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Winter Wear

special issue

- // MARKET WATCH
- // KEY SEGMENTS
- // CORE CATEGORIES
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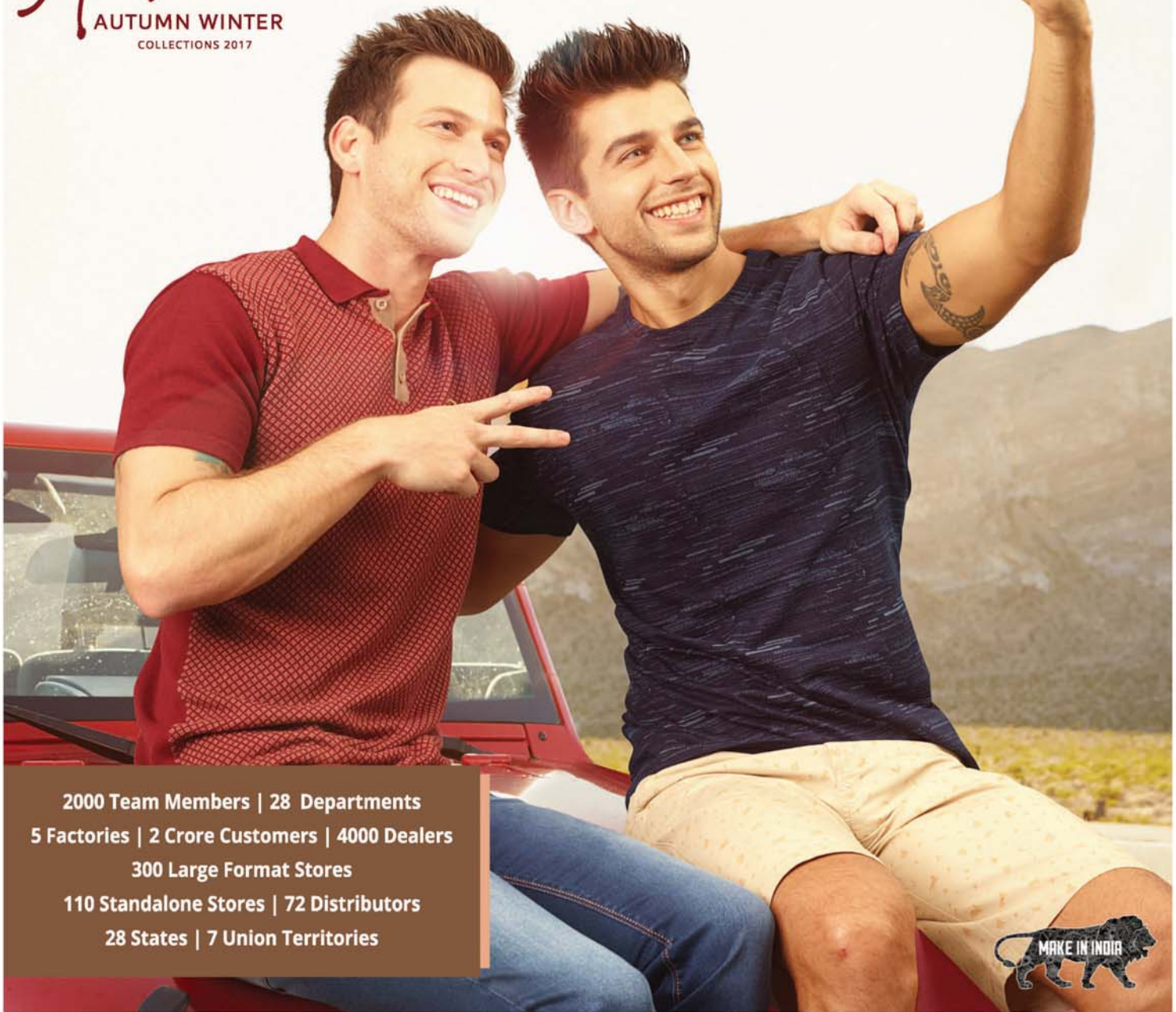
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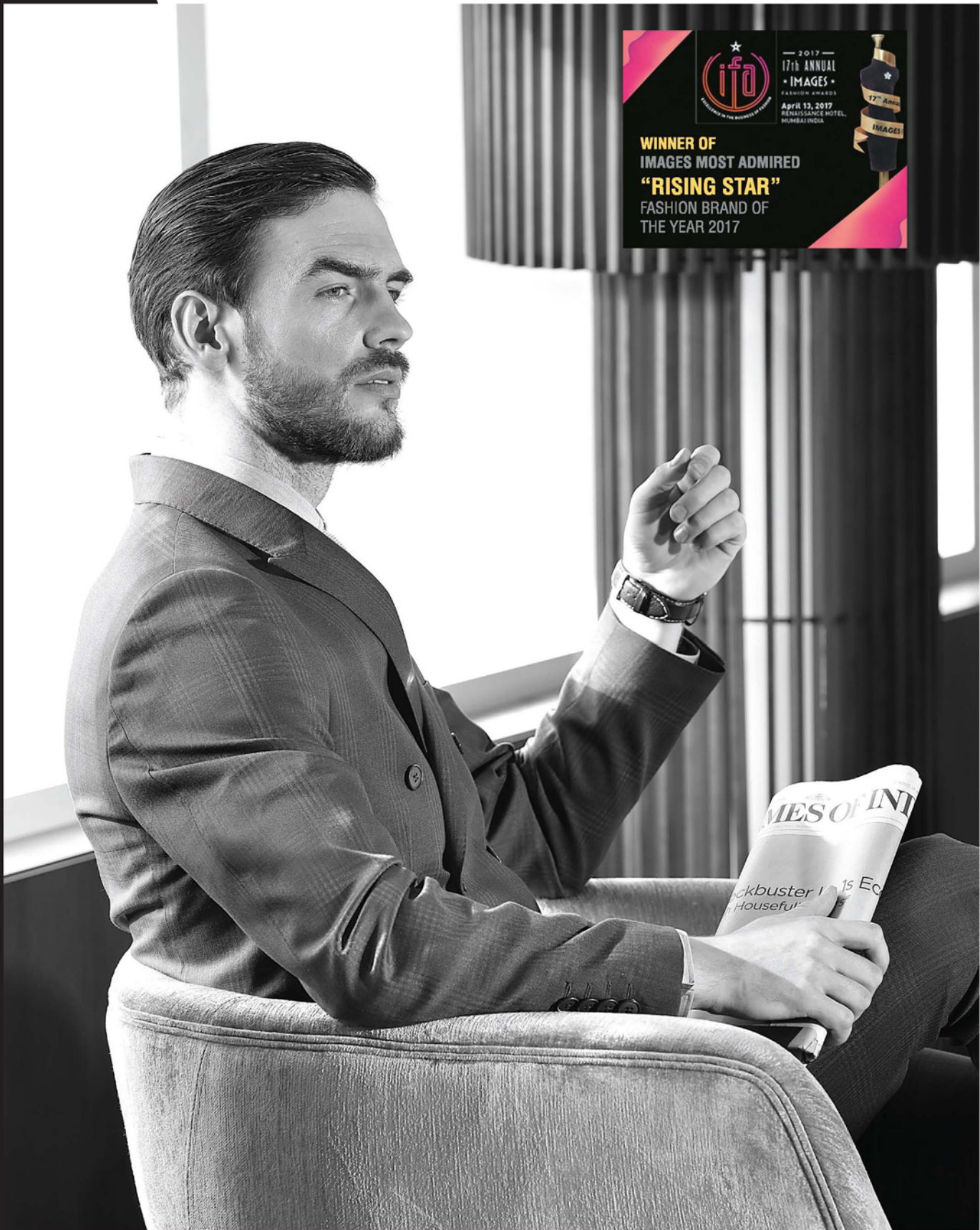
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

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Dear friends,

Winter is hands down the most fashionable season. It is so much easier to be fashionable during the winters - outer-up, mix and match, layer it up or creatively improvise! Winters nowadays are also full of color - the brighter they are, the warmer they look. Best of all, winters can also help one shapeup. Skinny people can size up and overweight people can hide their bulges so much better with winter clothing.

Personally, I love winters and I look forward to this time of the year when I get to work on my favourite brands of suits, jackets, sweatshirts, et all. And like every time, the entire Images BoF team, had a splendid time giving shape to the dedicated stories on the various winter wear sub-categories in India - jackets, suits, sweatshirts, sweaters, thermals, and shawls. It was quite educative to say the least. I was especially surprised to see the growth of the suits in India. Suits were either an entitlement of the *business babus*, or a strict wedding occasion wear, back in the day. But it seems, things have drastically changed now, as evinced by most of the brand which are a part of the issue, even tuxedos are highly in demand now in India. Overall, the winterwear wear market is evolving and growing at an exponential rate as a result of lifestyle shifts in our people. What was just a necessity based market till a few years has now morphed into a very lucrative segment.

In the lead research, Technopak reflects on the growth factors, sub-categories and recent

innovations in this segment brimming with retail opportunities.

I am also very grateful to Ingene Insights, who have collaborated with us to share insights on how fashion in this upcoming autumn-winter season will be quite experimental, personal and outrageous. This is followed by an exclusive feature by Meher Castelino on the innovative new adoption of leather and wool in Indian fashion, and a candid chat with veteran designer Ashish Soni, who reminisces on his 25-year journey in the fashion industry. Plus, we turn the spotlight on some of the biggest winterwear brands of our times including Jack & Jones, Monte Carlo, Shingora, Woodland, Celio, Park Avenue, Corneliani, Gap, and many more. Also rising is the trend of bespoke suits. We have been successful in talking to some of the most prestigious brands to delve into its finer nuances of this sphere, and will be sharing that story with you in the next issue.

And finally, we have a special feature on the Raymond Group, without which, in my opinion, no Indian winter fashion issue could be complete. In an exclusive story, we outline the iconic brand's history, achievements and competence in worsted wool and highlight what it takes to be a global leader.

Wish you a great cheer and a chilling time. Until next month



Amitabh Taneja

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LETTERS TO THE EDITOR

The Images BoF August '17 issue turned out to be a Godsend. I read BoF from cover to cover. The article on "United Colours of Benetton launches Activewear in India" made for nostalgic reading. Active wear now-a-days is getting popular and it has found its niche almost everywhere from the locker room of the gyms to yoga drills. ... The quality of the content reflects your team's dedication and commitment to BoF. Thank you, BoF team for being my constant companion.

- Vinod C Dixit, Ahmedabad

Referring to the article "Draped in luxury" (Issue: Images BoF October 2017). A saree can be worn to appear sexy, sensual or conservative. It is truly versatile. Saree is the most elegant dress for any woman--as it covers the whole body. A woman in saree looks the most beautiful if properly draped. Modern fashion designers are creating new innovative images and beauty of saree.

- Mahesh Kumar via e-mail

It is true that women in India are turning online shoppers and their number is increasing by the day. Referring to the article, "Women's Wear Online", it presented a very promising overview on the growth of the online key markets and the innovations in this field. Immensely enjoyed reading this article. Keep writing such optimistic articles on rising markets.

- Priyamvada Shetty, Bengaluru

It is indeed wonderful to see so many brands participating in the mega women's wear special issue of Images BoF October 2017. The magazine is scaling new heights in terms of design and content. All the best for the coming issues.

- Rohan Osgaonkar, Mumbai

For a very long time I have always wanted to write a letter to Images BoF. I think I have become a smarter businesswoman by reading and understanding nuances of fashion business. Thank you team Images.

- Priya Bindra, New Delhi

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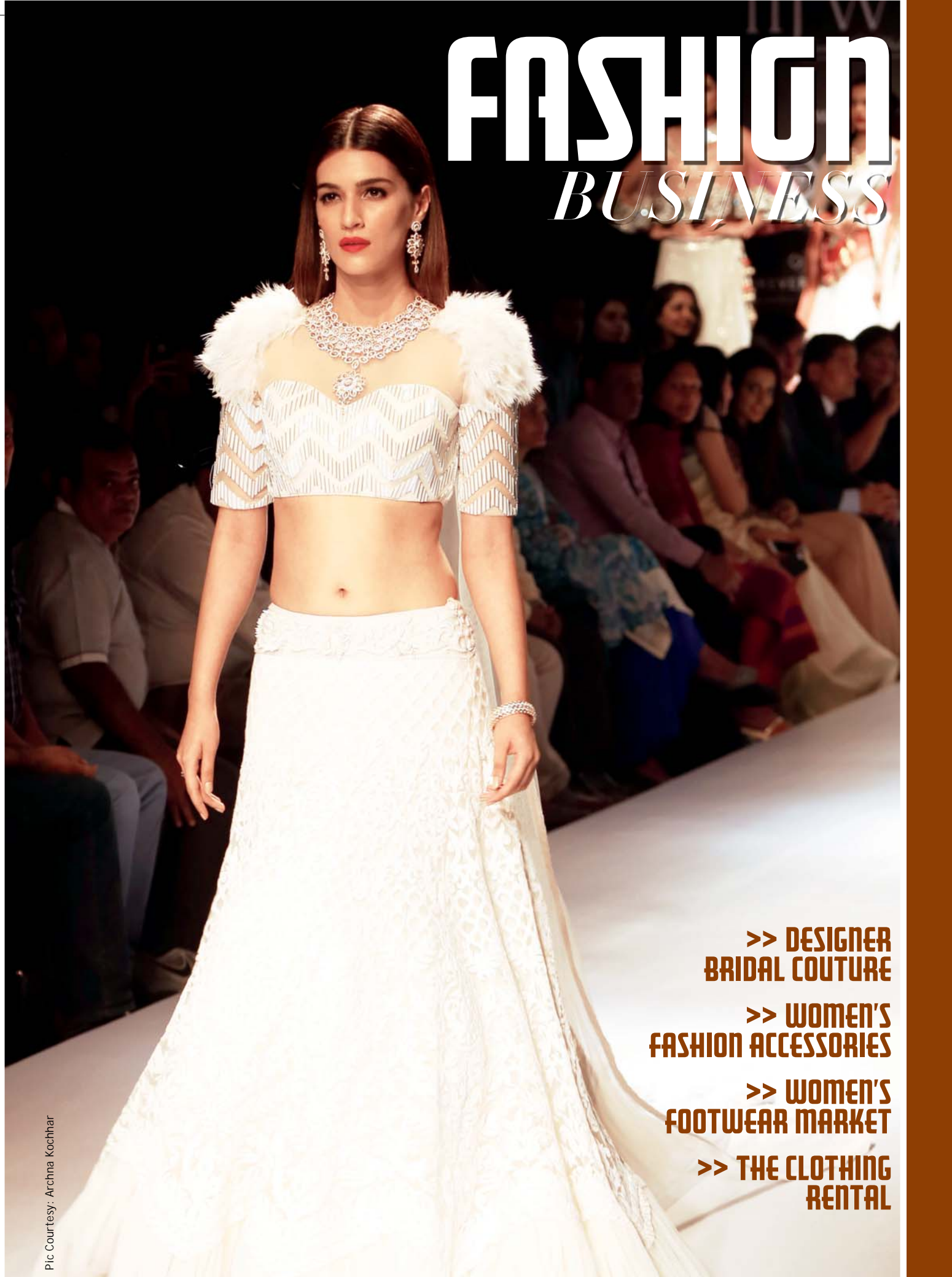
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Stores



Monte Carlo

A peek into Monte Carlo's newly launched store in Sarabha Nagar, Ludhiana that sprawls across a lavish 1,650 sq.ft.

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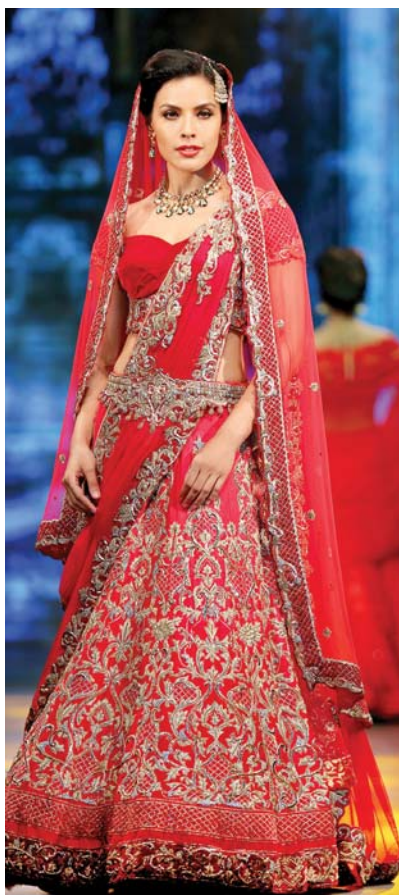


DESIGNER WATCH

DESIGNER BRIDAL COUTURE

Indian design legends elucidate how bridal couture has evolved into a big part of most designers' repertoire.

Pg No.46-48



ACCESSORIES

Opportunities in Women's Fashion Accessories

Top brands and designers talk on how changing consumer trends as well as retail developments are driving the women's fashion accessories category.

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FOOTWEAR

Women's Footwear Market in India

India is the second largest footwear producer in the world. Veterans from the industry share insights on the new developments.

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RETAIL INNOVATION

Indulge, Don't Splurge on Luxury Fashion With 'The Clothing Rental'

Renting designer or high-end brand clothes has become a trend during occasions. IBoF takes an overview in an interview with a leading player.

Pg No.58-60



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MONTE CARLO

BRAND:
Monte Carlo

LOCATION:
Ludhiana (Sarabha Nagar)

SIZE OF THE STORE (IN SQ.FT.):
1,650 sq.ft.

Collection:

The new Monte Carlo exclusive outlet offers the latest Autumn- Winter 2017 collection. The collection includes apparel for men, women and kids. There is an exclusive range of jeans, t-shirts, shirts, tops, sweaters, cardigans, sweaters, sweatshirts, jackets, blazers and socks. Monte Carlo also offers a range of accessories for men as well as women. There are also stoles and shawls with juxtaposed prints in premium quality fabrics. The store also offers varied range of skull caps and mufflers. This season, Monte Carlo is focusing on bright colours and prints.

Store Theme:

The new store focuses on well-detailed architecture. It is spread over a vast space of 1,650 sq.ft. The store has separate space intended for the different product range. There are wall hangers as well as floor hanging spaces. There are mannequins having the collections and different looks on display. The clothes on the shelves are displayed in colour coordination, making the view more pleasant and harmonious, it also offers shoppers an ease to select the range.

Store Interior:

The store is a spacious trendsetting showcase. The colour scheme of the store exterior is inspired from the logo of Monte Carlo. And interiors colour scheme is beige and grey providing a more spacious and dense look. The store walls are majorly covered with mirrors making the store look more vast and making it easier for the customers to check out the new collection. The white lights and vast open space redefines the ambience. The shelves of the store make a memorable visual for the patrons.

Store Designer:

The store has been designed by the in-house design team of Monte Carlo. The team is responsible for the designing of all EBOs of the brand.



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EMBOSSING MEMORIES WITH DESIGNER

BRIDAL WEAR

Bridal couture is a big part of most designers' repertoire and since weddings are a once in a life-time experience, a recent trend of people opting more and more for designer wear has been registered. We talk to a few designers to dig into the phenomenon.

By Shivam Gautam

Ritu Kumar

When it comes to nuptials, nothing quite rivals the opulence of an Indian wedding. The Big Fat Indian Weddings, as they are righteously referred to as, are epitome of pompous grandiose. Since weddings are a round the year event, the need for opulent and designer outfits are always in demand. By and by, the stability and rapid growth in the business of weddings has prompted more and more designers to enter the bridal couture market of late. Brides are even more conscious now and prefer opting for designer wear pieces than first copies. So the sales for bridal couture do add to a significant business to any brand or designer. An estimated 10 million plus weddings take place in India each year, leading experts to call the industry "recession-proof".

"With the ongoing 'wedding season', one can't help but notice that the Indian wedding fashion industry is an enormous one. Every manufacturer and designer with Indian Bridal enterprises awaits the "wedding" season to push business. With each passing decade Indian weddings are getting grandeur and larger, they no longer stick to the traditional wedding trends; they have become more elaborate and contemporary, from destination weddings to theme weddings. Hence, weddings are an integral part of the Indian bridal designer segment," shares Archana Kochhar.

Today it is not just the bride and groom who prefer designer wear, but the family and guests too want to look their best. Also, weddings in India are no longer limited to traditional one-day events but are a collection of beautiful rituals and colourful events. "The number of events associated with weddings have increased so have the



Archana Kochhar

share of wallet associated to them. This change reflects on multiple industries including the independent design community,” says Ritu Kumar.

Share in Overall Repertoire

Indian fashion designers have seemingly spotted a huge opportunity and have successfully aligned themselves with the wedding wear market. “Bridal couture is my forte and my main sphere is my designs and 90 percent of the business and annual turnover of my brand is through my Indian bridal designs,” reveals Kochhar.

Renowned designer Ashima Singh even opened up on the percentage share that weddings add up for her. “For us, 60 percent of our annual business is contributed by bridal couture. A wedding ensemble typically sets the brand image for a designer, his or her individual style and also manner of workmanship and identity. Wedding wear is of great significance as an image icon to set the mood for the rest of the designer’s repertoire eventually,” she adds.

Designer Abhinav Mishra, who has recently launched a new bridal store called Leela in Delhi, says bridal wear is the primary market for India and the segment is gaining recognition, the world over.

Colours, Silhouettes & Embellishments

If there is one thing that typifies Indian fashion, it is the vibrant range of colours. And with modern detailing prowess, and the ability to morph cuts, stitches, and drapes, wedding wear, today, displays unprecedented experimentation. “The colour red has been a favourite in India among brides but over the years we have seen people opting for hues of gold, peach, blue, green and even white for their big day. Sarees and lehengas with elaborate embellishments, zari work and embroidery have always been popular for the wedding season and have been defining traditional bridal couture,” says Kumar.

Conferring her thoughts Kochhar acknowledged that shades of red and maroon which signify the traditional Indian bride are still the colours that continue to dominate the traditional bridal couture. “But the silhouettes and concepts are modernised with the use of conventional embroidery style and techniques,” she adds.

The garments today are a contemporary version of recreated motifs used in innovative ways, a modern upgrade of the traditional styles and prints. Heavy dhapkas, coiled wires are replaced with lighter alternatives like silver and gold discs, fine patina wire to create a gossamer, tulle like effects. In comparison to earlier wedding outfits, today, the garments are lighter, delicate and comfortable to be in, which may look simple yet outstanding. “Brides of this generation are more aware of the trends that revolves around them, also they want everything to be elaborate and over the top. They no longer stick



Ritu Kumar





“Indian weddings no longer stick to the traditional wedding trends; they have become more elaborate and contemporary, from destination weddings to theme weddings. Hence, weddings are an integral part of the Indian bridal designer segment”

Archana Kochhar
Designer



“The number of events associated with weddings have increased so have the share of wallet associated to them. This change reflects on multiple industries including the independent design community.”

Ritu Kumar
Designer

to the basic lehenga choli and dupatta, they have shifted to a more modern and contemporary panache from contemporary embroideries to revamp silhouettes everything is lavish and larger than life,” says Kochhar.

Talking about the trends expected to be seen this season, Kumar shared that pastels, gold, rich blue, red, black and white will take the limelight. “Asymmetrical shapes, draped layouts, garments like capes and coats made from the printing tradition specialised in creating unstitched fabrics like dhotis and sarees will be given a dimension for a glamorous and contemporary look,” she says.

