish. Established in 2011 by Ginza Industries, Soie has expanded to over 2,000 multi brand outlets, and has a presence in western India with six exclusive retail outlets and a robust social media presence.



Core Strength: Foreign technical expertise and in-house vertically integrated setup for lingerie manufacturing are Soie's core strength.

Target Group: The brand offers quality, affordable and inspiring clothing for the fashion-conscious, independent young women who want to dress well and pay less. Soie targets modern females in the age group 16- 45 years across India.

Product Portfolio: Soie offers bras, panties and panty packs, sets, shapewears and nightwear. The brand's product basket also comprises of western apparels like tops, dresses and tunics.

Share of Innerwear: Innerwear comprises of about 35 percent of the brand's total product portfolio.

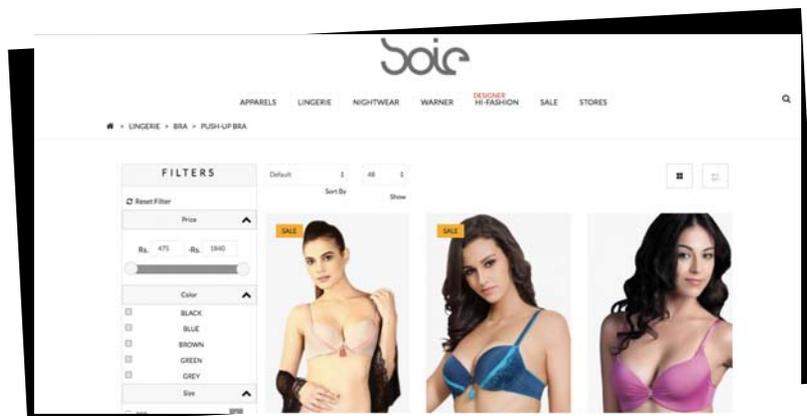
Latest Innerwear Collection and Theme: The latest by Soie is its Core collection, catering to mostly basic styles that should be found in every woman's closet.

Latest Product Innovation: The brand has tried to give a twist to the plain basic collections by introducing prints. Innovations also include a convertible and a reversible bra.

Product Expansion Plans: Soie is planning to introduce a new catalogue of basic and fashion bras, panties and nightwear every six months.

Primary Markets: The premium brand has a strong market presence in Mumbai, Delhi, Gujarat, North and Northeast India.

Online Presence: Myntra and Jabong have given huge business to the brand.



BRAND UPDATE

► Name of the company: **Ginza Industries Ltd.**

Year of launch: **2011**

► Headquarter: **Mumbai, India**

► Total no. of EBOs: **6**

► Total no. of MBOs: **1,500**

► Total no. of LFS: **25 approx.**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹340- ₹1,290

Panties: ₹140- ₹390

Nightwear: ₹690- ₹1,890

TT

Launched in 1964, TT is one of the oldest and most respected brands in the Indian apparel sector. It is a vertically integrated concern and is a self contained textile producer, garment manufacturer with 25 franchise production units at eight different locations. TT is also the first Indian knitwear company to go public. An ISO 9001 certified and govt. registered trading house, TT Ltd., today covers the entire spectrum of the textile sector from cotton, yarn, fabric, to garments and accessories. Over the years, the brand has been conferred with countless awards and honors including Excellence Award in 2010 by the Indian Economic Service and the Master Brand Status by CMO Council.

Core Strength: TT is a fully integrated company – fibre to fashion which allows it to deliver consistent quality at reasonable prices.

Target Group: The brand targets the middle class within the age bracket of 25- 40 years.

Product Portfolio: The brand's product portfolio encompasses a complete innerwear and casual wear range for the complete family – predominantly in knitwear.

Share of Innerwear in Product

Portfolio: Innerwear constitutes about 25 percent of the total product portfolio of the brand.

Latest Innerwear Collection: TT's latest innerwear collection features trendy colours and spandex fabric to meet the fashion and comfort needs of its customers. The entire line conforms to modern styles and features an innovative range of fits and styles.

Manufacturing Capabilities: The brand has manufacturing facilities at Gajroula (UP), Avinashi (Tamil Nadu), Tirupur (Tamil Nadu), Kolkata (West Bengal), Gondal (Gujarat) and Rajula (Gujarat). Each of these units are armed with cutting edge machinery and experienced manpower, that ensures

that every piece that rolls out are unmatched in terms of quality.

Product Expansion Plans: The brand plans to play with novel colour combos, prints and comfort styling products. At TT, restyling the existing range and introducing new products is a continuous process.

Primary Market: North India region is the brand's largest market.

Market Expansion Plans: The brand is aggressively trying to penetrate newer markets in India. In line with this, it is appointing/ changing agents and sales teams in areas where it is not amongst the top brands. It also is actively looking at establishing TT Bazaar stores to penetrate markets with its complete range.



Online Presence: TT is present in all popular marketplaces in addition to selling on its own website ttbazaar.com.

Annual Turnover: For the last fiscal, FY (16-17), the brand registered a turnover of ₹700 crores and it aims to reach ₹1,000 crores in the next few years.

CAGR over the Last 3 Financial

Years: The brand is growing at a CAGR of 20 percent.



BRAND UPDATE

► Name of the company: **TT Ltd.**

► Year of launch: **1964**

► Headquarter: **Delhi, India**

► Total no. of EBOs: **25**

► Total no. of MBOs: **25,000**

► Total no. of LFSs: **50**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► **Men's range**

Vests: ₹65- ₹150 | Briefs: ₹90- ₹175

► **Women's range**

Brassieres: ₹60- ₹200 | Panties: ₹60- ₹125

► **Kids range**

Boys range: ₹50- ₹100

Girls range: ₹50- ₹100

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TUNA LONDON

A part of the Liberty Group, Tuna London is an Indian brand with English sensibilities. The products have been designed in London by reputed international designers such as Erika Marteez and Ingmar Veresimea who have also deigned for brands such as Next, Calvin Klein, H&M, etc. All products are produced in its world class, state-of-the-art manufacturing facility in Coimbatore.

Core Strength: The brand doesn't believe in the common myth that 'comfort and style don't go together'. This belief reflects in all its offerings – briefs, vests and tees. Made from the best quality materials and subjected to silicon wash and bio polish process, each Tuna London product stands for comfort and quality.

Product Range: Tuna London's product basket encompasses a total of 21 styles with 3 styles of white vests with different rib, structure and construction; 3 styles of trunks – 2 in cotton rib and 1 in cotton lycra; 3 styles of gym vests in cotton rib; 3 styles of t-shirts and 9 styles of briefs in a mix of all the aforementioned fabrics.

Share of Innerwear in Total Product Portfolio: Innerwear comprises of about 50 percent of Tuna London's product basket.

Top Innovations: At Tuna London, every fabric is bio-washed and bio-polished for a smoother and superior finish. The bio-polish finish ensures that the innerwear takes the shape of the body of the wearer hence making sure the fit is perfectly accurate. The brand's cotton Lycra is a very special feature. It uses 97 percent cotton and 3 percent Lycra content, thereby giving a very good cotton feel at the same time maintaining an excellent stretch factor. Briefs and trunks have a special extra buffed elastic which is extremely soft on the skin. The brand's Tubular vest is only 110 in gsm and features no side

stitch. Hence, there is no irritation to the person wearing it or any chance of deshaping or spirality. The brand's rib fabric is super stretch with enhanced recovery .

Product Expansion Plans: Tuna London is now concentrating more on sportswear and innerwear which is more sports centric. In line with this, it is currently exercising rigorous research and development regarding the same. The brand also has launched its women's sports collection lately.

Primary Markets: The brand's primary markets are Punjab, Delhi, Mumbai, Odisha and Karnataka.

Retail Presence: Currently, Tuna London is present in over 100 MBOs all over the country. The brand is also in the process of opening 10 of its own EBOs.



Top Retailers: The brand's top retailers include Cloth Palace in Chandigarh, Plus Point in Surat, Naidu Hall in Chennai, Body Basics in Pune and Jain Ent in Jalandhar.

Online Presence: Tuna London is available on most portals like Mynta, Amazon, Flipkart, etc. The brand has received excellent response online contributing to about 50 percent of the brand's total revenue. The brand's online sales are growing at a rate of 30 percent month-on-month.



BRAND UPDATE

▶ Name of the company: **Tuna London Company**

▶ Year of launch: **2014**

▶ Headquarter: **Mumbai, India**

▶ Total Number of MBOs: **100**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

▶ **Men's range**

Vests: ₹200- ₹400 | Briefs: ₹150- ₹500
Others: ₹200- ₹400

▶ **Women's range**

Brassieres: ₹600- ₹1,000



V STAR

Belonging to the promoters of V Guard Group, V-Star has captured the hearts of customers with its exquisite, affordable and comfortable portfolio of innerwear and lifestyle products. V Star's expertise is end to end – it applies exacting standards of innovation, design and service throughout the journey from its origin as a single fibre of cotton, all the way to its culmination as an exhilarating and satisfying shopping experience for all its customers. V Star manufactures more than 15 lakh pieces of innerwear and outerwear every month for women, men and children.

Core Strength: V Star's strength lies in the goodwill of its parent companies. It also prides in offering quality products at affordable price, style and comfort in line with global standards and also its loyal customers.

Target Group: The brand targets young men, women and kids from the middle and upper middle class of the society.

Product Portfolio: V-Star showcases a superlative spread of bras, panties, comfy blouses, camisoles, leggings, t-shirts, sleep wear and shapewear that are designed to complement femininity in the most beautiful way. Crafted in trendy styles and designs with a flawless blend of lace and fabric using advanced technology, all the V-Star products are of superior quality and of an international standard. The specially crafted cups, lenient straps and individually-designed laces enhance the feminine aura of the modern woman.

For men, the brand offers polo t-shirts, vests, briefs, boxers and track pants, which are available in an array of shades and cuts. The kidswear showcases product ranges in t-shirts, track pants, vests, briefs, boxers, panties, leggings, tights and bloomers.

Latest Innerwear Collection and

Theme: In men's category, V Star's latest collection is Huerocks Collection which are stylish vibrant innerwear fit for youngsters. While in women's category, V-Star has recently launched new designs in sports bras, panties shapewears, etc. For kids, the brand has launched 10 new innerwear styles, in vibrant colours and prints.

Latest Product Innovation: V Star's latest innovation in product category is Comfy Blouses which are a stylish range of readymade blouses. V-Star's Comfy Blouse is stretchable thanks to its spandex fabric. Having a close back, relaxed scoop front neck and three-quarter sleeves, this readymade top adds glamour and gives a stylish twist to traditional wear like sarees. Comfy Blouse also can be paired with new-gen choices of attire like modern jackets, fashion outfits and high waist bottoms.



Primary Markets: The brand's primary markets are Kerala, Tamil Nadu, Karnataka, Andhra Pradesh and the Middle East. V-Star has already made its presence felt in major towns and cities across India and the Middle East.

Market Expansion Plans: V-Star is present in major towns and cities across India. The brand is all set to open more EBOs and expand its presence in South India.



BRAND UPDATE

► Name of the company: V-Star Creations Pvt. Ltd.

► Year of launch: 1995

► Headquarter: Kochi, India

► Total no. of EBOs: 12

► Total no. of MBOs: 5,000

► Total no. of LFS: 50

PRICE RANGE OF THE CATEGORIES AVAILABLE..

► Men's range

Vests: ₹145- ₹215

Briefs: ₹106- ₹188

Trunk: ₹167- ₹245

► Women's range

Brassieres: ₹130- ₹455

Panties: ₹85- ₹182

► Kids range

Boys range: ₹85- ₹265

Girls range: ₹75- ₹310

WACOAL

Wacoal, a Japanese luxury lingerie brand born in 1949, is guided by the spirit of helping 'women everywhere feel more beautiful'. Known for its superior fit, quality and exceptional craftsmanship, the brand, today, has metamorphosed into a global leader in the luxury lingerie market, with presence in over 66 countries and regions including North America, Europe and Asia. The brand had entered India in 2015 under the partnership with Periwinkle Fashions, the flagship company of Tainwala Group.

Core Strength: Wacoal prides in its functional and innovative products backed by intensive product research done by Human Science Research Center. Every year, Wacoal's Human Science Research Center measures the physiques of approximately 1,000 women and girls between the age of 4- 69 years. Over the past 50 years, they have accumulated measurement data of more than 40,000 women and girls. This data helps them understand a woman's changing body shape with age and develop products that give a better fit and comfort for women of all age groups. Before production, the product undergoes 150 tests and checks.

Target Group: The brand targets women. Wacoal's mission is to contribute to the society by helping women express their beauty. The brand wants to make products for every age, need, function and occasion.

Product Portfolio: Wacoal offers bras like minimizer, sports and beginners bra for the teenagers. The product basket also includes panties of various

styles and purpose, and functional shapewear. Wacoal specializes in innovative products like mastectomy bra and shapewear for athletes.

Share of Innerwear: Wacoal is a lingerie brand and innerwear forms the core of its product category.

Latest Innerwear Collection and Theme: The brand's latest innerwear collection is 'Fire & Lace', which is a combination of lace and seamless cups. It can be worn as a day wear or as an occasional wear.

Latest Product Innovation: Wacoal's shapewears are its latest innovation as they are highly functional yet comfortable to be worn for the entire day. As a normal practice, most of the shapewears are not comfortable beyond 4-5 hours. The fabric technology at Wacoal is such that it makes movement easy and natural. In addition to this, Wacoal also offers sports bra range for low to high impact physical activity.

Product Expansion Plans: The luxury lingerie brand introduces new products every season and within the season, which are a mix of basic and occasional wear generally in line with the international trends.

Primary Markets: The brand has major presence in cities like Mumbai, Delhi, Chennai, Hyderabad, Bengaluru and Kolkata.

Market Expansion Plans: Wacoal has plans to reach out to the remaining metro cities where its presence has not reached yet.

Online Presence: Wacoal is growing on a month on month basis in e-commerce with presence on Jabong and Myntra.



BRAND UPDATE

► Name of the company: **Wacoal India Pvt. Ltd.**

► Year of launch: **2015**

► Headquarter: **Mumbai, India**

► Total no. of EBOs: **4**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► **Women's range**

Brassieres: ₹995- ₹4,995

Panties: ₹495- ₹2,495

Others: ₹1,695- ₹5,495

Kids range

Girls range: ₹595- ₹1,295



WOMEN'S SECRET

Women's secret is a Spanish innerwear brand that offers lingerie, sleep wear, beach wear, home wear, accessories and swim wear for today's woman. A brand created for and by women, the brand concentrates its efforts on developing a global brand capable of combining prestige, femininity, modernity and excellent prices. Women's secret is part of the Grupo Cortefiel, Europe's fifth biggest textile group. Women's secret was created in 1993, and the first store opened in the centre of Madrid, Spain. It will now be retailed through exclusive brand outlets in India.

Core Strength: Women's secret is unique in its proposition of combining comfort and style. The brand is all about sophisticated clothing and classic shapes that are supremely comfortable.

Target Group: The brand targets a wide spectrum of women within the age bracket of 25-45.

Product Portfolio: The brand offers a wide range of women's lingerie, swimwear, beachwear and sleepwear in styles that are stylish yet comfortable. The entire innerwear collection is exquisite, seamless and sensuous and ensures no visible lines.

Share of Innerwear in Product

Portfolio: Innerwear comprises 60 percent of the collection in stores. The remaining 40 percent is occupied by home wear, sleep wear, gym wear, accessories and shapewear.

Latest Collection and Theme:

The current Spring collection at Women's secret is all about dual-use

items. It includes a variety of lines including bralettes, a versatile piece with lace and transparencies; Valentines, a super sexy, sophisticated line, meant for the bold; a range of comfortable and stylish home wear; and a special line called 'Here Comes The Bride' that helps flaunt sexier shapes with a classy touch.

Top Innovations: The brand's top innovations include its range of sexy corsetry, the dual use sleep wear range and a maternity collection.

Product Expansion Plans: The brand plans to introduce swimwear, men's secret innerwear and perfumes along with launching a special range of surgical bras. It also has plans to expand its range of shapewear and gym wear.

Market Expansion Plans: By the year end, Women's secret plans to expand its retail footprint to 3 new stores in Bengaluru, Mumbai and Chennai. By 2021, it aims to open 42 Women's secret stores which would be spread across metros including Delhi, as well as other important Indian cities like Pune, Ahmedabad and Chandigarh.



BRAND UPDATE

► Name of the Company: Tablez India, Franchise partner for Grupo Cortefiel for India and Sri Lanka

► Year of launch: July 17, 2017

► Headquarter: Global Headquarters: Abu Dhabi; India: Kochi

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹799- ₹2,499

Briefs: ₹599- ₹1,299

Home wear: ₹999- ₹3,599

Accessories (like vanity case; bags): ₹229- ₹2,299



KIDS INNERWEAR

The kidswear market in India is definitely on the rise. Growing awareness has been driving parents to spend more for their kids of late. The kids' innerwear segment, specifically, is touted to have grown 5 times in the last 5 years. Experts from the kids' innerwear industry talk about the tremendous growth and the influencers of this burgeoning market segment.

By Manisha Bapna with inputs from Gurbir Gulati

India has 300 million kids and 60 per cent of the population is under 35. So the sky is the limit for everyday basics in India believes the Dutch retail brand Claesen's which had set foot hold in India in 2013. While figures are tough to come by, according to analysts at Ambit Capital Private Limited, kidswear accounts for 20 percent of the innerwear market in India. "This segment has grown 5 times in the last 5 years with the influence of more branded players in this market. Yes the scenario has undergone a major change," believes Mahesh Vora, Director, Red Rose Kids.

Till recently, there was seen no specialization in the kids' innerwear wear category. The same players that were manufacturing men's and women's innerwear have has extended lines for kids. Also, the competitors in the organised kids' innerwear category are somewhat limited in India . But things have comparatively changed today. There are specific innerwear brands for kids who give a good variety and collection. Yet, the category still remains to be exploited to its full potential. "Till today, the market for kid's undergarments is driven by niche players and there is lot of vacuum in this segment" says Vora.

Innovations

Innerwear for kids become outerwear in summers and colour is a priority. "We change the colors the design the print the

style every season,” says Pradeep Arora, Director, Zero. Like outerwear, kids innerwear is primarily driven by cartoon characters. “At Red Rose kids, for girls it is mostly driven around Barbie, Dora, Hello Kitty. In boys it’s focused around Minions, Ben10, Superman, and Batman,” says Vora.



“We use different yarn for different item in cotton fabric. At present we have 35 types of fabric to suit the needs of children.”

– Pradeep Arora,
Director, Zero

In India we add 1.25 crore kids every year. The primary recognition for a good kids undergarment is fine cotton which is comfortable and gives full satisfaction. “When it comes to innovation in fabric, there are so many qualities and ranges of yarn in cotton. We use different yarn for different item in cotton fabric. At present we have 35 types of fabric to suit the needs of children,” says Arora.

Trends in color

Color preferences even in kid’s innerwear changes with geographical locations, given the diversity of the nation. While some preferences are more skewed towards light colours, some prefer dark colors too. At the same time, while some states prefer neutral colours, others prefer bright tones too. “We have a selection 150 samples of kid’s innerwear with all different colour pallets,” says Vora. Normally, all over the world, the preferred colours are blue for boys and pink for girls. “But we change the shade of pink or blue in every season plus all the other colours which we make. We make a large range of colours as per the demand in various parts of the country” says Arora. He further adds that not only colors but they make pretty soft, cool and stylish products at times with witty and humorous captions to attract the parents as they influence this purchase adds Arora.



“Trends for girls is mostly driven around Barbie, Dora and Hello Kitty. In boys it’s focused around Minions, Ben10, Superman, and Batman.”

– Mahesh D. Vora,
Director, Red Rose Kids



Red Rose Kids

Challenges

According to Vora, the challenges are mostly posed by unbranded players who are randomly copying the licensee characters and destroying the health of the market and serious players. Infrastructure also poses as a major challenge in this quality conscious age. “We have to be sure about the quality from the yarn stage. The perfect combination of knitting to suit the demand of the customer, proper dyeing or bleaching to retain the softness and elasticity of the knitted fabric, etc., all adds in making a quality innerwear,” says Arora.

Future trends

The market has evolved to an extent that the innerwear retailers have started given a counter space to the kid’s innerwear players. Moving ahead with the influx of specialized brands and growing awareness the day is not far when one can see an exclusive store for kids innerwear only.



RED ROSE KIDS

Since inception in 1977 by the Vora brothers, Red Rose by Sagar Products has carved a niche as a leading brand amongst women's intimate wear. Red Rose Kids was started by the company in 1998 as a separate entity in order to fill the gap in the branded kids innerwear segment. Outstanding performance resulting from ultimate strength, excellent quality and perfect management systems (ISO 9001 certified) has enabled the company to develop and produce fine products that have made it a world-class company. The kids undergarments collection comes in a variety of colourful and playful prints to pamper the innocence of the little ones.

Core Strength: Red Rose Kids is a specialized player and its core strength is the brand's product line. The brand is known for kids' innerwear and its happening collection.

Target Group: Red Rose Kids undergarments caters to kids— both boys and girls in the age group of 0-12 years.

Product Portfolio: The brand offers innerwear for both boys and girls. It has products like briefs, boxers, trunks, vests, panties, slips, socks and bathrobes. The price range varies anywhere from ₹75 to ₹125 per piece.

Share of Innerwear: Innerwear comprises of 95 percent share in its total product basket.

Latest Product Innovation: Red Rose Kids has launched two new cartoon licensees in its range. One is minions and the other is from Justice League wherein it has superman and batman.

Product Expansion Plans: The brand's new product launch is socks and it will be focusing more on this category for the next two years. The company has established a separate unit for manufacturing socks in Surat.