Growing Popularity of Western Wear

As the demand for designer wear is increasing, it also has been noticed that the trend is definitely not limited to Indian wear alone as western and fusion wear are also slowly gaining popularity in the wedding scene. “Sarees and lehengas are synonymous to Indian weddings but modern brides are experimenting with their looks and incorporating the latest trends in order to look their best for the grand day and so gowns and other modern fusion wear outfits are gaining popularity. However, saris and lehengas are a part of the whole ‘traditional Indian wedding’ experience and easily add opulence which is classic and is loved by all,” says Kumar.

The Online Push

Technology has taken over the wedding season and buying habits. Families and planners both are coming online to check latest trends in this wedding season. There is a sharp increase in buying of heavy lehengas and sarees online. Consumers are also beginning to trust online websites for their wedding purchases.



Archana Kochhar

“E-commerce plays a significant role for international clients for bridal couture, as our stores may not be available in their country and online shopping through our website is a preferred option. In domestic markets, we field numerous queries across our social media pages and websites, which sometimes becomes the first touch point for a customer. We see a portion of influx into the stores being driven by our online efforts, which is always a good sign and speaks lengths for our design aesthetic and service quality,” says Kumar.

Three decades ago, people hardly thought about the lavish wedding function that has now become a trend or even a compulsion. It’s true that Indian weddings are getting grandeur with each passing decade and designers are absolutely optimistic about the future, given the country’s propensity towards ostentatious marriage celebrations.



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E2O

STEADY GROWTH EXPECTED IN ACCESSORIES SEGMENT

The women's fashion accessories industry is abuzz with action and handbags and footwear are proving to be the fastest moving. Lavie, Hidesign, E2o Accessories and designers Meesha and Trishna Khanna talk to Images Group about their changing consumer trends as well as their online and physical retail developments.

By Roshna Chandran with inputs from Rosy N Sharma

With the onset of GST on hand bags, unorganised retailers and manufacturers are at a disadvantage, while making it favourable for organised retailers to enter into tier-II and -III cities. The accessory market is expected to grow at 20 percent per annum. Reaching out to smaller cities and rural pockets is no longer subject to boundaries for the accessories market. Apeksha Patel, Founder of Even 2 Odd Fashion pointed out, "With the rising disposable income and consumer's 'Look Good, Feel Good' attitude, fashion accessories are gaining popularity among consumers. Fashion accessories market can be expected to go through a dynamic phase in the years to come and witness a series of innovations, apart from the entrance of new players."

Hidesign has seen a huge increase in demand for women's leather bags due to the increase in women entering the workforce. The brand finds more demand for higher quality leather bags that makes a statement.

According to designers Meesha and Trishna Khanna, "The total fashion accessory retail market is worth ₹15,557 crores, growing at 18-19 percent and is expected to touch ₹25,306 crores by 2017 as per India Retail Report 2015."

International brands like Zara and H&M have become great influencers for consumers in tier-II and -III cities. Brands like E2o Accessories, who already have a retail presence in smaller towns with their apparel brand 'Deal Jeans', have made a profitable entry. Meanwhile Lavie is eyeing tier-II and -III cities with their online platform. Internet penetration and the rise of social media, fashion magazines and celebrity culture are some of the factors that are increasing demand in these regions. However, Director of popular



Hidesign

leather brand, Hidesign, Dilip Kapur had a different take, "Our greater success as a brand has been at airports and top tier malls in the big cities. We reach most cities in India and do well in more far-flung areas through e-commerce. For a brand with a strong identity and international outlook our best customers are often found in major cities."

Shopping Online

E-commerce portals have been much preferred by the customers, while physical stores are stepping up on their special experience during customer interaction. As of today, customisation, better pricing and trending products prove to drive in more attention. Online sales have seen fewer returns in the fashion accessory segment as compared to apparel, as easy payment options and delivery made in a matter of hours have made online experience convenient across the country.

Retailers Expand into Accessory Segment

"With rise in demand for accessories by customers, lifestyle brands are



"Fashion accessories market can be expected to go through a dynamic phase in the years to come and witness a series of innovations, apart from the entrance of new players."

-Apeksha Patel,
Founder, E2O

venturing into launching accessories to uplift their brand positioning and broaden their product portfolio," said Patel. Brands like Meesha also find it advantageous to work closely with Le Mill and Ogaan as these retailers work hard to promote accessories as they do apparels. This could also be due to the increase of impulsive shoppers as well as consumers who look for matching accessories for every outfit. "Women beyond the age group of twenty have specific preferences and also the income to spend on fashion accessories, they have a requirement of variety for different occasions for example, a spacious handbag for work, may be a metallic one for parties and a sling bag for everyday use. She also chooses her accessories with great care as it is an extension of her personality," said Sandeep Goenka, COO of Lavie.



Lavie



"Women beyond the age group of twenty have specific preferences and also the income to spend on fashion accessories."

-Sandeep Goenka,
COO, Lavie

Trends

Indian women are driven by statement jewellery, metallics, quilted prints, suede bags and shoes, graphic shaped accessories, embroidery, printed scarves, printed, neon, glitter or frilly



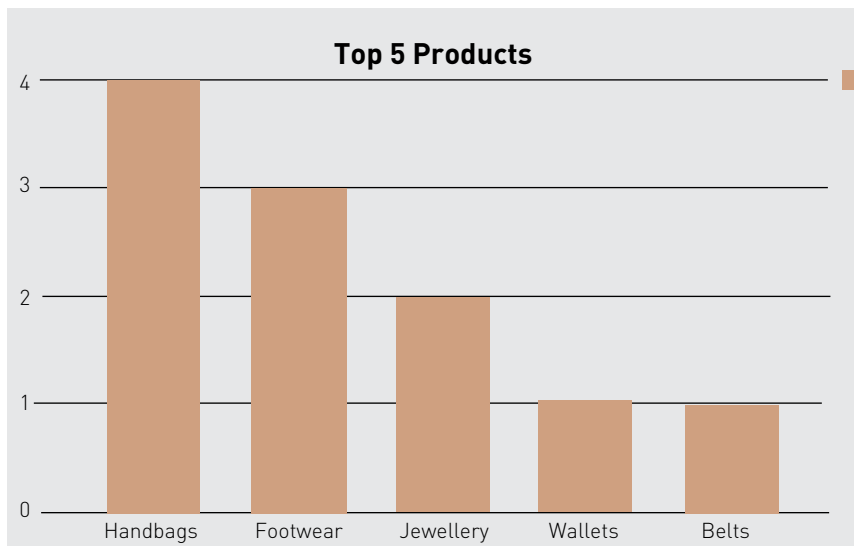
“We personally feel accessories are versatile across age groups however for us the style or fabric varies as we feel women over 45 love their silk scarves whereas someone in their 20’s will go for a lighter cotton modal print.”

- Designers Meesha and Trisha Khanna



“Our greater success as a brand has been at airports and top tier malls in the big cities. We reach most cities in India and do well in more far-flung areas through e-commerce.”

-Dilip Kapur,
Director, Hidesign



socks and body shaper belts on saris. The leather handbags, sling wallets, briefcases, laptop bags and passport holders have been moving well.

According to Patel, the retro look has returned, “The comeback of oversized vintage grandpa glasses is giving retro and sophisticated nerdy look. Interchangeable add-on guitar straps for handbags are in-trend this season. Embellished shoes with appliques, metallic beads, pearls and sequins are trending to jazz up your look. Fishnets-under-jeans craze seen this season has got fishnet ankle socks and thigh-highs giving that 80s inspired look. The now in trend corset belts are giving a flawless statement to dresses and tees this season.”

Lavie has incorporated the latest in runway trends as well as sports trends. Sports shoes, backpacks, low heels have become the staple for the season.

New Season Collections

Athleisure theme has brought forward sneakers and running shoes. Trends where comfort meets fashion has become a rage in the industry. White soles, bright laces, mesh, metallic accents and texture uppers are in vogue. Goenka elaborated, “Our handbags have been influenced by four key stories, Design Matters, Earthed, Infusion and Nocturne. The Autumn-Winter collection has fine tuned

colours of deeper shades, minimalist designs and is made spacious for the women on the go.”

Design Matters, explores the changing role of sustainability in design, as it shifts from an add-on to an imperative. Earthed, is inspired by nature, and a desire to tap into the wilder side of our surroundings. Infusion explores the resulting themes of convergence between the real and the virtual, the tactile and the technological, and the past and the present. Nocturne is an introspective direction that focuses on accepting melancholy, and takes inspiration from the night.

Hidesign has seen major success with its earthy leather bags inspired by the fierce African Maasai tribe, designed and hand crafted using brass fittings teamed with modern shapes and trendy guitar straps.

Going by festive season, E2o Accessories has moved a lot of its gold and silver colours in metallic textures. Bling, stud, crystal embellishments with metallic chain as well as floral patterns have also been popular.

Clutches in different shapes, fur belts and sling back shoes have also been some of the hottest trends in the women’s accessories this season.





Juelle



Alberto Torresi

WOMEN'S FOOTWEAR MARKET IN INDIA

By Rosy Sharma

The Indian footwear market has seen a lot of development in the recent times. According to a research, India is the second largest footwear producer in the world, with footwear production accounting to approximately 9 percent of the global annual production that is 22 billion pairs as compared to China, which produces over 60 percent of the global production. Meanwhile, the Indian women's footwear industry report says that the total market size of women footwear is ₹568 billion in the urban sector across tier -I, -II and -III cities in India.

“Women's footwear constitutes 30 percent market share currently, but the growth rate of this segment is double than the men's segment. Where the men's footwear market has registered 10 percent CAGR growth rate in the last fiscal, it is 20 percent for women's segment,” stated Farah Malik, MD and CEO, Metro Shoes.

The demand for footwear products in India is increasing with each passing day. Be it men's category or women's, footwear have become a necessary style statement for everyone. Ishaan Sachdeva, Director, Alberto Torresi, explained, “With the women's increased contribution in household income and change in spending patterns, the footwear industry is experiencing a rapid growth. The upsurge in number of career-oriented women is leading to a boon of the women's footwear sector and will continue to do so in the coming future. The easy availability of varied styles and access to various brands are also contributing towards the same.”



“Tier -II and -III markets have proved to be very beneficial in reaching out to a larger audience, in turn increasing the growth of the industry.”

Farah Malik
MD and CEO, Metro Shoes

Malik also shared, “With the society becoming open minded and the increasing number of working women gives them the ability to invest more in their wardrobe choice. Tier -II and -III markets have proved to be very beneficial in reaching out to a larger audience, in turn increasing the growth of the industry. Online availability has made it easier for the consumers to buy newer products, especially for women.”

Growth drivers

Fashion is becoming a very important aspect of the decision-making, which directly has a positive impact on growth. The average selling price of men’s footwear is approximately triple than that of the women’s footwear. So while women may actually consume more pairs per capita, the overall value of this is far lower than that of the men. Another contributing factor is that men tend to emphasize on durability. This means that products are made out of more premium components, such as leather. It has been observed that women tend to give more preference to the look and design of the footwear rather than the comfort. Whereas for men, comfort has always been the top priority. Therefore a man’s purchase is usually dominated by the comfort factor and brand loyalty. This is one of the main reasons behind the huge disparity between men and women’s footwear market.

Unorganised market

Though women’s sector is still highly unorganized but women are aware about the trending styles and designs and there is an increase in individual’s spending pattern. It is believed that the women’s footwear constitutes about 30 percent of the total market share, which is expected to increase in the coming years. “The unorganized segment

gains prominence in the Indian context due to its price-competitive products, which are more suitable and attractive to the price conscious Indian women,” said Malik.

“Due to an influx of large number of global brands and penetration of footwear companies into tier -II and -III cities, the organised retail in women’s footwear market is rapidly evolving and is expected to grow at a higher rate in the future. In addition, with the implementation of GST, there will be a strain on the unorganized sector which may result to a shift to the organized sector,” she further said.

Latest trends

According to Sachdeva, today’s generation is very fashion forward and does not compromise at all when it comes to the latest styles. Footwear has in fact become an integral part of everybody’s wardrobe and the consumers wish to stay updated with the latest variety available in the



“Coming to women’s footwear, for them visual appeal of the product is more important than comfort and durability. Their purchase is often driven by the look and design of the footwear rather than the material used.”

Ishaan Sachdeva
Director, Alberto Torresi



Metro Shoes

market. Every woman wishes to own a variety of pairs, be it sneakers, heels, or boots. With approaching winters, boots have become the new favorites for women. "Boots are more functional and women are investing in stylish ankle and desert boots. Boots with block heels are also quite in vogue these days," he disclosed. Another shoe style, which is sneakers, is a timeless pair that always goes well with women's fashion quotient. This range of footwear is smart, a perfect choice for daily wear.

"The main essence of the brand is to offer a lot of variety in terms of styles, designs and colours. We at Alberto Torresi offer great variety in sneakers and boots for women. We plan to provide high fashion options to our patrons, which include embroidered sneakers and sneakers with tattoos. In boots, there are mid-length boots, ankle boots and high boots that we plan to come up with in winters."

Driven by an individual's changing lifestyles, an increased number of women are becoming more and more health conscious these days. Rising health concerns are influencing women to participate in physical activities. This trend has generated a high demand for sports shoes amongst women recently.

Malik shared, "There has been a sharp increase in the athleisure category. Sneakers have become a global trend. A melding of memory foam and comfort in sports casual footwear have contributed significantly to the growth of this category."

Metro Shoes sneaker collection and women's formal work wear category are doing well this season. The brand is trying to incorporate an element of

comfort, be it memory foam or latex to each product, as it fundamentally believes that no shoe should be uncomfortable. According to them, boots, wedges and chunky silhouettes still see strong demand. In the high fashion category, the androgynous look keeps women looking iconic from brogues to derbies in a wide variety of colours. Ethnic wear such as mojaris and kolhapuris still work well with both Indian and western outfits.

And finally, leather products capture a classic essence of style statement. People today are inclined towards adapting latest leather fashion trends be it apparel, footwear or accessories. Particularly, leather shoes are considered to be an undeniable part of a person's wardrobe. Thus it would not be wrong to say that India is a nation of leather footwear. Sachdeva stressed, "Coming to women's footwear, for them visual appeal of the product is more important than comfort and durability. Their purchase is often driven by the look and design of the footwear rather than the material used."



Alberto Torresi



Alberto Torresi

Conclusion

Indian market in the long run has a huge scope. Moreover, India as a market is evolving and people are open to the idea of experimentation. This idea of experimentation gives numerous opportunities of growth. However the women's footwear market is still highly dominated by the unorganized sector. But with women gaining more power to spend in their hands and their inclination towards the latest fashion trends, is leading towards the development of women's footwear market. This will further bring new prospects of growth for all the shoe brands. Thus eventually with time, women footwear sector is expected to witness a great boon.

Women footwear segment in tier-II and -III cities has a lot of potential. However the preference for any specific brand is still not there in women's category but in the coming times, this segment will become much more organized and will further increase the potential of women's footwear segment that will be beyond just look and designs.





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INDULGE, DON'T SPLURGE ON LUXURY FASHION WITH

'THE CLOTHING RENTAL'

The rental clothing industry has emerged tremendously in the fashion market. Renting designer or high-end brand clothes has become a trend during occasions. An overview on how such companies function and about their clientele.

By Tanya Krishna

Having clothes for each and every occasion, be it brunches and hi-teas, cocktail evenings or a formal dinner is practically not possible and one always desires for that perfect dress to look good and feel great. And of course, Cher Horowitz's computerised closet from the movie *Clueless* is not everyone's privilege. So, the millennials have moved towards a new style of wardrobe — one of the endless, no strings attached type. The rental clothing industry has emerged tremendously in the fashion market. Renting designer or high-end brand clothes has become common for those special occasions where one requires a luxury dressing and at the same time does not want to spend a fortune in buying them.

The Clothing Rental is one such company, bringing the best of luxury fashion to all the discerning fashionistas. Started in 2005 by Shilpa Bhatia, The Clothing Rental has been a secret destination for the film and media industry professionals. Images BoF talks to Shilpa Bhatia, Founder & Director, The Clothing Rental, about the company's functioning mechanism, its product range and its clientele among other things.



– Shilpa Bhatia,
Founder & Director, The Clothing Rental

IBoF: The concept of renting is not new. Tell us how the trend caught up in the fashion category.

Shilpa Bhatia (SB): While renting homes, apartments, car rentals, vacation rentals, boat rentals have all existed for a while globally, the concept of fashion is fairly new (closer to a decade or so). As the cost of labour and raw materials rises, good quality products get more and more expensive. Also, with the onset of digital age and 'selfie generation' where one shares their fabulous life publically, one can not be seen repeating the same clothes. If you mix the trend, you realize that mass fashion brands like Zara, H&M and Forever 21 are doing well in wear and discard fashion and higher quality luxury fashion often doesn't feel like value for money. If one could rent something fancy for only one night and pay a fraction, people would be okay with that.

IBoF: What do you think are the key factors driving this business model?

SB: In India, we have enough occasions to celebrate life and festivals. Event dressing is the main focus for fashion rental business. Social media growth and rising prices all aide to boost this business.

IBoF: How does tier-II cities or towns respond towards the concept

of renting clothes? Do you see any future prospects in these cities for your services?

SB: I would think tier -II cities already have smaller unorganized stores renting wedding jewellery and wedding attire. They love the concept; we receive many enquiries and orders from tier -II cities, as they don't really have a lot of choice available locally. When they find that they can wear a stunning outfit at a fraction of price, they fly/take a train or drive in to our stores to confirm what they heard is true. We get people call us constantly with multiple questions regarding the renting concept.

IBoF: What kind of response has 'The Clothing Rental' received till date?

SB: Extremely positive! We cater to the top stylists in India; we've been a source for them for over a decade now. These stylists are setting the trend in the country. We have to listen to their needs and try to bring what they ask for. They have lots of options and choices, however once they have run around the entire city and the internet, they come to us and find relief that we have what they need. We carry unique finds and we are more of a boutique rental model. The collection is curated to suit the needs of the stylists.

IBoF: What customer demography generally gravitates towards your services?

SB: We have a wide variety, some simple folks from small towns looking for an outfit for a wedding, some are crème de la crème of high society in the city. We get young girls and boys going to prom and we get grand moms wanting to wear a gown on a cruise. We get young boys who want to wear a suit for a work event and we get their fathers who want something to wear to a wedding.





IBoF: Tell us about your pricing policy. How do you decide the rental fees of a particular garment?

SB: We have a concept of perceived pricing, that is, pricing is decided on the basis of what would a person be comfortable paying for an item. Sometimes, the price could be 5 percent of retail and other times 20-25 percent of the retail price. For example, We have a beautiful grey Valentino lace dress, now it's expensive but many don't even know the value of it so they might only offer to pay ₹2,000 for it. I know it doesn't make business sense but we add inventory. That dress might not rent as often or even recover the cost but we believe we need to have a few pieces like that and we add it to our offering.

IBoF: Tell us in detail about the maintenance and hygiene routines you follow for your collection.

SB: We have tie-ups with the finest dry cleaning vendors in the country. We look for dry cleaners that use gentle cleansing techniques to avoid damaging the product. Too many chemicals in a cleaning agent can often weaken the fiber of the garment. Thus, we also have a team who look into maintaining the stock in store.

IBoF: Tell us about your marketing strategies.

SB: We are fairly organic, one can reach us through one of our stores,

website, Facebook or Instagram. We collaborate with influencers and focus on digital marketing strategies. Times are changing fast and traditional marketing is slowly losing relevance. We get greater engagement and conversion from our digital practices.

IBoF: Does renting businesses get affected by the discounting seasons?

SB: I would think so, as one tends to often think why should I rent when I can own a piece. During sale season, people would rush and get options from their favourite stores, however, we stock more occasion wear and less of casual fashion. So somewhere, it doesn't affect us that bad.

IBoF: Tell us about the collection offered by The Clothing Rental. What are the top products in demand for renting?

SB: Our focus is event dressing: men's suits and tuxedos in colour options like black, grey, navy, cream, reds, pinks, pale blues and many more, women's dresses and gowns. We are a one stop shop for Indian fashion where a full family can rent different looks according to their personality with outfits, jewels, shoes and bags under one roof.

IBoF: We hear that The Clothing Rental has also dressed celebrities. Tell us about your celebrity clients. What do you think attracts them to your company?

SB: We cater to the top stylists in the city. When L'oreal needs their brand ambassador in an elegant red dress, the stylists come our way. When a luxury car maker has a celebrity open their new showroom, the stylist can find that luxury gown right next door with our store. Our flagship store is located in Bandra, Mumbai. Bandra is a cool neighborhood of Mumbai city, home to many celebrities. It has bars, restaurants and shops that cater to the movers and shakers of the country. We are proud to be a part of the same ecosystem.

IBoF: There has been an online boom in the country. What, according to you, are the pros and cons of the sudden emergence of online retail?

SB: The thing about online is, very often people do competitive analysis with online products. Often one will thoroughly research before parting with money. If you are buying the basics like cleaning supplies or small nick knacks, online is great. Whereas when you are selling something high value online, the website serves more as a browsing catalog; people view it, think about it, pick the phone and ask questions about it and then eventually add the product to the cart and check out. Once they have experienced the brand, repeat buy is strongly possible, based on their first experience.



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WINTER WEAR MARKET IN INDIA

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>> JACKETS

>> SWEAT SHIRTS

>> SWEATERS

>> THERMALS

>> SHAWLS

INDIA'S TOP
WINTER WEAR BRANDS



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FASHION RETAIL



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WINTER FOCUS:

SUITS: THE NEW SUIT LOOK

Suits in India have traditionally remained restricted mostly to boardrooms, festivities and special occasions. Industry experts outline the changes and the current dynamics.

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WINTER FOCUS: JACKETS

JACKETS: THE JACK OF ALL TRENDS

Although their demand shoots up during winters in India, but jackets are much more than mere winter wear. IBoF traces their rise.

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WINTER FOCUS: SWEATSHIRTS

SWEATSHIRTS MOST SOUGHT AFTER THIS WINTER

IMAGES BoF talks to some of the leading casual and athleisure brands to check the rapid permeation of sweat shirts into mainstream fashion.

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WINTER FOCUS: THERMALS

SEEKING A THERMALS CONDUCTIVE WINTER

Despite being hampered by brief winters over the past few years, how does the thermal wear industry still see growth? A report.

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WINTER FOCUS: SWEATERS

SWEATERS: THE OLD FEEL LOOK REVITALISED

Images BoF takes a look at how sweaters have been reinvented and have jumped back in fashion.

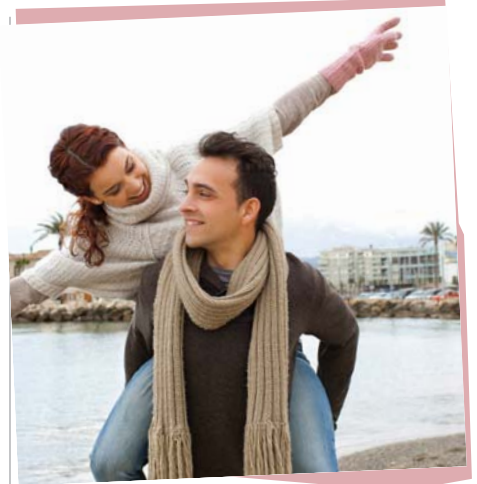
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WINTER FOCUS: SHAWLS

S.O.S. FROM SHAWLS

IMAGES BoF speak with industry experts to find out why the market dynamics for shawls haven't really caught on in India.

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COVER RESEARCH

WINTERWEAR MARKET IN INDIA

Technopak reflects on the growth factors, sub-categories and recent innovations in the winterwear market in India, which was pegged at ₹17,011 crores in 2016.

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COLLECTION LAUNCH

RED RIDING: FUN WITH FUR

Red Riding launches its new fur scarves collection. A very new category for the Indian market.

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NEW COLLECTIONS

WOOLEN SOCKS

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WINTERWEAR MARKET IN INDIA

Earlier, the winter wear market in India was absolutely necessity based. Over the years, rising aspirational lifestyle habits have been instrumental in intensifying the category. Today, the winter wear market is flourishing at an exponential growth and was pegged at ₹17,011 crores in 2016. Amit Gugnani, Senior Vice President Fashion - Textiles & Apparel and Engineering, Technopak, elucidates the growth factors, sub-categories and recent innovations in this fashion segment.





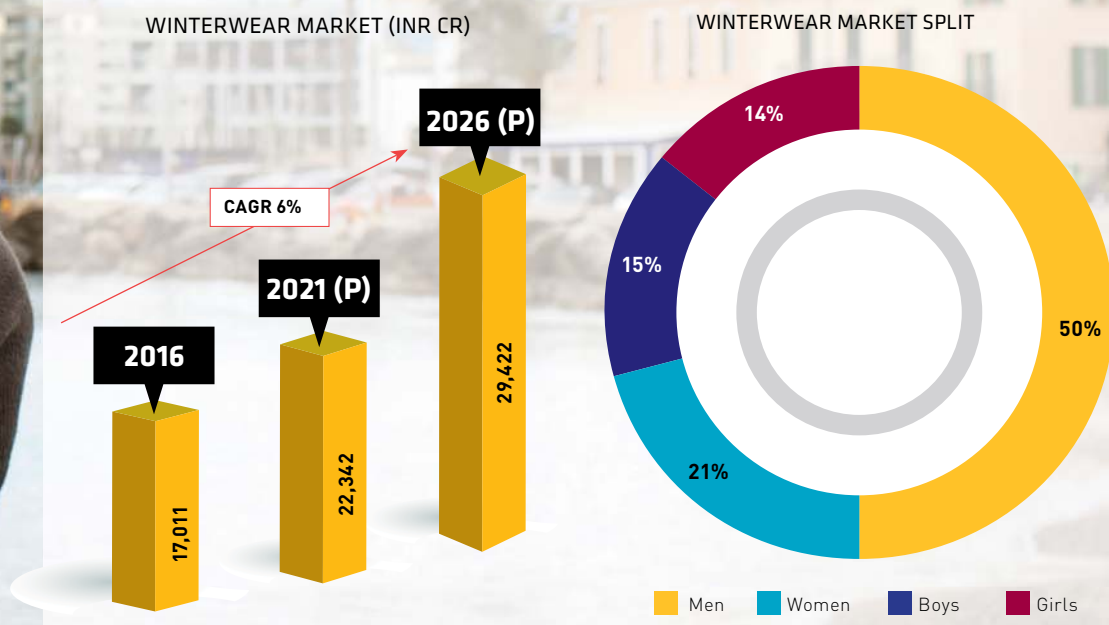
The Indian sub-continent is known for its diversity, not just in terms of culture, but also in terms of weather and climatic conditions. The north of India witnesses considerable impact of the winter season from mid-November to mid-January. Though this period spans just about three months it provides a sizeable market opportunity for apparel brands and retailers.

The winterwear market in India was pegged at ₹17,011 crores in 2016. The market is expected to demonstrate a compound annual growth rate of 6 percent to reach a size of ₹29,422 crore by 2026. Currently, the unbranded segment commands a market share of nearly 70 percent, with the branded segment trying to bridge the gap by innovating and offering new products.

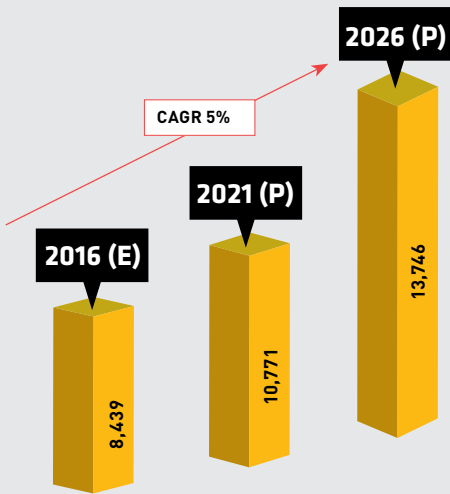
WINTERWEAR SUB-CATEGORIES:

The winterwear category can be further classified into men’s, women’s, boys’ and girls’ categories.

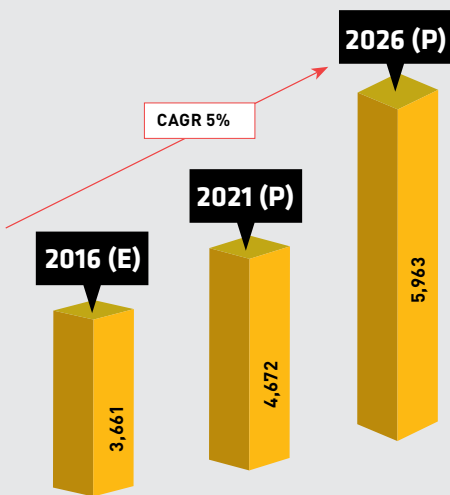
Men’s winterwear accounts for 50 percent of market share of the Indian winterwear market and is followed in size by women’s (21 percent), boys’ (15 percent) and girls’ (14 percent) categories.



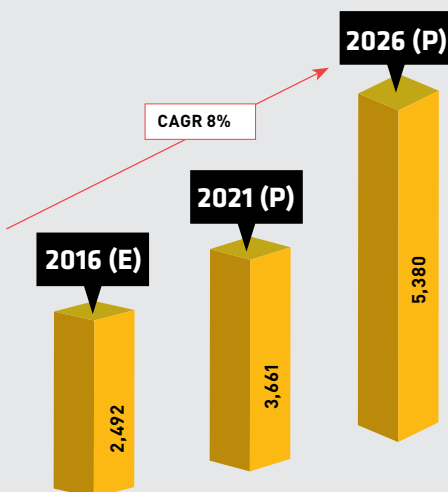
MEN'S WINTERWEAR MARKET (INR CR)



WOMEN'S WINTERWEAR MARKET (INR CR)



BOY'S WINTERWEAR MARKET (INR CR)



MEN'S WINTERWEAR

The men's winterwear market was estimated at ₹8,439 crores in 2016 and is expected to grow at a CAGR of 5 percent to reach a market size of ₹13,746 crores by 2026. The key products in the men's winterwear segment are jackets, sweaters, pullovers, cardigans, sweat shirts, mufflers, thermals, blazers and suits.

WOMEN'S WINTERWEAR

The women's winterwear market was worth ₹3,661 crores and is expected to grow at a CAGR of 5 percent for next ten years to reach the market of ₹5,963 crores by 2026. Women's winterwear in tandem with other women's apparel categories is witnessing growth due to the increased women workforce and their tendency to spend more and frequent purchases. Women's winterwear are usually more fashionable with a wider range of designs, feels and embellishments. The major winterwear products in this segment are sweaters, cardigans, pullovers, stoles and shawls, thermal innerwear, track suits, tunics, etc.

KIDS' WINTERWEAR

The kidswear segment in India is gaining traction in the overall apparel market. Many national and international brands are finding kidswear a lucrative segment and have started catering it, thereby making it grow rapidly. Kid's winterwear too is leveraging the benefit of the drive and is witnessing a shift towards organised retail.

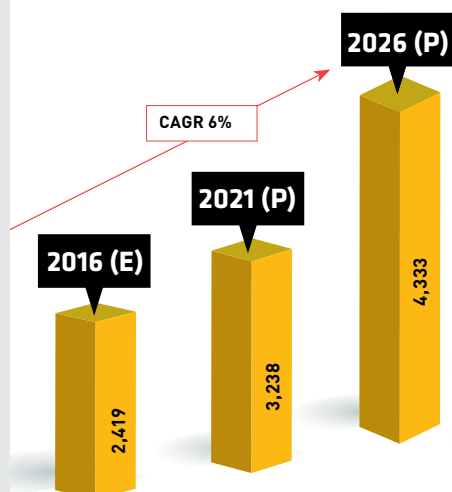
BOY'S WINTERWEAR

The boys' winterwear market was estimated to be worth ₹2,492 crores in 2016 and is expected to grow at a CAGR of 8 percent to reach ₹5,899 crores by 2026. The major categories in boys' winterwear are sweaters, jackets, blazers, thermal innerwear, sweat shirts, etc.

GIRL'S WINTERWEAR

The girl's winterwear category was estimated to be worth ₹2,419 crores in 2016 and is expected to grow at a CAGR of 6 percent to reach ₹4,759 crores by 2026. The key products in girls' winterwear are cardigans, scarves, jackets, knee length, thermal innerwear, tunics etc.

GIRL'S WINTERWEAR MARKET (INR CR)





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Many new winterwear categories have emerged due to the mentioned changing climatic pattern. Reduced winters have led in the emergence of semi-thermal or pre-winter categories. Millennials are ready to experiment and to cater this segment, retailers are providing them ample options in terms of sweat shirts, poncho, Indo-western tunics, etc.

2016-17- A WINTER FULL OF CHALLENGES

The previous winter season emerged as a challenging one for the winter wear market. Decline in sales of winter apparels could be attributed to following reasons:

THE CHILLING EFFECT OF DEMONETISATION

Sale of woollen wear which is primarily restricted to winter season collided with the demonetisation of higher currency by the government in 2016. The ensuing liquidity crunch resulted in restricted and reduced spending by the consumers which effected the winterwear market very badly.

THE CHANGING CLIMATIC PATTERNS

The shortening of winter season due to increased warmer seasons is yet another reason for the low sale of winterwear compared to previous years. Heavy outerwear such as fur coats and thick woollen sweaters have witnessed decreased demand. The short and moderate winters could be due to the overall gradual changes in climatic conditions. This, and the changing fashion trends have seen the market witnessing a shift from pullovers and wool to lighter jackets and sweat shirts. The retailers have realised this and have expanded their product portfolio by providing more semi-thermal or pre-winter categories to cater the market.

GROWTH DRIVERS OF WINTERWEAR

Despite these and several more challenges, winterwear can attribute its growth to the following growth drivers:

LIFESTYLE POSITIONING

Gone are the days when winterwear consisted only of categories like basic sweaters, shawls, cardigans or trousers only. Today, the increasing fashion awareness and rising disposable incomes have resulted in increased demand of trendy and colourful apparel to meet the season's requirements as well as address the fashion needs of the consumers.

From jackets to suits, sweaters to thermals, the wide collection on offer by both upscale brand stores and unbranded small retailers are trying their best to attract more customers. However, since this category is seasonal, brands need to invest in heavy marketing and supply chain management strategies to churn out maximum profit during winter season.

PRODUCT INNOVATION

Many new winterwear categories have emerged due to the mentioned changing climatic pattern. Reduced winters have led in the emergence of semi-thermal or pre-winter categories. Millennials are ready to experiment, and to cater this segment retailers are providing them ample options in terms of sweat shirts, poncho, Indo-western tunics, etc.

The product portfolios of brands and retailers now include a whole range of products such as mufflers, warm caps, hats and footwear complimenting the main products like sweaters, jackets and pullovers to capture higher share of consumer's wallet.

Over the last few years, major innerwear brands have expanded their product portfolios to include thermal innerwear and warm comfort wear for every segment of the market.

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Despite such promising growth, the seasonality of sales, lack of skilled labour, availability of cheap imported products, huge unorganised market and changing climatic pattern have become major challenges for the retailers.

INCREASED FASHION AWARENESS

With increased internet penetration and exposure to media, millennials are aware about the changing fashion trends in the international market resulting in increased demand for a variety of products in apparel categories. This is applicable to winterwear segment also.

CONCLUSION

Factors such as fashion awareness, rapid urbanisation, higher disposable income and rising aspirational lifestyles have resulted in more want-based purchasing of fashionable products in every season.

Indian winterwear market is attracting a lot of international and domestic brands owing to these growth drivers. In case of winterwear, brands have a significant market opportunity as the margins are higher in comparison to other product categories. Despite such promising growth, the seasonality of sales, lack of skilled labour, availability of cheap imported products, huge unorganised market and changing climatic pattern have become major challenges for the retailers.

Thus, it becomes prudent for the retailers incorporate strategic planning and innovation along with the fashionable products, competitive pricing, aggressive marketing, etc., to cater to their target customers and capture maximum market share in the winterwear market category.





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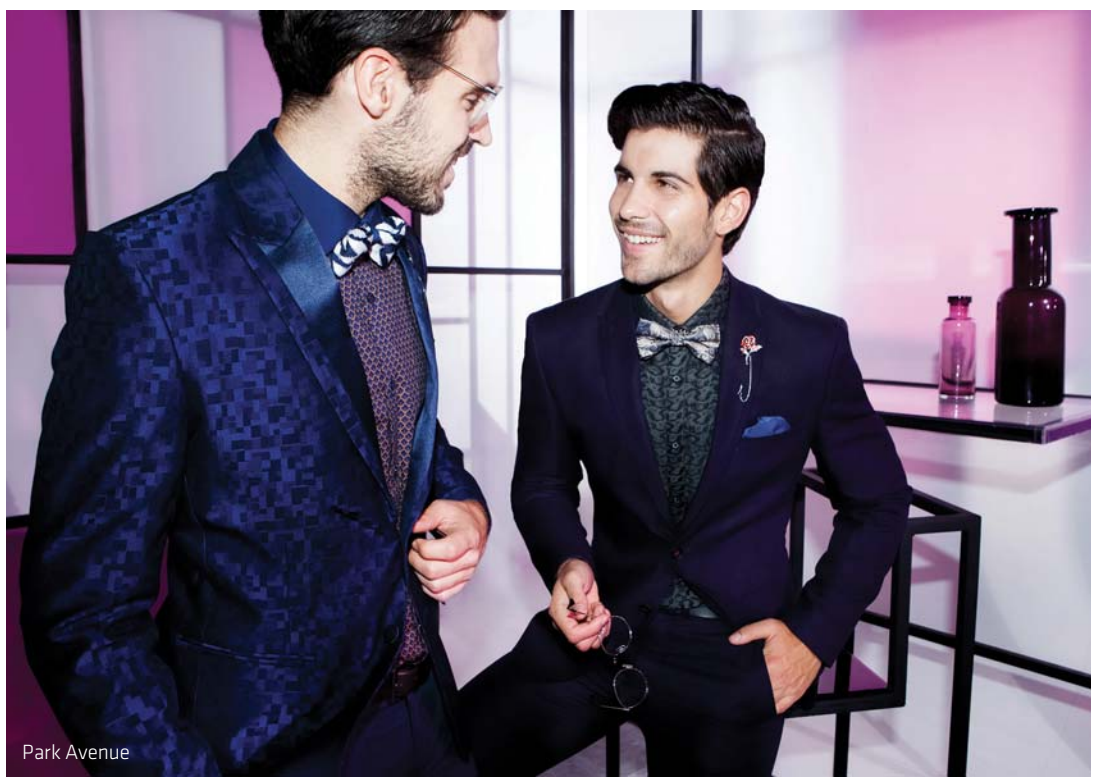
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THE NEW SUIT LOOK

Suits as regular wear in India have remained restricted to mostly boardrooms, festivities and special occasions. And, this is true even in mass markets where they hold a novelty factor during weddings in the family and men want to be seen wearing western attire. IMAGES BoF speaks with industry experts to see if there are any changes in these habits and on the current dynamics for suits in India.

By Zainab S Kazi with inputs from Rosy N Sharma

The market for men's suit has witnessed steady growth in India, especially so post the emergence and easy availability of ready-to-wear suits across both physical and e-commerce platforms. Earlier, the concept of bespoke suits ruled the market, and this made it difficult for penetration into the interiors of the country. It wasn't unusual for people to travel to a city nearest to their town or villages to get a suit stitched, when there was a wedding in the family. The custom to gift a suit to the groom and his close relatives by the girl's family remains prevalent even today. Not exponentially, however the demand for suits, has indeed grown steadily at least over the years.

Amit Dhelia, Proprietor, Courtyard says, "The man's suit as a product is still the same. Whether you talk about boardrooms, corner offices of the biggest companies or official parties, casual parties, marriages or any other ceremony, suits are and have been always the first choice. Even after emergence of jackets there is not much of a difference, as suits have their own

style statement and can be worn at any occasion, casual or formal and are always in demand." According to Salesh Grover, Business Head, Cornelianani (OSL Luxury Collections), a suit is an expression of style and this makes it a perfect attire for business, ceremonies and special events. He also shared that today, men are opting to wear suits irrespective of the occasion and this has given a rise in their demand. Talking about the relevance of suits as official wear, C M Ladha, Managing Director, Sheriff shares, "We see many corporates opting for suits. We also see people working in smaller companies having a penchant to wear suits to work. Even in marriages, the ratio of people opting to dress up in suits has risen considerably."

Rajnish Sethia, Director, Agwani Fashions that own the brand Success adds, "The suit market always has its own trend. When you talk about formal wear and evening wear, a suit is irreplaceable. Moreover, with blazers coming in, it has captured the casual segment as well." According to him,

>



“Suits & blazers constitute around 20% of the total formal wear segment in India. The growth of suits has been very significant in the last 5 years. Also, the corporate culture has developed further making people to wear suits more.”

-Rajnish Sethia,
Director, Agwani Fashions (Success)

blazers have become an integral part of the suit segment and their adaptability to be worn casually on a pair of denims or trousers has increased demand. He pointed that suits and blazers constitute around 20 percent of the total formal wear segment in India and that the growth has been very significant in the last 5 years. Talking specifically about the regions that drive the suits' market, Grover shares, "Within India, the North Indian market is the strongest owing to the different

weather patterns that allow people to experiment with various fabrics. And, the South India market is most challenging, but it has showed growth in luxury sector in recent past."

NEW TRENDS

Casualisation

With casual wear gaining momentum, one may momentarily like to believe that suits may have taken a set back. But industry experts refuse to believe that casual wear has impacted the category.

Dhelia shares, "Suit market has never taken a setback, and will never do, as people have their own preferences for the same. There are no alternatives to suits when we think of luxurious clothing and classy style statement. Casuals can never take over formal clothing, and suits these days have casualised well. Hence, there is no setback." Narinder Kaur, Creative Head, Turtle points out that crossover is the call of the day which is about mixed looks. She explains, "It is not about formal or casual anymore. It is about style. You can go ahead and wear a smart, well cut suit with sneakers. One can even go sockless with ankle length bottoms paired with short and fitted upper." On this current dynamic for suits in India, she shares, "Suits as an occasion wear category are well placed. Their relevance still holds strong. Recent trends show a mixed look taking over. Sport suits are catching up internationally wherein the fabric is more comfortable, and the look is relaxed. Though this trend is still mostly prevalent in the metros, the B and C towns are moving into the suit zone. Consumers in suburbs are coming into this bracket, for them suits constitute a style factor."

Atul Apte, Design Director - Formals & Ceremonial, Park Avenue also feels, "The other casual markets are getting crowded, with existing consumers and new consumers look for more fashionable ensembles which make them stand apart."

Courtyard



Sheriff



“Suits are now a style statement. For example, in offices many corporates are opting for suits and even in marriages the ratio of person going for suits has risen sharply.”

-C L Ladha,
MD, Sheriff



“The current generation becoming more style conscious, suits market will witness a boom in the next 2-3 years, as formals will never fade out and casuals cannot be used in all spheres of clothing.”

-Amit Dhelia,
Proprietor, Courtyard



Success

Styles & Fabrics

Talking about the fabrics in trend, Apte shares, “The trending fabrics are fine pure merino wool, wool-rich and premium poly-wool. In fact, 100 percent wool is the most comfortable through out the year as it is breathable, natural and crease resistant. In the international market 90 percent premium suits are fine pure wool.” Adding further and also indicating upon casualisation, Dhelia shares that fabrics with linen are doing well and even the jacquard fabric with tuxedo blazer are in demand. He shares, “Other than these, dooby, checks and formals are always in.” Commenting specifically on the corporate trend, Apte shares, “The corporate business suits continue to have two button single breasted style that is cut close to body but with wider lapels both in peak and notch style. A double-breasted suit is making a comeback as power dressing.” Ladha shares, “Two buttons are the most popular, although two buttons with big lapels and double brace are also seeing good growth.” Sethia believes that three-piece suits and checkered suits are in trend this season.

Even on the style aspect casualisation seems rife, Grover shares that now suits are worn in a much more casual way, like with a crewneck sweater rather than in the super-formal, buttoned-up way. Elaborating deeper, Kaur shares, “People are experimenting with colours like electric blue, green, purple and burgundy. Surface texturing like embroidery and printing is doing good, as well. Pairing it with sockless loafers and running shoes is the other ongoing trend.” Adding further, Apte shares, “A jacquard pattern floral or geometric in combination three-piece suits with variations of shawl collar and more of textured patterns are in trend.”

Technology Helps Perfecting the Fit

For any suit to look good, it is imperative that not only it is in a style that is doing well in the fashion market but also is tailored well. Explaining this, Dhelia shares, “The tailored suit is an icon of men’s style. Whether it is a classic piece for the office, a summer design in silk and linen, or an elegant tuxedo for a black-tie event, all are



acceptable only with proper fits, range of colours and fine quality fabrics, all at competitive prices, giving the biggest challenge in the industry.” He further adds, “Today, the work has been more systematic. Previously the masters used to cut with hands. Now the CAD cuts the fabric with less wastage and proper margin. The fusing for support are coming in more better quality.” Sethia shares, “Ten years back, the making of a suit requires 50 percent hand work by the maker and 50 percent by machines but now with the advent of new technology and machinery, the focus has completely shifted to machines.”

Suits in Winters

During winters, the demand for suits increases manifold, especially amongst the traveling class. Each brand has a special winter collection with warm fabrics used to suit the winter needs. Grover from Cornelian shares, “For winter wear the prominent materials used for jackets are cashmere wool, worsted wool. For suits, virgin wool,



Park Avenue store



Sheriff store



“Casual wear market is getting crowded and existing consumers and new consumers look for more fashionable ensembles which make them stand apart. So, there is nothing more complete than a Suit-Jacket.”

-Atul Apte,

Design Director - Formals & Ceremonial,
Park Avenue



“In India, suits is primarily an occasion wear. Though the suits wearing segment is still a handful, yet occasions are all round the year. So sales definitely pick up, the festive season records the maximum throughput.”

-Narinder Kaur,

Creative Head, Turtle

extra fine cool wool, light weight nano-technology fabrics are much in use.” Ladha agrees, “In winter wear basically wool fabrics go into the suits.” Sethia shares, “The fabrics which are being used for winter are tweed and other manufactured wools, leather, velvet, corduroy, fur and fleece. When we talk about winterwear in India, it varies from region to region. The North and North-East India use tweed, wool, leather, fleece, etc. Other parts where the climate is moderate, use velvet, corduroy and very less percentage of above mentioned fabrics. When we talk about the international market, these markets experience severe cold during winters, the fabrics used mostly are tweed, wool, leather, fleece and fur.” Kaur points out that terylene rayon and poly viscose are the key perennial fabrics, and in winters, wool blends are used.