Primary Markets: The most important markets in its network are Gujarat and Mumbai. The brand currently has 75 distributors in its network which cater to approximately 75,000 shops. The brand is also present in supermarkets like D-Mart and regional large format stores like V-Mart, Unique Bazaar, etc.

Market Expansion Plans: In the coming years, Red Rose Kids would like to focus and target the large format stores in the country. It is trying to increase its focus in the northern sector.



BRAND UPDATE

► Name of the company: Sagar Products

► Year of launch: 1998

► Headquarter: Mumbai, India



SIMPLY

Simply which was launched in 1998 by Candid Casuals (I) Pvt. Ltd., is for simple basic products like slippers, vests, panties, briefs, shorts, tops, frocks, babysuits, mittens, booties, etc. for infants and kids. It is 100 percent cotton brand and is designed keeping in mind the comfort of a child. Simply is a value for money brand and pays equal attention to the quality of the garment.

Core Strength: The brand prides in offering full range of babywear in very soft colours and comfortable fabrics.

Target Group: Any income group can opt for Simply's products as it is basic and value for money. The focus is always on the parents as they decide about the quality, price range, colours, etc.

Product Portfolio: Simply offers slippers, vests, panties, briefs, shorts, tops, frocks, babasuits, mittens, booties, caps, towels, napkins and gift boxes consisting all these items in a box.

Latest Innerwear Collection and Theme: The brand introduces new shades, new prints, new colours and new fabrics every season.

Product Expansion Plans: Since there is a heavy demand for the brand's products due to its good quality, reasonable pricing and variety in colours and range, Simply is planning to increase its production capacity.

Primary Markets: The kidswear brand supplies its products all over India. It retails through its own EBOs and also through 2,500 MBOs.

Top Retailers: Simply has presence in Cott Counter, Central, Pantaloons and Big Bazaar.

Market Expansion Plans: The brand is planning to expand its presence through direct retailing in Bihar and Odisha.

×



BRAND UPDATE

► Name of the company:
Candid Casuals (I) Pvt. Ltd.

► Year of launch: 1998

► Headquarter: Kolkata, India

► Total no. of MBOs: 2,500

PRICE RANGE OF THE CATEGORIES AVAILABLE..

► Kids range

Boys range: ₹50- ₹495

Girls range: ₹50- ₹495



ZERO

A renowned name in kids innerwear category, Zero was launched in 1990. The Kolkata based brand received a lot of appreciation for its 100 percent cotton range of daily wear for newborns to two year old kids. Zero is a 'value for money' brand and offers anything and everything for little babies.

Core Strength: Zero prides in offering an entire range of fabric and items for babies and little kids. The brand also boasts of a superior yarn and better knitting and processing. The kids brand also offers a wide range of colour options for every parent's specific choices.

Target Group: The parents, especially mothers are the core customers for the brand. They demand and look for 100 percent safe and comfortable clothing for their babies and Zero provides exactly that.

Product Portfolio: Zero's product basket comprises of vests, panties, bundies, front open vests, open neck vests, shorts, briefs, leggings, tops, half sleeves, full sleeves, frocks, baba suits, etc.

Share of Innerwear: About 60 percent of the brand's product portfolio comprises of innerwear.

Latest Innerwear Collection and Theme: In baby wear, all the items keep changing regularly, be it prints, colours or shades. The brand strives to keep the newness alive at all times. Zero also introduces a new fabric every year.

Product Expansion Plans: The kids brand has installed new machines for cutting, in its new factory space. This will increase the capacity to atleast 50 percent this year. Zero further plans to add more space next year to increase the capacity by another 100 percent. The work will start in a months time in Hosierey park.

Primary Markets: Zero has presence all over India. However, Maharashtra and Gujarat remain the largest markets. The brand also retails through large format stores like Big Bazaar, FBB and Central.

Market Expansion Plans: Though Zero supplies all over India, but there are few states like Odisha and Bihar, where the brand is planning to establish its presence directly.

Online Presence: The brand retails through FirstCry and the sales are increasing every month.

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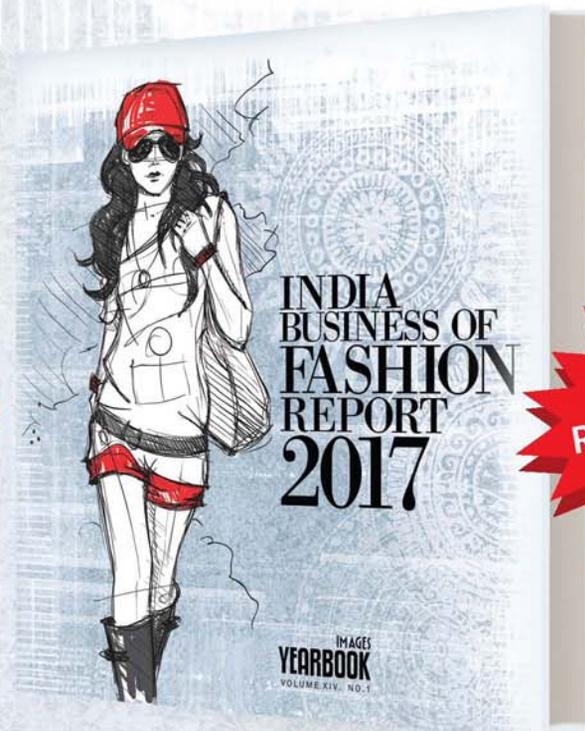


BRAND UPDATE

- ▶ Name of the company: Cotton Casuals (India) Pvt. Ltd.
- ▶ Year of launch: 1990
- ▶ Headquarter: Kolkata, India
- ▶ Total no. of EBOs: 3
- ▶ Total no. of MBOs: 2,500
- ▶ CAGR (last 3 years): 20%

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PAST IBOFR ISSUES:





The Lingerie Shop

A WISH COME TRUE

ONLINE INNERWEAR

The internet has secured a respite for the Indian women especially when it comes to innerwear shopping. Traditionally, a humiliating and fleet-footed affair, e-commerce manifested itself as a saviour for these consumers, and helped the whole segment in India progress like never before. IMAGES BoF takes a look at the current dynamics of the online innerwear market in India.

-By Manisha Bapna with inputs from Tanya Krishna

Online shopping has taken away my inhibitions on shopping innerwear. It's a boon when compared to the traditional process of asking a male salesperson for a size 34 with large cups and push up style," says Amrita Pathak, a corporate executive. Among the few percent who have been able to voice out their preferences, there is still a lot of discomfort surrounding the purchase of lingerie as a category in India. It still remains a hushed up purchase item among women. "We ask — why shouldn't women talk about it in a much more open and confident manner? What is so embarrassing talking about innerwear? But we also believe that Rome wasn't built in a day. We have been consistently trying to break the stigma and encourage women to ask questions on company owned platforms such as Clovia's Closet," says Pankaj Vermani, Founder and CEO, Clovia. He further continues, "We will continue to challenge

stereotypes and generate conversations to discuss lingerie openly and freely.” India’s largest online lingerie retailer, Zivame’s prime focus is to break open the category. In their fitting lounge, women can experience a half an hour session with their fit experts and get themselves fitted.

But at PrettySecrets, women’s privacy is the top-most priority. “All orders are packed with utmost care in a specially designed box. The box is shipped in a white coloured, sealed, unmarked and tamper proof plastic shipping envelope. The contents of the package are not visible and details are not mentioned on the exterior,” says Karan Behal, Founder and CEO, PrettySecrets. The same is the norm at The Lingerie Store. “Once the customer places the order, the box does not display on the outside that the package is delivered

from TLS. Internally, all customer data is kept confidential and we do not divulge this to anyone unless instructed by our clients themselves,” says Rosmin Kunnathottathil, Co-Founder, The Lingerie Store. Though there is nothing to hide, but at TLS, the customer discretion policy does not force any visitor or customer to even confirm their names, mobile numbers or email on chats with the customer representatives.

The Market Information

“The innerwear market is still so nascent that even the top 10 brands put together are not addressing 8 percent of the overall market. Innerwear shopping online is estimated to be growing at 50- 65 percent annually,” says Pankaj Vermani. Valued at USD 3 billion, the lingerie business holds the largest pie of the market share in India with high margins in returns. From being a market worth ₹780 crores (175.9 million dollars) in 2003, the organized lingerie market has almost doubled to a ₹1,645 crores (370.3 million dollars) bustling business in the last five years. Many entrepreneurs and investors like Rehan Yar Khan, Orios Venture Partners, Kalaari Capital, Anupam Mittal, Ronnie Screwvala, Farooq Omerbhoy have pumped money in this segment due to its latent potential. “Not only that, but the last few years has seen an unprecedented growth in awareness – from sizing, hygiene as well as from the fashion perspective,” says Karan Behal. A study by retail consultancy Technopak Advisors shows that over the next eight years, the lingerie segment will see a growth of 15 percent, which is more than double the growth rate of the saree market in India, pegged to grow at 6 percent.

For a lot of international brands, entering into the Indian lingerie retail market is restricted because of government and customs regulations. Therefore they prefer online retailers. Relaxation in restrictions will provide a huge boom in the lingerie sector in India. “However, a



The Lingerie Shop



Clovia



PrettySecrets





“The innerwear market is still so nascent that even the top 10 brands put together are not addressing 8 percent of the overall market. While innerwear shopping online is estimated to be growing at 50- 65 percent annually.”

– Pankaj Vermani,
Founder & CEO, Clovia



PrettySecrets

lot of international brands have already started to push into the Indian market, like Wacoal,” says Karan Behal. He further adds, “We need to be aware of the environment growing much more competitive. Brands will need to differentiate themselves with more focus, create stronger identities and ensure they meet evolving needs and desires.”

According to Boston Consulting Group and Retailers Association of India, the female share of internet users is pegged at 29 percent whereas the remaining 79 percent are men. The report also projected that the gap will shrink with women users increasing to 40 percent in the coming years. “Couple it with rising youth population, rise of women spenders, increasing disposable income and a need for more solution based approach, you witness a growth in this segment,” says Pankaj Vermani.

Choosing With Right Fit and Size

The lack of knowledge about various sizes and fits makes it difficult for a client to choose the perfect size and design. Clovia has come up with a breakthrough technology and has created a tool called the ‘Fit Test’ to solve this fundamental problem. “We did extensive research and developed this test that asks woman

5 questions about her body type and then recommends the right bra. The tool has been used/ attempted over 150K times and we have a very high customer satisfaction score,” says Pankaj Vermani. PrettySecrets has a fit calculator link on its website, which helps women find the perfect fit while shopping online. “In our offline stores, the staff is well trained to help and figure out the customer’s size,” says Karan Behal.

At TLS, the brand initiates the right size finding service by offering customers a bra-size calculator that is made to an exact algorithm to give the exact size as the customer’s measurements. “This calculated answer is then translated as per each brand that we sell, so the customer can purchase accurately across brands. We also translate this to all the different sizing available, region wise. Added to this, we also offer something called a ‘Sister Size chart’ that will help our customer to further refine their size calculations,” maintains Rosmin Kunnathottathil.

Exchange and Return Policy

“Our return and exchange policy allows a customer to return their purchase within 30 days of its delivery. We have an early single digit return rate. As



The Lingerie Shop



“TLS has initiated the right size finding service by offering customers a bra-size calculator that is made to an exact algorithm to give the exact size as the customer's measurements.”

– Rosmin Kunnathottathil,
Co Founder, TLS



“All orders are packed with utmost care in a specially designed box. The box is shipped in a white coloured, sealed, unmarked and tamper proof plastic shipping envelope.”

– Karan Behal,
Founder & CEO, PrettySecrets

soon as a customer returns the product, we immediately provide the customer with a credit in their online wallet, or a full refund,” says Pankaj Vermani. PrettySecrets also has a simple 30 day return policy. “Only the products under End of Season sale or discounts cannot be refunded, instead can be exchanged. But, certain products are not eligible for returns or exchange for hygienic reasons,” says Karan Behal. For TLS, the return margin is 14 days. “We have a very efficient and hassle free exchange policy, with no questions asked on exchange within 14 days of purchase by the customer,” says Rosmin Kunnathottathil.

Online v/s Brick & Mortar

Many women feel that websites give them a discreet, budget-friendly, trendy and comfortable alternative to buy innerwear. While talking about the advantages and disadvantages of online v/s brick and mortar stores, Karan Behal strongly believes that both has its pros and cons. “While online shopping comes with its own advantages, brick and mortar stores have its own perks too. Whereas on one side, online shopping gives you reachability even in the remotest of areas, brick and mortar stores provide customers an overall physical experience,” he adds. But consumers like Amrita Pathak has professed that shopping online bypassed all unpleasantness or discomfort that are otherwise associated with innerwear buying in India in physical stores. “The fact that online portals are providing specialized products which are not available at all offline stores also attracts consumers,” believes Pankaj Vermani.

With fit, variety, consulting and hefty discounts, online players are aggressively targeting the middle class women living in tier -I and -II cities, mini metros and smaller towns. ThatsPersonal.com which sells erotic lingerie, costumes for women, men's erotic innerwear, etc., gets 30 percent of its orders from smaller towns and



districts like Warangal in Andhra Pradesh, Nanded in Maharashtra and various towns in Punjab outside Patiala and Ludhiana. “With regards to consumer trends in tier -II and -III cities, we can notice a strong shift from functional or occasion led buying to emotional buying,” says Karan Behal. He further adds that for them, it's a great development since PrettySecrets is an aspirational brand growing at 35 percent per annum, and has led them to aspire for more growth of around 55 percent per annum in the next 5 years. Thus, its evident that the aspiration for brands and the availability of high fashion products gives a perfect reason for companies with a strong web presence to reach to tier -II and -III markets. “Some of the tier -II and -III centres where Clovia has seen good traction are Panchkula, Udaipur, Vellore, Bareilly, Siliguri, Bhatinda, Agra and Nagpur among others,” states Pankaj Vermani.

As per the Images Yearbook 2015, the women's innerwear market, which is driven by value added innerwear products, contributes around 60 percent to the market. This market is worth ₹12,300 crores, and is growing at a promising CAGR of 15 percent. The men's innerwear market is pegged at ₹7,650 crores and is growing at 9 percent.



CLOVIA

Clovia is a full stack lingerie brand addressing India's underserved women's innerwear and sleep wear market. The brand claims to have one of the fastest growing and capital efficient brand stories in India backed by Ivy Cap Ventures, Zurich-based Mountain Partners AG and a group of private investors. Clovia designs, manufactures and distributes premium fashion lingerie, innerwear, nightwear and shapewear. The brand offers 100-150 new options every month and currently sells ~2,75,000 units a month.

Target Group: The innerwear brand initially targeted working women in the age bracket of 25- 32 years. Currently, it is also targeting a younger demographic, those between 18- 24 years of age.

Product Portfolio: Clovia started predominantly as a bra'n'brief brand which extended into nightwear, shapewear and lounge wear with time and demand. Today, the brand launches 200+ styles per month across women's bras, briefs, nightwear, shapewear, lounge wear, resort wear, swim wear, leisure wear and activewear categories.

Share of Innerwear: Almost 87 percent of Clovia's products sold in a month are bras and briefs. Rest include a mixture of nightwear, lounge wear and shapewear.

Market Expansion Plans: Clovia is currently expanding both in the online and the offline space with equal vigour. Recently, the brand has launched shop-in-shops in leading MBOs in the NCR region, will launch its

franchisee store soon and has also started a new distribution model — Clovia Partnership Program. Under this program, Clovia invites women around the country to start educating other women about sizing and fits and run their own enterprise by selling Clovia products from the comfort of their home.

Top Selling Categories: Clovia's top selling categories are bras, panties, nightwear, camisoles and shapewear.

Retail Presence: Clovia sells its products through its own e-store clovia.com and through partner sites such as Myntra, Jabong, Flipkart and Amazon. Currently, the brand delivers products in 970 cities and over 10,000 pin codes.

International Market Presence: While the run-up to be the largest affordable premium lingerie brand in India is on track, Clovia is also encountering a host of organic/ inorganic opportunities to grow internationally. Clovia was recently launched in a new

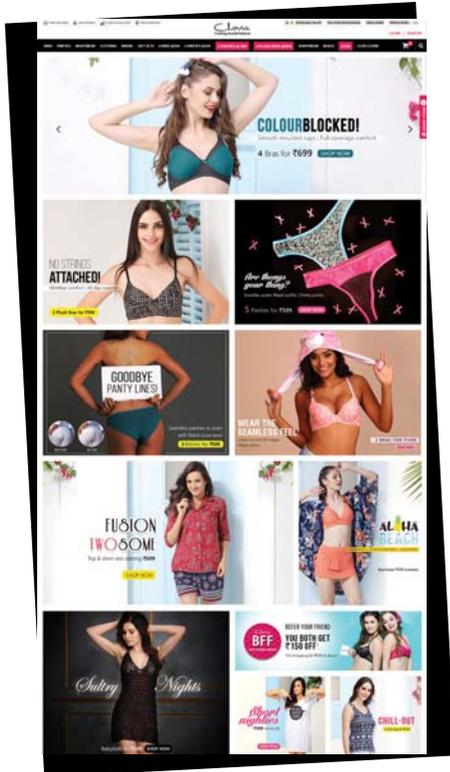


geography and a test run is active in another one.

Top Contribution to Sales: Bengaluru, Pune, Mumbai, New Delhi and Hyderabad contribute to the maximum sales for Clovia.

Performance of Tier -II and -III: The brand sees the real growth juice in tier -II and -III towns of India. While the aspiration is high, reach is still an issue. Clovia has been extremely fortunate for having almost 55 percent of its audience coming from these locations.

Average Sales: Clovia is shipping approximately 2,57,000 units a month. The brand has managed to grow by around 50 percent in 2016-17 inspite of the demonetisation challenges.



BRAND UPDATE

► Name of the company: Purple Panda Fashions Pvt. Ltd.

► Year of launch: 2013

► Headquarter: Noida, India

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹149- ₹1,299

Panties: ₹249- ₹1,299

Others : ₹49- ₹1,499



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PRETTYSECRETS.COM

PrettySecrets, a young, fun and aspirational brand, was launched in the year 2011. Headquartered in Mumbai, it was formed for the new Indian woman who is confident, happy and stylish. The brand's mission is to deliver superior quality lingerie as well as to give its customers access to products which were previously not available in the market. It's extensive range of bras, panties, nightwear, swim and workout wear is aspirational yet reasonably priced.

Core Strength: PrettySecrets stands strong as a young, fun and aspirational brand which provides great comfort and fit, yet is uncompromising on style. Its core strength lies in being competitively priced when compared with other brands. The brand works with an aim to make its customers look good and feel great, with the main essence of the brand being the functionality of its products.

Target Group: The brand's inspiration lies in the woman herself – confident, sensual, feminine, with inner drive and strength. PrettySecrets targets women in the age group of 18- 35 years with the core target being the women between 23- 35 years of age.

Product Portfolio: PrettySecrets is a style seeking brand where fashion meets function and comfort, and the choice for every woman's lingerie needs. The brand's portfolio consists of 1,200+ products including lingerie, nightwear, active wear and swimwear. It has two seasonal launches – Spring/ Summer and Autumn/ Winter with 300 style collections in

each season spread across categories. With 2 season launches and 2 injection rounds per season, the brand puts in a lot of research into product development.

Share of Innerwear: Innerwear comprises of 70 percent of the brand's total product portfolio.

Product Expansion Plans:

PrettySecrets never stops innovating. The next 1-2 years will see a continued awareness building up on the brand's extensive plan for increased retail footprint, with 300 franchise owned stores in the next two years, presence in over 150 SIS counters and 1,000 MBOs.

Top Selling Categories: Bras, nightwear, panties and swimwear attract maximum customers to PrettySecrets.

Retail Presence: PrettySecrets delivers to more than 19,000 pin codes in the country. The brand is now available through exclusive retail outlets in Mumbai, Surat, Ludhiana, Jalandhar and the Northeast. PrettySecrets is also available at leading SIS counters across the country.

International Market Presence:

PrettySecrets is the only Indian lingerie brand to partner with the biggest e-commerce websites of UAE

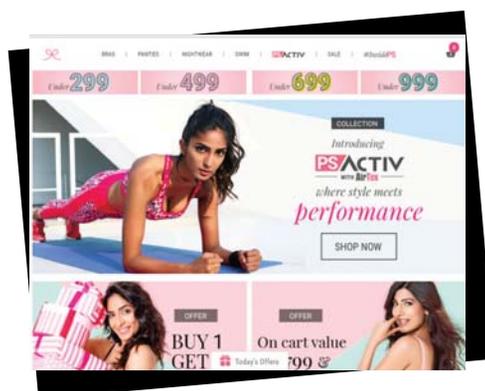


and South East Asia, Souq.com and Lazada.com respectively.

Top Contribution to Sales: The cities like NCR, Mumbai, Bengaluru, Pune and Kolkata bring in maximum sales for the brand.

Average Order Rate: PrettySecrets loyalists order over 6 times a year. In an annual calendar, the brand gets 5-6 orders from every customer.

Future Plans: The brand aims to open 300+ exclusive PrettySecrets stores in India within the next 36 months. PrettySecrets has also seen keen interest for its product offering from outside the country and hence is also seriously exploring the international waters as well.



BRAND UPDATE

► Name of the company: MTC Pvt. Ltd.

► Year of launch: 2011

► Headquarter: Mumbai, India

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹499- ₹1,299

Panties: ₹299- ₹499

Others: ₹399- ₹3,499

TLSLINGERIE.COM

The Lingerie Store (TLS) was created in 2016 with a mission to bring quality lingerie to women in India and around the world. The brand believes that lingerie should help each woman express herself and her innermost feelings. The brand offers everything from basic bras to support you at work to beautiful lounge pieces to help you make the most of your time at home.