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“Brands looking for expansion have fewer options when it comes to right spaces. Due to lack of luxury space rentals have been extremely high and this is one of the major roadblock for growth.”

-Salesh Grover,
Business Head, Cornelian (OSL Luxury Collections)



Turtle store

Impact of International Brands

Like in any other category, the foray of international brands in the category for men’s suits too has only helped improve the market. Competition from international brands invariably makes national brands pull up their socks and attract more customers. Grover shares, “Every new brand has something new to offer such as new fabrics, cuts, technology and style.” Sethia adds, “This category has become more competitive with the advent of big international brands, but again this has led us to be more innovative to remain afloat in this market. Moreover, operating in the medium priced segment and having better understanding of Indian customers has helped Indian brands remain afloat in the face international brands.”

The Road Ahead

“With the current generation becoming more style conscious, the suits’ market will surely boom in the next 2 to 3 years, as formals never go out of acceptance and casuals cannot be used in all spheres of clothing,” foresees Dhedia. Surely, brands need to make sure that they remain abreast with international trends and work on styles and colours that are more acceptable in the country. Elaborating, Grover feels, “The industry should focus more on innovation in designs, fabrics, accessories and most importantly fit. They should also keep a tab on the price range to be competitive to international brands.” Commenting on a challenge faced by high end

brands, Grover adds, “Lack of luxury destinations and quality retail space remain important issues. Brands looking for expansion have fewer option when it comes to right space. The lack of luxury space rentals have been extremely high and this is one of the major roadblocks for growth.” He further shares that demonetisation and GST acted as a pause factor to the growth.

To Conclude

Apte encapsulates the growth of suits in India and why innovation plays an important role to increase the demand for suits, “Contemporary suit making has evolved a lot today where the whole piece has become soft and light and gives natural soft rounded fall on the shoulders at the same time taking care of the body shape. With the advent of new fabrics, blend and fashion some suits are constructed either half lined with lighter interlinings-linings or totally unlined which enhances the natural drape of fabric. Consumers in new professions and at new work places look for newness and fashion elements. They put great emphasis on fabric touch, silhouette and some unique elements to go with their personal style.” He reiterates that consumers today are open to experimenting with new colours, new fits and new textures which suits their personal style and only brands that take care of this would be able to do well.

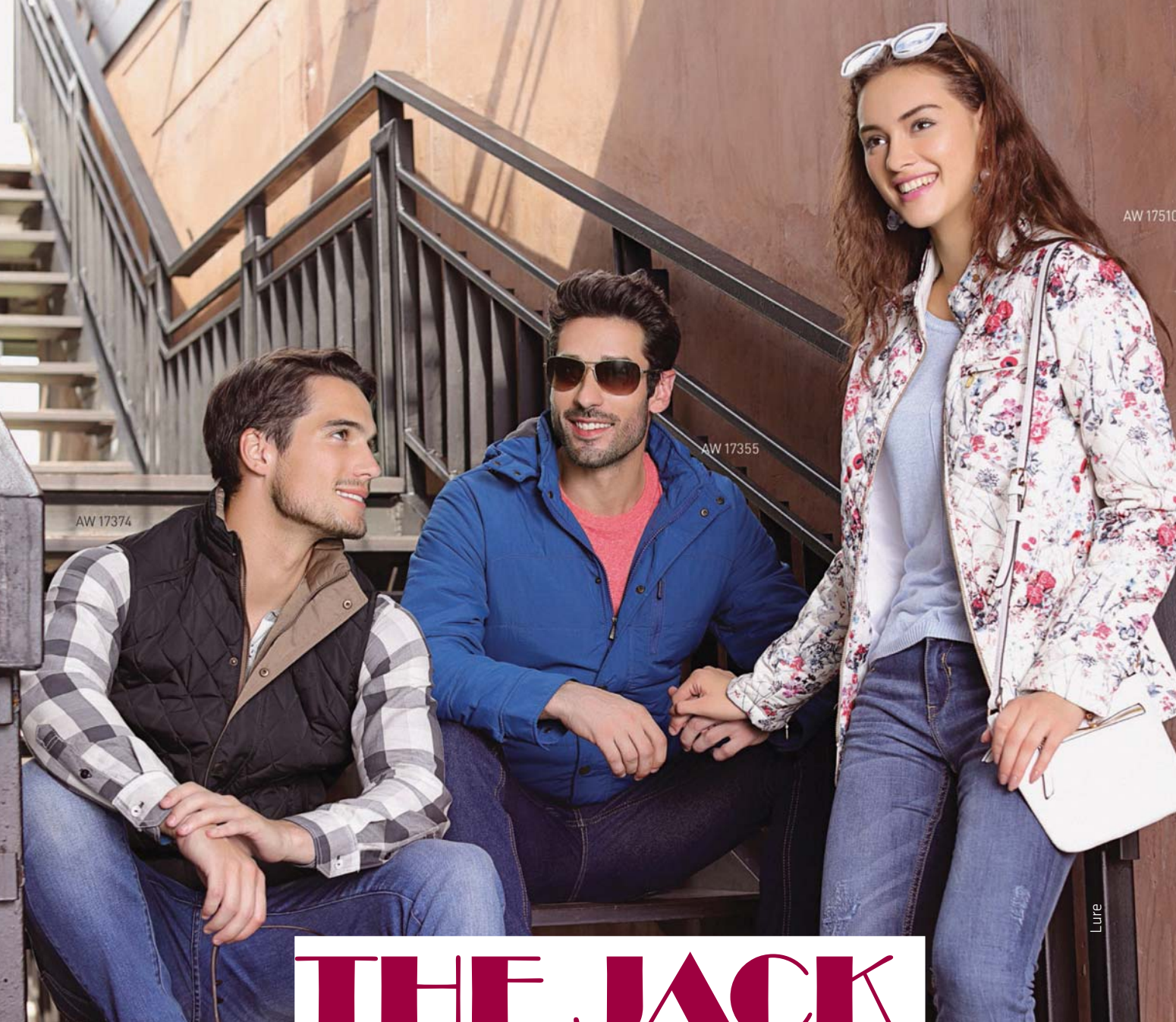




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THE JACK OF ALL TRENDS

While suits are looked upon more as formal wear, jackets carry with them a cool quotient. The demand for jackets in India shoots up during winters but then jackets are considered all-season wear as well.

IMAGES BoF takes a quick look at the market dynamics for jackets in India.

By Zainab S Kazi with inputs from Gurbir Singh Gulati

It is simply unimaginable to think of a movie star without a jacket. The macho image of a man is accentuated when spotted in a jacket. Jackets become a necessity when it is winter and a fashion statement during the other months. A jacket on a t-shirt changes the complete look making the wearer look cool and smart. These and many more reasons drive the demand for jackets in the country throughout the year.

The Demand Dynamics

Vineet Gautam, Country Manager and CEO, Bestseller India (Jack & Jones) explains why jackets always remain in demand, "Jackets are viewed as garments that amplify an otherwise plain outfit. While suits and blazers are a great option for a formal set-up, jackets bridge the gap between formals and casuals. Celebrities who are also imitable style icons have redefined the way jackets are perceived. Be it throwing on a jacket with a t-shirt to the airport or sporting it with a semi-formal shirt at the work place; jackets are a clothing item that can be used at all occasions." To this, Tabby Bhatia, Director, Voganow.com adds, "During winters be it a casual evening or night parties, the millennials these days prefer going for classic tones leather jackets crafted in premium leather paired with jeans and ankle boots or brogues. Robust and dynamic, leather jackets render iconic fashion statement." The options for jackets are aplenty and their availability in different materials like linen, denim, corduroy, leather, wool, etc., make them perfect to be worn casually as well as formally.

Abhishek Yadav, Design Head, Spykar Lifestyle elaborates, "If we are talking about casual jackets, it is a big trend and is going to be there for some more time. Casual jackets like washed unlined blazers, biker's jackets or bomber jackets are in. Each jacket

is for different occasion and has a different value in terms of fashion and styling." A bomber cannot be worn for boardroom meetings or even regular days at work, while a casual unlined blazer can be. At the same time a suit or a casual blazer is not the correct jacket for riding a bike. And the customer knows this very well.

On the most obvious advantages of jackets Gaurav Dublish, Co-Founder, Wildcraft shares, "Clothing incorporates three utterly important features of 'less weight', 'comfort' and 'multi-utility' which aid in trouble-free travel in urban landscapes and outdoors. Suits and blazers face a drawback in this segment since they cannot be work for every occasion. Sweat shirts, along with jackets are leading in this segment, especially with millennials. Its alignment with the global fashion trends further fuels its popularity amongst the millennials." He further adds how jackets constitute an important travel clothing for millennials today and serves the multi utility and comfort factors. On the prevalence of denim jackets, Parag Dani, CEO, GAP India says, "The denim jackets being versatile, from desk to dinner, can be styled for a variety of occasions. In India, we also see customers switch denim jackets for sweaters as it is an easy layering option to dress up or to dress down."

Growth Over the Years

Commenting on the growth that the jackets category has seen within their brand, Dublish reveals, "We are growing by 60 percent plus as of now and the market will surely be growing by 10 to 15 percent in future." He adds, "When we launched the winterwear collection, it was designed to meet the requirements of a tropical country. We have seen a huge demand for our winterwear, mainly comprising jackets, cheaters,



"Clothing at Wildcraft incorporates three utterly important features - less weight, comfort and multi-utility which aid in trouble-free travel. Suits and blazers face a drawback in this segment. Sweat shirts, along with jackets are leading in this segment. Its alignment with the global fashion trends further fuels its popularity among the millennial."

-Gaurav Dublish,
Co-Founder, Wildcraft



Voganow.com



“The jackets market has evolved over the time due to change in the need and demand of the consumers. We have a large portfolio of leather jackets. We focus on technology embedded products that are light weight and suitable for outdoors. Woodland products are strong and meant for tough conditions.

-Harkirat Singh,
MD, Woodland



“GAP’s heritage is rooted in basics, whether it’s the tees, shorts, denim or jackets. Jackets have always been a key part of our offering, which has evolved over the years. Our denim jacket is akin to a sweater when it comes to layering and hold importance as a wardrobe essential.”

-Parag Dani,
CEO, GAP India



hoodies, etc., in the last few years. As of today, our winter clothing and footwear alone contributes to 30 percent of our revenues, we intend on taking it to 50 percent in the coming years.”

On the winter market for jackets in the country, Harkirat Singh, MD, Woodland shares, “Jackets occupy almost 40 percent of the market in both saturated and unsaturated winter wear segments. With increasing industrialisation and growing spending power the market will tend to grow at a good pace in the near future.”

Bareskin (Voganow.com) has had an impressive growth inspite of it being a relatively new brand. Bhatia shares, “We are witnessing 300 percent growth every year as we are exploring untapped segment of the market. We are showcasing our products through online shopping sites like Myntra, Amazon, etc., and also through some of renowned offline channels that provide a dedicated wall to us.”

“Winter season has been shrinking which in turn pushes a lot of competition in both the regional and national brands producing jackets.

Over the years, due to this factor many of the jacket manufactures have either shut down, switched businesses or decreased their production capacities. With respect to our brand we have been able to maintain our organic growth every year,” disclosed R Kapoor, Director, Replay Square.

Brand Speak: Latest Innovations

For any youth wear brand, jackets are an integral category that plays an important role for their growth. Gautam shares, “Jackets have been an integral item in the Jack & Jones wardrobe. This season we have reinvented jackets through hi-density reflective prints and distinctive detailing. The designs are also inspired by one of the most talked about trends this season, futuristic fashion, with a color palette that deep dives into varying shades of blue, grey, blacks and military green.” Bhatia talks about the brands under their portfolio stating, “Leather jackets, be it biker, bomber or slim fit adds a definite style statement. We through Voganow.com house two iconic brands Brune and Bareskin.” The brands have received good response keeping in mind their customisation feature that allows customers to choose the fit as



Wildcraft



Wildcraft



“Winter season has been shrinking which has put a lot of competition within both regional and national brands. Due to this, many of the jacket manufactures have either shut down, switched businesses or decreased their production capacities. With respect to our brand we have been able to maintain our organic growth every year.”

R Kapoor,
Director, Replay Square



Jack & Jones

well as the zip style. Dani talks about GAP, “Our denim jacket is akin to a sweater when it comes to layering and importance as a wardrobe essential. Our campaigns season-on-season have focused on this iconic product, based on the product innovations through the 2004 Fall, the “How Do You Wear It?” campaign featuring Sarah Jessica Parker, 2014’s “Dress Normal” campaign featuring Angelica Houston, Michael Williams, Zosia Mamet, and so on. We went beyond just colorful basics and accessories with shrunken jackets. With the current trend of embroidered jackets, our products have iconic motifs rendered in our heritage colours. What stands out through years of fashion revolutions and evolutions is the GAP denim jacket. The latest 1969 icon denim jacket is a rendition

of the original denim line with vintage inspired bomber and varsity designs, and classic denim creations.”

At Woodland, the portfolio tilts more towards leather and denim jackets. Singh shares, “We have a large portfolio of leather jackets, as these are one of the major segments in apparels offered by Woodland. We focus on technology embedded in our product ranges that are light weight and suitable for outdoors range. The category split of our product folio is 60:40; in this ratio 60 percent is dedicated to leather while remaining percentage is for other materials. We aim to maintain the same ratio. However, this may fluctuate basis consumer demand and ongoing market trends. Woodland products are strong, meant for tough conditions and have a different style. We have launched innovative, technology-based jackets, which are high on comfort, style and durability, which have been well received by the consumers. Last year we introduced limited-edition line of jackets have technologies like ‘infralite’, ‘heat lock’ and ‘storm breaker’ to suit different winter situations.”





Jack & Jones store



“Jackets market is a relatively big component in the apparel sector in e-commerce. Though its demand is seasonal, yet the e-commerce retail market is estimated to be worth USD 12 billion as of 2016. With increased awareness in online trading, there has been a significant rise in demand of jackets during off seasons specially when customers planning vacation to cooler countries and they have no offline store coming to their rescue.”

-Tabby Bhatia,
Director, Voganow.com



Woodland store



“When it comes to colours, jackets are tricky product categories. Colour mainly depends on the kind of jacket and its purpose. Utility products for extreme weathers are bright coloured while regular casual wear jackets are earthy in shades, which can be clubbed with a wide variety of products.”

-Abhishek Yadav,
Design Head, Spykar Lifestyle

To offer a variation and a surprise element to their customers, Jack & Jones has a striking variation in their collection for Spring-Summer and Fall-Winter. During Spring-Summer the brand offers an eclectic mix of varsity wear, cool and laid-back fabrics that are perfectly breezy for the summer heat. The Fall-Winter collection provides fashion that is functional, easy to sport and weather friendly.

Weight Matters

Light weight jackets are an all time favourite. They are not only convenient to wear but also offer great comfort. Gautam explains, “Everyone prefers traveling light and hence it important to innovate and create fashion that is trendy and comfortable to sport. Our experiments with bomber jackets are one of the most versatile styles of all time. They effortlessly compliment every look and are the perfect street style statement. The brand also experiments with light fabrics like

polyester and a blend of cotton-nylon that are easy to carry and sport. During the winters, utility in men’s wear is a necessity. We have an array of parka and leather jackets that are the ultimate truce between style and comfort.” Vinay Agarwal, Director, Sear Knit (brand Lure) shares, “Light weight jackets are in demand with all genders. There are new micro fillings and cotton blended fabrics which are being used to make such a product.” Yadav adds on the features of light weight jackets saying, “Light weight jackets can be versatile and used at multiple occasions if designed and crafted smartly. We have jackets, which are occasion driven yet casual. Casual blazers which are unlined and washed and can be worn over your denims or chino pants, as a daily wear product to office, date with girlfriend or for heading to a pub with bunch of friends. At the same time, we have a collection of light to medium weight leatherite jackets that



“Jackets today stand out as a fashion statement and a perfect layering concept. People want to wear designer jackets where the trend is catching on. We have made a study of the international trends and have incorporated some new features in our products.”

-Vinay Agarwal,
Director, Sears Knit (Lure)



“Jackets, as a category has limited shelf life. Despite this, it has grown owing to global trends and the advent of international brands in India. Also, consumers’ preference for superior quality and craftsmanship is instrumental in catalysing the growth of this category.”

-Vineet Gautam,
Country Manager & CEO, Bestseller India
(Jack & Jones)

are perfect for motor biking, adding ruggedness to the look and providing comfort and protection from abrasions. Another set of jackets is light quilted in utility collection. This range is focused on winter and protection from cold.”

Talking about how light weight jackets are preferred by trekkers, Dublisch shares, “When our consumer sets out on expeditions like mountaineering, trekking or hiking, we understand their need for lighter products which can keep them warm at the same time. We



cater to this through our ‘hupa warm’ technology which is incorporated with three layers – base, mid and shell. The base layer is the one closest to your body keeping you warm, the mid layers acts as an insulation between layers preventing the body heat from escaping and the shell layer acts as a repellent to elements like moisture and cold winds. Keeping this technology intact we launched products like down jackets, husky jackets, micro loft packable jackets, softshell jackets & the light quilt reversible jackets. Most of these jackets are made with 100 percent nylon and a polyester filling. Our down jacket comes with a shell layer made of 100 percent. Nylon and the



Jack & Jones

filling consisting of 90 percent Down feather and 10 percent feather, making it extremely light. It can be rolled to the size of a tiny pillow which makes it extremely easy to carry around too. Similarly, the micro loft jackets have a poly micro fibre filling keeping the consumer warm while the product is light and compact at the same time.”

GAP India offers jackets such as the cold control stretch puffer, light weight harrington, light weight bomber, trench coats, hoodies, make exceptional warm layers minus the heavy bulk.

Trending-in

Denim jackets remain evergreen when it comes to style but many new styles come and go and have a huge fan following as well. Gautam talks about what is trending at Jack & Jones, “The current style trends have a rebellious spirit of punk culture. Submerged in all dark elements of colour and design, the jackets are shaped by strong motifs of Skeleton and Botanica, taking inspiration from 1970’s biggest punk rockers. We have tried to repurpose punk fashion with Redrawn Rebellion where the accents of orange and red appear conspicuous and goth lettering rules. Glitch is another trend that pays an ode to millennials, reflecting on the disturbances in digital transmissions with distorted prints. The military



COLOR PALETTE

JACK & JONES

Classic red and orange, shades of royal purple, mauve, emerald blue, olive, teal grey distressed white and military green.

VOGANOW.COM

Black, dark brown, wine, burgundy, rich navy and red. Good demand for dual tone shades like black-wine, tan-dark brown and the likes. Rich shades during winters.

SEARS KNIT (LURE)

Earthy and popular colours.

SPYKAR

Shades of blue, wine, olive and khaki and deeper shades of navy.

WILDCRAFT

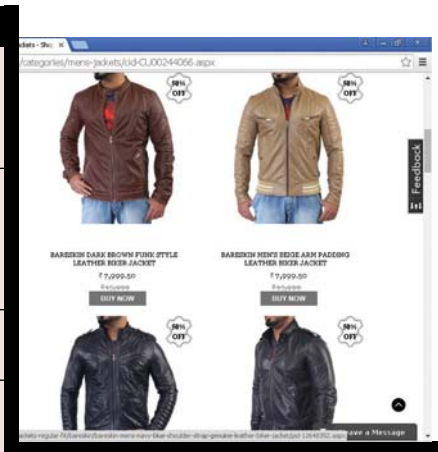
Lime, blue, orange, green, black, grey and maroon.

GAP INDIA

Gap is bringing back its iconic rainbow-striped sweaters. The Fall 2017 range features colours like red, blue, green and vintage florals.

WOODLAND

Black, brown, grey, blue, tan, navy, pink, orange, green, mauve and mustard.



camo jackets bring back militia in full force. We have reinvestigated its approach on military taxonomy with newer innovations in camo through botanical influences and splattered prints. Simple in thought but intricate in garment construction, the new Jack & Jones collection appeals to the forever fashion stalwart." Bhatia of Voganow shares, "Well, bomber, biker jackets in leather and zippers in quirky and camouflage prints are some of the ongoing style trends in jackets. We are coming up with great options in leather biker jackets and slim fit jackets both for men and women this season. Jackets crafted in premium leather are timeless and juxtaposes exclusivity when teamed with right outfit and footwear. We are soon to experiment with embroidered leather jackets for women and studded jackets for men to keep up with the current trends." Agarwal reveals the emergence of artificial look alike leather jackets. At Spykar, Yadav shares, "Major trends are

bombers, military inspired long utility jackets and casual unlined blazers. There are different kinds of prints and embellishments, on these products. We do have trendy bombers and casual blazers along with riding jackets in leatherite this season. These come in trendy colours such as wine, olives, khakis and tans, which are in focus this season. As travel and weekend getaways are trending camouflage, military and utility inspiration is a big part of collection." Dubish bets high on the demand for light quilted jackets, nylon performance shirts, lightweight convertible pants, puffer jackets, performance softshell jackets and oversized sweat shirts."

Road Ahead

Showing concerns effecting the industry, Kapoor shares, "Manufacturing jackets is still a cut and sew job. We are lagging behind in the techniques we still adopt in manufacturing them, there has been nothing new to craft this product. It still involves tailored techniques and most of this involves manual labour. This is the reason why the jacket production is very low in comparison to other garments." He also adds, "The prices of the product that have gone up because GST had to be shifted on the consumers. We as a brand have worked on a strategy wherein we have tried to absorb part of the increase in our margins and part has gone up with pricing." Gautam highlights that jackets as a category have a limited shelf life in India though



GAP

the category has witnessed steady growth. He shares, "Despite this, the category has grown in terms of width of the collection. This growth can be attributed to increasing awareness to global trends owing to the advent of international brands in India. Also, consumer preference of superior quality and craftsmanship in this category is instrumental in catalysing the growth of the premium and super premium segments." Singh concludes, "The jackets market is growing in terms of premium and super premium products. This is one of the most interesting trends in the jacket market. The growth in the premium jackets segment which comprises the best fabrics and designer products is visible. There is also a rise in the number of customers from super premium segment who want to ensure that their jackets reflect their personality."



A stretchable zipper designed to stretch records





Being Human Clothing



Being Human Clothing



Cello

SWEAT SHIRTS

MOST SOUGHT AFTER THIS WINTER

Sweat shirts the new flagbearers of winterwear foray into streetwear, and now with more chick innovations, into athleisure as well. IMAGES BoF talks to some of the leading athleisure brands in India to check this rapid permeation into mainstream fashion. | By Roshna Chandran with inputs from Rosy N Sharma



Juelle



Pepe Jeans



Pepe Jeans

Over the past few years, several apparel brands have made more space for the athleisure category. Recently the women's active wear category has seen an increase in sales, especially through online portals. Consumers go in for sweat shirts as they are comfortable and yet do not necessarily make them look dressed down. This implies that they can be worn to work as well, bringing a whole new lifestyle movement of mix and match in active wear. The look-good and feel-good factor of the sweat shirt makes it the most versatile category, especially for women who use it as an all-day-wear, whether they are in the gym, a supermarket or even a classroom.