Core Strength: The Lingerie Store prides in offering a combination of international and domestic brands on the same page. The market place or drop ship model of its business gives the brands an opportunity to showcase maximum number of pieces through its page, without having to move their stocks, thereby making it beneficial for both the brand and the customer who gets a wide variety of styles and sizes to choose from. The online lingerie brand also prides in offering the following to its customers:

Trousseau Gift Pack: This is a combo deal by various brands. Here, multiple pieces of the same brand are offered at a lower price than it would be if these pieces were purchased individually.

Bra Size Calculator: Though many websites offer the bra size calculator facility, TLS is taking it a notch higher, by not stopping at giving you your exact size. It gives you a table, listing your size in various international formats.

EMI: TLS is the only curated lingerie supplying brand that offers its customers an option for EMI, arranged with their own banks.

Gift Wrap: The regular gift wraps offered by websites have been upgraded at TLS where it uses eco-friendly, recycled paper for the wrap, then ties with a golden string, finished with a pair of flowers and complimented with a thank you card.

Target Group: The online brand targets ladies from the age of 16 to as long as they feel young. Loving gentlemen who want the best for their ladies also form its target customers.

Share of Innerwear: The Lingerie Store is basically an innerwear online brand and all their products fall in the category.

Brand Portfolio: The online website offers products from brands like Blush Lingerie from Canada, Elegant Moments from USA, Clovia, Nodr, Innersence, Fasence, Heart to Heart, Amante, Inkurv, Sweet Dreams and Dermawear.

Product Expansion Plans: On the expansion front, TLS is currently looking at opportunities to diversify its product mix, into bespoke bridal wear. Also, the online brand is exploring the markets of the Middle East.



Top Selling Categories: The top selling categories for TLS are bras, nightwear, shapewear, swimwear and panties.

Market Presence: The brand sells pan India servicing 9,000+ pin codes and 800+ cities. It also delivers internationally.

Performance of Tier -II and -III: TLS has a strong customer base from tier -III cities, chiefly for gifting purposes. This is closely followed by tier -I for own consumption.

BRAND UPDATE

► Name of the company:
Triple Alpha Trading Pvt. Ltd.

► Year of launch: 2016

► Headquarter: Bengaluru, India

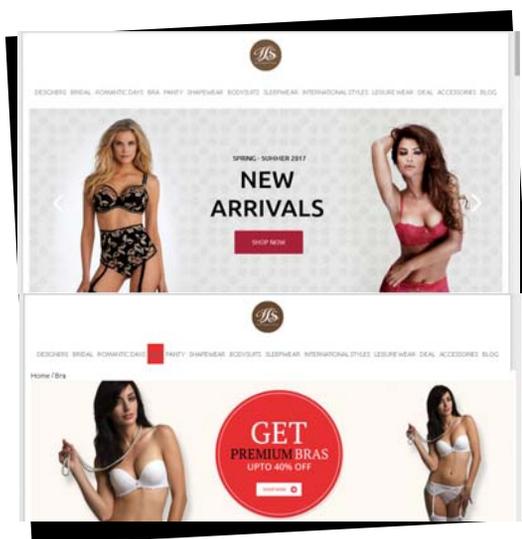
PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Brassieres: ₹249- ₹6,000

Panties: ₹189- ₹2,600

Others: ₹500- ₹6,000





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SWEEE SHAPEWEARS

Being slim and fit is one important aspect of good appearance that everybody craves for. However, not all are naturally blessed with a toned, slim body or great silhouette. Shapewear comes as a rescue for all those who wish to shoo off their flabs when wearing a fit dress or outfit. Shapewear is fairly common in the western countries, especially among women. It is even worn by models and celebs to attain that perfect 'hour glass' figure. With the emerging demand for this category, a plethora of brands have come up offering various kinds of this 'wonder' garment. Images BoF talks to one such brand, Swee and finds out about this evolving market. Vijay Patel, Managing Director, Swee, shares insights about the category and its scope in India.



– Vijay Patel
Managing Director, Swee

IBoF: Tell us about the emerging innerwear market in India.

Vijay Patel (VP): The Indian innerwear market continues to be underpenetrated and thereby holds immense business opportunities. The Indian innerwear market is certainly one of the most unique amongst the major markets of the world today. A distinctive shift from price sensitivity to brand sensitivity and preference for bold colours and innovative designs are two key trends to have emerged in this segment. Provided the positive macro and demographic fundamentals, the innerwear market has a favourable demand growth outlook over the medium-to-long term. The Indian innerwear market is expected to witness expansion in the near future. However, lesser product portfolio and high costs of brand building are expected to be the challenges for this sector. Brand sensitivity is the major trend in the Indian innerwear industry.

IBoF: How are consumers accepting shapewear in India?

VP: Women now have become very conscious and fashionable in what they wear. They not only look for new trends which are fashionable but also effective and provides comfort at the same time. Shapeweares are a new trend in this and this segment is rapidly increasing. We, as a shapewear brand, are continuously researching and finding out new ways to tap this segment and we have been

gaining a good response all over for our hard work.

I believe it is always great for customers to have a wide selection of different shapewear brands on offer, so that they can look for an item that best suits their body type and purse strings. Despite the choice of fashionable, functional and comfortable shapewear products in the market and the support for even more competition, some designers feel that retailers need to do more to make these innovative garments available to consumers.

Sadly, too many buyers are still afraid to offer such garments and feel they should be kept under the counter. This will only drive the end consumer, who is desperate for a solution, to other outlets. Shapewear is needed and will continue to be needed.

IBoF: What factors have influenced the growth of shapewear consumption in India?

VP: I guess women want to look good in all ways possible and that's the best part. Earlier it was always an issue with women that they wanted to buy their choice of clothes but were restricted because their body was not in shape. But since shapewears have been in trend, women now can show their curves instead of hiding them as those curves will not look bad when they wear their choice of clothes.

IBoF: Who are the specific consumer categories that shop the most for shapewear?

VP: Majorly working women in the age group of 25- 45 years from tier -I and -II cities are interested in shapewear.

IBoF: How would you compare the popularity of shapewear in India against how popular it is in the west?

VP: India is an exception to the rise and growth of global brands due to the presence of immense demographic diversity and varying levels of consumer preferences when compared with other emerging economies. Although consumers in the developing countries are not highly familiar with global brands before the brands actually enter the market, they tend to become more loyal towards global brands as compared to the local brands because of perception of better quality.

IBoF: Are there segmentations like super premium, premium,

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Women want to look good and also slim in all ways possible. With shapewear, women now can show their curves instead of hiding them as those curves will not look bad when they wear their choice of clothes.

and economy in shapewear? Which is the fastest selling category?

VP: Yes, there are various segments available in shapewear and the fastest selling category is economy.

IBoF: What are some of the more innovative products in shapewear, and how effectively are they addressing what consumers are most interested in? Also, shed some light on the new technology, styles and fabrics used.

VP: We currently came up with *Hooked Up* and *Gem* Collections. The idea behind introducing the two collections was to deliver superior quality product to the customers. In order to achieve the quality, we came up with a material which blocks moisture and helps prevent irritation, is skin friendly and durable. *Hooked Up* series was brought to give a better grip and support. These would help women seize every opportunity to wear their favourite designer outfits to adorn and flaunt their beauty.

IBoF: Name 5 coveted national/international shapewear brands that you admire. Also, tell us what you appreciate about them/their products?

VP: Dermawear, Jockey, Triumph, Enamor, Hanes, etc. Every company has their strength and weaknesses in terms of products, but Swee firmly believes in total quality management and it always endeavours to keep up with the international standards.

IBoF: Tell us about the challenges, if any, faced by the Indian shapewear industry now.

VP: Understanding the Indian mentality, quality of the product, competitors in the market and also awareness about the product are the key challenges faced by the shapewear industry in India.

IBoF: Tell us about the special packaging that shapewear features with special focus on product attributes communication.

VP: The shapewear comes under different levels of packaging. The *Seamless* collection is packed with specialized box packaging, while our *Hooked Up* and *Gem* collection series are packed with high quality PVC packaging. On all the packagings, we highlight every style's specific features and attributes.



SWEE

Swee shapewears are a comfortable and instant slimming solution for women with different body types. It is designed to give a perfect body shape and slimmer waistline to females so that they look gorgeous in any dress. Swee offers the wearer flawlessly designed wardrobe essentials that trim their hips, thighs and waist to give them the perfect hourglass shape that they always wanted. Swee shapewear is made of a light-weight fabric which does not cause irritation or harm skin. It's nothing but a second skin without the superfluous stitches and won't be visible even if worn under a thin fabric.

Core Strength: Swee prides in its seamless collection for invisibility under fitted clothes, breathable fabric for extended comfort. Its micro massage can give slimming effect in 3-6 weeks, layered gussets are used for hygiene and the four-way stretch gives a flattering silhouette.

Target Group: Swee has branded itself as a perfect makeover brand for daily use. So, it majorly focuses on the working women in the age group of 25- 45 years from tier -I and tier -II cities who have large disposable income.

Product Portfolio: The brand's current product portfolio consists of shapewear that provides instant slimming solution for women with different body types.

Swee has designed 3 collections:

High Compression Gem Shapewear

Collection: Ruby, Jade, Opal, Coral, Pearl;

Hooked Up Seamless Shapewear

Collection: Spark, Glow;

Seamless Shapewear Collection:

Velvet, Lilac, Daisy, Orchid, Iris, Fern, Glory, Tansy.

Latest Innerwear Collection

and Theme: The brand's latest collections are the Hooked Up and Gem collections. The idea behind introducing the two collections was to deliver superior quality products to the customers. In order to achieve the quality, Swee came up with a material which blocks moisture and helps prevent irritation and is skin friendly and durable. Hooked Up series was brought to give a better grip and support. This would help women seize every opportunity to wear their favourite designer outfits and to adorn and flaunt their beauty.

Product Expansion Plans: Currently, Swee is majorly looking at promoting

the current collections available.

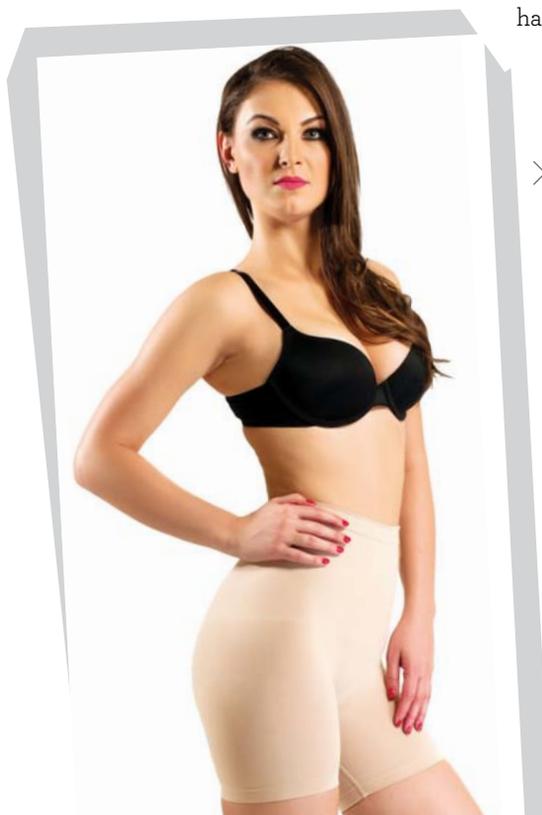
In near future, the brand plans to introduce more collections depending on the market requirement.

Primary Markets: Swee's primary markets are basically the ones situated in the metros in the lingerie section of stores. The brand retails through multi brand outlets like Big Bazaar, etc. Its distribution channel is also spread across the nation.

Top Retailers: The brand's major retailers are Future Group (pan India), Lady Care (Mumbai), Chennai Silk (Chennai), Naidu Hall (Chennai) and Kamdhenu (Mumbai).

Market Expansion Plans: Swee believes that the innerwear industry offers big opportunity to the franchisees for the known brands. The lingerie business is not new, however this industry still has great potential in the Indian market. The brand is looking forward to expanding its business in shopping malls as well.

Annual Turnover (FY '16-17): Swee has registered an annual turnover of ₹18 crores in FY '16-17 and is aiming to achieve a turnover of ₹30 crores in the next 2-3 years.



BRAND UPDATE

- ▶ Name of the company: Omtex Healthwear Pvt. Ltd.
- ▶ Year of launch: 2013
- ▶ Headquarter: Mumbai, India
- ▶ CAGR (last 3 years): 15%

PRICE RANGE OF THE CATEGORIES AVAILABLE...

Women's range

₹660- ₹2,510

BEATING THE CHILL WITH *THERMAL* *WEAR!*

IMAGES Business of Fashion speaks with top brands to find out about the dynamics in the thermal wear industry in India in terms of acceptance, demands and trends.

Team IMAGES BoF



The popularity of thermal wear can be traced back to the rise of the layering concept of dressing. It was a hit not only because of the protection it offers but also because of its functionality - you can flaunt anything you wanted even in the chilliest winter night because you know you have your thermals inside. Encouraging people with a lot of space to wear more fashion clothes, these thin thermal apparels superbly retain body heat and keep the body warm for a longer period of time during winters.

Thermal wear traces its history back to the Long Johns that were first introduced in England in the 17th century, but they did not become popular as sleepwear until the 18th century. Allegedly, they were named after a famous knife fighter who fought in long underwear. The Long John's modern avatar can be credited to Myles Stanfield, a native of Truro, Nova Scotia who came up with the adjustable two-piece design and patented it in 1915. Over the years this piece of clothing underwent massive metamorphosis in design options thus enabling them to be used as normal clothing and standalone winter wear as well.

The thermal market in India spans mostly across the Northern states. The last five years have seen specific growth in this segment. Lower cost than winter garments make thermals a winning option along with the fact that as it is worn inside, the wearer's style statement remains intact. The popularity of thermals is therefore on a steady rise in India. "The Indian thermal wear industry has definitely evolved in the last 5 years. Today,



Dollar

consumers are becoming more brand savvy and style conscious when it comes to thermal wear. Understanding the need and trend changing demands of the market, brands have become more innovative with unique design and features in their products. Other aspects like investment in new technologies and being abreast of international trends have also helped in boosting the scope of Indian thermal market," says a spokesperson from Lux, which is one of the biggest names in the thermal wear segment in India.

As mentioned above, thermal wear has been subjected to rigorous innovations and newer features like material of the fabric, and different weaving techniques were introduced, resulting in a slew of options available to the customers of today. "We manufacture thermals both in mid and premium segments starting as low as ₹150 for children and going upto as high as ₹650 for adults. Dollar Ultra Thermals which is promoted by celebrated anchor Manish Paul, is our highest selling products," says Vinod Kumar Gupta, MD & CEO, Dollar.

In Lux, the thermal wear range comes in two different styles — Lux Cott's Wool Thermals and Lux Inferno Thermals which because of their fine fabrics, snug fittings and stylish colours have remained consumers' hot favourite across the years. "Our product Lux Inferno Thermals are of far more superior in quality which retains body heat with brushed fabric inside and ensures warmth without weight. Crafted with double layer knit and warmth retaining fabric, Lux Cottswool soothes the wearer's body and gives an amazing experience without any itching or irritation. Available in both round and V- shaped neck line; Lux Cottswool and Lux Inferno thermals offers a variety of style and colour options for both the genders," expressed the Lux's spokesperson.

Ideally, thermal wear comes in four major types — synthetic, cotton, wool and silk. In India, however, cotton, wool and its blends are most sought after. On being asked about the preference of Indian consumers, Vinod Kumar says, "The more thinner the material is, the more chances of getting sold fast. As a result, we are also concentrating on thinner fabric materials to make our thermal products." In line with

this, the brand has have evolved with technology which ensures thinner fabric in its range without compromising either on warmth or style. The trend is expected to hold strong for the next few years.

With the growing awareness in the consumer's mind in regard to global fashion trends, the retail market has seen a considerable growth. Now the consumer is willing to pay for a good quality fashionable product by a domestic brand as well. "India can actually boast of its wide array of customers. They can experiment, accept and reject products based on value-for-money principle. They would not hesitate to buy a costly product if it attracts pride and brand value. Manufacturing companies like us, need to ensure that we are reaching the right audience with the right message," says Vinod Kumar.

As thermals are seasonal products their demand and supply varies according to the time. During winters, the retailers have to provide more share to thermal wear products as their demands increases, whereas in off-season the share of thermal stocks reduces to a very limited number. "Thermal is a seasonal product and retailers who would want to keep up with the competition, will definitely keep their shelf illuminated with new attractions," says Vinod Kumar.

The young demographic's propensity towards the foreign tag has led a fresh flurry of foreign brands to open up in India, creating stiff competition for home grown brands in almost all sectors. So does the Indian thermal segment face any competition from international brands? If Vinod Kumar is to be believed, there isn't much contest in this segment. "Exported products are too costly for Indian middle class buyers. Moreover, thermals cannot be worn outside to show off the brand. So, Indian brands like us provide the best quality and that too in most affordable cost," he says.



Lux Thermals





THE RISING POPULARITY OF BEACHWEAR

Beachwear in India is picking up as the younger generation has started to prefer bikinis and mod dresses over casual wear which has long been the beach staple in India. While the percentage of Indians willing to flaunt smart beachwear and resort wear on their holidays is still less compared to the west, experts believe the segment is fast picking up and is poised for significant growth in the near future. In an exclusive interview, Harshad Daswani, Founder, The Beach Company, shares about the recent developments in the sector.

IBoF: Tell us a bit about The Beach Company.

Harshad Daswani (HD): The Beach Company is India's largest online marketplace offering the ideal apparel range for all those who love water: swimming equipment and pool toys that meet every requirement, exclusive aquatic fitness training gear as well as trendy, functional and fashionable swimwear to wear at a pool, on the beach or in a holiday resort. It is an innovative online company servicing the entire country.

IBoF: So, what according to you is beachwear? Isn't beachwear and swimwear the same thing?

HD: Well, not actually! Beachwear is what makes you comfortable when you are not in a swimming costume; it could range from a simple sarong to fashion-driven kaftans, playsuits or dresses which you could wear over your swimsuit, or even while lounging by the water.

IBoF: What are the main defining products in the beachwear category and what share of sales do they occupy in your company?

HD: The clothing side of beachwear is a large product category and accounts for 50 percent of our sales approximately. The Beach Company offers over 100 styles in this category every season with prices starting at ₹500 for sarongs.



— Harshad Daswani,
Founder, The Beach Company



IBoF: How is the current demand for beachwear in India?

HD: Well, it is a growing space no doubt, but it definitely has potential. A simple online search shows over 100 non-stop flights to Goa every day from Indian cities. I am not even including people who choose to travel abroad, or inbound travel from foreign countries into Indian shores. And add to that resorts with pools and you've got a market that is geared up for.

IBoF: Talking about potential, do you think it has the potential to grow into a major apparel segment?

HD: Yeah, it has an immense potential. You see, the scenario in India is changing rapidly. The growing number of low-cost carriers, the increasing

Indian travelers to global beach destinations, increasing disposable income and double income families moving into building complexes with pools, etc., have propelled the beachwear market to growing exponentially. Even the government is working towards creating more beach destinations and tourism initiatives to grow the space.

IBoF: Seems legit! And then there's social media too.

HD: Absolutely!

IBoF: So, what specific beach wear products enjoy the most popularity in India?

HD: Sales wise, playsuits still continue to be the most popular, followed closely by sarongs.

IBoF: And what about fabrics? What are the most preferred fabrics for both men and women?

HD: Fabrics continue to evolve. When we first started, chiffons were the order of the day but today, there is a tremendous innovation. Blended fabrics, viscose and cotton are current favourites. Women prefer more flowing garments and men's sales are still driven by quick-dry board shorts and cotton t-shirts.

IBoF: What are the popular elements/embellishments?

HD: Ours is a country that loves the bling. So we have silver sequins, metallic beads and vibrant prints on offer.

IBoF: Tell us about your latest collection.

HD: Our latest beachwear collection includes a lot of cotton muslin and heavier mul fabrics. The focus of our current collection for women has been to ensure that it's all multi-functional — so it includes styles that can be worn from the beach to office and elsewhere. For men, our focus has been boardshorts in bold prints and strong stripes.

IBoF: Are there any international brands you admire and why?

HD: I think my favourite global online beach brand is one called 'Everything But The Water'. The range is beautifully curated and their marketing skills are un-matched. The Beach Company is new and we have grown a lot over the past couple of years. I hope, soon we will be a brand that others will try to match.

IBoF: What are the latest trends and designs that are in vogue right now?

HD: Accessories are very much in-trend now. We offer a range of tote bags, summer hats and eyewear to make your beach wardrobe well rounded and perfect for any occasion. We see a lot of upward movement within our accessory range besides beachwear and swimsuits.

IBoF: What do you think will trend in the near future in beachwear?

HD: Innovation wise, I believe technical fabric innovations in elastane/lycra will be the next big trend. It will help increase the functionality of swimsuits and will definitely make a huge difference to this sector.

IBoF: Tell us about your retail model and its current mapping across India.

HD: As you would expect, we have to follow a hybrid model of sales. We sell online across all states and UTs in India, offering COD if the client prefers. Besides, we are present in MBOs and stores located within hotels in Goa, Puducherry, Mumbai, Lonavala, Kolkata and Delhi.

IBoF: What are your retail expansion plans?

HD: We are focused on growing our online retail presence at www.TheBeachCompany.in as market accessibility will always be greatest. Our top line and profitability exists here. We also sell via online retail channel partners on our close out ranges at discounted prices. For branding purposes, we are targeting to have over 100 offline points of presence by the year end.