"According to industry reports, India's winterwear market had been growing at a (CAGR) of 8 to 10 percent annually. Out of all winter wear items, the sweat shirt category amounts to 9 percent amongst other items such as jackets, pullovers, sweaters, cardigans, etc.; industry reports suggest. This is due to different and unstable climatic conditions that prevail across India, with heavy winterwear dominating the northern areas of the country," said Neha Shah, Head - Marketing, Pepe Jeans. Abhishek Shetty, Head - Marketing, PR & Loyalty, Celio, is even more upbeat and felt, "The winterwear market is expected to clock about 9 to 11 percent growth in the coming years." He added, "Currently the unbranded segment accounts for about 70 percent of this market." However, Shah felt, "The sweatshirt category in particular has an equal market of branded and unbranded players. Both international and local players are always looking for innovative way to capture majority of the market share. New introductions from time to time showcase sweatshirts that are more in line with current trends, also functional features like using heat producing material coupled with innovative prices and offers which help in retaining and expanding customer base."

What's Trending & Price Ranges

Elaborating upon the current style trends in sweat shirts, Saurabh Singh, Design Head Men's Wear, Being Human Clothing, shared, "From humble beginnings as the classic utility product; sweatshirts are now truly a fashion staple with wide variety of styles to choose from, the most common remains the jumper and hooded versions. The latest trends in sweatshirt include the luxury versions with lot of surface embellishments to space age tech sports versions. Another key trend is the boxy fit with cropped sleeves or kimono variations." Graphic prints on sweat shirts

>



jeell



Celio store



Pepe Jeans store

are also coming back this season. According to Shah, “In menswear, sweat shirts are all about quirky slogans, camo-prints, ombre shades and raglan style with hoodies. For women’s wear, floral prints, pastel colours are at the forefront.” Embroidered concepts are also growing in demand.



“In men’s wear, sweat shirts are all about quirky slogans, camo-prints, ombre shades and raglan style with hoodies. Floral prints, pastel colours, etc., are at the forefront in women’s wear.”

-Neha Shah,
Head-Marketing, Pepe Jeans



“The scope of sweat shirts is increasing as winters being less harsh they are taking the place of jackets. Sweat shirts are more casual to wear and in the coming years their market share will increase.”

-Guneet & Japneet Singh,
Directors, Juelle Retail

Although seasonal clothing is yet to catch on in India, brands are going aggressive on their winterwear portfolio. Shetty has stated that the organised sector typically prices sweat shirts upwards from ₹2,500. While the entry price may remain the same, He is optimistic that the sales for the premium range may go up. The prices obviously change according to the kind of design and materials used. Sweat shirts are widely available during the colder seasons and do not see much price fluctuations in a year. Guneet Singh and Japneet Singh, Directors at Juelle Retail shared, “They (sweat shirts) are more casual to wear and in the coming years both their market share and the pricing might increase, especially for value-added high-fashion products.”



“Though the segment has shown promising growth, the seasonality of sales, necessity of skilled labour, competition among established brands and difficulty in importing fabrics tend to make the manufacturing process challenging.”

-Abhishek Shetty,
Head-Marketing, PR & Loyalty, Celio



“From the humble beginning as a classic utility product, sweat shirts are now truly a fashion staple. The latest trends include luxury versions with a lot of surface embellishments to space age tech sports versions.”

-Saurabh Singh,
Design Head - Men's Wear, Being Human Clothing

Challenges

As consumers continue to demand the latest in trends available globally, the entry of various brands is said to bring more competition within this category. According to Shetty, “Though the segment has shown promising growth, the seasonality of sales, necessity of skilled labour, competition among the already established brands and difficulty in importing fabrics from other countries tend to make the manufacturing process challenging.”

The Future

Youth being the major driver for this segment, the sweat shirt category may see many more innovations, but price and competition will be the main concern factors especially between the organised and unorganised segment. Shetty points out that non-branded segments that have procured a huge amount of innovative and cheaper products from countries like China have great price points thereby making it difficult for bigger brands to penetrate the market. “You will see an aggressive push from the branded segment in the next few years to bridge this gap by innovating and offering new product ranges,” he added. Shah feels that the brands will go onto a more seasonal approach, “Brands now have a pre-season and main collection focused on particular seasons. For instance, in winterwear, brands will launch an entire range of winterwear such as shoes, boots, pullovers, complimenting jackets along with top wear with an aim to influence the consumer into buying an entire ensemble as well as target a larger share of spending in comparison to just looking at one particular item for purchase.” Guneet concludes by sharing, “In the new post GST regime, it is going to be a challenging scenario, but I feel that organised and professional business houses will definitely have an edge over the unorganised ones.”



Celio store



Juelle store



SEEKING A THERMALS CONDUCTIVE WINTER

Despite being hampered by brief winters over the past few years, the thermal wear industry has seen substantial growth. IMAGES BoF speaks to some of the biggest thermal wear players in India to unravel this dichotomy and for their fine insights into the category.

By Roshna Chandran with inputs from Gurbir Singh Gulati

Thermal wear was the sunshine category with both the traditional woolen hosiery and innerwear majors holding a lot of expectations from it. But, due to short winters in the past two years, thermal wear sales slipped, and stocks had to be carried forward. "Like all other hosiery products competition hampers it most but last few years rising temperature during peak winter season has played the major role in declining sale," points out Bhanupriya Prahladka, Manager - Operations, Hillman. "Global warming and strong economic reforms like demonetising have impacted the movement of thermals and blocked its (category) growth though temporality," agrees Niti Jain, Director, Neva Garments.

However, despite this dip, the thermal industry has managed to grow slowly as customers have evolved into becoming more brand savvy and style conscious. Brands are exercising innovation by investing in new technologies and keeping abreast with global standards. In fact, some brands have experienced tremendous growth as Mithun Gupta, Director, Bodycare International shares, "The segment has grown by 30 percent Y-O-Y as it has been able to penetrate into tier-II and -III cities but growth has been hampered because of short in winter season in the last three years."



“Winterwears are seasonal products and the demand is based on climate. Weaker winter and enticing outer wear, its demand has increased aggressively. Thermal wear is getting preference for its easy to carry feature. Manufacturers like us are constantly introducing new products and variety thus securing the future of this segment.”

-Vinod Kumar Gupta,
MD, Dollar Industries



“The thermal wear segment has been growing at 30% Y-O-Y as it has been able to penetrate into tier -II and -III cities but its growth has been hampered due to shorter winter season in last three years.”

-Mithun Gupta,
Director, Bodycare International

Industry experts are not sure of the actual market size in the thermal wear segment. According to Vinod Kumar Gupta, MD, Dollar Industries, “There exists 10 million pieces of thermal wear in a year within the country, still dominated by the unorganised sector.” However, this domination of the unorganised sector is seriously being challenged as the consumers now seek fashionable, branded thermals. Gupta of Bodycare International, in fact, feels that the market is now “60 percent branded and 40 percent unbranded.”

V K Gupta of Dollar Industries has an interesting observation that gives insights into another key reason for the growth. “Weaker winter and enticing outer wear has increased the demand of thermal wear aggressively. People are becoming fashion conscious day by day and look for trends and comfort, both at one time. Thermal wear is getting much preference for its easy to carry feature,” he shares.

International Competition

With international brands making a bee line into the country, Indian

brands try to remain unflustered. On the plus side, competition has brought relevance for the organised sector, with the consumers have become brand centric. Traditional styles have also faded away with competitive fashion styles and higher quality.

“The customers are becoming more aware and now understand the importance of the product category better. The Indian market is gradually shifting towards branded products, so the entry of global brands has created more room for the domestic organised players like us,” points out V K Gupta of Dollar Industries. This is echoed by players like Neva Garments who remain positive, “No, we do not take the entry of big international brands as a competitive threat,” says Jain, “Indian consumer are quite brand loyal and stick to their choices. Very little brand-hopping has been observed.”

Evolving Fashion Trends

Apart from the growth in variety of collections under the thermal



Hillman



vests, trousers and have also extended to leggings for women and bomber jackets and hoodies for men.

Fastest Moving Categories

According to Sanjay Jain, MD, TT, the upper middle class are shifting more towards light weight thermal wear (210 gsm), while the lower middle class are going for fleece knit raised fabric with 260 gsm plus. Predominantly, light knit wear has been the fastest moving category under thermal wear, with round necks, full sleeves with thin stretchable fabric. Jain of Neva Garments pointed out that their quilted thermals, that offer softness and comfort of Egyptian cotton and polyfill, have been their fastest moving range. Gupta shares, "Dollar Ultra Thermals is one of the most preferred types of thermal for both men and women. It is made from 100 percent super comb siro clean cotton yarn which is guaranteed to provide warmth and comfort. These are specially processed to control shrinkage and to hold its shape for a long time." According to a spokesperson from Lux, "All the thermal

wear segment, demand for light weight and branded thermal wear has grown manifold in the past few years. Consumers are more in tune with comfort fits and stylish cuts at affordable prices, this could be due to the sudden short winters. Overcoats and cardigans are no doubt in vogue, but the fashionable more stylish thermals have grown in demand. Inner wear designs have also evolved into tops, but the key features in thermals are its light and portable nature. "Thermals are used as both outerwear and inner wear winter protection. Previously they used to be simply a soft, warm and comfort product, but now they are coming with a lot of other features like seamless, and in a wide variety of colours. They are now quite trendy to be easily worn as a winter body suit," said Prahladka. The category has moved drastically and has seen growth in terms of variety of styles, cuts, colours and fabrics. Thermals have also undergone several upgradations in their functionalities such as weather and water proof, making them appropriate for the entire season from mild to harsh winters. Traditional colours like grey, brown and blue are being replaced with brighter hues. Originally a unisex trend meant to be hidden under clothes is now good enough to wear solo. The products now range from



"Fashion has entered in the thermal wear category and customers are demanding colours options, style cuts and fabric variety. Moreover, international brands have added new fabric options and many performance fabrics have been introduced in this segment."

-Sanjay Jain,
Managing Director, TT



“Nowadays, thermal wear is used both as outerwear and innerwear. Previously, it used to be a simple, soft, warm and comfort product, now it is coming up with features like seamless, variety of colours and quite trendy that can be easily worn as a winter body suit.”

-Bhanupriya Prahladka,
Manager - Operations, Hillman



“Thermal wear category directly depends on climate changes, as well as customer sentiments. Global warming and strong economic reforms like demonetization have impacted growth temporality.”

-Niti Jain,
Director, Neva Garments



Dollar Ultra



Neva

brands - Lux Inferno, Lux Cott'swool, Onn Thermals fulfill consumer's desire and provides them utmost comfort, warmth and style.”

Pricing Questions

Added to the challenge of weaker winters, the cost of yarns, fabrics, transport and labour have gone up drastically. However, as the economy aligns to new government regulations and also simultaneously sees intense competition Indian brands have tried to remain stable with their price ranges. Jain of Neva Garments says, “No we are equally loyal to our consumers, as they are to us. We do not increase prices frequently. Some impact of the GST implementation has been there, but we are not deliberately increasing price, until forced by market pressure.” Viewing increase in product price as a bad strategy, many brands like TT and Hillman have decided to stick to their original rates. However, Bodycare International has decided to increase their product prices and Dollar expects a price rise.

Challenges & The Future

Gupta of Dollar Industries shares, “The organised apparel segment is expected to grow at a CAGR of more than 13 percent over a ten year period according to industry sources.” However, with short winters disrupting positive sales, brands are also looking forward to increasing their export businesses. The thermal wear industry has created several new job opportunities and was leading winter wear economic growth, and yet the industry still faces challenges in getting access to the right quantity and quality of raw materials. The fact that there are limited manufacturers for thermal fabrics in India means that there are limited stocks with the right quality. The new government regulations have also thrown several challenges for the players. Players are finding compliance tedious. On the whole, domestic brands are gearing up for a more competitive winter and as Jain of Neva Garments puts it the key to success will be, “Loving your consumer and giving a comfortable protection against severe winter at affordable prices.” If winters go well that is...





SWEATERS

THE OLD SCHOOL FEEL REVITALISED

Tracing back to the 19th century when members of the British military used to wear thick knitted sweater coats, sweaters have jumped back in fashion and are being reinvented as a 3-season piece of clothing. Images BoF takes a look.

By Manisha Bapna with inputs from Gurbir Singh Gulati

Whereas on one side, in the early fall and spring, the sweater functions as cosy outerwear, in deep winters it becomes an essential inner and more often an insulating layer that can be worn over long-sleeved shirts or under sports coats and jackets. The thickest variety is worn as a coat on cooler nights as well. India's love for sweaters is deeply embedded. And why only we humans, even our elephants living in the Wildlife SOS Elephant Conservation and care centre in the city of Mathura keep themselves warm and safe from the freezing temperatures with beautifully embroidered sweaters made by locals.

Sweaters or cardigans no longer have an old school feel, it's perfectly possible to wear them in a way that's sharp and up-to-date, conveying both style and stability. Fleece jackets, pea coats, and heavy-duty winter coats are great outerwear pieces, but the most important part to layering for fall and winter begins with the sweater. "Sweaters have their own identity and profile in the market. We, as a brand, have been doing great business and haven't felt any competition from other categories in the winter wear segment," says Ritesh Punyani, Managing Partner, Calbury. The



“Sweaters during winter season have always held the upper position and their sales are growing at a consistent pace independent of all other categories. Also, with the advent of big international brands this category has become more competitive and transformed to an organised sector.”

-Sandeep Jain,
Executive Director, Monte Carlo



year-on-year growth in this segment flourishes on an average is 15 to 20 percent. He further adds, “We have had a pre-booking for our products wherein the retailers have ordered and are not cancelling the consignment. But then, there is a general perception in the market that it’s a bit slow this time. It may be due to the impact of GST, but the retailers are not saying this openly.”

“Sweaters are still considered as one of the main winter clothing lines and we have good market share in this segment. Since, the market is highly unorganised, the size of the market cannot be easily foretold. And, we are indeed expecting high growth in the coming years,” states Kuntal Raj Jain, Director, Duke Fashions.

Blending is Trending

While the flagship bearer of sweaters is wool—and the market does manufacture pure wool—blends are in and the choice of blend, fineness, gauges, and grade class are some of the characteristics that define a sweater’s functional quality. A blend becomes useful if it has to do with the function of a fabric. Like 10 percent nylon may have different effects on skin than 20 percent. Some brands believe that the very best blend is 50:50 cotton and wool because each has qualities that compliment by overcoming the other’s shortcomings. “Sweaters which are most popular are mostly in a blend of 80:20 which is 80 percent acrylic and 20 percent wool,” feels Punyani. The fabrics used in winter wear collection at Duke range from 100 percent cotton to techno-blends with polyester, acrylic, linen, poly-mix, lyocell, viscose, modal spandex, nylon, rayon, etc. Natural fabrics have been used which are thinner leaving a softer feeling on





“The sweaters are facing competition due to its high cost of production and it doesn’t manage to stop chill weather. Moreover, young people love to dress themselves in trendy styles and so jackets and sweat shirts have taken over as a fashion statement to a great extent.”

-Kuntal Raj Jain,
Director, Duke Fashions

the skin. Monte Carlo manufactures a range spanning 100 percent acrylic, 100 percent lamb’s wool, 100 percent wool, acro-wool, wool or cashmere, and wool or nylon sweaters. At Juelle they also incorporate viscose, nylon, wool blends and the mix-and-match of lurex yarns.

Fashion Trends

From crop sweaters to embellished sweaters, long sleeves covering more than half of the palm, puffed sleeves and cold shoulders, to crewnecks and mock necks, in solid colours all are trending this winter season. The fashion versatility also means that whether wearing a v-neck over a shirt and tie, a turtleneck under a blazer or sport coat, or a classic casual crewneck by itself, sweaters can be incorporated into almost any type of outfit.

“For this winter, a lot of effort has been put in to recreate the magic of our collection. From innovative techniques like engineered dip dye, updated patterns using space dye yarns and bleach laundry techniques mixed with synthetic yarns to go along with a

whole lot of fibres, decorative fabrics, new embossed pattern jacquards, complex transfer stitches, updated stripes, decorative cable openwork, woven-in yarn tapestry looks, and engineered transfer ribs have been used to recreate the essence of our collection,” shares Sandeep Jain, Executive Director, Monte Carlo.

The winter collections will boast of some very exciting colour combinations, designs in stripes, prints, embroidery, patch work, short lengths, round necks, collars etc.

Clean modernist aesthetics are introduced through unlined structures, bright colours and fine branding. “Light weight sweaters have been given a depth of bold attitude in fine tune, using exceptional details and superior grains,” says Kuntal. Punyani shares, “We are known for making formal sweaters with a touch of casual in bright shades. We are a well known brand for men’s sweaters where we mostly produce acrylic blended ones. In the latest collection, v-neck, round neck, collars, buttons, zipper necked sweaters with comfort fits are in as they are more in demand.” “Different shapes, loose fits, embroidery patch work concept are in demand with use of fine gauges and fancy yarn, blends. This is our style statement for the season,” feel Guneet Singh and Japneet Singh, Directors at Juelle Retail.

Challenges to Sweaters as a Category

While traditionally Delhi and North India account for 30 to 40 percent of a fashion and lifestyle brand’s total revenue during the winter months, but last year their share was down to just 20 percent. The winter season set in late and thereby the sweaters lifecycle was reduced to 30 days from 45 to 60 days, a much longer summer season, and demonetisation, etc., all led to a massive shift from sweaters and wool to lighter jackets and sweat



Duke



Monte Carlo

shirts. So much so that many stores in North India have cut down feather jackets and heavy woollen sweaters to stock up products like sleeve-less Nehru jackets to light pullovers. Jain of Duke feels, "One of the biggest reasons for sweaters facing competition with other winter wear varieties is because its cost as a product is high and it doesn't manage to stop chill weather conditions. Moreover, jackets and sweat shirts have not only captured the youth's fashion needs but are also capable enough to stop cold winds." However, the Singh brothers feel, "Sweaters have their own market share and though conventional sweaters are facing tough competition, the introduction of finer gauges, fancy yarns and premium blends, and with new shapes and styling, etc., have given sweaters a new look which is getting good response from the end consumer."

However, Jain of Monte Carlo disagrees to the notion totally, and shares, "Sweater sales are increasing at a steady pace year on year and the customer base for sweaters is also increasing." He instead believes that because of short season, tough competition and the complicated setup, a lot of big brands avoid entering this segment.



"Sweaters have their own market share and though conventional sweaters are facing tough competition, the introduction of finer gauges, fancy yarns and premium blends, and with new shapes and styling, etc., have given sweaters a new look which is getting good response from the end consumer."

-Guneet Singh and Japneet Singh,
Directors, Juelle Retail

Impact of International Brands

The sweater or wool manufacturers in Ludhiana and Punjab may have their own challenges but the advent of international brands has not been able to largely disrupt the winter wear business in the domestic market. Jain of Monte Carlo feels, "The entry of big international brands has made the category more competitive, but at the same time this has also led to acceptance of higher price points and a shift to branded sweaters from the

unbranded ones." Punyani shares, "Mostly these international brands do not invest a lot in the winter wear segment. They also outsource design and manufacturing abilities to complete their product mix from Ludhiana which in turn adds to the business. They only compete with us during sale period where they somehow try and go down with their pricing to match that of a domestic brand." At Juelle they go about producing the Indianised and more practical version of the international sweater which is more acceptable to the masses by way of fits, durability and overall comfort.

The Real Challenges

What is important to know is that this is a labour-intensive industry, with multiple processes at various heads and layers of techniques? The people who face stiff manufacturing challenges are not the big players but the small manufacturer and traders who rely on cash and handmade processes. "Despite being highly unorganised, the spread of manufacturing facilities in Ludhiana is visible. The machinery and labour parts are well available; however, we face difficulty in sourcing new varieties and blends of fancy yarns at local level which is necessary these days to complete with fashion conscious markets like China," believe the Singhs from Juelle Retail. And apart from ingredient sourcing, the bigger challenge sweater brands face lies in marketing, distribution and retailing. "Particularly we are facing challenges in pricing, changing trends and designing, quick responses from retailers, branding, positioning, space and locality along with marketing like understanding customer wants and needs across different segments and how to reach customers in a meaningful way," says Jain of Duke.





S.O.S. FROM *SHAWLS*

THE MARKET DYNAMICS FOR SHAWLS IN INDIA HAVEN'T REALLY CAUGHT ON. IS IT JUST THAT THE EASE OF SPORTING ALTERNATIVES LIKE A SWEATER OR JACKET HAVE GIVEN SHAWLS STIFF COMPETITION? OR IS IT MUCH MORE? IMAGES BOF SPEAK WITH INDUSTRY EXPERTS.

BY ZAINAB S KAZI WITH INPUTS FROM GURBIR SINGH GULATI

The likes of Gulzar, Shabana Azmi, Javed Akhtar and, even Amitabh Bachchan, on some days, have kept the fine tradition of shawls visibly alive in media. Shawls are also exchanged during weddings in many communities in India, so the demand for shawls may stay, but without any significant growth potential. As a fashion statement, shawls with fine embroidery, can light up a dull outfit during winters and ponchos made out of shawl material have a good demand as well. And, when it comes to shawls, the first things that comes to mind is the term Pashmina. A shawl is no good till it is a Pashmina shawl. Originally from Kashmir, Pashmina and shawls remain synonymous and we have a lot many sellers selling their shawls using the term Pashmina, whether or not they are originally Pashmina shawls is something that remains unclear. Many issues abound.

Understanding the Blends

To keep up with the changing fashion dynamics, shawl manufacturers are keeping a tab on what is preferred by the generation today. Arun Jain, Director, Jain Shawls for brand Cashma shares, "This year we are introducing digital prints and very fine blends in cashmere, woolen cashmere, silk blends and Modal. We weave digital prints and jacquards together. We make pure wool too." Talking about the blends in vogue today, Amit Jain, Managing Director, Shingora Textiles shares that shawls made using 100 percent wool, silk, cashmere, wool blends, cashmere/silk/EFM blends do well. At Shivam Shawls, Pawan Kumar Sabharwal, director for the

brand shares that their company makes shawls using 100 percent wool, wool blends, polyester wool etc. and they have a good response from the market. In terms of popularity, woolen shawls remain evergreen. Jain of Shingora adds, "Squares, Kani shawls, prints, pocket squares too have a strong demand."

Pashmina Blunders

The term 'Pashmina' remains one of the most misused terms to define a shawl, especially by those on streets selling inferior quality synthetic or artificial fibre shawls as 'Pashmina'. An original Pashmina shawl from Kashmir runs into thousands and has extremely fine hand embroidery and soft fabric. Jain of Shingora calls it a shame when sellers or brands pass viscose and acrylic as Pashmina shawls. Sabharwal elaborates, "The word Pashmina definitely depicts very fine quality wool. Earlier this was sourced from the sheep in Kashmir and Kargil region wherein the wool bales were sourced and used to produce such a rare garment. Nowadays, this is being exploited by inferior polyester wool blends and the seller tries to pass it through the ring to show the genuineness of this product which is misleading and is not the real test of Pashmina."

Jain of Cashma shares, "Today most of the retailer's nickname shawl as Pashmina which is again not true. This is a pure form of art from Kashmir. Good shawl manufacturers have realised this is a threat to the loyalty of their original Pashmina." To ensure the authenticity of Pashmina shawls, the industry has been taking various initiatives. He elaborates, "We as a manufacturer and a part of the industry raise this topic very serious during our meetings with Woolmark and Shawl Club that the term "Pashmina" should



"Made from 100 percent wool, silk, cashmere, wool blends, cashmere-silk-EFM blends, Shingora is one of the brands that still uses handlooms for making hand crafted shawls."