AS YOGA GETS YOUNGER

THE YOGA WEAR MARKET IN INDIA

The proliferating inclination towards a fitter lifestyle among the younger generations in India has boosted the popularity of yoga wear. IMAGES BoF delves deeper to discover the progress of the sector in India.

Yoga wear is possibly one of the biggest trends to have hit the discipline of fashion recently. Think of women wearing yoga pants for a night out after work. There are CEOs wearing yoga bottoms to board meetings. Such is the proliferating popularity of this trend that even fashion giants like Levi's have recently acknowledged that "they're feeling the encroachment of yoga pants on their turf", as reported by Business Insider. While some have downplayed the rise of yoga wear as a passing fad, a sizeable number of industry reports seem to indicate otherwise. Yoga wear reflects a lifestyle shift, a growing trend of fitness consciousness that view athletics not only as a hobby but also as an all-around lifestyle. Infact, this fashion trend has already manifested strong signs for the industry sentinels to tout as a major cultural shift of the 21st century.

Acceptance

In India too, the fad is fast picking up. Just last month, e-commerce giant Amazon revealed about the jump in sales for yoga fashion merchandise in the Indian market. The retailer has seen a growth of over 225 percent year-on-year for yoga products under sports category. As told by Apparel Resources, the majority of the demands were from urban areas. Mumbai, Delhi, Bengaluru and Hyderabad emerged as top four cities that ordered such products. The rest 60 percent comes from other tier -I, -II and -III cities.





Urban Yoga



Urban Yoga

Indian population is still discovering fabrics other than cotton and there is a learning curve involved with the customer. In the metro cities however, the people are increasingly accepting the products," expresses Tushar Sharma, Director, Yogue.

Product Categories

So what actually is yoga wear? Simply put, yoga wear, a part of athleisure, is clothing made of breathable fabrics that are comfortable. "We prefer to call the category as athleisure wear, which can be defined as casual comfortable clothing meant to be worn for exercising and for general use," says Rina Nathani, Business Head - Retail, Satva, a brand that has established itself as a manufacturer of a vibrant line of yoga wear and accessories and organic bodycare for women. According to her, staple products in this category include leggings, pants, bralettes, tees, pullovers and camis, etc.

Best Sellers

Of the entire range, tights and capris have hitherto proven to be the fastest selling products in India. "The fastest moving ones for us in the Indian market are tights and capris for women made of high performance fabric. We want to be the go-to brand for yoga tights for women in India," says Tushar Sharma.

For Urban Yoga, the highlight of their collection is the line of aromatic t-shirts which have succeeded in enjoying high popularity amongst its consumers. "Our cotton aroma scented t-shirts are our number 1 sellers — one, because of its affordable price point (₹699-₹799) and two, because of the aroma scents the t-shirts give out. All our



Yogue

"Athleisure, as a concept, has been gaining popularity in the last few years. Working out/ doing yoga is now a fashionable activity and the importance of a workout wardrobe is gradually increasing. Popular brands like H&M, Zara, Forever 21 have also embraced this new category and have adapted to it by adding athleisure products to their range. Celebrities are often seen wearing athleisure clothes on a daily basis thus adding to the growing popularity of this category," says Aditi Mirani, Brand Head, Urban Yoga.

The result is a number of established brands entering into this segment as well as emergence of dedicated athleisure brands to capitalise on this growing popularity. "In India, this category is new, creating a space for niche brands like ours. The





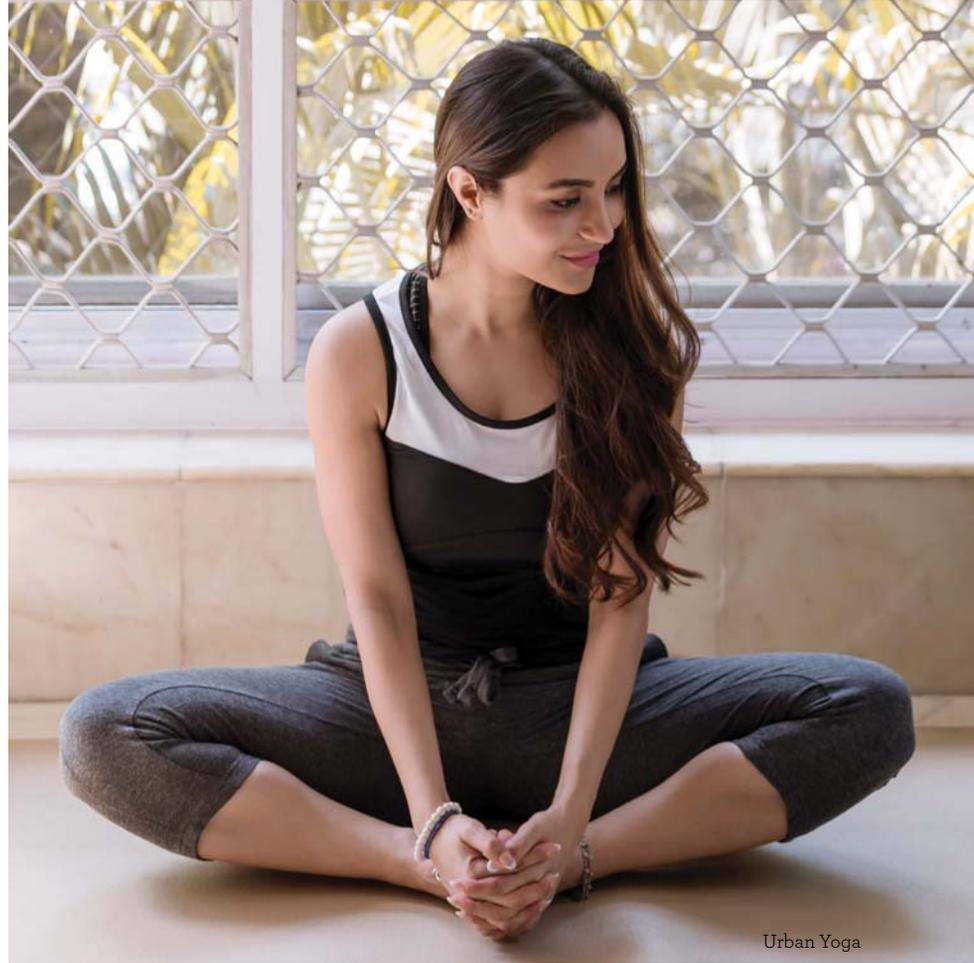
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– Rina Nathani,
Business Head - Retail, Satva



“Athleisure, as a concept, has been gaining popularity in the last few years. Working out/ doing yoga is now a fashionable activity and the importance of a workout wardrobe is gradually increasing.

– Aditi Mirani,
Brand Head, Urban Yoga



Urban Yoga

cotton bottoms are also doing really well because almost 95 percent of the activewear market sells polyester based clothes. So, it is a refreshing change especially in a country like ours where it is hot in most parts throughout the year,” Aditi Mirani, Brand Head, Urban Yoga, of Future Lifestyle Fashion Limited.

Latest Collections

To keep ahead of the increasing competition, brands are indulging in a host of innovations in their product categories. Satva offers a range of organic yoga wear that are free from chemicals including bleaches, toxic waxes, sulfur and heavy metals commonly used in the production of clothing. “Only natural, non-toxic plant based dyes are used. Our growing practices and ingredients are at the heart of our product - they lead to better quality, allergy-free cotton for our clothing,” reveals Rina Nathani.

While brands like Satva are betting on 100 percent organic products,

a slew of other brands are trying to push the envelope on what can be done in terms of colours, fits, flexibility and silhouettes. “We have introduced the concept of adding an exciting story every season. This season, we did a Chakra collection and the next season, we are doing a varsity inspired collection called the Gurukul collection. Besides the new story, we have focused on our bottom wear creating 8 silhouettes for different body types and different needs of the customer. We have jogger fits, straight fit track pants, tapered fit, layered capri, 3/4th length capri, tights, foldable waist pants and dhoti pants. We also have a yoga on the go collection which is a contemporary range and is perfect for those on the go as these clothes can be worn pre and post yoga as well,” says Aditi Mirani.

The Indian Edge

If Tushar Sharma is to be believed, there are two kinds of yoga wear available globally. “First is the skin-tight apparel made of polyester fabrics



Satva



Satva

that western companies have mastered and the second kind is made of natural fibers like cotton. In my opinion, on the global level, the Indian players can attain a leadership in cotton yoga wear. This kind of loose cotton apparel is also identified with Indian culture already," he adds. But can Indian brands leverage on this fact and attain global leadership in this category? Sure, a lot of Indian brands like Satva are offering the unique proposition of being environmental friendly and sustainable adding bold and fashion to the category which has enabled them to differentiate themselves from other players in the market. "So far, the North American market has dominated this space on a global level. However with intelligent marketing and use of our inherent knowledge of yoga, Indian brands can definitely emerge as global players. If we focus on using cotton as a material, we will be able to stand out in this highly synthetic based market," says Aditi Mirani.

Promotion

In today's fast paced world, it is more vital than ever to promote recognition of a product, especially so when it comes to a new trend. "We are partnering with yoga instructors and yoga centers to promote the brand. We are also promoting it through digital platforms to increase the brand visibility and reach," says Rina Nathani. While Satva is engaging yoga instructors, brands like Urban Yoga are betting heavily on digital and social media. "We are focusing heavily on our digital platforms to promote yoga as a way of life. For the same, we have grassroot level tie-ups within the yoga community ranging from yoga studios to brands in the healthy living space," says Aditi Mirani.

Also, in the last few years, the Government has become more proactive and is encouraging more activities for a better quality of life. Especially, Prime Minister Narendra Modi's efforts to seize on yoga as India's signature cultural export has

helped push the category further. "Awareness around the benefits of yoga and meditation and initiatives on International Yoga Day will all help in pushing the category further. Perhaps, the government can push the message that exercise can lead to a healthier lifestyle, similar to what China is doing to boost the category even further," says Rina Nathani.

The Future

Yoga wear ubiquity isn't really surprising anymore. Some have said, every trend eventually has its downfall, but according to market data and industry experts, there is a convincing case to be made that active fashion is here to stay. One of the reasons for the massive popularity of the athleisure trend is that it filled a gap in the market place, where clothing that was functional wasn't particularly stylish. Such clothing can be worn to the gym, as well as everywhere else. This relaxed standard of clothing has been largely driven by the millennials, a driving force of Indian fashion. "Its going to grow at an exponential rate and we are preparing ourselves for this growth curve. It is becoming synonymous with a certain type of lifestyle, thus moving it into a yoga plus category. People are moving towards more breathable and smart fabrics — we will see a lot more use of cotton, organic cotton, aroma scented fabrics, etc.. going forward," says Aditi Mirani.

This yoga wear phenomenon has overtaken the worldwide apparel industry and looks like it is here to stay. In India as the society becomes even more fitness conscious, it will help the category immensely.



SATVA

Satva is a US based brand founded 5 years back on the uncompromised values of giving back to the society. Satva manufactures a vibrant line of yoga wear, accessories and organic bodycare for women. The brand takes an all-natural approach to organic cotton cultivation, free from pesticides and fertilizers – allowing nature to take its own course and develop self-sustaining eco-systems. All Satva products are free from chemicals including, bleaches, toxic waxes, sulfur and heavy metals commonly used in the production of clothing.

Core Strength: Uncompromising values, from start to finish. The brand understands and celebrates cotton made from eco-friendly, non-GMO bio ingredients, so that its customers can proudly enjoy 100 percent organic cotton made clothing.

Target Group: Satva's clientele comprises of women aged between 21 to 55 years, having interest in yoga, sports and athletics, fashion, sustainability, organic food and travel.

Product Portfolio: The brand's product line consists of a vibrant line of yoga wear in organic cotton with bold prints and basic styles for women.

Latest Collection and Theme: Satva's summer collection boasts of bold prints in hues of blue, apricot, frost along with basic black and white. From its cassi capri to bani bralette, all its customer favorites are in new colours and prints in this season.

Top Innovation: The brand is launching quick dry recycled polyester leggings and sports bras in its fall and holiday collections, in line with its fundamental value of sustainability.

Primary Markets: The brand's primary markets include both India and the US. The designs come from the US and manufacturing happens in India.

Retail Presence: Satva started retailing in India through its e-commerce channel partners such as Myntra and Jabong and its own website www.satvaliving.com. In the offline market, the brand has partnered with its MBO partner, SportXS at 6 locations covering most of the metro cities.

Market Expansion Plans: Satva is continuously looking at expanding in new markets globally. In addition to the US and India, the company has recently launched itself in France, the UK and Singapore.

Online Presence: In addition to its own e-commerce platform, Satva is present on Myntra, Jabong and will be available at Amazon very soon. The brand has witnessed good response from the customers who are interested in organic yoga wear. There has been a growth of 20 percent month-on-month through online retail.



BRAND UPDATE

► Name of the company:
Nirvana Organics

► Headquarter:
New York, USA

► Countries present in:
USA, India, France, UK and Singapore.



URBAN YOGA

Urban Yoga, launched in 2005, offers yoga apparel and accessories with a collection of casual wear that compliments an active lifestyle. A brand launched by Indus League, a division of Future Lifestyle Fashion Ltd., Urban Yoga is fashionable yet rooted in functionality. It is for people who believe in the spirit of yoga, seek happiness in everything they do and therefore lead a more fulfilling and fashionable lifestyle.

Core Strength: Urban Yoga is a one stop shop for all things yoga. A homegrown brand, its products are extremely versatile and over 80 percent of its range is made with cotton.

Target Group: Urban Yoga brand primarily caters to women. It has two primary age groups – young, health conscious girls in the age group of 22-35 years and the second group comprising of older ladies in their 40s who feel confident and comfortable wearing its products.

Product Portfolio: The brand's product offerings include yoga bottoms that are available in different silhouettes along with Yoga Specialist (made for the yoga practitioner), Sandesh Tees (aroma infused tees), Season Special collection (Gurukul for AW'17). The product basket also encompasses a wide range of warm up and yoga accessories like mats, blocks, towels, etc.

Latest Collection and Theme: Along with more options in cotton, the brand has revamped its polyester based Yoga Specialist range. It also has introduced a special edition called the Gurukul Collection for both men and women. A varsity inspired collection, it highlights the contemporary touch of Urban Yoga clothing. A cool, funky collection, it boosts the sporty element of yoga practice and helps connect with the younger end of the spectrum.

Top Innovations: The brand's 100 percent cotton aroma infused tees are great not only to feel good but also

keep the wearer fresh during practice. They are infused with lavender for women and musk for men.

Category Expansion Plans: As mentioned, the brand is moving more towards a cotton based range. Urban Yoga is planning to expand its accessory collection so that it can fully become a one stop shop for all things yoga. Urban Yoga will also be introducing open toed socks, eye masks for meditation, incenses. The brand even has its best selling aroma scented cotton sandesh t-shirts.

Primary Markets: Currently, the brand has a stronghold in metros and tier-I cities such as Mumbai, Delhi, Bengaluru, Hyderabad, etc. In the last couple of months, it has registered good growth in cities like Ahmedabad, Surat and Pune.

Retail Presence: Urban Yoga has 3 EBOs and is present in 32 Central department stores, over 40 Brand



Factory outlets, as well as has an online presence in Amazon.

Market Expansion Plans: The brand is exploring the concepts of kiosks and wall stores which will make it easy to penetrate into more malls in tier-I and -II cities. Besides offline retail, Urban Yoga is vying to make a big move in the online space in the coming months.

Online Presence: Currently, the brand is only available on Amazon and will continue to work closely with them. Following good results in the past few months, Urban Yoga is increasing its product offerings at Amazon.

Annual Turnover: Urban Yoga aims to see a topline of about ₹50 crores in the next 3 years.

Growth Rate: Urban Yoga has registered a 15- 20 percent CAGR.



BRAND UPDATE

► Name of the company:
Future Lifestyle Fashion

► Year of launch: 2005

► Headquarter (city/country):
Mumbai, India

► Total no of EBOs: 3



YOGUE ACTIVWEAR

Yogue Activewear is a premium brand of designer fitness apparel that stands at the crossroads between fitness apparel and fashion. It was launched in 2015 with a philosophy of “From treadmill to runway in casual chic style”. In other words, it is a casual-wear brand that offers clothes flexible enough to be performing physical exercises in. With laser-focused on providing maximum comfort apparel to the modern yoga practitioner, the brand’s fabric is specifically manufactured for “sweaty and stretching” activities. It is moisture-wicking, lightweight, ultra-stretchable and breathable. The needle work and the fit of its apparels stand as a testimony of the brand’s workmanship and the passion.

Core Strength: The brand’s core strengths are high performance fabrics and garments. All products are developed with yoga/ fitness instructors to provide the best form and flexibility for fitness activities.

Target Group: Currently, the brand targets the young metro-population in India but as the awareness for fitness spreads, it plans on encompassing a wider group of consumers.

Product Portfolio: The brand’s product basket encompasses tights, capris, shorts and tops for women and joggers, workout vests and t-shirts for men. The brand is also known for its range of hoodies and winter wear.



IMAGES Business of Fashion



BRAND UPDATE

► Name of the company:
Toska Labs Pvt. Ltd.

► Year of launch: 2015

► Headquarter:
Noida, India

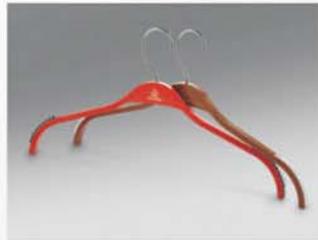


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Sweet Dreams

THE EMERGING **SLEEP WEAR & LOUNGE WEAR** MARKET IN INDIA

Lounge wear and sleep wear are catching tremendous momentum in India. Encompassing aspects of active wear, athleisure, travel wear, yoga wear, gym wear, etc., the category has in fact become more than a trend in consumers' lifestyle. Images BoF takes a look at the emerging trend.

-By Bharti Sood with inputs from Gurbir Singh Gulati

Talking about the emergence of the lounge wear/ sleep wear market in India, Manish Agarwal, Director, Gemini, states, "Lounge wear and sleep wear are now an integral part of the wardrobe. The growth in retailing, the rising level of fashion consciousness has supported sleep wear and lounge wear to move onto a higher step in the market." And neither are they very basic as when they began a decade ago. The silhouettes in the sleep wear world have become much more versatile. They are no longer just limited to be worn at night time but can also be worn as underpinnings, or as casual wear during weekends, travel or at home.

Vijayashree Parameswaran, Founder & CEO, Nuteez, also affirms the strong demand in trend, "Initially, it was the innerwear segment that gained lot of attention and the sub categories under which lounge and sleep wear fell were not on the consumer's radar. But since the past one and half years, the lounge and sleep wear market in India has definitely gained visibility and the need to have a few pieces of good sleep wear is slowly setting in as a trend."



Gemini

Gargi Ruparelia, Head of Design and Product Development, Sweet Dreams, agrees and maintains, “Over the last few years, young India has become an attraction for all the global players. Indian clothing industry is witnessing many waves of change. Categories like undergarments, sleep wear and activewear clothing have seen aggressive demand. This has a lot to do with the lifestyle of young India, and I feel that with the increasing amount of stress, people have started valuing their relaxed time more and more.”

Growth of Lounge and Sleep Wear Market

Lounge wear and sleep wear are today on a high growth curve. The trend, which is especially strong amongst teenagers and young professionals, is being led equally by men and women. There has been a rising demand of lounge wear, as people are looking for a third wardrobe to wear after coming home from work. They require something to lounge around in before going to bed, or while surfing internet or while working from home.



Gemini

Vijayshree of Nuteez explains the history, “The nightwear-as-daywear trend hit the international market way back in 2008. By 2011, pyjama dressing had started catching fire. In 2014, the global nightwear market (defined as all clothes designed to be worn indoors/ in bed including pyjama separates, pyjama sets and robes) reached \$29.2 billion, expanding at a compound annual growth rate of 11 percent from 2009 to 2014, according to the Euromonitor, which expects the category to grow at an additional 16 percent between 2014 and 2019, driven, in no small part, by demand in Asia, the Middle East and Africa. We see a huge growth in nightwear at the moment.”

According to Manish of Gemini, Indian women are today not hesitant of experimenting with their sleep wear or lounge wear. They are looking for comfort, which is encouraging the growth in the market share.



Gemini

Gargi Ruparelia feels that the growth story of sleep wear in India is in itself a case study. She says, “From being the neglected category whose biggest competition were “old clothes” it has now become an independent part of the wardrobe. This change is a result of the change in lifestyle of the new consumers and how the industry has reacted to that change. Lounge/ sleep wear now encompasses aspects of activewear, athleisure, travel wear, yoga wear, gym wear, etc. This has increased the category bandwidth. The lounge wear/ sleep wear segment now provides for the clothing need of almost 128 hours out of a total of 168 hours per week.”

Consumer Behaviour

The sleep wear and lounge wear is emerging quickly as a wanted fashion segment in Indian market. Increase in retail space has encouraged a remarkable response by the brands in various parts of the country. There is a large segment of consumers who wish to wear high quality nightwear which



match the international standards. According to Manish of Gemini, the sleep wear and lingerie market in India was emerging quickly as a style statement over the last decade and with the concept of 'Make in India' and limitations of export from China, the market would further increase. He felt that there had been a tremendous increase in value of sleep wear/ lounge wear due to a higher domestic demand and consumption. Shifting demographics, a greater number of educated consumers, the growing number of working women, changing fashion trends, rising disposable incomes, awareness levels, new retail formats, technological innovations, and changing consumer behaviour were the trends powering the growth in the domestic market.