-Amit Jain,
MD, Shingora



"The word Pashmina depicts a very fine quality wool. Earlier this was sourced from the sheeps in Kashmir or Kargil region and used to produce a rare garment. Today, this is being exploited with inferior polyester wool blends."

-Pawan Kumar Sabharwal,
Director, Shivam Shawls



Shivam Shawls



“Woolen shawls are catching popularity. This year we have introduced digital prints and very fine blends in cashmere, woolen cashmere, silk and modal.”

-Arun Jain,
Director, Cashma

be safeguarded and should not be misused. Very soon we will see a resolution towards protecting this.” Sabharwal adds, “The good players in the market are now sourcing high-quality Australian authenticated wool which can only make and save the true Pashmina identity.”

The Challenges

According to Sabharwal the shawl industry is listed as a small scale one which was first hit by the market slowdown and then by demonetisation, and is now struggling with GST. He adds, “The biggest problem is GST. A shawl which was being made as a small-scale industry product has suffered badly with this government policy. Now today anything priced above ₹500 is levied with 5 percent GST and anything above ₹1,000 is levied with 12 percent GST. The biggest shawl manufacturing base, Amritsar is struggling with government policies.

Today as a manufacturer we too face the difficulty of getting exposed to new threads which can give a new dimension to our products. Woolen prices have also gone up by a whopping 20 percent or so, which is adversely affecting the use of pure wool.”

Road Ahead

Another reason why the demand for shawls is gradually slipping away is that the younger generation is more

into scarves and stoles. The demand for Pashmina too hasn't reported any significant change. Internationally, Pashmina shawls do generate decent interest but within India there isn't much awareness with regards to the authenticity for Pashmina shawls. The government support is much needed to not only involve craftsmen but also to promote the tradition of shawls in India. Jain of Cashma points out, “There has also been slow movement in getting good craftsmen for the shawl industry. We are the ones who take fresh ones and train them. There is hardly any support from the government to protect and help the industry which is a small scale one.” Sabharwal concludes, “It is an old industry and the new craftsman is not ready to step into this. Today, most of the work is done on machines and the handwork which is an exclusive element to shawls has gone down.”

What perhaps can give a push to the industry is designers taking interest in shawls and creating ensembles with them. The shawl industry in India most certainly needs a push.



Shingora

ANALYSIS

BIG DATA

IN-STORE TECHNOLOGIES

RETAIL OPERATIONS

SUPPLY CHAIN & LOGISTICS

RETAIL FORMATS

MARKETING & BRANDING

LOCATION STRATEGY

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RED RIDIING

fun with fur

Red Ridiing scarves was founded in April 2016 by Yogesh Jain (MD), Maneish Gupta and Paras Mahajan. Red Ridiing is a name synonymous with edgy, urbane, classy and elegant scarves. Red Ridiing is ever innovative and has more than 2,000 scarves and stoles designs in its repertoire which can be used for any occasion.

Red Ridiing is part of the prestigious Mahak Group. After successfully launching products like “Chaini Khaini, Mahak Pan Masala, Choc on Choclates, Jelly Belly, Woosh detergent and dish wash in FMCG, the group has stepped into the retail industry with renewed energy with the brand Red Ridiing.

In its one-year successful journey, it has opened more than 50 stores in 17 different tier -I and -II cities across India. These include Delhi, Mumbai, Pune, Bengaluru, and several in Punjab. The brand presently has a turnover of ₹50 crores selling both online and offline.

Last year, the brand launched its “ponchu collection” for winters and “floral elasticated scarves”, ties and “flower wraps” for the first time in India. These try to exaggerate the higher version of scarves and its multi-purpose usage. In the first year of Red Ridiing, the brand has succeeded in analysing the Indian girl’s perceptions and met their expectations and has left an impact. Therefore, this year the brand’s customers are expecting much more than the previous year.

Collection Winter’17-18.

This year Red Ridiing is going strong on fur. Fur is also a very new category for the Indian market. Yogesh Jain shares, “Our studies on the Indian market had revealed that Indian girls think that furs were far from the reach of mid-level ladies as they were perceived to be very expensive for them. That’s why we began with a bang and launched fur tubes and scarves. These are meant for multi-purpose use and are available in very economical price range. Our target is to educate the market on these new arrivals that meet their expectation. The focus is on both creating beautiful and catchy designs, as well as ensuring that each range is multipurpose and useful for our clients.”

Fur with Tube



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Elasticated Fur Scarf

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Experimental Fur Scarfs

Fur and leopard designs



BEING HUMAN

In 2012, Mandhana Industries Ltd., brought to life a full-fledged clothing line for Being Human – The Salman Khan Foundation. Being Human Clothing embodies six positive, simple and humane values - love, care, share, hope, help and joy - binding these values in a bond of respect. Each of these values form the DNA and is imbibed into and reflect through their work. What brings out the DNA in the clothing range is the detailed visual evoking the charitable aspect of the brand. The results are collections that are stylish yet reach out to the people to help spread these values. Every garment helps shape a life through education or helps save a life through healthcare initiatives.

The new line of sweat shirts

As a brand, Being Human Clothing has always strived to remain on the fore front of latest trends. Over the years, apart from the basic options that they have introduced, many fashion versions of sweat shirts like reversible ones to sporty athleisure versions have been launched. In terms of fabric and blends the brand has experimented with textures and space dyed mélanges, scuba fabrics, bonded fabrics in cotton or poly blend.

Latest product launch

This winter season, the brand has introduced two lines of sweatshirts in the fashion category – varsity sports with super soft mélange in all over printed and embellished versions, and secondly, an athleisure line that includes quilted fabric jumpers and long line hoodies in space dyed bonded fabric.

Change in demand

This season, the brand is witnessing an increased demand in jumpers probably because they work as really versatile products that can be

layered for winter in many ways from casual look to more smart casuals for the evening.

Consumption pattern: metros vs. non-metros

With e-commerce now catering to almost all the non-metros the difference in preferences is diminishing rapidly especially for the digitally connected youth who want to follow the latest trends in real time.

Competition from international brands

According to the brand, competition can be looked as a challenge and with a positive perspective. Since the beginning, the goal of the brand has been to be at par with global brands in terms of product quality, latest fashion trends and create a truly international brand born in India. With the increased international competition there will be increased understanding of international fashion which they believe will make the customers appreciate their products even more.

Retail presence

Being Human Clothing has 62 exclusive brand outlets (including franchise outlets) across the country. The brand is doing great in North, West and East regions. Metros are coming up with more demand, but other tier -II and -III cities are also growing rapidly for them.

Retail expansion plans

Being Human's retail expansion plans is to open 40 to 50 exclusive stores in the next 2 to 3 years.

Online presence

The brand began looking past metros and towards tier -II and -III cities. This is because online shopping in these regions has increased as the number of internet users in the rural areas has shot up.



BRAND UPDATE

- > Name of Company: **MANDHANA INDUSTRIES LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **MUMBAI**
- > No. of EBOs: **62** (including franchise stores)
- > No. of SISs: **284**
- > No. of MBOs: **71**
- > No. of LFSs: **213**
- > Annual Turnover (FY 2016-17): **₹220 CRORES**
- > Brand website: **WWW.BEINGHUMANCLOTHING.COM**




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BODYCARE INSIDER

Driven by values of trust, quality and excellence, Bodycare International has become a force to reckon within the innerwear market. With styles that echo the sentiments and aspirations of the urban dweller, the company has become synonymous with providing stylish products to fashion savvy consumers who value money and aspires for quality products. The company has often been credited with pioneering products that have revolutionised the innerwear apparel industry.

BRAND UPDATE

- > Name of Company: **BODYCARE INTERNATIONAL LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **NEW DELHI**
- > No. of EBOs: **4**
- > Total Retail Space Occupied: **2,800 SQ.FT.**
- > No. of MBOs: **15,000**
- > Annual Turnover (FY 2016-17): **₹130 CRORES**
- > Brand website: **WWW.BODYCAREAPPARELS.COM**

Product range

Bodycare manufactures thermals from the finest quality Miyabi yarns. All products bearing the company's stamp are unmatched in terms of quality, comfort, fit and style. The price range varies from ₹199 to ₹999. Round neck full sleeve and lowers are their fastest selling products in thermals.

Innovations

Bodycare International has always been driven by a constant urge to innovate and reinvent ground breaking products that align with the changing taste and needs of the consumers. Recently, the company has introduced extra thin, super stretchable and warm thermals that are made from Japanese technology. It also offers seamless thermals with no side stitch for better comfort.

Recent product launch

The brand has recently introduced a new range of seamless thermals that won't irritate the wearer's skin, however sensitive it might be.

Consumption patterns: metros vs. non-metros

Being a premium segment product, sales are better in metros than in non metro cities.

Domestic marketing network

The company's team of 150+ distributors and presence in 15,000 multi-brand outlets cater to their pan India consumer base.

Retail expansion plans

Bodycare aims to open 10 exclusive brand stores by end of this financial year. It would also increase its distributor network in tier-II cities.

Online presence

The brand's products are available on all major online stores and are anticipating good sales from them this winter season.

Turnover growth aimed at in the next 2-3 years

Bodycare is aiming at an annual growth of 25 percent Y-O-Y.



CADINI

Cadini was founded in 1970 in Florence, Italy as a manufacturer of men's garments and accessories. The name evolved from a group of mountains in Northern Italy "il Gruppo dei Cadini di Misurina" - a group of dolomites, which feature exclusive variety of rocks, types of hills and valleys. Over the years, Cadini has evolved from a manufacturer into a classic men's wear brand, developing its own collections. The brand targets successful men in the age bracket of 25 years and above, who are fashionable, brand conscious, global travellers conversant with the latest trends.



Product range and MRPs

Cadini offers a wide range of suits, jackets, and trousers, bandgalas, tuxedos, ties, pocket squares and scarves made of 100 percent silk. The brand is also known for its range of casual wear, denims and its range of leather accessories. The apparel line starts from ₹2,100. The brand also offers customised services for its clients.

Production and design capabilities and talent

Quality, creativity and innovation are the guidelines and distinctive characteristics of every Cadini product. The new collection reflects the brand's passion for style, quality and research. It celebrates the traditional 'Made in Italy' ethos to create tailor-fit garments for contemporary men.

Product expansion plans

Cadini has recently introduced a line of cotton chinos and denims, which will be augmented in the upcoming seasons. It has also added a range of shirts in hues of indigo, fashionable jackets that are wearable all year round and wrinkle free shirts and suits.

Product speciality

The brand's core is its product. It showcases the best of fabric available across the globe to produce garments that portray class and contemporariness. Cadini has also introduced slimmer silhouettes to meet the market requirements.

Current distribution network

Currently, Cadini has exclusive brand outlets in Mumbai, Bengaluru and Pune and are expanding into Chennai and Hyderabad. It also has a strong presence in Central (HD format) and at locally renowned MBOs in Delhi, Punjab, Maharashtra, Mumbai, Tamil Nadu, etc.

Presence in international markets

Cadini is an internationally renowned brand from Italy with a global presence in over 40 countries worldwide, including the USA, UK, China and Russia, amongst others.

Retail expansion plans

Cadini has store launches lined up for the cities of Chennai and Hyderabad. Going forward, the brand would be expanding its stand-alone stores in tier-II towns as well. It is targeting to have presence across 100 key MBOs across India and also improving its footprint in LFS stores.

Turnover growth in the next 2-3 years

Cadini aims to garner a business of ₹100 crores over the next two years.

Popularity of tuxedos

Tuxedos have now become an acceptable variant of suits in India for evening occasions and wedding receptions. Apart from the classic black tuxedo, the brand also offers other shades as popular tuxedo colour choices.

Customisation in the suits category

Customers are now conscious about the fit of the garment. What's unique about the brand's customization service is its fabric offering which provides a diverse range of fabrics at multiple price points for the customers to choose from.



BRAND UPDATE

- > Country of Origin: ITALY
- > Headquarters: MUMBAI
- > Total No. of EBOs: 9
- > Total No. of SIS: 10
- > Total No. of MBOs: 20
- > Total No. of LFS: 1
- > Total Retail Space Occupied: 16,000 SQ. FT.
- > Brand website: WWW.CADINI.IN


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CALLINO

Callino offers aesthetically appealing collections for men in casual, semi-formal, formal and party wear. Callino has created a perfect blend of silhouettes and colours along with innovation in designing to deliver personal style statements. The entire range of Callino's clothing is crafted to deliver excellence and exude timeless appeal.



Rising star

Callino received the IMAGES Most Admired Fashion Brand of the Year: Rising Star 2017 for registering a growth of over 100 percent over the previous year across its 114 point-of-sales. The brand started operations in October 2014 and by 2016 it had logged a reach of over 100 shop-in-shops. Its retail space also doubled over the previous year.

Product range

Callino offers men's clothing and accessories. The clothing range comprises shirts (₹1,299 to ₹1,999), trousers (₹1,599 to ₹2,199), waist coats (₹2,599 to ₹3,999), blazers (₹4,999 to ₹7,999), and suits (₹7,999 to ₹12,999). The brand also offers premium range in shirts (European collection ₹2,099 to ₹2,799) and blazers (wool blend ₹9,999 to ₹11,999). The accessories range include belts, ties, pocket squares and wallets, and their prices range up to ₹2,499.

Latest F/W collection

The latest Fall-Winter collection is all about new trends from the European market in affordable competitive price. The collection offers a wide range of checks in blazers and suits with an assortment of colours, patterns and weaves. Callino also introduced knitted blazers in its latest range.

Product speciality

The brand offers latest fit and cuts across all categories and has also introduced permanent crease in formal trousers. It

uses special washes and peach finish to give the fabrics a softer feel. Available in bold colours and playful prints, the shirt range offers the best in business and casual shirt. To cater to a wide range of buyers, it has introduced slim fitted shirts.

Production and design capabilities

Callino has a strong team of designers based in London who provide technological expertise and design input. Be it texture, design, trend, colour, fit or price, the brand assures the best combination in its products

New product launch

In order to capture a wider market share, the brand is planning to enhance its casual wear range. It would be launching a wide range of casual shirts and trousers. Demand for party wear is high, hence Callino has plans to increase the share of its party wear suits from this AW season.

Current network

In order to increase its presence in other regions, Callino is increasing its presence in MBOs through its robust distribution channel. At present, the brand has strong penetration in North India and has recently started exploring the markets of South, West and East India.

Retail expansion plans

Callino has plans to open at least 50 more shop-in-shops by the next season.

Turnover targetted

The brand is in its expansion phase, it aims to grow by at least 50 percent Y-o-Y.

Customisation

Callino offers customisation at some of its exclusive stores. However, it is not doing any customisation as of now because it has recently launched its suits collection at shop-in-shops at various retail outlets and they are receiving good response. The brand aims to resume these services soon.



BRAND UPDATE

- > Name of Company: **CALLINO INDIA PVT. LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **DELHI**
- > No. of EBOs: **6**
- > No. of SISs: **100**
- > Total Retail Space Occupied: **5,000 SQ.FT.**
- > Annual Turnover (FY 2016-17): **₹15 CRORES**
- > Brand website: **WWW.CALLINO.COM**

CASHMA SHAWLS

Cashma Shawls is a brand launched by Jain Shawls, that was incorporated in 1973 in Ludhiana, Punjab. Since the beginning, the company's products were synonymous with fashionable designs, shrink resistance, smooth texture and premium quality fabric. In 2007, the company launched Cashma, a premium shawls brand that offers an exquisite array of cashmere blends and embroideries. Within a very short span, the brand has successfully embossed its presence not only in the domestic market but also in the overseas markets of East Asia, Middle East and South East Asia.

BRAND UPDATE

- > Name of Company: **JAIN SHAWLS**
- > Country of Origin: **INDIA**
- > Headquarters: **LUDHIANA**
- > Total no of MBOs: **500 +**
- > Total no of LFS: **6**



Target audience

The brand targets women within the age bracket of 16 to 35 years who prefer bright colors and prints.

Product range & MRPs

Jain Shawls offer a wide variety of shawls, scarves, and stoles, in wool, silk, cashmere, modal, viscose and their intimate blends. The prices range from ₹500 to ₹4,000. The brand Cashma's price range starts from ₹1,500 and goes upto ₹20,000.

The latest collection

Keeping in view that ponchos, raparons, stolls are in demand this season, the brand has worked a lot on some of the new age prints to give a fresh fashion collection.

Strength in Pashmina

As an expert in Pashmina products, the brand always try and explore new embroideries which are a core to Pashmina products. The brand also has invested heavily on research and study of forecasting to give its customers unique products that are in sync with the latest trends.

Production and design capabilities

The brand is armed with a hi-tech infrastructure, which is equipped with requisite facilities to facilitate smooth work flow. The brand also has an expert in-house design team which is equipped with all new age machinery, right from knitting, processing to finishing. The brand's high class products are the direct consequence of its strict compliance with firm quality standards.

Distribution network

Cashma (Jain Shawls) has a team of 6 agents which supply its products across India. All these agents are experienced buiness establishments that are well aware of the regional preferences and distribute products in sync with it.



Export market

The relentless efforts of the brand's skilled marketing personnel have enabled it to develop a wide clientele across the globe. As of now, the brand is supplying to about 15 countries. Its export ratio is 70 percent compared to 30 percent in the domestic market.

Core markets

The brand retails through about 500+ retailers presently. It has established a strong presence in Punjab, Haryana, Uttar Pradesh, Bihar, Maharashtra, Karnataka, Rajasthan, Gujarat, Delhi, Bengaluru, Chennai and Mumbai.

Retail expansion plans

Currently, the brand wants to focus and increase its penetration in the existing market.

Success through online retail

After exhaustive research, Cashma has entered the online sphere recently and plans to aggressive explore it in the coming future. As of now, the brand is enjoying a good response from its online retail presence.



CELIO

Founded in 1985, Celio has become the leading men's ready-to-wear brand in Europe and many other parts of the world. The brand offers a wide selection of clothing and accessories for men created by its office of integrated style, thus responding to every desire and every moment of a man's life. In terms of pricing strategy, the brand has an accessible pricing with focus on good value.



BRAND UPDATE

- > Name of Company: **CELIO FUTURE FASHION PVT LTD**
- > Country of Brand Origin: **FRANCE**
- > Headquarter: **PARIS**
- > No. of EBOs: **36**
- > No. of SIS's: **165**
- > Total Retail Space Occupied: **95,000 SQ.FT.**
- > No. of MBOs : **25**
- > Brand website: **WWW.CELIO.IN**

Design Competence

Celio is all about effortless style and fashion because of its European roots. It provides a stylish alternative to today's discerning young male customers. The brand's products are urban, smart, elegant and very wearable. Each product has a distinct twist of fashion. "Fits & Quality" are strengths of the brand. The products are cleaner and have a style statement. This has helped the brand to garner a huge fan base. Over the years, it has increased both the width and depth in terms of winterwear offering. Over the last few years a portion of the consumers have been moving from value based purchasing to lifestyle based purchasing. In terms of fabrics, the brand closely works with its global teams to identify new trends in this segment and bring them to the Indian consumers.

Manufacturing competence

Celio in India manufactures nearly 70 percent of its volume requirements locally. The company has tied up with

some of the best vendors in India who are both Socially Accountable (SA8000 compliant) and Oeko compliant (no harmful substances used). The company also audits its vendors on an annual basis and ranks them through a rating system.

Latest product launch

In line with the global fashion themes, Celio has launched the Autumn-Winter '17 collection under six main themes namely, *California Surf, Retro, Back to Black, Design, Earthed* and *Smart*. The brand's winterwear products, specifically the sweat shirts range, use these themes as the underlying concept in their design philosophy.

Change in demand

Celio is witnessing a surge in stylish and trendy pieces in this segment. Also, products which make a fashion statement tend to do quite well in the urban areas. Apart from that, brighter tones and lightweight premium quality fabric are currently trending.



Consumption patterns: metros vs. non-metros

When it comes to product categories such as sweatshirts, the consumption depends on the weather and the season. Over the last few seasons, Celio saw increased saliency in non-metros for global fashion. Although metros form a majority of its sales today, it believes with rising number of 1 million+ cluster districts, the majority of the growth would come from non-metros in the next few years.

Marketing strategy

The entire marketing strategy is built on the interest areas and the media consumption habits of the primary customer base. In addition to leveraging mediums such as stores, print, out-of-home media, point-of-sale branding, etc., the digital medium has played a huge role in reaching out and engaging

with its target group. Celio also has its own loyalty program called the Celio Fantastic Program with a base of 4 lakhs+ members. A lot of marketing activities are undertaken on a targeted basis by crunching huge amounts of data to understand each customer. On the basis of data analytics, dynamic customer segments are created to identify various cross-sell and up-sell opportunities. In addition to these platforms press relations form an integral part of the marketing strategy. By constantly doing fashion events with the fashion media, bloggers and various celebrity stylists, Celio ensures a healthy top of mind recall among the influencer segment.

Retail expansion plans

In terms of retailing strategy, Celio covers all key markets such as Mumbai, Delhi, Chennai, Bengaluru, etc. It is currently present in 60 cities with 36 EBOs, 165 SISs and 25 MBOs and are additionally present in most major e-commerce channels such as Myntra, Jabong, Amazon, Flipkart, etc. Celio,

today has a total retail area of 95,000 sq.ft. It is planning an aggressive expansion strategy which would be a combination of deeper penetration in the current cities, where it is present and also entering new cities.

Cities with potential

The upcoming supply of retail spaces in 2018 is estimated to be around 16-20 msf and cities such as Pune, Hyderabad, etc., would form atleast 45 percent of the upcoming supply. These markets carry a lot of potential for growth and deeper penetration.

Online presence

With over 900 million mobile phone subscribers and 432 million internet users, India's e-commerce market is poised for growth in the coming years. The online shopping boom can be attributed to the tech-savvy, socially active, earning and shopping millennial generation. This audience enmeshes quite well with the brand's vision. In Celio, they strongly believe in merging online and offline spaces towards the next wave of growth which is omni-channel retailing. As an organisation, it is preparing themselves to be digitally ready.

Turnover growth aimed at

Celio is targeting double digit growth over the next few years to be amongst the top three men's wear brands in the country.



CORNELIANI

Tradition, quality and modernity - Corneliani stands out for its values of tradition and quality that together with its modern brand image makes it a landmark in men's elegance. Designed for the demanding, fashion-conscious man, it combines the most refined fabrics with the finest tailoring details into a lithe, graceful look. The brand has a long history of bringing innovations and new styles into men's wear segment.

Product range

The brand offer a wide range of products from ready-to-wear to made-to-measure, including accessories. The price range starts from ₹6,000 and goes upto ₹3 lakhs. The shirts range starts from ₹12,000, jackets from ₹70,000, suits from ₹98,000, trousers from ₹15,000, t-shirts from ₹8,000 and accessories start from ₹12,000 onwards.

Production speciality

The brand has a long history of bringing innovations and new styles into the men's wear segment. The focus is on the man who should feel comfortable and relaxed in his clothes, he should be unique, and he should care about details.

New product launch

The brand is known for its use of nano technology with innovative styles. The brand tailors designs which are compatible with all looks. Corneliani ID is known for its detachable chest piece that allows the wearer to flaunt himself in different styles.

Innovations in technology and production

With every passing year, Corneliani tries to offer products that are woven utilising latest technology, but in complete compliance with its history, and tradition. Nano technology, light weight, unlined suits and jackets are the milestones in this direction.