Vijayshree from Nuteez felt that while the major buyers include women in the age group of 18 to 45 years, "Though the nightwear styles and variety were considerably lesser for men as compared to the more elaborate and decorative options available for women, men too have started making significant purchases in the category. There is a large segment of consumers who wish to wear high quality nightwear with features that match international standards. We, at Nuteez, saw a 100 percent growth in our revenue in 2015 when lounge and sleep wear came to limelight in the online marketplace."

According to her, the products in the sleep wear category were not just limited to night time use, but worn as underpinnings, or as casual

wear during the weekends at home. "People have really started looking after themselves and caring about their looks at all times. Relaxation and mindfulness are at the forefront of everyone's mind and luxe- lounge wear is the perfect accompaniment. For men, the growth of the nightwear category is more of a lifestyle choice, that focuses around comfort," he adds.

Affirms Gargi Ruparelia, "Ever since there has been an exposure through internet media, there has been a huge level of globalization. Now, clothing is not an optional buy done in a need based manner, it is more technical and purpose based. For example, a person wanting to join a gym would first invest in a wardrobe of gym clothing and also attempt to recycle his nightwear for the same."

Growth Opportunities

Manish of Gemini shares, "The segment has been beholding considerable growth in its market share over the last few years and has potential to grow further." Agrees Vijayshree, "The market holds immense growth potential due to growing income levels and changing lifestyles, which has shifted gear for the sleep wear segment to move from just comfy clothing to a fashion-clothing item, especially in the urban areas." Gargi of Sweet Dreams felt there was an immense potential in the workout and the athleisure categories.



"Indian women are today not hesitant of experimenting with their sleep wear or lounge wear. They are looking for comfort, which is encouraging the growth in the market share."

– Manish Agarwal,
Director, Gemini

Emerging Trends

Lounge wear and sleep wear today are more practical and comfortable. Since more than a decade, this category has been emerging quickly as a fashion segment and has seen enormous growth. While discussing the emerging trends, Manish Agarwal shares, "Resort wear is the talk of the town for now and we are working aggressively to explore the opportunities in this segment." He maintained that linen as well as handloom fabric had taken up the market with a storm, and would grow further in the near future.

The consumers of today want variety in designs and are also aware of what is in vogue and what is not. Vijayashree of Nuteez adds, "The Chief Industry analyst Marshal Cohen pegged pyjamas becoming a normal part of weekend wardrobes as one of his top expectations for the year ahead. Younger generations are re-purposing clothes according to their own casual

tastes, and want to push boundaries and experiment. Since clothing style has already become so informal, going one step further with pyjamas has crept into the bounds of acceptability." According to her, the current trends in this segment were family pyjamas, maternity pyjamas, pet clothing to match family pyjamas and onesies for the adults. Avers Gargi of Sweet Dreams, "The latest seasons have seen an uprising on the acceptance of sleep wear. Bed dressing is no longer reserved solely for the bedroom. Night wear has gone into various array of home to around home, travel wear and even casual coffee with friends."

Latest Collections

The product range designed by sleep wear and lounge wear brands focuses more on quality and comfort. While talking about their latest collections, Vijayashree Parameswaran shares, "The new eye candy for our patrons will be our denim collections as well as linen collection in nighties." While Manish adds, "At Gemini, our latest collection this year is inspired with a fusion of 19th century polkas with our top character prints for women and stripes and checks for men."

Gemini





“The latest seasons have seen an uprising on the acceptance of sleep wear. Night wear has gone into various array of home to around home, travel wear and even casual coffee with friends.”

– Gargi Ruparelia,
Head of Design and Product Development,
Sweet Dreams



“Since the past one and half years, the lounge and sleep wear market in India has definitely gained visibility and the need to have a few pieces of good sleep wear is slowly setting in as a trend.”

– Vijayashree Parameswaran,
Founder & CEO, Nuteez



Top New Colours

When asked about the top colours predicted for the forthcoming season in sleep wear and lounge wear, Manish felt that bright fruit toned natural colours as well as pastel shades would be in vogue. According to Vijayashree, the year 2017 would be the year of greenery. She informs, “Pantone has released the top ten colours for the spring 2017, to coincide with various fashion weeks around the world. This year, the list is decidedly subdued, featuring plenty of muted, earthy tones, including kale and hazelnut, with pops of primary colours like lapis blue and primrose yellow.” Gargi of Sweet Dreams felt that pastels, mélanges and textures would be more in trend.

Market Mapping

Manish from Gemini, says, “Being the new must-haves, lounge wear and sleep wear are undergoing a serious

makeover and becoming the new wardrobe essentials and have become drivers of growth for the industry.”

While discussing the potential of tier -II and -III cities in lounge wear/ sleep wear segment, Manish Agarwal said that the non-metro cities were still lying untapped. With rising income levels of the households and the growing markets and fashion sense, the ladies were not hesitant to spend. Hence to him, the market seemed wide and open for the category. Meanwhile, Vijayashree of Nuteez, was of the view that today with the growth of mobile industry and affordable internet, consumers were able to place orders easily on the websites with their handheld devices and with individuals residing in tier -II and -III cities not having access to the big name brick and mortar stores, buying online remained the only feasible option rather than travelling. “The promising 71 percent online shopping growth in tier -II and -III cities would definitely influence the sleep wear segment too as the fashion trends have penetrated seamlessly into all tiers in the country,” she declared.



Interestingly, Vijayashree Parameswaran adds, “We will soon see a wider range of selection in this segment with sleep wear accessories spinning-off as a new independent line.”



GEMINI

The journey of Gemini started in the year 1996 from a 100 square feet office headquartered in Kolkata, with a vision to fulfill the ever growing demand of night wear. And today after a span of two decades, the brand has grown at a rapid pace and has almost 20,000 square feet backyard with offices in cities like Kolkata, Jaipur and Mumbai and another 50,000 square feet office space coming up in the Howrah district of West Bengal. The brand is dedicated to providing high customer satisfaction by delivering quality and new designed products at reasonable prices.

Core Strength: The futuristic approach in selection of fabrics and to anticipate patterns and designs in line with the market trends is the brand's core strength clubbed with the hand embroidery and the core artistic strength since its inception.

Target Group: Gemini believes in fulfilling the desires of every household with a focus towards young and middle aged females with access to disposable income, who want to sleep in comfort like royals. The brand strives to delight its customers by providing quality articles through continuous innovation.

Product Portfolio: The brand offers regular nighties, room nighties, night suits, night set (up to 10 piece night sets), palazzos, capri sets, jeggings, leggings, bathrobes, kurtis and a full range of slips and camisoles.

Latest Sleep Wear Collection and Theme: The latest collection of sleep wear by Gemini is themed around celebrating the Indian women who is equally comfortable in saree, kurti or western wear.

Latest Product Innovation: The brand's latest innovation is the ezo free processing of the fabric giving itch free comfort. The fabric is 4 way stretchable for perfect fit and comfort.

Product Expansion Plans: Being a new entrant in the sleep wear category, the brand is looking forward to spread out its product range.

Primary Markets: Primarily, Gemini is present across the length and breadth of the country across geographies. The brand is trying to penetrate deeper into the micro markets.

Market Expansion Plans: India is getting fashionable and exploring fashion in all spheres. Tier -II and -III cities too are growing rapidly. The brand is exploring opportunities in the women's innerwear segment as well.



BRAND UPDATE

► Name of the company: K. D. Garments Pvt. Ltd.

► Year of launch: 1996

► Headquarter: Kolkata, India

► Total no. of MBOs: 800

► CAGR (last 3 years): 30% approx.

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Women's range

Bathrobe: ₹545- ₹865

Cycling Shorts: ₹185

Slips: ₹165- ₹785

Nighty: ₹545- ₹3,000

Leggings, Jeggings: ₹985- ₹395

NUTEEZ

A young brand that offers trendy and comfortable casual wear and lounge wear for women, men and children, Nuteez is all about fun, colour, humour and being cozy. The brand's products are conceptualised by a team of ace artists and designers all over the country and guarantees to fit every individual's style perfectly. Nuteez's apparel line is high on quirky designs, vibrant colours and are made from 100 percent cotton knit. Every single style has been created keeping in mind the tastes, preferences and love for everything creative.

Core strength: The brand takes pride in its quirky designs, fabric quality, pocket friendly prices and its customer service.

Target Group: The brand targets both women and men from the age of 16 to 40+ years. It's kids' range targets children in the age group of 2- 10 years.

Product Portfolio: Nuteez's women's lounge wear online collection includes capri sets, pyjamas, shorts, tank tops and night gowns (with and without sleeves). The men's lounge wear range includes boxer shorts, tees and shorts sets, pyjamas and PJ sets. For kids, Nuteez has themed PJ sets, onesies and creepers. The brand's most popular products include night shirts/dresses for women and boxers for men.

Theme of Latest Collection: The brand's themes are based on nature, animal prints, funky and quirky designs. Nuteez works with a mix of established

and budding designers across India and have an in-house design team as well. The brand's latest collection is inspired by a fusion of 19th century polkas along with character prints for women and stripes and checks for men.

Product Expansion Plans: Nuteez is gearing up for the launch of lounge and sleep wear for maternity and nursing mothers, family lounge sets and winter lounge/ sleep sets.

Primary Markets: Majorly an online player, Nuteez enjoys popularity throughout the length and breadth of the country.

Market Expansion Plans: With the aim of becoming India's premium lounge wear brand, Nuteez has planned to expand its wings for online market expansion in 2018 and entering into the B2B segment very soon.

Online Presence: The brand retails through its own e-commerce site nuteez.com apart from being available in all the prominent e-tailers like Jabong, Amazon, Flipkart, Snapdeal and FYND. Nuteez has witnessed an overwhelming 100 percent growth in 2015, and a steady 50 percent growth in the years that followed. Majority of Nuteez's business is driven by mobile commerce, contributing to almost 80 percent of its sales.

CAGR Growth: The brand has hitherto enjoyed a steady growth of 60 percent year on year.



BRAND UPDATE

► Men's range

Boxers: ₹275- ₹349
Pyjama sets: ₹799- ₹999
Shorts set: ₹449- ₹749

► Women's range

Boxer Shorts: ₹249- ₹349
Capri sets: ₹569- ₹949
Night Dress: ₹349- ₹549

► Kids range

Pyjama Sets: ₹299- ₹499



SWEET DREAMS

Sweet Dreams is currently the leading sleep and home clothing brand of the country. Launched in 1989 by SD Retail Pvt. Ltd., Sweet Dreams was among the first few sleep wear brands in India and have stuck to its speciality of quality night clothes since then. Its modern retail reach includes some of the best known names like Shoppers Stop, Lifestyle, India Bulls, Central, Spencers and it also boasts a striking brand visibility in UAE, East Africa and other emerging markets. Recently, the brand has also ventured into other complimentary categories like active wear and travel lounge wear which has given a further boost to its business.



Core Strength: Sweet Dreams draws pride in being the sleep wear expert down the years. The brand's USP lies in providing the best innovations in terms of the softest fabrics, fashionable and trendy collections which are in-line with any international brand. The brand also has a strong distribution network and a good history of delivering goods in a timely manner.

Target Group: Sweet Dreams is a family brand. It offers sleep wear for the whole family —men, women, girls and boys. The brand has recently gone through a transition and is now targeting the young India.

Product Portfolio: Currently, the brand's product portfolio comprises of a maximum amount of sleep wear sets, which are coordinated tops and bottoms in various fabrics and in-tune with the latest trends. Sweet Dreams boasts of a collection of 1,000 styles per season only of sets. It also offers intimate sleep wear, which is the signature collection for women majorly. Other than that, the brand also sells a huge range of separates (top + trackpants) in 15-20 different fabrics

and for purposes like travel and lounge. And finally, Sweet Dreams also has a range of athleisure, which is separates made with specialized performance fabrics for the purpose of gym, yoga, dance, etc.

Latest Sleepwear Collection and

Theme: The latest seasons have seen an uprising on the acceptance of sleep wear. Bed dressing is no longer reserved solely for the bedroom. This makes Sweet Dreams collection wide and exciting. For A/W'17, the brand has gone for lots of soothing mélanges and luxe fabrics. In sets, there is a romantic touch added which makes them an alluring combination, in rich tones. With Sweet Dreams, one's night wear is now a fashion statement piece. The collection, offering pastels in powder pink, ecru and frost blue and the nocturnal element offering grey and black, navy blue, ruby, bottle green and deep red all come together to create the extensive colour palette with design concepts for an all-encompassing collection with exponential wardrobe options over the Autumn/Winter period. Alongside this, Sweet Dreams is offering beautifully luxurious lounge wear that can be worn throughout the day. And the brand's latest and most

famous collection, the workout or athleisure collection has also come up with a lot of fabric variations.

Primary Markets: The brand has strong market presence in Punjab, Delhi, NCR and Gujarat. Sweet Dreams retails through lingerie stores in traditional retail to regional MBOs like Chunmun and Half Ticket to Departmental stores like Central and Shoppers Stop.

Market Expansion Plans: Sweet Dreams is exploring the West and South India for expanding its business and to get a stronger foothold.

Online Presence: The brand is present on e-commerce websites like Mytra, Jabong, Amazon, Snapdeal and PayTM.



BRAND UPDATE

▶ Name of the company:
SD Retail Private Limited

▶ Year of launch: 1989

▶ Headquarter:
Mumbai & Ahmedabad, India

DE MOZA

De Moza means attractive girl in Spanish, and the brand offers every day basic range of leggings, tights, spaghetti tops and fashion bottoms such as palazzo pants, skirts, joggers, etc., in super fine bio-wash cotton and viscose stretch fabrics. The brand was launched by Audaz Brands Retail India Pvt. Ltd., in 2013 and has spread its operations to major cities since then.

Core Strength: The brand's strength is its product quality. De Moza comes from over 2 decades of technical know-how with in-house facilities of design, development and manufacturing. Its unique supply chain ensures India's wide spectrum of size ratios.

Target Group: De Moza's core customer is modern Indian women in the age group of 18- 25 years, who are aspirational and value seekers.

Product Portfolio: Currently, De Moza offers leggings (ankle length, churidars and capris) in plain, laced and printed, basic innerwear such as tights, spaghetti tops, racer backs along with other fashion essentials like, jeggings, shrugs, basic tops, joggers, etc.

Share of Leggings: De Moza gets 35 percent of its business from leggings.

Latest Leggings Collection and Theme: De Moza's new A/W'17 range is inspired by Bohemian passions for the use of laces and embroidery and Folkloric senses for prints.

Latest Product Innovation: The brand is focusing on making every day wear more functional. It is making leggings from 100 percent Modal with effects like anti-microbial and fragrance, to give it an everlasting freshness and make it multi-functional.

Product Expansion Plans: Over the past two years, De Moza has been working on getting fashion bottoms closer to Indian consumers with latest trends like palazzo pants, joggers, dhoti pants, tulip pants, pencil skirts, flare skirts, etc.

Top Retailers: The brand's top retailers are, Central (pan India), Ethnicity (pan India) and online websites like Myntra and Jabong.

Market Expansion Plans: De Moza is expanding to new markets through collaborations with large format stores and exclusive stores.



BRAND UPDATE

- ▶ Name of the company: **Audaz Brands Retail India Pvt. Ltd.**
- ▶ Year of launch: **2013**
- ▶ Headquarter: **Bengaluru, India**
- ▶ Total no. of EBOs: **20**
- ▶ Total no. of MBOs: **10**
- ▶ Total no. of LFS: **40**
- ▶ Annual Turnover (FY'16-17): **₹12 crores**
- ▶ CAGR (last 3 years): **250%**

PRICE RANGE OF THE CATEGORIES AVAILABLE...

▶ Women's range

Leggings: ₹399- ₹499
Innerwear: ₹299- ₹399
Fashion: ₹699- ₹1,299

▶ Kids range

Leggings: ₹249- ₹399
Innerwear: ₹199- ₹299



PINK 'N' PURPLE

Deepeejay Textiles (P) Ltd. introduced Deepee Twister in 2009 in the ethnic bottom wear category. The product is composed of cotton based fabric which was highly applauded in the Indian market. The company's R&D wing brought out a premium segment in the category- Pink 'n' Purple which offered premium stitch and style in leggings, jeggings, capris, ankle lengths, printed leggings, stripe leggings and also western wear bottoms. In 2011, Soha Ali Khan became the brand ambassador of the brand.

Core Strength: The brand prides in offering comfort with superior fabric, various styles and designs and perfect stitch for every size.

Target Group: Pink 'n' Purple's target group are the females in the age group of 15-40 years, from the middle and upper middle class of the society.

Product Portfolio: The brand's product basket comprises of: **a)** Bottom Wear: ankle length leggings, premium churidars, plain capris, printed leggings, ankle net leggings, ankle zip and knitted pants; **b)** Innerwear: camisoles, racerback, kurti slips and spaghetti; **c)** Athleisure: bermuda shorts, relaxed capris and lounge pants; and **d)** Kidswear: leggings.

Latest Innerwear Collection and

Theme: Pink 'n' Purple has shifted its focus from the normal leggings to the ankle length leggings as youth prefers ankle lengths and they don't just wear it under the kurtis but also under tops and tunics. In the ankle lengths, the brand is making 75 colours in 3 sizes.

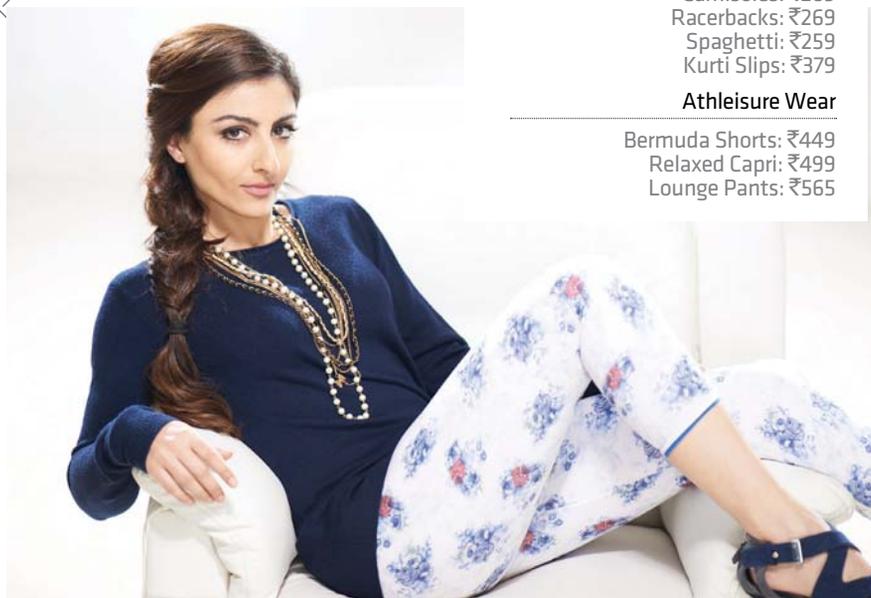
Latest Product Innovation: Since fabric is its forte, Pink 'n' Purple launched premium leggings with superior quality fabric and stitch. In its recent addition to the innerwear segment, kurti slips is an interesting

product. This product can be used both under kurtis and as mid-day slips.

Product Expansion Plans: The brand has already started diversifying both its product line and categories. Last year, it had launched its innerwear and kids wear collection which is an addition to the category expansion. In its core product line of leggings, Pink 'n' Purple has diversified into ankle lengths and pants.

Primary Markets: The brand's primary market is in the North - Rajasthan, Gujarat, Madhya Pradesh, Uttar Pradesh, Chhattisgarh, Odisha, and the Northeast.

Online Presence: In 2016, Pink 'n' Purple launched its own portal deepeeonlinestore.com and is also available on Amazon.



BRAND UPDATE

► Name of the company:
Deepeejay Textiles (P) Ltd.

► Year of launch: 2011

► Headquarter: Kolkata, India

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Bottom Wear Range

Ankle Length Leggings: ₹425

Capris Plain: ₹380- ₹400

Premium Churidars: ₹485

Ankle Net: ₹525

Printed Leggings: ₹540- ₹899

Kids Wear Range

Leggings: ₹245

Women's Inner Wear Range

Camisoles: ₹269

Racerbacks: ₹269

Spaghetti: ₹259

Kurti Slips: ₹379

Athleisure Wear

Bermuda Shorts: ₹449

Relaxed Capri: ₹499

Lounge Pants: ₹565



Mustang Socks & Accessories

SOCKS

MARKET IN INDIA

The market for socks in India has registered a bolstered curve over the past few years. Improved fashion sensibilities powered by rising income levels have forced socks brands to focus on style and innovative designs that resonate with the modern consumers of today. IMAGES BoF takes a look at socks as an independent market segment, which is strengthening with each passing day.

India had, for long, defied global trends in accessories and socks are no exception. But with growing urbanization, disposable incomes, exposure through media and specifically the Indian consumer's now "Look Good, Feel Good" attitude, socks have come to the forefront as an indispensable fashion accessory. Sock fashion has evolved with the inclusion of more innovative patterns and designs that have contributed to increasing their popularity among people. It has become the new way for individuals to express their style and personality.

"The Indian socks market has seen a paradigm shift over the last decade. Socks were seen earlier as a commodity, but now with new styles, patterns and colours, socks are being seen as a fashion and style statement. The market has seen a tremendous growth," expresses Lubeina Shahpurwala, Partner, Mustang Socks & Accessories. Concurring her thoughts, Ayesha DadyBurjor, Director



“Consumers are willing to pay for value as long as the quality, comfort of the design meets their standards, regardless of where they are manufactured.”

– Lubeina Shahpurwala,
Partner, Mustang Socks & Accessories

of the prominent socks brand Lord Walker, says, “The growth of the socks market has been exponential in the last ten years. Socks are definitely a fashion item now.”

So exactly, how big is the socks market in India? According to Ameet Panchal, Director, Happy Socks, the market was reported to be around USD 5.6 billion in 2016. “What is interesting is that the socks sector is growing faster than any other apparel. It is noticeable that the humble sock is poised for a cool, stylish make-over. The growth of the socks market is attributed to the rapid expansion of the retail network in India. Increasing population and disposable income in these regions is expected to further drive the retail sector, which in turn, is increasing the demand for socks,” he adds.

It has to be noted that socks came into prominence as a vital style accessory only in the last decade in India. “More so in the last 4 to 5 years,” adds Harsh Saraf, Head - Business Development, Super Sox, “This recent attention to the sock industry has naturally brought about a much wider expansion to the industry with many more manufacturers and a lot more consumers as well.”

Over the last 20 years or so, the Indian customer has opened up to consumerism and this change is most apparent in the fashion and apparel industry. With the growing awareness in the consumer’s minds in regard to global fashion trends, the retail market has seen a considerable growth since the consumer is now willing to pay for a good quality fashionable product by a domestic brand as well. This holds true for the socks



market as well. “Consumers are willing to pay for value as long as the quality, comfort of the design meets their standards, regardless of where they are manufactured,” says Lubeina Shahpurwala.

Popular Categories

While calf length and ankle length socks enjoy evergreen demand, a whole new slew of modern additions like bamboo socks, mercerised cotton socks, health socks, no show socks, have flooded the markets today. It was also revealed that the most preferred price points of socks in India is between the range of ₹100- ₹200, although products are available from as cheap as ₹60 and go up to ₹500 plus. “Our designs range from formal to casual and funky and price ranges from ₹60 per pair to ₹200 per pair. Our basic category sells the fastest,” avers Harsh Saraf of Super Sox.

As a hot and humid country, cotton has long been the mogul of the Indian daily wear apparel and socks are no exception. In terms of materials used, cotton accounts for the largest market share at almost one third of the total market. “Lord Walker socks are made up of 78 percent cotton, 20 percent polyamide and 2 percent elastane. We



Lord Walker



Mustang Socks & Accessories

A growing demand for wool socks, which earlier enjoyed only a seasonal demand, has also been noted in the Indian socks market. “Currently, the demand for the socks made from natural fibers such as wool and cotton is higher than wool blended with man-made fibers. The market size is hard to estimate, but our consumer trends suggest a growing demand for natural fiber socks,” says Lubeina Shahpurwala. Traditionally, the market for woolen socks was comparatively limited and these socks are consumed mostly in North India during the winter months.



“Socks came into prominence as a vital style accessory in the last 4 to 5 years, in India. This recent attention to the sock industry has naturally brought about a much wider expansion to the industry.”

– Harsh Saraf,
Head – Business Development, Super Sox

also have 100 percent bamboo socks and 100 percent superfine mercerised cotton socks.” reveals Ayesha DadyBurjor. In Happy Socks, the composition stays at around 80 percent combed cotton, 17 percent polyamide and 3 percent elastane. But if Ameet Panchal is to be believed, the market share of cotton is expected to decline during the forecast period owing to the tough competition from man-made fibers, especially nylon and polyester.

“Blended cotton socks are the most common type of socks and also the best composition for quality socks. Since 100 percent cotton socks would lack the stretch and therefore the life of the product would reduce, so nearly all our sales is in blended cotton with an average cotton component of 75- 85 percent cotton in each pair,” says Harsh Saraf. Also, trending now is combed cotton socks. It is a soft version of cotton that is “combed” before being spun into threads. This specific type of cotton makes the socks softer and gives a more luxurious feeling. It is then mixed with speciality yarn like polyamide to make the socks more durable.

Contemporary brands also feature a whole new set of fun prints and embellishments so that customers can express themselves via their fashion choices. Brands have dedicated design and research & development teams that work round the clock to bring about aesthetically appealing products. “We have an in-house research and design team that constantly works on presenting our consumers with something new. They continue to design and innovate new collections on a regular basis by specially creating several unique designs to cater to the diverse demand for socks for the entire family,” reveals Harsh Saraf.

Today, the market is teeming with a slew of options to choose from — right from fun prints, innovative colours, patterns to even licensed designs. “We focus on design as our consumers have started to look at socks as a fashion/style statement. We have a host of styles from licensed designs such as Jungle Book and Garfield to different patterns and innovative colours,” says Lubeina Shahpurwala.

While calf length and ankle length socks enjoy evergreen demand, a whole new slew of modern additions like bamboo socks, mercerised cotton socks, health socks, no show socks, have flooded the markets today.

Innovations

These modern sock innovations range from fashion-focused leg wear accessories to products that aim to cure or improve health problems. As with other fashion products, socks manufacturers are continually striving to innovate and come up with products that are relevant to contemporary times. Happy Socks' range of athletic socks are a more dynamic-friendly product specifically created with light compression, arch support and cushioned sole. The primary driver for the athletic socks market is its diversified application. Athletic socks are majorly used for sports and gym purposes; however, they can also be used as casual wear with informal footwear and trousers. Socks are accessories used along with formal footwear by both men and women. "The core idea behind is that it should be a new canvas for customers to express themselves just as they do with the combed cotton socks but through a more active friendly socks. Skate, shoot some hoops or simply walk down the street in the comfort of Happy Socks Athletic," reveals Ameet Panchal.

Lord Walker offers a standout range of anti-bacterial treatment in sports socks for day long freshness. The brand also offers a range of bamboo and health socks, with

the latter offering comfort to people suffering from diabetes and obesity. "Bamboo socks are sweat absorbent and UV protectant. It also protects from skin cancer," says Ayesha DadyBurjor. Other innovations that stand out are Mustang Socks and Accessories' diabetic and trekker socks that are led by consumer preferences, tastes and needs.

Soaring Sales

Sales wise, as men tend to use socks more often than women, men's socks sales naturally outweighs the women socks ranges for most brands. "Men's socks would have to be the largest selling followed by women and then kids socks. Probably, because men end up wearing shoes most often while women mostly wear slippers and open shoes most of the time," says Harsh Saraf. Also according to Ayesha DadyBurjor, sales of women's socks are high in the winter months whereas men buy socks year round.

A growing consumer demand for socks including an attraction to newer colours and patterns has led to retailers giving more retail space for socks. This is also evident from the growing consumer market for socks. Today, retailers like Regal, Shoppers Stop, Lifestyle, Debenhams, Marks and Spencer, Kapsons, Jade Blue, Next UK, Max, etc., have emerged as the preferred partners of socks brands in India. "It's not about just the clothes anymore. The generation today wants to make a statement with their appearance and they concentrate on all the details there are. Also, something like fun socks is a great way to add personal style even in an office space where you are restricted to express yourself via your fashion choices," says Ameet Panchal. A fair section of experts believe that going forward, it will be advantageous to create a shop in shop module for socks for better sales.



Mustang Socks & Accessories



Mustang Socks & Accessories



Mustang Socks & Accessories



Mustang Socks & Accessories

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Competition from the Unorganised Sector

The socks industry has a strong unorganized industry, and from that sense, it does pose as a threat to the organised sector. “Yes, of course the unbranded market is our biggest competition. Unbranded socks provide inferior quality products at throw away prices and it gets hard for us to justify our pricing. But the people who seek quality are able to understand the difference and are happy to pay the extra buck for it,” says Harsh Saraf. Nodding consent, Lubeina Shahpurwala expresses, “We do face competition from the unbranded market. But having said that, there is a great demand and the consumers for unbranded and branded socks are two distinct target groups.”

Trends

On being asked about the trends that expected to emerge in the near future in the men’s segment, Ameet Panchal predicted that the bright and multi coloured socks, ombre socks, checked socks and novelty socks will be the call

of the day. Also touted to be a craze in the near future are no show socks, party ankle socks, mismatched socks, and premium mercersied cotton socks. “Men have started to become more and more cognizant of what they wear. In terms of socks, the top five trends we see are the use of innovative graphics and designs, niche targeted product ranges, an increasing openness to try new patterns and styles, a higher demand for quality and functionality and using different types of socks for different activities and occasions,” says Lubeina Shahpurwala.

In the women’s section, a growing demand for full length designed socks and a need for socks for different occasions and needs has been apparent. “Crochet stockings, semi sheer patterned stockings, novelty socks, novelty tube socks, toe socks and experimental prints for both men and women will be in demand since the new age consumer is all about having fun and experimenting with their styles,” says Ameet Panchal.

In terms of growth prospects of the individual market, several factors, including an improved sense of fashion among the global population and the rising proliferation of the e-commerce sector, are working in its favour. For retailers and brands, the socks market in India will continue to present an opportunity to innovate and grow. The market is thus expected to witness a promising upward trajectory in the next few years.



Happy Socks



Super Sox





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HAPPY SOCKS

Propelled by the core belief that “There’s a pair of high quality socks and underwear for every occasion, mindset and style”, Happy Socks aims at spreading happiness and spice up every day with colourful designs. As a prominent socks manufacturer in the country, the brand has become a symbol of quality, craftsmanship and creativity.

Core Strength: Happy Socks features almost an endless variety of trendy and chic models and designs, using a broad spectrum of colour combinations and original patterns. At the same time, the brand also ensures superior comfort.

Target Group: Happy socks has a very broad consumer base as its products are worn by everyone be it men, women, kids or grandparents. The brand is for people who love colour, and will always be there for people who want a colourful everyday essential.

Latest Collection and Theme: In its Fall/Winter 2017 collection, the brand has worked with rich autumnal colours including deep burgundy, warm terracotta and olive green, interspersed with lighter pastel shades like pale green, rose pink and baby blue. The line also encompasses the Happy Socks’ classic colours – pomegranate pink, crimson red and canary yellow that are a staple for each season.

Collaborations are an important part of Happy Socks and the brand has collaborated with a slew of celebrities and luminaries over the years. The brand’s latest collaborations are listed below:

The Beatles Collection: Happy Socks has joined forces with The Beatles to commemorate the iconic animated film ‘Yellow Submarine’. This exclusive collaboration consists of six pairs

of combed cotton socks and two collectable gift boxes featuring several of the film’s most famous characters and scenes.

Steve Aoki Collection: For Fall/Winter 2017, Happy Socks gets caked by legendary DJ Steve Aoki. His three designs are a reflection of his dedication, determination and passion for living life to its fullest. This new collaboration brings the brand together with the world of electronic dance music, appealing to millions of passionate Steve Aoki fans.

Category Expansion Plans: The brand is planning to expand its product portfolio to include liner socks, gift boxes, toe socks, value packs, etc. The brand also has plans to launch a range of women specific socks by the name of Hysteria. Hysteria is the first lifestyle sock brand for modern, fashion conscious women.



Market Expansion Plans: Indian market has a lot of potential. A large part of the market is untapped till today. People here welcome new trends and brands happily hence Happy Socks aims to cater every possible market as a retail brand.

Also, as an initiative to expand the retail business, Happy Socks has come up with a new exclusive flagship store at Seawoods Grand Central Mall, Seawoods Railway Station, Navi Mumbai. The look and feel of the flagship Happy Socks store is trendy yet classy. The design and concept of the store is at par with international standards.

Online Presence: Apart from its own website, happysocks.in, the brand is also present on most leading e-commerce sites like Amazon, Gofynd, Flipkart, Paytm, Wooplr, etc.

CAGR Over The Last 3 Financial Years: The brand is enjoying a 20 percent CAGR year on year.



LORD WALKER

Launched in 2014 by Virat Industries Limited, Lord Walker has, within a very short span of time, embossed marks of unrivaled dominance in the Indian socks segment. The brand provides the widest range of dress socks, casual socks and sports socks for men, women and children. It's assortment encompasses socks in combed cotton, mercerised cotton, bamboo, wool, etc., in plain, rib, link, jacquard, fillet, motif and embroidery. The socks are available in 4 colour plus ground on the same course and up to 12 colours can be used in single socks.

Core Strength: Lord Walker premium socks have been especially created for discerning Indian consumers. The brand's core strength is its quality, comfort, durability and aesthetic appeal of its products.

Target Group: Lord Walker range of products cater to all customer groups. The consumers are definitely up-market and brand conscious.

Product Portfolio: Lord Walker produces a profusion of socks in all the categories including business, casual, party, sports, gold collection, etc., for men, women and kids. The brand's products are available in a slew of options like combed cotton, mercerised cotton, bamboo, wool, etc., in plain, rib, link, jacquard, fillet, motif and embroidery.

Latest Collection and Theme: The brand's latest collection is called Festive. Designed keeping in mind the festive season, the collection encompasses a wide range of stylish socks in a concoction of colours and caters to different occasions.

Top Innovations: The brand's top innovations include its range of bamboo socks, super fine mercerized socks, invisible socks, etc.

Category Expansion Plans: Lord Walker has plans to introduce extra super fine mercerized socks along with a colourful collection of party socks.

Primary Markets: The tier - I and -II cities of India make up the primary market for the brand.

Market Expansion Plans: The brand plans on adding new distributors in business potential markets.

Online Retail: The brand has a strong online presence in all leading e-commerce sites like Flipkart, Amazon, Snapdeal, Ajo, etc.



BRAND UPDATE

- ▶ Name of the company: Virat Industries Limited
- ▶ Year of launch: 2014
- ▶ Headquarter (city/country): Mumbai, India
- ▶ Total no. of Retailers: 2,500

PRICE RANGE OF THE CATEGORIES AVAILABLE...

- ▶ Men's range
Socks: ₹99- ₹499
- ▶ Women's range:
Socks: 89- ₹109
- ▶ Kids range
Socks: ₹59- ₹399



MUSTANG SOCKS & ACCESSORIES

Mustang Socks & Accessories is one of the leading manufacturers of quality socks in India. The brand has been a pioneer in the socks segment with many industry-firsts to their credit. Manufacturing more than 1 million pairs of socks per month, the company caters to the domestic and International markets.

Core Strength: The main strength of Mustang Socks & Accessories is to constantly innovate and refine their products based on changing consumer demand and preferences.

Target Group: The brand manufactures socks and accessories to cater to all age groups from infants to adults.

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

Latest Collection and Theme: Minions (limited edition), Peppa Pig and Garfield are some of the theme socks the brand has introduced recently. Apart from this, Mustang Socks & Accessories is constantly introducing different patterns and themes.

Top Innovation: The brand takes pride in innovating at all aspects, and it has been at its core from the start. Mustang Socks & Accessories was the first brand in India to introduce women socks into the market. The brand's innovations are led by consumer preference, tastes and needs. Its diabetic and trekker socks were innovations borne out of the need of the target audience. Another



key innovation is the manufacturing process for children's socks, which ensures that there are no metal pieces are part of the packaging for children's safety.

Product Expansion Plans: Mustang Socks & Accessories is about to launch two special collections – Warli designs and a collection by renowned designer Masaba Gupta. The brand is also adding two new products in toddlers segment – bottle covers and boots.

Primary Markets: As the brand's business deals in a segment which

caters to everyone, its primary market and target audience are across all age groups and geographies.

Top Retailers: Regal (Mumbai), Shoppers Stop (all major cities), Lifestyle (all major cities), Marks and Spencer (all major cities) and Max (all major cities).

Market Expansion Plans: The brand is always in the look out to expand into new markets. As of now, it is focusing on increasing its penetration in the East and Northeast markets and aspires for Mustang to be available in every city in India in the future.

Online Presence: Mustang Socks & Accessories is present with all leading e-tailers like Firstcry, Jabong, Amazon, etc., in addition to its own online store. The brand has seen a steady progress in its online sales over the last few years.

Annual Turnover: The brand's turnover for FY 2016-17 was INR 75 crores, and it looks forward to having growth in terms of product range, distribution and different innovations in the coming 2-3 years. The brand will be focusing on increasing its online retail business and will be looking to have stand-alone Mustang retail locations as well.

CAGR Growth: Mustang Socks & Accessories has been growing at a steady growth of 30 percent over the last three years.



BRAND UPDATE

- ▶ Name of the company: Mustang Enterprises
- ▶ Year of launch: 1987
- ▶ Headquarter (city/country): Mumbai, India
- ▶ Total no of MBOs: 8,000+
- ▶ Total no of distributors: 40



SUPER SOX

Super Sox is a young brand with a vibrant personality that brings socks of superb quality and international styles to Indian consumers. Established in 2012 by Mumbai based Super Knit Industries, the brand has today become synonymous with products that exude style and superior comfort. It has a vast product line with over 4,000 patterns for men, women, kids and newborns. Super Sox is present across more than 10,000 MBOs and a vast number of a majority of LFSS, some under its own brand name Super Sox and some under their respective private labels.

Core Strength: The brand's core strengths are variety, unmatched quality and affordable price points.

Target Consumer: Super Sox has a mixed bag of customers almost equally split between men, women and kids. The brand targets consumers who are style conscious and want to be associated with reputed brands.

Product Portfolio: Super Sox brings to its customers a mix bag of about 4,000 patterns in socks. Notable products include regular and exclusive socks for men, women and kids, health socks for diabetes patients, cotton tights for men and women, arm warmers and arm sleeves, leg warmers and socks dispensers. Apart from several lines of premium quality combed cotton and woolen kinds, Super Sox offers their Indian consumer the sophisticated and classy looking, mercerized cotton



socks. Mercerized cotton is made with the finest cotton yarn of high staple that is put through a highly specialized process to produce stronger, smoother and shinier cotton.

Top Innovations: Super Sox has, since the beginning, strived on innovation. A few innovative products from the brand are listed below:

Royale Collection — the luxury line for men,

Funky Times — trendy new styles for men and women,

Window Socks — to improve air circulation for women,

Health related products — for diabetes and blood pressure patients, and

New and unique colourful prints for children.

Product Expansion Plans: Super Sox has just launched a new brand

of boxers by the name of 'Supergear' and a new brand of handkerchiefs by the name of 'Luxxio'. Supergear caters to men with some basic prints like checks and various other funky designs.

Primary Markets: The metros along with various tier -I and -II cities across make up the primary market of the brand.

Market Expansion Plans: Presently, the brand is well spread across India. But with every passing day/ year, it is increasing its reach and presence in new towns that are hitherto untapped.

Online Presence: Super Sox products are available online on Amazon, and other platforms since 2015.

A brand new website, www.supersox.in has been launched in mid-June 2017 to give socks lovers a seamless user interface to browse through several colours and styles of each category of socks very easily by sorting them out using a number of filters like length, thickness, colours, mood, prices, sizes and many more.



BRAND UPDATE

► Name of the company: Super Knit Industries

► Year of launch: 2012

► Headquarter: Mumbai, India

► Total no of MBOs: 10,000+

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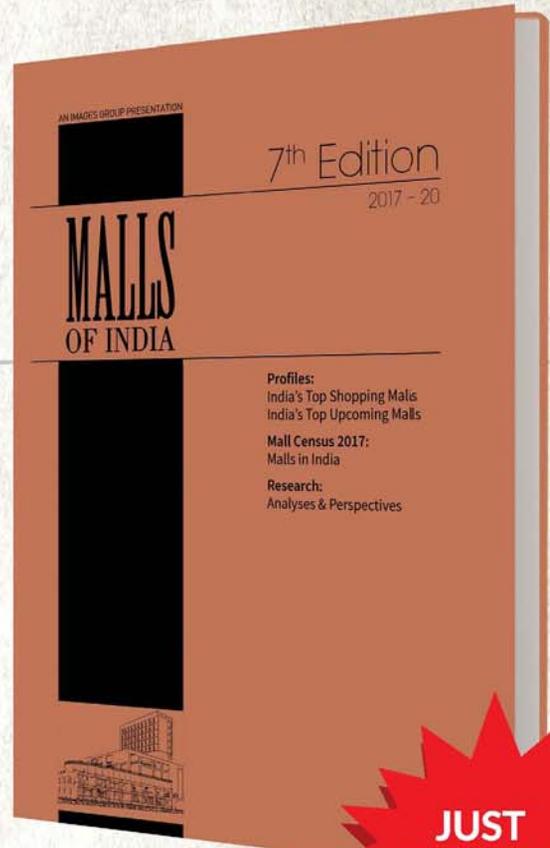
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IMAGES Research presents the **7th edition of Malls of India**, the comprehensive report on the retail real estate industry in India. Along with documenting the current status of the shopping centre industry, the voluminous report also presents detailed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

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GROWING ATHLEISURE

ACCEPTANCE IN INDIA

The widespread focus on health and fitness saw the emergence of activewear and its softer fashion manifestation, the 'athleisure' trend is upon us. With people becoming more fitness conscious, there is a huge demand for their fitness-fashion.

-By Bharti Sood with inputs from Gurbir Singh Gulati

Ramavtar Maheshwari, Director, Texperits India Pvt. Ltd. (Fitz), shares, "The concept of fitness is growing and is supporting this category. The casual look preference is increasing with the youngsters as well as middle-aged generation." Aditya Udani, Founder and Director, Garcon, feels that athleisure was basically about giving any look a sporty/ athletic feel. "I think the main factor that has brought about this trend is simply comfort. People have started valuing free time more than ever before. And in their free time, they want to be dressed comfortably. Whether that is at a restaurant, a bar, the cinema or even on a date, people prefer to be in a comfortable tee and track pants rather than in shirts and trousers. This is a look which all the major trend setters and celebrities have been endorsing. Take for example, the Justin Bieber concert in Mumbai. He came on stage in an over-sized tee, basketball shorts and sneakers. You also find celebrities wearing sneakers with their suits to the award ceremonies. These have most certainly given popularity to the athleisure look and vibe," he adds.