USP tuxedos

Tuxedos are a big hit during wedding seasons in India. The brand offers 4-5 variations in tuxedos in the current collection. The entire collection features magnificent proportions and shades of pure elegance, epitomised by pared down lines and perfect structures. The impeccable designs are a hit with every man who knows his true worth and style.

Festive collection

At Corneliani, crafted bandhgalas and Jawahar jackets are the latest for the festive season which features a blend of Italian construction. The collection offers changes in terms of colour and fabric with Indian styles and bright colours which get a very high response.

Marketing strategy

The brand's market is still in a growing stage and hence it concentrates on strategic marketing plans and the right mix of promotional activities such as discounts, pop-up shops, trunk shows, mailers, campaigns and more. The brand's focussed marketing strategy has been successful in establishing it as a renowned luxury brand in India.

International markets

Corneliani needs no introduction when it comes to brand acceptance in international market. With its glorious history, Corneliani is a well established name in the global men's luxury wear fashion industry.

Retail expansion plans

Presently, the brand is testing waters

BRAND UPDATE

- > Name of Company: **OSL LUXURY COLLECTIONS PVT. LTD.**
- > Country of Origin: **ITALY**
- > Headquarter: **MILAN**
- > No. of EBOs: **2 (DELHI & BANGALORE)**
- > Brand website: **WWW.CORNELIANI.COM**

in potential cities like Chennai, Hyderabad, Chandigarh and Pune.

Turnover growth targetted

The brand is growing at a steady pace and it aims at a growth rate of 12-15 percent in the future.

Customisation

Made-to-measure is another limited edition specialised service that is offered by the brand. Through this Corneliani gives the ultimate experience in sophisticated men's wear for clients who demand the very best. It has been offering this exclusive service to its esteemed clients for quite a few years now and this has definitely proved an asset.





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Courtyard is a renowned casual lifestyle brand. It was launched in 2015 by Artex Creation. Started as a men's denim wear brand, Courtyard offers innovative, provocative and cutting edge fashion that reflects in its unique fits and washes, giving the brand a level of credibility. What makes them different from other denim manufacturers is the fact that there's absolutely no compromise when it comes to fabric and colour, and the different styles ensure that the pair of denims feel comfortable and confident to wear.

BRAND UPDATE

- > Name of Company: **ARTEX CREATION**
- > Country of Origin: **INDIA**
- > Headquarter: **KOLKATA**
- > No. of EBOs: **1**
- > No. of SISs: **3**
- > No. of MBOs: **350+**
- > Brand website: **WWW.COURTYARDJEANS.COM**

COURTYARD

Product range

The product range includes suits, blazers, Modi jackets, jeans, trousers, chinos and formal pants. Although the brand's products feature better fabrics and finishes, the brand keeps its pricing with keen sensitivity towards cost effectiveness.

Production and design capabilities

Courtyard produces approximately 180-200 suits per month. At Courtyard design studio, one would find the perfect fusion of fashion and technology, carefully executed by the finest designers. Their effort has always been to provide trendy collections and create designs that help young adults and teenagers express themselves.

New product launch

The brand has plans to introduce its kidswear brand, Courtyard Junior in Spring-Summer 2018. The sub-brand would cater to teenagers in the age group of 12 years to 16 years. Initially, the product range would be jeans followed by chinos and formals.

Considering the demand for after hours wear, Courtyard is focusing on formal suits that can be worn for corporate meetings and also be used worn in parties, marriages, etc. The brand has applied a small ¼" piping of satin on suits to enhance its usability.

Fabrics

Courtyard is using wollen mix, linen mix with other filaments in the making of its suits. The fabrics are being bought from the finest mills and then they are fused with other fabrics to give a firm look to the suits.

Distribution network

Courtyard is being retailed and distributed through a network of agents,

distributors, 350+ multi-brand retailers and online market places.

Core markets

Though it is a national brand being available across the country, it is strong in the eastern region especially in West Bengal, Odisha and Bihar.

Retail expansion plans

Courtyard is coming up with its first exclusive brand outlet in Howrah (West Bengal) at Raghav Plaza. The brand has plans to open 3 more EBOs by 2018-19. Also, it looks forward to increase its MBO count to 500+ units, and tie up with more LFSs by 2018-19.

Presence online

The brand is gradually expand its online presence. It has its own e-commerce website and is also present on various other portals.

Turnover growth targetted

Courtyard is aiming to double its current financial growth by the next year.

Tuxedos in India

Tuxedos are gaining importance now a days. Tuxedos and blazers are the latest range that Courtyard is offering this season. Made in jacquard fabric, the tuxedo range is available in black colour as of now. The brand plans to soon introduce a new range in a variety of color options.

Customisation in the suits

As the saying goes, "clothes maketh the man", the brand upon evaluating the market has followed the concept of "make-to-measure". The custom made suits are tailored to meet the needs and desires of its customers are getting a good response.



DOLLAR ULTRA THERMALS

The leading innerwear company of India, Dollar has been manufacturing thermal wear since its beginning in 1996. The company introduced the most stylish designer range of thermals this year under its Dollar Ultra Thermals range. Made from amino silicon that gives excellent elastic properties, exceptional softness and silky finish to the thermals, that are also capable of withstanding repeated washing cycles. These are ultra luxurious thermals with superior fit and comfort.

Product range

Dollar offers thermals range under four brands. Dollar Ultra Magic is made with modern style and is fit for all day comfort. Dollar Ultra Thermal is made from 100 percent super comb siro clean cotton yarn which guarantees to provide warmth and comfort. Dollar Esteem is specially designed to keep the wearer warm and comfortable even in extreme winter weather. Dollar Wintercare is another warm and comfortable product for severe chilly weather. Available in v-neck, round neck, full and half sleeves for men and full sleeve and sleeveless for women, these thermals are priced between ₹300 to ₹375. Meanwhile, Dollar Ultra Thermals with its wide range of products is one of their fastest selling products that is priced between ₹380 to ₹500.

Innovations

Dollar believes in the saying, “innovate or die” by Dr. Robert Hogan. Innovation is concurrent with their business development. Having a fully integrated production unit well equipped with newfangled machinery and manpower, Dollar has been incessantly improving its product range.

New developments

Thermals mostly comes under the basic winterwear segment. Dollar has been experimenting with colours, fits and styles to give a fashion product to its fashion aspiring consumers.

Change in consumer demand

With increasing exposure to global trends, consumers today have become more brand aspiring and fashion conscious. In innerwear, consumers are highly price sensitive, hence domestic brands like Dollar offer value-based trendy products.

Consumption patterns: metros vs. non-metros

The consumption pattern varies by the product category. Since Dollar Ultra Thermal is a premium product, it is more popular in metro cities whereas, Dollar Winter Care is popular among the non-metro towns.

Retail presence

Ultra thermals enjoy massive goodwill among the customers in India. The brand's products are available in over 800 cities and towns across 26 states in India. Additionally, the brand also has its own online retail platform.

Retail expansion plans

The company always keeps its eyes open for new opportunities and tries to expand to new markets to introduce their products to everyone. North India is a key market for thermal wear, hence the brand has been focusing on increasing its penetration in the North markets. Dollar aspires to make its products available in every city of India.



BRAND UPDATE

- > Name of Company: **DOLLAR INDUSTRIES LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **KOLKATA**
- > No. of MBOs: **1,00,000**
- > Annual Turnover (FY 2016-17): **₹906 CRORES**
- > Brand website: **WWW.DOLLARGLOBAL.IN**

Serving the rural belt

With new sale channels and branding strategies, Dollar is assertively tapping the huge and unexplored rural market of India.

Online presence

Dollar launched its e-commerce retailing section (www.dollarshoppe.in) three years ago and has increased its availability on online retailers in the country. About 2 percent of its total sales come from e-retailing.

Turnover and growth targeted

The annual turnover of Dollar in FY 2016-17 stood at ₹906 crores compared to ₹830 crores in FY 2015-16. Dollar is expecting a healthy growth of 15 to 20 percent per year for a period of 5 years.





DUKE

Ludhiana based Duke Fashions (India) Ltd., is acknowledged as one of the undisputed leaders in the knit wear industry. The company's values are based on its authentic fashion understanding, and heritage dating back to the launch of the brand in 1966. Duke offers full ranges of clothing for men, women, and kids. Duke is taking on the challenge and opportunity to turn itself into a global brand in the near future.

Competence in sweaters

Customers today are demanding customized products according to their own taste, likes and fittings. In line with this, Duke has introduced new color tones and designs in its sweaters range to keep up with their expectations. It also has developed multiple designs in sweaters by using innovative fabrics and the trendiest of colors.

Apparel range

Duke is now providing an endless range of products which include, t-shirts, jackets, sweaters, sweatshirts, tracksuits, thermals, jogging suits, shirts, denims, trousers, lowers, bermudas, shorts, value packs, lounge wears, along with a wide variety of accessories for men, women and kids. The entire Duke collection is priced attractively from ₹599 onwards.

Latest innovations

Light weight sweaters, quilted interlocks and fancy jacquards are new innovations by Duke for the forthcoming season. Functionality and fashion both equally contribute to the product and complement each other. This year the brand would be promoting a theme Viva Las-Vegas Winter Fashion.

New colour innovation

Duke has launched its new jackets and sweatshirts in neon, bright and contemporary colours as per customers' demand and new trends in markets. With comprehensive designer training, the company builds reputable and durable clothing designed for all ages.

Infrastructure

Duke utilises the latest technologies and the most talented quality assurance team to achieve impeccable synergy. Its in house knitting, dyeing, mercerizing, finishing, compacting, garment printing, embroidery, printing and manufacturing facilities feature state-of-the-art machineries and equipment supplied by world class Juki, Fuku Hara, Pegasus, Yamato, Brother, Barudan, Stefab, Ramsons and others. The embroidery section is fully computerised. By using high quality fabrics and the best pattern technology the brand is able to deliver stunning fashion at affordable prices.

The knitting division is fully equipped to make single jersey, double jersey, auto stripes for ribs, fleece, velour, feeder stripes, terry and computer jacquards in diverse gauges, The fabric choice ranges from 100 percent cotton to techno-blends with polyester, acrylic, linen, polymix, lyocell, viscose, modal spandex, nylons blend, cotton's coated fabrics, rayon

The design studio of the company is well laced with expert professionals and latest softwares. At the beginning of each season, its design team carries out extensive research-based forecasting to ensure that the brand stays at the pinnacle of contemporary fashion.

Footwear expansion plans

Duke has launched its range of premium lifestyle footwear collection called Step Ahead. The collection is specially designed and crafted for



lifestyle, casual, moccasins, high ankle, joggers and more.

Retail expansion plans

The brand is expanding itself into different segments and in the e-commerce business where it is expecting high growth in coming years. The brand is looking for extension or expansion in new markets and diversification in ladies and kids wear. The brand is also looking towards expanding into untapped cities and in export markets of the Gulf countries.

Potential markets

The untapped markets in India are the rural markets. A lot of potential lies in unexplored rural areas and also from institutional sales. The brand these target rural markets as they give good returns.

Online presence

Currently the brand is working with major e-portals of India like Flipkart, Amazon, Snapdeal, Myntra, Jabong, Limeroad, Paytm and others. To expand its online business, the brand has started its own online shopping portal www.dukeindia.com. It offers free delivery and online payment support along with cash on delivery services.

Pricing policy

The brand believes in an accessible pricing policy. But with rising costs, the brand is also increasing the prices of its products, which, in general, is in sync with market norms.

Turnover growth aimed at

Duke is aiming at ₹500 crores turnover in the next coming years.



BRAND UPDATE

- > Name of Company: **DUKE FASHIONS (INDIA) LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **LUDHIANA**
- > Total No. of EBOs: **360 +**
- > Total No. of SISs: **50 +**
- > Total No. of MBOs: **4,000 +**
- > Total No. of LFSs: **200 +**
- > Annual Turnover (FY 2016-17): **₹285 CRORES**
- > Brand website: **WWW.DUKEINDIA.COM**

utmost comfort style and durability and perfectly epitomises the brand in its style, aesthetic and production. Every detail of the shoe is carefully produced with the care of Italian craftsmanship.

The brand plans to expand its product range. The expansion will create a centralised, multi-product engine for wholesale and retail distribution, supporting Duke's long-term business growth in India. The footwear range of Duke features a variety of sports,

GAP

Gap Inc., was started by Donald Fisher and his wife Doris Fisher in 1969 in San Francisco (USA). Fisher was fascinated by the idea of selling apparel in chain stores to attract the young generation of consumers who were looking to buy cheap, comfortable and durable attire like jeans. The USP of Gap was that they had limited products but catered to all sizes, shapes and colours. In India, Gap was introduced by Arvind Lifestyle Brands through a franchise agreement and the first store opened in Delhi in May 2015. Gap currently has 11 stores across Delhi-NCR, Mumbai, Bengaluru, Pune, Chennai and Indore and retails through the brand's official omnichannel www.gap.nnnow.com and exclusively through amazon.in/gap.

Latest jackets collection

The Fall 2017 collection for men is focused on the performance collection which fuses style and fit of every day favourites with performance technology, like puffer jackets. Apart from the performance collection, the rugged motor-cross range introduces indestructible denim. This is one tough jacket that can take a beating. At 100 percent tear resistance, and 400 percent stronger than regular denim, this product is up for any challenge, but is comfortable enough for everyday adventures.

Most popular jacket

The classic denim jacket is something that has remained a favourite through generations. A bomber jacket is also currently one of the most preferred in this segment.

Top fabrics

The brand's top fabrics are cotton and Tencel.

India specific collections

Gap has created an exclusive line of products for the India market, which are unique to this market. It piloted some of these products with great success in Fall 2017 and customers can expect more products with exclusive designs in Spring 2018 and Summer 2018.

Demand of denims

According to Gap, the demand for denim has only grown within the Indian market. This is driven by the global sentiment of denim being an acceptable piece of clothing in offices, or desk to dinner dressing. One can always dress up or dress down their style with denim. The brand has also seen the denim market explode across the kids and baby division where parents are increasingly comfortable with putting their children into jeans, thanks to the product innovations. Gap's 'Super Denim', which is extra soft, with stretchy waist bands, is one such example of product that does well for them.

Retail network & reach

Gap is being retailed through its own stores and online businesses. The brand is looking at expanding to tier-II markets through a series of stores, and shop-in-shop formats in the next few years. Even before it launched the omnichannel site, it had customers across the country writing in and asking them about the online deliveries. It had a latent, untapped demand for Gap in the online shopping segment which it was able to meet through its omni-channel site which services approximately 19,000 post codes across the country, and through its exclusive partnership with Amazon. Gap's online business has been very successful, owing in a huge part to the existing demand for a brand as iconic as Gap.



Untapped markets in India

The appetite for the branded market is no longer relegated to a singular market. With the growing comfort customers have with shopping online, Gap's focus is more on reaching to their customers wherever they might be, for example if a customer is in Coimbatore, or Vizag, or Cherrapunji, their omnichannel store helps them meet that customer rather than being focused on the potential of one geography.



BRAND UPDATE

- > Name of Company: **GAP INDIA**
- > Country of Brand Origin: **USA**
- > Headquarter: **BENGALURU**
- > No. of EBOs: **11**
- > Brand website: **THE BRAND IS AVAILABLE ON WWW.GAP.NNNOW.COM AND THE BRAND'S WEBSITE IN INDIA IS WWW.GAP.IN**



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

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HILLMAN

Based out of West Bengal, Hillman is a part of Hillman Hosiery Mills Pvt Ltd., and is among the the oldest and most prominent names in the domain of winterwear. The brand has, over the years, gained a significant following owing to their commitment to quality and customer service. From thermals to sweat shirts, the brand's product basket features a wide array of designs and styles that are visually appealing, contemporary, and are in line with the latest trends.

Product categories

The brand offers three core categories — winterwear, formal wear and innerwear, but it is its range of winterwear that has established the brand as a major player in its domain. Hillman's winterwear range encompasses two brands — Chasmere and Quilt that feature a wide range of options in cottswool and thermals respectively. The entire range comes in an array of contemporary color combinations, and different styles in neck and sleeve. Also, a unique feature of the brand is that it produces two qualities - general and premium so that its clients can have the freedom of choosing products in line with their budget.

Product expansion

As a contemporary brand Hillman strives to keep up with the demand of its clientele. In accordance, the brand has launched a new collection of sweat shirts for kids, recently. Although conceptualised as a trial launch to gauge the response of the market, the entire line has been meet with overwhelming response.

Infrastructure

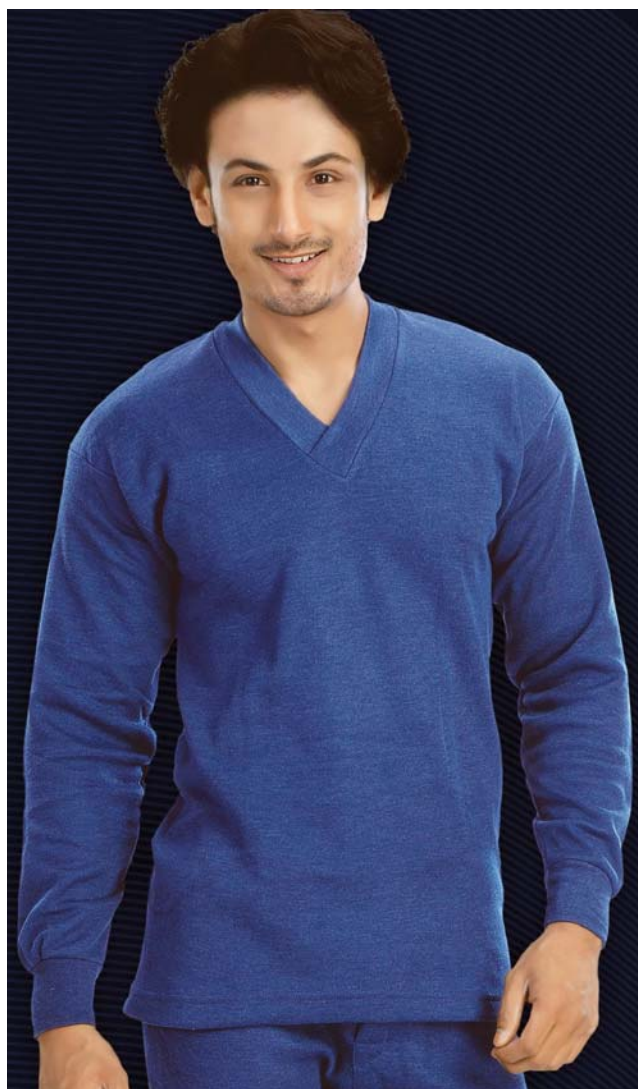
Hillman is armed with a robust manufacturing set up that features a perfect blend of both man and machines. The brand's manufacturing unit is equipped with cutting edge machinery that ensures that each and every step of the manufacturing process is executed seamlessly without any room for errors. Hillman also boasts of a talented pool of designers that study the latest trends to ensure that the brand's offerings comply to international standards.

Consumption pattern: metros vs non metros

A major chunk of the brand's produce is consumed by the non metros. Ratio wise, the brand's consumption statistics stands at 1:3 between metros and non metros.

Ratio of sales — domestic to exports

As of now, Hillman enjoys a stronger presence in the domestic market. The ratio of sales in terms of domestic to exports is around 2:1.



BRAND UPDATE

- > Name of Company: **HILLMAN HOISERY MILLS PVT. LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **KOLKATA**

Core domestic markets

The brand has a prominent presence in the North West, including the sates of Delhi, Rajasthan, UP, Haryana, and Jammu and Kashmir.

Retail expansion plans

Hillman already has a good network and will look at strengthening its present markets with newer products and innovations. Apart from that, the brand is also keen on exploring new territories especially Maharashtra and the North Eastern states. The brand also wants to expand its retail footprint with more focus on the younger generation.

Turnover growth aimed at

The brand is aiming to achieve a a growth of 8 to 10 percent.





JACK & JONES

The journey of Jack & Jones began in 1990 when Bestseller first sold this carefully crafted collection at a fashion fair in Oslo (Norway). Targeted at young men, the response at the fair exceeded all expectations and the iconic men's wear brand was born. Today, Jack & Jones is one of Europe's leading producers of men's wear. It has more than one thousand stores in 38 countries and its clothes are sold by thousands of wholesale partners all over the world. The brand entered India in 2008 and is currently present in more than 70 cities in the brick-and-mortar format. It is also sold throughout the country via e-commerce.

Product range

Jack & Jones has a diverse product range which caters to the needs of its young and rebellious target audience. While the focus has always been on denims, the brand also has a vast range of pop culture inspired accessories, shirt, t-shirt, pants, shorts, trousers, winter wear and inner wear.

Latest in jackets

Jack & Jones is offering a mix of cool, classic and extremely versatile jackets that aim to meet all diverse fashion preferences. It has experimented with details, prints and colours that elevate the jacket game. From gothic moth prints to floral free-spirited details, geometric patterns to reflective panels, the Autumn/Winter '17 jackets are extremely persuasive.

Focus on innovation

Fashion at Jack & Jones is constantly evolving as per the tastes and preferences of consumers. Being an international brand, trends at Jack & Jones are always at par with global standards. For SS-17, the brand offered an array of distinctively styled varsity, bomber and trucker jackets. Whereas for the winter collection, focus is on functionality, and hence the brand is offering a range of highly durable parka and leather jackets.

Top fabrics

Jack & Jones works with fabrics that complement every season. The brand always aims to offer clothes that are highly functional, comfortable and easy to maintain. Fabrics that it plays with include a blend of cotton and polyester,



BRAND UPDATE

- > Name of Company: **BESTSELLER INDIA**
- > Country of Brand Origin: **DENMARK**
- > EBOs: **66**
- > No. of SISs: **271**
- > Total Retail Space Occupied: **2,00,432 SQ.FT.**
- > Brand website: **WWW.JACKJONES.IN**

satin, nylon, suede and leather. However, the brand's core product is denim. It has a myriad acid and enzyme wash treatments and laser technology. It also introduced earth tints with extensive mud wash that satiates the rising need of ruggedness.

Production and design capabilities

Jack & Jones continues to strive for an elevated level of expertise when it comes to the craftsmanship, quality and design of jeans. The brand is nowadays defined and represented by five unique brands — Jack & Jones Vintage Clothing, Premium by Jack & Jones, Originals by Jack & Jones, Core by Jack & Jones and Jack & Jones Tech. The brands are designed by independent design teams, each one of them with their own ideas, concepts and designs.

They all offer a full range of clothes, accessories and footwear for every man and every occasion.

Latest collections

The brand is gearing up to introduce its Spring-Summer '18 collection. Amidst the changing fashion trends and preferences, it aims to evolve while staying true to its pillars viz., Core, Originals, Vintage, Tech and Premium. Through each of these verticals Jack & Jones offers a unique ethos which is translated into contemporary styles

and designs, that cater to the varied yet discerning taste of the modern man.

Change in demand

With brands, which are present both in online and offline, there has been a significant improvement in customer accessibility. Consumers can easily view and compare branded products and prices thereby increasing awareness and demand.

Retail presence

Jack & Jones is present in more than 70 locations in the country with 66 EBOs and 271 SISs. It is also present with major online partners. It has a dedicated website for online sales.

International presence

Jack & Jones is one of Europe's leading producers of men's wear with more than one thousand stores in 38 countries.

Retail expansion plans

Jack & Jones continues to explore ways in which they can be accessible to consumers in tier -II and -III markets as well as explore more partnerships with e-commerce portals.