Garcon



Garcon

Consumer Trends

Elaborating on the specific section of consumers who go for athleisure, Ramavtar shares, "People are hitting gyms, jogging tracks and engaging in physical exercises to stay fit. Today's consumers are more aspirational and quality conscious. Hence, this category has increased in terms of both value and volume." He says that athleisure was more preferred by men staying in the metros, tier-II and -III cities and by women in metro cities and to some extent in the tier-II cities. Aditya affirms, "Athleisure is certainly as popular with men as it is with women. I think kids, in some way or the other, have always sported a more dressed down, casual look. This fits perfectly with the athleisure trend. There is already a huge variety of athleisure available in the kids departments."

Athleisure Fashion Trends

While discussing the different types of athleisure trending in the market, Ramavtar shares, "Activewear suitable for all types of activity is trending in the market. The trend is more on the fit and the shape of the t-shirts/ tops, track pants/ slacks, various types of bermudas/ shorts and jackets." According to Aditya, long line tees, caps, track pants, sneakers, hoodies, bomber jackets and leggings were more in trend. And, of these, according to Ramavtar, track pants, yoga pants and t-shirts of micro-polyester with wicking finish/moisture management and anti-bacterial properties were the fastest selling products. Aditya agrees, "I would say the fastest selling category is track pants/ joggers. This is a very versatile item. Earlier, track pants/ joggers/pyjamas were viewed only as something you wore at home or to the gym. This, most certainly, isn't the case anymore. Nowadays, you



"I think the main factor that has brought about this trend is simply comfort. People have started valuing free time more than ever before. And in their free time, they want to be dressed comfortably."

— Aditya Udani,
Founder & Director, Garcon

With the rising sporting culture in India and a growing number of sports clubs, the brands are introducing more fashionable products in the category, to target majorly the youth. When asked about the penetration levels of the athleisure category in India, Aditya remarks, "Any brand, domestic or international, that sells knitwear would have this category. And that constitutes every major brand in the world."

Athleisure is usually more durable and comfortable, with properties like wrinkle and odor resistance incorporated into its tech-infused fibers. Affirms Ramavtar, "Leisure look and comfortable fit are required for free movement. The main attraction is the feel of youngness with easy care." He felt that the athleisure category in India is considered as trendy and cool, and is available at affordable prices. Even Aditya agrees to this and says, "Athleisure allows people to be comfortable yet at the same time dressed for the occasion. Sometimes, being in a polo t-shirt might be a better option than wearing a button-down shirt in the sweltering heat. This trend allows people to do that."



Fitz

get everything from jog jeans (tracks which look like denims) to track pants that actually look like formal trousers in the market. In the women's category, I think leggings have become very popular. This is practically a staple now in every girl's wardrobe and again this is an item that can be dressed up or down. Apart from this, I would say white sneakers have almost single handedly become the most popular item across men and women categories and across all age groups too."

Trending Fabrics

Athleisure fabrics need to be comfortable as well as light in weight, very fine in texture, highly breathable, sweat wicking, stretchable and super soft. According to Ramavtar, 100 percent cotton and micro polyester with stretch/ Lycra combination were predominantly being used to provide a perfect fit so that the garment took shape as per individual body. Informs Avatar, "Cotton-polys, cotton-Lycra, poly-Lycra, French terry, fleece, flat back ribs are some of the trending fabrics being used. Since athleisure is all about comfort, various wash treatments like acid wash, enzyme wash, cotton/poly burnouts are carried out on the fabric to beat



"Today's consumers are more aspirational and quality conscious. Hence, this category has increased in terms of both value and volume."

– R Maheshwari,
Director, Fitz

it out and make it as soft as possible. Wicking process on poly based fabrics is also quite common."

Comfort is not just about softness and coziness, intelligent fabrics also reduce stress. Most of the clothes that people now consider work-appropriate incorporate sports-inspired materials, like spandex, Lycra, and other synthetic fibers. Avers Ramavtar, "Fabrics such as body cool, eco-friendly, body-mapping, finer fabrics with better finish are trending. Styles such as t-shirts with sublimation prints and bottoms with attractive prints in different knits are in vogue."

Moving Ahead

Shedding light on the future prospects about this category and its growth rate, Aditya concludes, " This category seems like it is here to stay. All our major buyers as well as fashion conferences which we attend have told us that this is one category which is not going anywhere. In fact, we have decided specifically to focus at least half of our range, when it comes to tops, bottoms and outerwear, in this category."



FITZ

With Indian soul and international outlook, Fitz is the flagship sportswear and activewear brand of Texpert India Private Limited, an international textile supply chain management company. The idea for the brand was conjured with an intent to cater to the proliferating fitness enthusiasm among the youth of the country. Consequently, the brand was launched just before Cricket World Cup in 2007. Today, Fitz is available pan India and ranks among the highest selling brands in its category.

Core Strength: The brand believes in fast fashion and designs products through innovative ideas with major focus on product fit.

Target Group: Fitz caters to the age bracket of 20- 35 years. It's target audience are young, educated, upwardly mobile, quite experimental, attire conscious and fitness oriented.

Product Portfolio: Fitz's present portfolio mainly focuses on A/W'17 products — sweatshirts, track pants, heavy GSM t-shirts and many more. The brand is also coming up with a new range of activewear focusing on gym wear.

Share of Athleisure in Product

Portfolio: Out of the total product portfolio, 60- 70 percent comprises of athleisure.

Latest Collection and Theme: The brand's new collection is based on its famous tagline - 'Let's Stretch'. It has track pants and t-shirts with innovative

fabrication — French terry, fleece, micro-polyester and regular knits.

Top Innovations: Fitz's A/W'17 collection consists of sweatshirts and track pants made of fleece, French terry and heavy GSM fabrics. The brand is also coming up with a wide range of activewear for gym and leisure wear — made of bodycool, dry fit, eco-friendly, body-mapping and regular knitted fabrics.

Primary Markets: Fitz has a strong presence in the metros along with tier-I and -II cities. As of now, it is present in cities such as Guntur, Kadapa, Kakinada, Kurnool, Vijayawada, Vizag, Ahmedabad, Tirunelveli, Chennai, Hyderabad, Vadodara, Rajkot, Surat, Gurgaon, Bengaluru, Mysore, Indore, Mumbai, Pune, Sangli, Malkajgiri, Miyapur, Gorakhpur, Lucknow, NCR, Noida, Durgapur, Kolkata and Guwahati.

Top Retailers: Brand Factory, More, Reliance Market.

Market Expansion Plans: Fitz is currently present in 11 states. Moving forward, it plans to venture into MBOs, private labels, distribution and institutional sales.

Online Presence: Apart from it's own e-commerce platform — www.fitzstudio.com, the brand has a prominent presence across major e-tailers like Myntra, Jabong, LimeRoad, Flipkart, Amazon, Snapdeal, Paytm, Voonik, etc. Fitz has registered overwhelming business through online retail.



BRAND UPDATE

► Name of the company:
Texpert India Private Limited

► Year of launch: **2007**

► Total no. Of SISs: **60**

► No. of states present in: **11**

► Product Price Range:
₹495- ₹1,495



GARCON

Garcon is a men's high fashion knitwear brand that offers unique and stylish designs whilst ensuring the best quality. The brand's innovative styles set it apart from any other t-shirt brand in the market. Today, a fairly young brand incepted in 2015, Garcon has successfully established its stronghold throughout the country because of its unwavering commitment to quality and sensitivity of cost effectiveness.

Core Strength: The brand's core strength is its quality, coupled with affordable price points.

Target Group: Garcon targets customers within the age group of 15- 40 years. Nevertheless, it enjoys demand from other age groups also.

Product Portfolio: The brand manufactures everything in the knitwear space. It's product portfolio includes a wide range of tees, polos, hoodies, joggers, shorts, bomber jackets, vests, boxer shorts, etc.

Latest Collection and Theme: Garcon's latest collection sports various design elements like stripes on the sleeves, big bold numbers on the garments, etc., to give it a sporty look and feel.

Top Innovative Products: The brand's most innovative products are its range of knit shirts, long line tees and utility tracks that are not just extremely trendy and unique in their design but are also really comfortable.

Product Expansion Plans: Garcon has already introduced boxer shorts



and briefs in its product portfolio. The brand plans to work on this further by developing a complete athletic line, that would include gym wear products.

Primary Markets: Garcon's primary market is the online space that helped it establish its presence throughout the country.

Online Presence: The brand is present in all leading e-commerce sites including Ajo, Jabong, Flipkart, Myntra, etc.

BRAND UPDATE

► Name of the company:
Kaytee Corporation Pvt. Ltd.

► Year of launch: 2015

► Headquarter:
Mumbai, India

PRICE RANGE OF THE CATEGORIES AVAILABLE...

► Men's range

Vests: ₹399- ₹799 | Briefs: ₹349- ₹499



FASHION

CREATION

- » TOP FASHION TRENDS
- » INNERWEAR AS OUTERWEAR
- » CELEBRITIES IN INNERWEAR
- » UPCOMING TRENDS
- » INGREDIENTS



Let's Party

Grace yourself with
classy partywear kurtis.

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FASHION CREATION



Ingredients

COMFORTABLE FASHION: LIVA

In 2015, Grasim Industries Limited launched new age fabric brand – Liva, which is natural, fluid and fashionable. We talk to Manohar Samuel, President - Marketing, Grasim Industries Ltd., Birla Cellulose, about the company, future plans, and the criticality of great ingredients in innerwear.

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My Thoughts

NO LONGER INVISIBLE

Innerwear peeping out from under the dresses or tops is considered totally in fashion and on the right trendy path. Veteran fashion columnist Meher Castelino reviews the trendy innerwear being introduced by the designers.

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Fashion Creation



Trends

CELEBRITY TREND: INNERWEAR AS OUTERWEAR

The innerwear-as-outerwear trend is allowing our undergarments a chance to really stand out and shine on their own. We take a look at different ways how celebrity style icons have been rocking outfits that are obviously glammed up versions of lingerie.

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Trends

INNERWEAR TRENDS FOR WINTER

You may think that bras, knickers and shapewear are pretty much the same, year in-year out, but just like fashion, new underwear trends emerge season after season. We bring you the three main innerwear trends for the winter season--Strapped In, Honeymoon Mood, and Aesthetic Sports Bra.

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COMFORTABLE FASHION

LIVA

Back in 2015, Grasim Industries Limited had achieved a major milestone marking the advent of a new era of Birla Cellulose with the launch of new age fabric brand – Liva, which is natural, fluid and fashionable and infuses fluidity into the garment. IMAGES BoF talks to Manohar Samuel, President - Marketing, Grasim Industries Ltd., Birla Cellulose, about the company and its future plans.



– Manohar Samuel,
President- Marketing, Grasim Industries Ltd.,
Birla Cellulose

IBoF: Tell us a bit about Birla Cellulose.

Manohar Samuel (MS): Birla Cellulose, the pulp and fiber business of Aditya Birla Group, is a global leader in Man Made Cellulosic Fibers (MMCF) and a pioneer in India in Viscose Staple Fiber (VSF). A versatile and easily blendable fiber, VSF is used in apparel, home textiles, women's wear fabrics, knit wear and non-woven applications. Liva is an ingredient brand which was introduced in Spring/ Summer 2015.

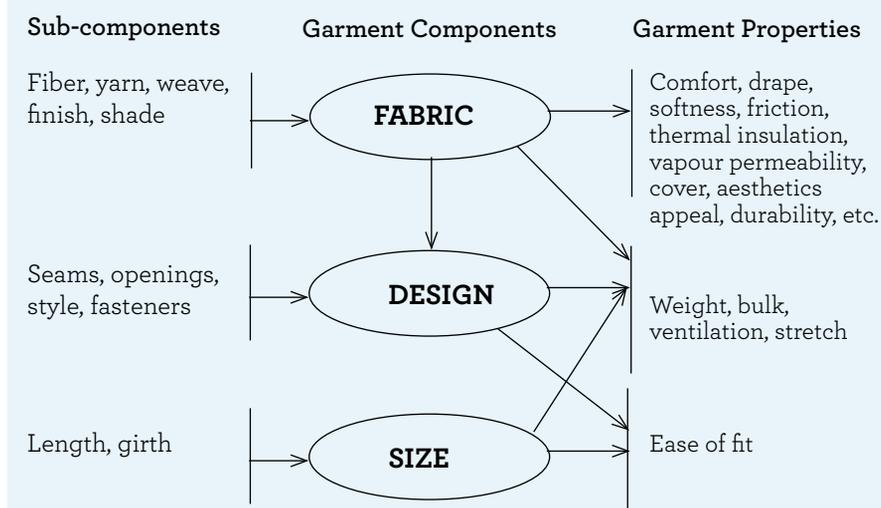
Liva stands for high quality fabric made using natural cellulosic fibers of Aditya Birla Group delivered through an accredited value chain for guaranteed performance. Liva imparts softness and comfort to the fabric.

IBoF: Just as it is paramount to have the right ingredients to perfectly cook a dish, I guess it is equally important to have the right fabric to tailor an impeccable innerwear product. Could you tell us in detail about how important a role fabrics have in the final product?

MS: This is indeed a very apt question for textiles and clothing as a whole. Fabric is the heart of ensuring what the consumer wants in terms of functional need, aesthetic appeal and utility performance.

Our consumer research shows that even if they buy a product which they wear, they connote the performance also on the fabric which has backed the product.

FABRIC CORRELATION TO GARMENTS



The fabric is perfected with right construction, and most importantly, the choice of fiber. The fiber relates to most of the fabric value. Of course the consumer desires a garment which has styling, designing and perfect choice of fiber, yarn, fabric construction.

The birth of ingredient brand Liva, is an amalgamation of consumer insights and core fabric needs. Our research shows that innerwear requires a fabric that is comfortable, soft and absorbent, good for the skin and is engineer-able for all consumer needs. Specific tests for low sheer performance has shown luxuriously soft Liva Crème as a fit for premium innerwear, and Liva with cotton blend for value segment.

IBoF: Tell us about the different types of fabrics you manufacture for the innerwear industry.

MS: Let me share with you some of the most prominent innerwear fabrics that we manufacture. We have Vortex Modal (100 percent) with 5 percent spandex in 160 GSM, and Vortex Cotton/ Modal (50 percent/ 50 percent) – 170 GSM. Then we have Siro Modal (100 percent) with 5 percent spandex in 160 GSM and Siro Cotton/Modal (50 percent/ 50 percent) in 170 GSM. Apart from these, we also have compact ring Modal and blends.

These fabrics are finished in a way that the intrinsic value of the product is brought forth with closed collaboration with the Liva Accredited Partner Forum (LAPF). The LAPF members have innovated leveraging the fiber attributes, yarn configuration, fabric construction and functional finishes to ensure consumer delight.

IBoF: In layman's terms, what would be the key attributes of these fabrics?

MS: The key attributes for fabric used for innerwear applications are softness, moisture wicking, light weight, colour brilliancy, lusture, skin friendliness, easy maintenance, etc.

IBoF: Tell us about the recent innovations that you have developed in terms of technology and product features.

MS: There are actually two key developments which we believe will take the product features to another level. One, the wider adaptation of Siro compact spinning with Viscose and Modal by the value chain which provides a much cleaner and softer end product. Secondly, micro-modal becoming a preferred fiber base in the intimate space imparting softness and comfort to the end product.

Also, we have innovated with fibers that kill bacteria; there's another one which is super white and a third which uses spun-dyed MMCF. Our innovation pipeline would ensure that we seek opportunity and align with consumer demand to grow our business.

IBoF: Tell us about the price points of your products.

MS: The inherit strength of our fiber adds a luxurious softness and premium look to the end product. The pricing of the end product is influenced by a profusion of factors including brand image as well as the target audience. Our fiber based product is normally targeted towards the premium end of the market with a price bracket of over ₹300 (for end product).

IBoF: Tell us, which innerwear brands are your key clients?

MS: It gives me immense pleasure to tell you that today, most of the top Indian and international brands use our fiber based fabric. Some of brands working closely with us are Jockey, FCUK, XYXX, Neva, etc.



NO LONGER INVISIBLE

Innerwear peeping out from under the dresses or tops is considered totally in fashion and on the right trendy path. A review on the trendy innerwear being introduced by the designers.

By Meher Castelino

RAAKESH AGARWAL

THE CORSET



How times have changed in fashion! There was an era when a brief peek of a bra strap was considered a fashion faux pas. But not any longer, since this is the decade when innerwear has turned into the ruling outerwear highlights on the style charts in the fashion world.

FROM IN TO OUT

There is a long list of lingerie or innerwear that now holds pride of place on the fashion charts as the perfect style item to make a startling impact on the ramp, to the viewers and of course to be seen in the media.

The trusty brassiere has turned into a cute bralet with skirts while the stringy bikini top appears under sheer blouses. The bodysuit that was often worn to keep the curves in check under form fitted creations now emerges as the eye catcher, while the corset whose fashion antecedents go back to the 16th century and was termed as “French Bodice” in France, was only a favourite to cinch waists and enhance bosoms but today it is teamed with everything that one can dream of.

The bustier that is a will power, off-the-shoulder version of the corset is now a hot item in the resort and holiday wear category. The slip or chemise worn under a dress decades ago appears on the global fashion runways; along with the slinky nightie dresses and the pyjama printed sets that are ideal for summer lounging on the patio or beach.

The petticoat, a close cousin of the slip, also appears in its outer avatar now, while racer or sports bras that kept the feminine athlete in full throttle make an entry on the bridal scene with a sari or lehenga and enough glitter to dazzle the guests.

Lingerie like nighties and peignoirs were honeymoon “must haves” but not anymore. Wear your nighties and peignoirs on the Red Carpet and cause gasps of admiration amongst the audience. Even the cute baby doll nighties work beautifully for that cocktail party appearance. Remember the trusty towelling bathrobe that helped to soak up water after an invigorating shower? Well now it has moved up the fashion ladder and turned into a stylish iconic ensemble over a sexy camisole and fluid pajamas for that Page 3 regular who is hailed as a style diva.

The almost invisible thong that prevented the unwanted panty line from being seen through a body-contouring outfit; now appears in all its glory under a lace mini for fashion connoisseurs to admire. The humble panty, that for centuries, had been hidden under layers of fabrics is now proudly paraded as outerwear with cropped tops. Of course poor Superman did set the trend decades ago but no one bothered about it till designers and Hollywood stars turned the idea into a trend.



SATYA PAUL

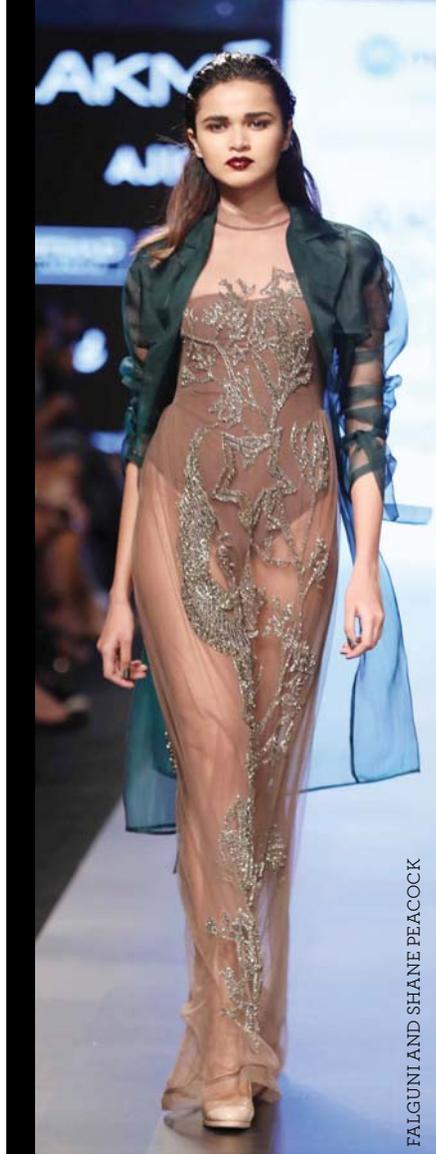
Giving innerwear and outerwear a generous push probably came from top French designer Jean Paul Gaultier whose great influence of turning underwear into outerwear is well known. When Madonna went on her famed *'Blonde Ambition'* tour in 1990-91, it was Gaultier who turned her stage appearance into an unforgettable drama with the iconic pink satin cone breasted corset. Since then, the corset has been an integral part of many collections for Gaultier.

While women no longer need to wear corsets under their garments to turn their waists into unbelievable visions, the corset remains as one of the most favoured underwear creations to appear as outerwear. A little credit must also go to the Punks and Goths who brought the corset out of hiding and gave it the outerwear designation. Other designers who promoted underwear as outerwear on the catwalks were Dolce and Gabbana, Stella McCartney, Dior and Ellie Saab.

Of course how to wear underwear as outerwear needed some correct styling tips. It is believed that Debenhams had a personal styling team at Oxford Street in London to advise women on the right way to team their corsets, slips and bustiers with skirts and dresses. Today, fashion experts state that lingerie inspired clothing is a "must have" in every fashionista's wardrobe.

HOLLYWOOD STARS APPROVE

Giving underwear its greatest thrust was Madonna when she made her debut on MTV in 1984. For her videos



FALGUNI AND SHANE PEACOCK



MASABAS SLIP DRESS

'Lucky Star' and *'Borderline'*, the blond bombshell singer wore lingerie inspired costumes while her favourite was a punk black navel exposing mini skirt with a lace tank top over a bra. In her 1985 movie *'Desperately Seeking Susan'*, Madonna again created a fashion movement with her white lace corset. Since then, younger singers like Britney Spears who appeared in her lingerie for a performance and Christina Aguilera have been wearing their inner inspired garments for their shows.

More recently, Mariah Carey in June 2016 appeared boldly dressed in a lace corset with black panties. Fergie too opted for a figure hugging, orange, lace maxi with a prominent black bra and panty for the Grammy's, once again created by Jean Paul Gaultier.

Numerous stars, since then, have presented their lingerie at Oscars, Red Carpets or award events. Stars like Courtney Love and Grace Jones also were pioneers when it came to exposing innerwear on the Red Carpet.

At the Glastonbury show in 2014, singer Ellie Goulding created a sensation when she performed in a cutout gold bralet and leather hot pants. To create fashion excitement off the courts at Wimbledon in 2013, Victoria Beckham scored a match point with her black lace Louis Vuitton dress. Super stars like Rihanna have stepped out in a full-length silk nightie for a football match in New York but teamed it with a demure denim jacket.



NAMRATA JOSHIPURA'S BODYSUIT



SHIVAN NARRESH'S BRALET

FASHION WEEK FAVOURITES

Closer home on the Indian fashion front, designers have been on trend as far as innerwear moving to the outer segments is concerned. Model turned designer Lascelles Symons who specialized in corsets and bustiers is called the "Corset King of India". He created quite a sensation with his corset collections at two consecutive Lakmé Fashion Week seasons in 2006.

"When I started designing in 1996, I didn't want to do main stream clothes. I wanted to design garments, which transcend size and I referred to the choli, which was used irrespective of one's size. That was my focus. When I started designing corsets, there was a gap in the market. My first collection was an animal print line of corset-like ensembles, which were featured in Femina," informs Lascelles, who feels that corsets and bustiers can be dressed up to give a sleek feminine look, which every woman yearns for during the wedding and festive season. However, Lascelles cautions that corsets are difficult to construct and time consuming but can give an amazing shape like no other garment can.



MANISH MALHOTRA

Singers like Lady Gaga and beauties like Bella Hadid have constantly created fashion news whenever they have appeared in lingerie as outerwear. It is believed that every time a celebrity dons lingerie at an event, sales of chemises, camisoles, bralets and corsets have soared in boudoir inspired innerwear around the globe.

Best sellers in many stores in the West are skirt slips, lacy nightie dresses, camisoles, bralets and corsets, which are being worn as normal everyday clothing. A blatant visual of a lacy bra cup or a corset is considered de rigueur in the 21st century, while the nude or the invisible dress now favoured by celebrities over sexy lingerie is termed as haute couture.

Designers Falguni and Shane Peacock create sheer sensations with an emphasis on matching bodysuits, bralets and granny pants. Bollywood Badshah, Manish Malhotra who has dressed movie stars around the world presents his version of velvet corsets and will-power bustiers with sleeve extensions teamed with stunning lehengas with dazzling embroidery that have been desired by stylish brides.

Masaba's trendy slip dresses with quirky embellishments worn with floor length inspired peignoir covers are on trend; while Namrata Joshipura's sheer swirling glass nylon maxi reveals a matching bodysuit.





NEETA LULLA'S BABY DOLL DRESS



SANCHITA'S PAJAMA SET



SOUNIA GOHIL



TARUN TAHILIANI



JADE



SUKRITI AAKRITI

At fashion weeks, Neeta Lulla, the “Czarina of bollywood fashion” unveiled a cute baby doll flared mini, while Rocky S Noir exhibited navel-baring skirts with printed camisoles. Sanchita brought the printed pajama and robe on to the Amazon India Fashion Week ramp for summer wear but Satya Paul teamed the label’s famed printed sarees with contrasting bustiers. Swimwear experts Shivan and Narresh added a structured bralet to their paneled skirt for holiday glamour. Jade, the haute couture label by Monica Shah and Karishma Swali has been presenting designer corsets and bustiers since 2008.

“Corsets and bustiers form a major part of both, the bridal couture collection under Jade and luxury prêt collection ‘Amoh by Jade’. They have been a part of some of our best selling ensembles. They flow with the idea of accentuating a woman’s body rather than covering it, also lend an air of sophistication and the new generation has loved this shift,” state Monica and Karishma.

Jade received a really good response for its ensembles that include corsets and bralets. They have been amongst some of the most loved looks by their clients. “We have seen so many of our clients swapping the traditional cholis for bralets and corsets. It’s a balance between staying rooted to traditions and yet relevant to the new generation. The millennials have been responding very well to the change. For them, it’s not just what’s sexy but it’s what’s comfortable and functional without sacrificing the beauty,” add Monica and Karishma, who have been creating looks with corset, bustiers and bralets for over 5 years.

Monica and Karishma continue as they explain, “The option between corset, bustier and choli depends a lot on how traditional the occasion and ceremonies are. In our





VIDHI WADHWANI



WENDELL RODRICKS



LASCELLES SYMONDS



VIKRAM PHADNIS

experience, the millennials have been extremely responsive to the change that we are drifting towards. We have included bustiers, bralets and corsets in our bridal couture collection under Jade as well as the luxury prêt collection 'Amoh by Jade' and have received a really great response from them. Though it hasn't totally replaced the traditional choli yet, they have been swapped for a choli several times as these pieces are easy to incorporate with other outfits and create multiple looks to express their individuality."

For the Jade brand, the lines between inner and outerwear have been blurring. "Today, wearing lingerie, as an outerwear is not about creating something that is unnatural to you; it's about enhancing your natural form, making you more comfortable and supporting you. People have been more accepting towards the change. For the person who may not be ready to go out and wear a bra in public opts for a bralet. What we have done is pair the bralets with high-waisted pants. Then, you realize that you're not really exposing any more skin than you usually do," explains the duo who haven't included slip dresses or camisoles in their couture collection yet. However, bralets and bodysuits have made their way into the collection for a few years now and have been doing really well. "These pieces are a great way to express your individuality through an ensemble. Also, it adds a lot of comfort, functionality and versatility in your everyday style," conclude Monica and Karishma.

Designers Sounia Gohil and Vidhi Wadhvani create bold fashion wear with sheer lehengas over micro shorts; while Sukriti and Aakriti give the baby doll silhouette an Indian tiered maxi appearance.

Tarun Tahiliani's bridal bustiers are kept in place with invisible fabric. Wendell Rodricks gives his resort wear a colour blocked appeal in a sheer orange/ blue mini over a bikini and shorts that could work very well for a beach soirée. Bollywood's favourite designer Vikram Phadnis puts an emphasis on corsets for his lehengas as well as asymmetric skirts.





RAAKESH AGARWAL



MANISH MALHOTRA

Designer Raakesh Agarwal was probably one of the first designers to create a corset in 2002 when he worked with Tarun Tahiliani. "I made a corset also for my first collection in 2007 and since then corsets have been great sellers for me and I have made a lot of money from them. I am originally a men's wear designer so for the construction of a corset or a bustier, it is an integral part and very much like a men's wear suit. I have often said that a suit is a corset for men," reveals Raakesh.

Some of the designer's creations are the unforgettable gold tasseled corset and pre-stitched saree gown worn by Lara Dutta and Raakesh is often considered the pioneer of the saree/gown since 2007.

"Innerwear has definitely come out in the open. For the Kingfisher calendars, many of my corsets and bikinis have been featured regularly," concludes Raakesh.

BOLLYWOOD BEAUTIES ON RED CARPETS

If Hollywood stars brought lingerie out in the open, can our Bollywood beauties be far behind?

Deepika Padukone created a sensation with her stick-on bra. Bipasha Basu and Priyanka Chopra too have given their assent to the discreet showing of a bralet. Kangana Ranaut's costume for the movie 'Revolver Rani' was a tribute to the warrior queen bra. Sonam Kapoor, the highly proclaimed Bollywood fashionista, while unveiling a Stardust cover allowed a black lace bra to peep out from under a grey/blue outfit.

So ladies do not fret if your innerwear peeps out from under your dresses or tops, you are totally in fashion and on the right trendy path.



RAAKESH AGARWAL

INDIA RETAIL REPORT

2 0 1 8

The potential of the world's most exciting retail market

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- The 'India Retail Report,' published once in two years by the Images Group, maps the key figures on Indian Retail – it sets bench mark figures for Indian Retail - sizing up the entire market with its key segments, scope and performance of key players across categories and formats.
- The report also carries insightful contributions from global research, consulting and thought leaders, on aspects critical to understanding Indian Retail.

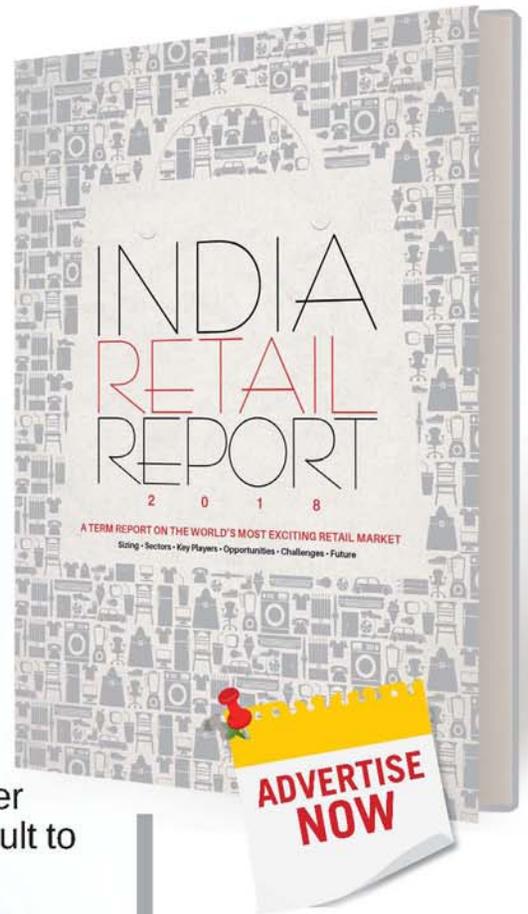
It is indeed the most sought after report for the retail industry, media and policy makers, and serves as the most comprehensive guide to Indian retail.

The next edition –“India Retail Report 2018” will be released at the India Retail Forum, to be held in Mumbai on the 19th & 20th of September 2017.

THE INDIA RETAIL REPORT HIGHLIGHTS:

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CELEBRITY TREND: INNERWEAR AS OUTERWEAR

- Aarti Kapur Singh

Putting an outfit together can be as much about what we're wearing underneath our clothing as it is about what we're wearing on top: Lingerie is no longer reserved for just a night in. What you wear underneath your outfit is important and often makes us feel better. While the boudoir may be a good place to give these pieces a test run, the innerwear-as-outerwear trend is allowing our undergarments a chance to really stand out and shone on their own. As Leandra Medine from the infamous blog Man Repeller said: 'Lingerie is so in, it's out!'. Lingerie has become a true day wear trend (like pajamas or the slip dress) but sometimes we do not give it the right attention. Of late, celebrity style icons have been rocking outfits that are obviously glammed up versions of lingerie, the trend is also leading to the fact that increasingly underwear is being designed keeping in mind the influence of ready-to-wear. In the past couple of years, the underwear as outerwear trend has continued to pick up speed. We've seen stars like Rihanna, Victoria Beckham, Rita Ora and Lady Gaga (to name a small handful) continue to push the boundaries and showcase their own delectable lingerie collections.

From bodysuits as tops to night-gown slips begging to be worn as dresses, nowadays you'll find lingerie worth the investment for the amount you'll be wearing it. While underwear as outerwear is not a new phenomenon, the new exposure takes a demure approach to delicate dressing. Newbies to the trend might find the thought of revealing their underthings to be a little intimidating. "If you do it wrong, it can look like you ran out of the house without getting dressed. Don't let that stop you. The underwear as outerwear trend is actually pretty easy to master. The key is to make it look intentional," says Falguni of designer duo Falguni and Shane Peacock.

Exposing your bra isn't often the most comfortable option for many women, but we say; don't be afraid! There are many ways to style this piece of lingerie, depending on how much coverage you would like to have. The underwear as outerwear trend isn't for the faint of heart, but we hope to convince you it's definitely worth trying!

From bodysuits as tops to night-gown slips begging to be worn as dresses and beyond, here are some styles you can count on being big in the next one year.



Just a Hint

Not sure where to begin? This is a great starting point for newbies to the trend. To start off slowly, add a semi-sheer blouse over your gorgeous new bra. Not only will it feel like you're more covered, but the effect won't be as full-frontal. Get playful and choose lace or patterned blouses over a simpler, t-shirt style bra. If the bra is detailed or embellished, go for a plain semi-sheer blouse. Wear a blouse that is just sheer enough so you can see an elaborate or statement bra peeking out from underneath. For a cool vibe, stick with a coordinating colour palette.

The Body Suit

One of the most versatile lingerie pieces you'll ever purchase, a Body Suit can be combined with your whole wardrobe for all occasions. Whether you're heading to the office, lunch with the girls or to drinks at a beach club take our style tips and wear your underwear as outerwear with confidence.

Match your body suit with a pair of straight-cut white pants, an open denim shirt and cute colourful clutch bag. Summer nights spent sipping on cocktails gives you the opportunity to add a pair of leather shorts or a leather skirt and statement necklace to match your body suit. Add a slick white blazer for full effect. Crooner Neha Bhasin was a red carpet stunner in a daring body-suit gown at the IIFA in New York recently.



Slip The Dress

When your petticoat is too pretty to keep covered up. If you are not ready to walk around with an exposed bra quite yet? Start off with your slip dress. Remember that it looks just as good with things layered underneath as it does worn with jackets. A flirty favourite, the fuss-free slip is set to return, but this time in luxed-up fabrics like velvet and silks. The slip was seen recently on Deepika Padukone at the MET gala and did she totally own the trend. Revisit the 90s and wear a sleek, figure-skimming slip dress with barely-there heels for a stripped-back yet sultry after-dark look. Turn the look into a day time boho one by layering a nude slip under a cool biker jacket and finishing with western boots.



A Pajama Party

When it comes to pajama dressing, it's all about finding the right balance. You want to look effortless, but not like you just crawled out of bed. Get the vibe right by adding some structure into the mix with a mini box bag and some heels. Don't forget that a sleek hairstyle will also help elevate things. Tank tops under sheer shirts is a no-fail style. If you're searching for something a little sexier, swap your tank for a bra. Go for coordinating shades on top, then add some colour with your pants. Silky pyjamas are not just strictly reserved for the bedroom. From the likes of Lanvin to Roberto Cavalli, nightwear is set to be your new go-to with chic silhouettes in the form of wrap tops and wide-leg trousers. Join the slumber party by pairing your PJs with mules and a bucket bag to make your sleepwear appropriate for daylight, or strappy heels and a clutch when staying up all night.



THE COLOUR PALETTE



Black Magic

The rule about how you can never go wrong if you wear black also applies to the underwear as outerwear trend. An all-black colour palette allows the different sheer fabrics to be the focus. Add in some sheer tights for another twist on the reveal and conceal look.

Blush Tones

Pastels have been coming in hot this season, but blush is reigning supreme when it comes to lingerie. The pink shade has a vintage vibe, so be on the lookout for blush high-waisted panties, blush garters, and blush dressing robes.



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la mode à petits prix

Jerome Calonne
Development Leader
KIABI INDIA



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A woman with long dark hair, wearing a black lace halter-neck crop top and matching lace underwear, is posing in a dark setting. She has her eyes closed and a serene expression. The background is dark with some architectural lines.

INNERWEAR TRENDS

FOR WINTER

- Aarti Kapur Singh

The delicates in the wardrobe of a woman have evolved to an extent that they can be bold and functional enough to be worn as outerwear. As a result, the lingerie market is exploding with options for the modern woman. Beautiful lingerie for modern woman plays an equally important role as clothes and accessories. You may think that bras, knickers and shapewear are pretty much the same, year in, year out, but just like fashion, new underwear trends emerge season after season. And no, we're not just talking about bra-tops as real clothes, although designers like Alexander Wang at Balenciaga, Dries Van Noten and Marc Jacobs all championed the look, sending bras down the catwalk over lacy T-shirts and under baggy jackets. This years, the three main innerwear trends that will be big for the rest of 2017 are strappies, athleisure and honeymoon.



STRAPPED IN

Strappy bras and underwear are here to stay! The top trend in lingerie right now is straps, straps and more straps, and this trend is going to carry on with us through 2017. Whether it's a choker collar on a bralette or extra straps around the band of your bra or underwear, straps are here to stay, in a big way. While racerbacks reigned supreme the last few seasons, bralettes are starting to play with multi-layered straps. And their underwear counterparts are following suit. Consider showing a peek through a drapey armhole or backless dress.

Playing off of the strappy trend, another common look that is popular is cutouts. They're everywhere! Showing a little skin between fabric is a must for 2017.





HONEYMOON MOOD

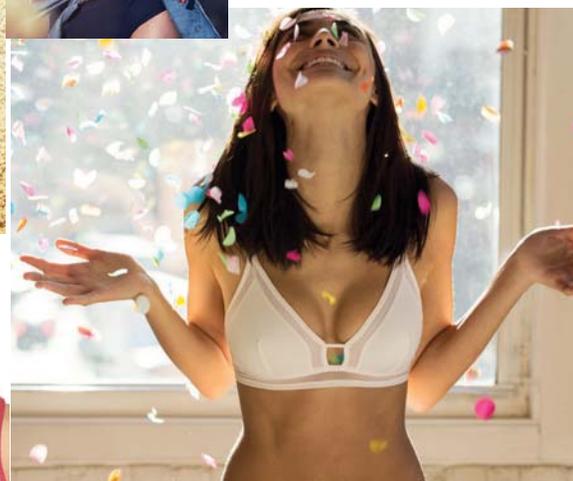
For winter 2017 romantic sets in lace and floral embroidery that adorn bra cups and briefs' sides are finding favour with designers. There's nothing wrong with straight-up, unabashedly pretty lingerie. There's a time and a place for risqué and edgy styles, but sometimes we just want a blatant touch of femininity to our undergarments. Scalloped lace instantly gives an elegant, luxe boost to a piece of lingerie. Tulle inserts can turn a body into a daywear garment worn with a midi skirt or palazzo pants like in Art Deco times: perfect for a dark lady, charming and sexy at the same time. Some lingerie labels propose hot 'bondage-inspired' styles featuring multiple laces tied over the body, creating new symmetries. No longer just for brides-to-be or newlyweds, white lingerie is popping up everywhere, from lace bralettes and thongs to even pajamas and lounge. If you're not into white lingerie (or think it's reserved for bridal), other pastel colors, like light pastels will do the trick.

SPORTS BRA AESTHETIC

Athleisure and comfort are likely to be key trends in innerwear for 2017. Athleisure, that falls between obvious sportswear and streetwear/leisure, will continue to influence lingerie wardrobes in terms of colours, cuts and technical details in the new year. But, irrespective of the inspiration, comfort has always been and will remain the bottomline.

Athleisure isn't going away anytime soon. Each season, it feels like fashion is edging closer to head-to-toe workout looks. Athletic looks have been hitting the runways for a few seasons now. Thick bands and bras without wires are the standout pieces to be on the lookout for. This trend it's not only "in" - it's functional, too. The wide bottom bands and structured seams stay put all day, giving you added support and comfort.

The latest bralettes are equal parts underwear and crop tops. Wear these sports bra look-a-likes under a loose tank, or paired with a set of a high-waisted jeans.



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DRESS WELL OR DIE TRYING !

NEXT ISSUE THE OCCASION WEAR SPECIAL

IMAGES
BUSINESS OF FASHION
SEPTEMBER 2017

The **September 2017 issue of Images Business of Fashion** is an **Occasion Wear Special**. An occasion is a particular event, function, ceremony or a party; and that there is a very vibrant Indian fashion ethos today coupled with the fact that invitations to occasions in India very seldom come with a prescribed dress code as you may find in the west, has opened up a vast spectrum of classics and innovations for the Indian consumer to choose from. Standing true to what Nina Garcia meant when she said that, "Style is a deeply personal expression of who you are, and every time you dress, you are asserting a part of yourself", India is indeed doing it in its own unique way!

The occasion wear market in India is today led by an array of established and fast rising **fashion designers** and by several established regional specialist **retailers**. Some of these have now even gone national. Several **corporate brands** are also betting it big on occasion and ceremonial wear, as are some specialized online shopping portals. The influence of Bollywood and international runways is also deeply manifested.

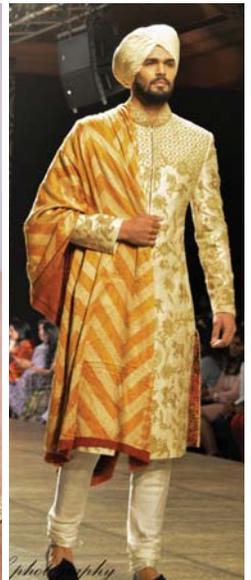
The Popular Segments in Occasion Wear are:-

■ Men:

- Sherwanis, Jodhpuris, Bandhgallas in ethnic; Suits/ Mandarins/ Tuxedos & Zoot Suits, Shirt Coordinates and Party Shirts
- Men's fashion accessories: Shoes, Watches, Ties/ Cravats, Cufflinks, Tie-Clips, Belts and Wallets

■ Women:

- Sarees, Lehengas, Suits, Westerns, Fusion wear, Party Gowns & Dresses
- Women's fashion accessories: Jewellery, Footwear, Watches, Bags, Clutches, etc.



With new-found affluence and with a plethora of options, the Indian fashion customer is today happy to echo Audrey Hepburn's happy refrain — **"Life is a party. Dress like it."**

ALSO IN THE ISSUE:-

New Wave: **Celebrities & Their Fashion Brands**

Special Report: **Milano Unica 25th Edition | Textiles India 2017**

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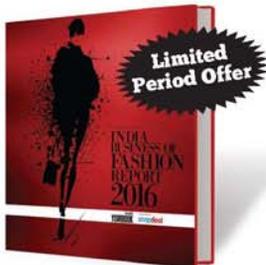


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- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

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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
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8	Presence on India Fashion Forum Website	URL Link	URL Link	URL Link	URL Link					

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- ▶ Special packages for members for Print Ads in relevant magazines.
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