Tier -II and -III cities across the country have a lot of market potential for the brand. Infrastructural development plays a major role to boost retail business in these locations.

Online presence

The brand is present with all major online partners. It also has its own dedicated website to aid e-commerce activity. It's online business has been extremely encouraging with significant growth in sales every quarter.



JUELLE

Juelle is a ladies wear casual young brand started in 2009 by Juelle Retail Pvt Ltd. Juelle is basically a French feminine name very exciting and pleasing to hear. The target audience is the young women between age group of 15-35. The basic reason and idea behind starting this brand has that the market was shifting at that time from traditional to western wear, so there was potential for such casual wear brands to mark their presence.

Product range

Juelle is a value for money brand that offers high end casual, modern urban chic fashion at affordable prices. The collection comprises bright colour sweatshirts, jackets, coats, pre-winter sweaters and woollen tops. Summer collection includes fashionable cotton jersey and lycra tops, tunics, shrugs and lounge wear. The price range varies from ₹545 to ₹1,395 in summer and ₹795 to ₹4,995 in winter. The brand's fastest selling products are dresses as well as sweatshirts ranging from ₹895 to ₹2,495. Within them, the most preferred price range is ₹895 to ₹1,795 of sweaters and sweatshirts, which is its core product line.

The latest in sweaters and sweatshirts

The brand is using fashion blends, new fancy yarns and lurex based knits in addition to jacquards this season. Embroidery sweaters and sweatshirts are big fashion statements this season too.

New launches

Juelle has launched an exclusive range of pre-winter fashion knitted tops this season and the same is getting warm response in retail.

Colours & innovations

The brand's young women's category survives and grows on the use of new, bright and experimental colours every season. The brand is very open to experimenting with these new mix and matches.

Marketing network

Juelle has a mix of agent based marketing and distributors network state wise.

Retail presence and expansion plans

Right now the brand is present pan India, covering all major cities. Hence, the brand is not planning to expand in terms of number of MBOs but in terms of product mix – by introducing new varieties, new categories, lounge wear, light track suits, light fashion jackets, dresses and gowns, so that its share within the MBOs increases and the product profile gets bigger.

Current turnover and growth targets

Last year the brand had touched around ₹45 crores and is now looking at sustaining at least 10 to 15 percent growth in the next few years. This is because it is increasing its product base, categories and is working more into the collection.

Drivers of winter fashion right now

With the changing social setup, the demand of evening wear, party wear is increasing day by day. The influence of western culture, increase in disposable income and change in perception of people towards life, has increased the demand of designer clothing.

Consumption patterns: metros vs. non metros

The brand feels that more there is more growth in non-metros because metros are kind of a saturated market. Moreover,



the retail spread of international and iconic brands are hitherto sparse in non metros. This creates tremendous potential for young domestic brands like Juelle. So non-metros are a more growth oriented markets as they are more rewarding by way of brand acceptability and volume generation as compared to the metro cities.

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BRAND UPDATE

- > Name of Company: **JUELLE RETAIL PVT.LTD**
- > Country of Origin: **INDIA**
- > Headquarters: **LUDHIANA**
- > No. of MBOs: **1800-2000**
- Annual Turnover (FY 2016-17): **₹40 CRORES**
- > Brand website: **WWW.JUELLE.IN**

LURE

Incepted in the year 1987 at Ludhiana, Lure is a part of Sears Knit, a leading manufacturer and supplier of an exclusive range of jackets and coats. A brand known for its ethical business practices and pro-client policies, Lure's products are highly demanded in the market for their exclusive style, superior fabrics and unique designs. The brand is backed by a state-of-the-art infrastructure facility that is segregated into various units like fabrication unit, quality control unit, warehousing and packaging unit to facilitate seamless operations. The brand is also backed by a pool of talented personnel that work in close coordination with its valuable clients in order to understand their specific requirements.

Jacket range

The brand offers a wide range of jackets for men, women and kids. Its product basket encompasses a wide range of cotton jackets, polyester jackets, nylon jackets, sherpa lining jacket, twill jacket, hard winter jacket, pre winter jackets, etc.

The men's range is priced at ₹2,995 to ₹4,995, while the women range starts from ₹2,495 and goes upto ₹3,995. The kids' range starts at ₹1,495 to ₹2,495.

Top fabrics

Lure uses a wide variety of fabrics that are hand picked from across the world. The main fabrics that it uses are artificial leather, cotton blends and some innovative new nylon fabrics.

Production and design capabilities

The brand has a sound infrastructure equipped with the modern machines and experienced human resource. It adheres to international trends and



design standards to come up with products that are unmatched in terms of quality and reliability.

Product expansion plans

The brand is planning to launch rain wear by the next season.

Distribution network and core markets

The brand deals mostly through agents. Currently, it has a network of 12 agents supplying pan India. The brand has a strong presence in the markets of the North Eastern states, J&K and Southern India.

Retail expansion plans

Lure already has a strong market throughout the country, especially the territories which are impacted by winters. Hence, it aims to focus on its existing markets and strengthen its presence more.

Turnover growth targetted

Lure is anticipating a growth of around 10 to 15 percent year on year.



BRAND UPDATE

- > Name of Company: SEARS KNIT
- > Country of Origin: INDIA
- > Headquarter: LUDHIANA
- > Total No. of MBOs: 400 +
- > Presence in LFS: GLOBUS
- > Brand website: WWW.LUREJACKET.IN

LUX INFERNO, COTT'S WOOL & ONN

Lux is a renowned Indian company and an enduring brand in the hosiery market. The company has over 60 years of experience and has created pan Indian presence over the years. Today, it is the undisputed leader in the hosiery segment, best known for its innovative and consumer driven product offerings. Its core consumers are value discerning consumers who believe in paying for the quality offered.

Thermal range

The Lux range of thermal wears comes in two different styles – Lux Inferno and Lux Cott's Wool. Made from fine fabric, the thermal range offer snug fittings and stylish colours, which has made it the consumers' hot favourite for years. Available in pocket friendly prices, both the ranges offer great comfort and warmth. Lux also offer finest quality products like Onn Thermals and Onn Woolen under its premium innerwear and casualwear brand. Onn introduced by Lux has evolved in accordance with the change in fashion industry and offers great style and comfort to meet with the expectations of the potential buyers.

Innovations

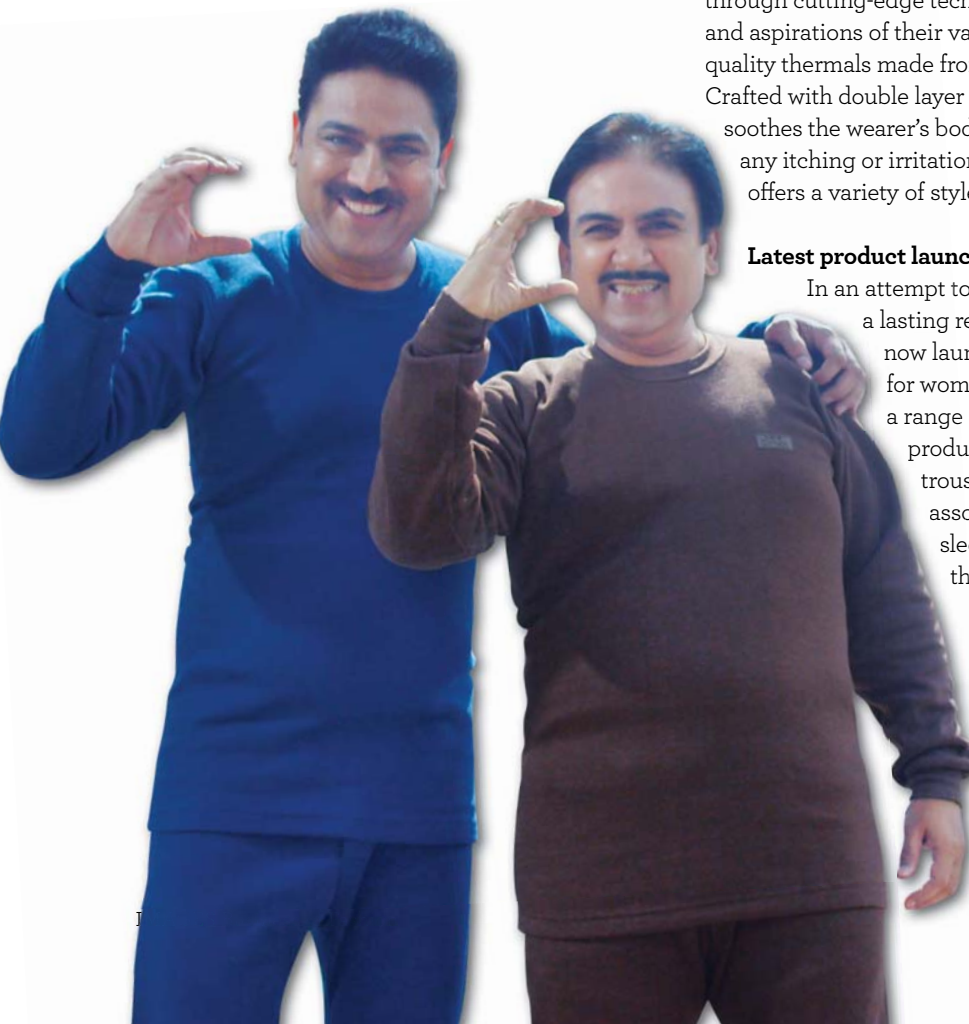
At Lux, they have laid great emphasis on research and innovation through cutting-edge technologies to meet the growing demands and aspirations of their valued customers. Lux Inferno offers superior quality thermals made from brushed fabric which retains body heat. Crafted with double layer knit and warmth retaining fabric, Lux Inferno soothes the wearer's body and gives an amazing experience without any itching or irritation. Available in both round and v-neck line, it offers a variety of style and colour options for both the genders.

Latest product launch

In an attempt to consolidate its market position and develop a lasting relationship with its loyal customers, Onn is now launching a new range of thermal winterwear for women and kids. Onn, which had been offering a range of fashionable winterwear for men with products like half-sleeves, full-sleeves, top and trouser in their thermal range is now foraying into assorted winter garments with round neck 3/4th sleeve tops, round neck full sleeve tops and thermal trousers for women and kids.

Change in demand

Psychographic segmentation of tier -II and -III cities has shown the changing and evolving nature of lifestyle bringing in a sea change in the Indian winterwear



industry. Consumers now demand thermal wear which are body hugging, light and soft to skin so that one can feel cozy and calm even during the chilly temperature.

Consumption patterns: in metros vs. non-metros

Changes in climate and region give variation in selection of winterwear products. Availability of Lux in different types of thermal wears brands enable consumers to choose according to their region and choices. As per the current scenario, Lux Inferno and Onn thermals are mostly preferred in metro cities for qualities like fuzz free, light weight and are available in dark colours. People in small towns and non-metro cities still favour the stone-washed Lux Cott's Wool to protect themselves from cold weather.

Sales: domestic vs. exports

All thermal ranges, especially Lux Cott's Wool and Lux Inferno are also appreciated in the foreign markets. With regular product quality enhancement and improvisation in the promotional

activities, Lux is now planning to penetrate deeper into the existing markets and expanding worldwide.

Retail presence

Like all its products, the demand for Lux thermal range is quite high in the country specially in those areas, where the effect of the season is most felt. The pan India distribution network of Lux industries has helped the brand to reach out to the people very easily even in remote areas of the country.

Retail expansion plans

Lux has cemented its place in the Indian markets and to maintain the image of a trustworthy brand, it has aggressively invested in the distribution network to penetrate deeper into the unexplored market and seek new opportunities especially in South India.

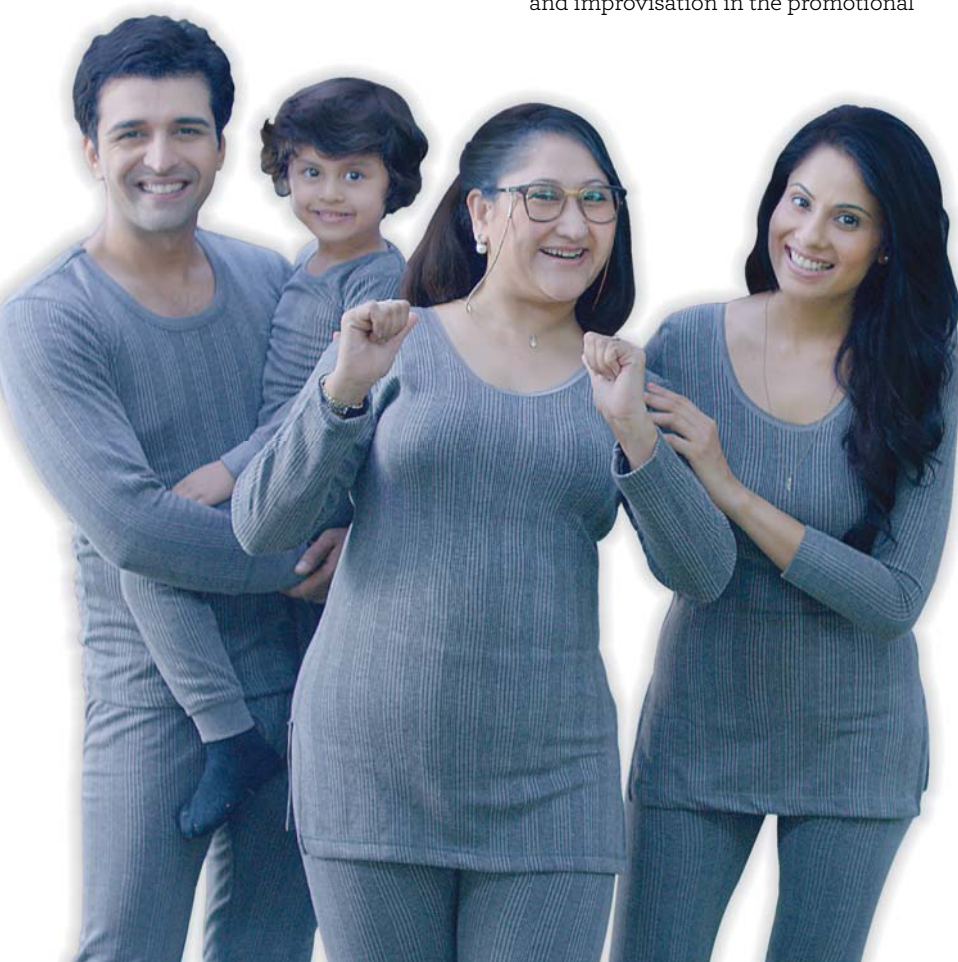
Online presence

With changing times, Lux realised the importance of online retailing and how it has become the "most impactful" medium to connect with the Generation-Y. Through online retailing, both Lux Inferno and Lux Cott's Wool have developed a powerful tool to reach out to their target audience with their presence in all major online shopping portals comprising Flipkart, Amazon, Snapdeal, etc.

Turnover growth targetted

In the last few years, the company's thermal range has been highly appreciated and accepted among the consumers. Going strong in the market and with a new launch under Onn thermals, this year the brand expects a growth of around 25 to 30 percent in the segment.

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MADAME

Madame provides fast, affordable fashion for women, men, teens and kids. The brand is known for the vast variety, latest styles and fast turnaround of its new collections. Globally, Madame is positioned as a mid-market fast fashion brand, however in India Madame targets the upper middle class positioning itself as bridge-to-premium brand. The brand intends to build a portfolio of products and international labels that earn admiration from the customer for the design and quality. Presented through eight labels, the products are sold in over 2,000 stores across three continents. The three premier brands – Madame, NY Citi and Madame also have 150+ EBO's in three markets internationally.

Product range

This season, Madame would offer a line of bomber jackets for women in its collection. The brand offers a wide range in women's wear from summer tops to dresses to winter clothes. The brand's style statement for the coming season is military outerwear, and elements like eyelets detailing, colour blocking, embroidery, etc.

Consumption patterns: metros vs. non-metros

The competition is getting interesting, with new entries from cross border in premium and commercial labels. Customers are spoilt for choices with a wide range of cutting edge fashion and better priced products. Quality of the merchandise is a major concern for Indian customers and brands like Madame are efficiently equipped to meet the increasing competition by maintaining quality, matching price points and fashion forecasting in metros as well as in tier -II and -III cities.

Competition from international brands

Madame plays a significant role by providing women's wear at affordable prices. With the arrival of international brands there has been a definite change in the scenario as the brand attempts to give the same taste to its consumers as the international brands. It constantly

has to keep track of the latest trends from fabrics to design development to silhouettes.

Retail expansion plans

Madame is a retail-focused brand aiming at aggressive expansion. The brand intends to give better look, customer service experience and ambience to its customers. In addition, it is working on international retail parameters. It is in talks with business partners to expand into the US, Canada, etc.

Market potential

For the brand, metros cities are raising fashion benchmarking while tier -II and -III cities, with their huge market size are significant for strategic business penetration. The brand is growing in a balanced ratio at both the market segments. Acceptability rate in tier -II and -III cities is faster and it has been successful in attaining a breakthrough in these market over non-branded players.

Online presence

Today, much of the business is coming from small towns. The brand's e-commerce is increasingly attracting customers from tier -II and -III cities, where people have limited access to brands but have high aspirations. These cities have seen a 30 to 50 percent rise in transactions. With new concepts such sale on weekends, holidays and festivals, the brand is attracting a lot of new customers and building customer loyalty.



BRAND UPDATE

- > Name of Company: **JAIN AMAR CLOTHING PVT. LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **LUDHIANA**
- > No. of EBOs: **150**
- > No. of SISs: **75**
- > Total Retail Space Occupied: **1,47,000 SQ.FT. (EBO), 28,000 (SIS) EXCLUDING MBO**
- > No. of MBOs: **2,000+**
- > No. of LFS: **62**
- > Brand website: **WWW.MADAMEONLINE.COM**

Turnover growth targetted

Madame aims to double its sales with a growth rate of 22 percent by 2018 and on the basis of new stores, presence in large format stores, innovative product offerings and increase in online sales in different market places.

MONTE CARLO

Monte Carlo was formally launched in 1984 through MBO's. The main products were woollen pullovers and jackets but in 1999 the brand launched men's t-shirts. Today, Monte Carlo holds the numero uno position in t-shirts and sweaters in India. In 2003, the brand took a step ahead and started its exclusive brand outlets, the store count of which has clocked 237 as on date. Monte Carlo is today considered as a complete apparel brand offering full ranges in men's, women's and kidswear.

Brand USP and strength

Monte Carlo has always catered to the fashion quotient and has consistently innovated and maintained its leadership position. Targeted at the middle class segment, the brand's USP lies in its superior quality and value for money products.

Product range

The brand offers a wide range of shirts (₹1,499-₹2,549), denims (₹1,699-₹2,999), trousers (₹1,199-₹2,360), t-shirts (₹895-₹1,899), sweat shirts (₹1,190-₹2,349), sweaters (₹1,499-₹4,500), jackets (₹2,500-₹3,999), shawls (₹849-₹25,000) and track suits (₹2,100-₹2,579).

Latest in sweaters

The brand is aware of the increasing demand of light weight sweaters and has developed a substantial range of light weight sweaters. It also has created a premium line of fine gauge light weight sweaters in Platine.

Colors innovations

Monte Carlo is innovating with new colors on a continuous basis and offering new fashion colors every season.



Retail expansion plans

Currently, the brand is planning to open new stores in North India. It is also in the process of exploring the western and southern parts of India.

Potential markets

According to the brand, the western and the southern parts of India, which have been hitherto untapped by the brand, have immense potential which it plans to explore soon.

Online presence

Monte Carlo retails through its own portal www.montecarlo.in. The brand

is also present in leading portals like Flipkart, Jabong, Paytm, Amazon, Myntra and growing 50 percent per annum.

Pricing policy

Monte Carlo believes in price sensitivity, but rising costs, especially of yarn, do have an effect on pricing. Monte Carlo has partially absorbed the excess cost in its pricing and have increased prices partially.

Turnover growth targetted

The brand's target to reach a turnover of ₹1,000 crores in the next 3 years.

BRAND UPDATE

- > Country of Origin: **INDIA**
- > Headquarter: **LUDHIANA**
- > Total no. of EBOs: **237**
- > Total no. of SISs: **350**
- > Total Retail Space Occupied: **4,00,000 SQ. FT.**
- > Total no. of MBOs: **1,000 +**
- > Total no. of LFS: **6**
- > Annual Turnover (FY 2016-17): **₹583 CRORES**
- > Brand website: **WWW.MONTECARLO.IN**



NEVA

Launched in 1998, Neva came into the market with the sole aspiration of providing unique and international quality clothing to every Indian. The brand gained the indisputable market leader position in knitwear through its innovative and quality products. Its initial innovative practice still resonates across the thermal innerwear industry to this date. Today, Neva operates in six categories – thermal wear, active wear, sweaters, jackets and innerwear for men, women and kids.

Thermals range

Neva was launched with a belief to bring innovative products that fulfill consumers' needs. Carrying forward this philosophy, the brand has introduced thermals for men, women and kids. Neva Esancia thermal is made from three layer cotton polyfill quilted technology that retains body heat and makes it warmer than woollen thermals. It gives the wearer an ultimate comfort, long durability and more breathability. It is priced between ₹164 to ₹589. Neva Mod quilt is the first and only modal based thermal and uses CMPS technology wherein polyfill is sandwiched between two layers of cotton Modal. It is perfectly equipped to fight against extreme cold. It is priced at ₹174 to ₹739. Neva Velveti is made from soft cotton rich fabric and employs extra brushing technique to give a feather like softness to the thermal, which makes it skin friendly, light weight and stretchable and offers a slim look. Neva Sofit is a super slim thermal for the fashion conscious consumers. It is made from special 'hollow' fibers that give the ultimate warmth. Sofit thermal is supposedly softer than a baby's skin and is proven to be thinner than a human hair. It is priced at ₹594 and onwards.

Innovations

With various fabric and yarn combinations, Neva has been developing a wide collection of styles in thermal wear.

Change in demand

According to the brand, changes in weather conditions impact the consumers' buying sentiments.

Retail expansion plans

Considering its vast array of product assortments, Neva has strategically decided to foray into large format stores and multi branded outlets. The brand would be showcasing the range in LFS and MBOs through special counters. This would enable the customer to see and choose from the large range of products offered by the brand. Neva is available at all leading stores like Pantaloon, Lifestyle, Shoppers Stop, Reliance Trends, etc. Neva aims to open exclusive outlets in Delhi, Punjab, Haryana, Jammu & Kashmir, Rajasthan, Uttaranchal and Uttar Pradesh. The stores would be opened on high streets with good footfalls and near to residential population.

Online presence

According to the brand, joining the online force was a litmus test to check the response of the consumers. And, for them the test proved profitable. Neva is running its own shopping website www.nevaindia.com and has presence in most of the major market places such as Myntra, Flipkart, Jabong, Shopclues, Lime road, Voonik, Homeshop 18, Amazon, Snapdeal, Gofind, etc. The brand is expecting good business in this season from its online presence.



BRAND UPDATE

- > Name of Company: **NEVA GARMENTS LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **LUDHIANA**
- > No. of EBOs: **135**
- > No. of SISs: **15**
- > Total Retail Space Occupied: **75000 SQ.FT.**
- > No. of MBOs: **7,000**
- > No. of LFS: **40**
- > Brand website: **WWW.NEVAINDIA.COM**

PARK AVENUE

The year 1986 saw the dawn of a new idea. Raymond introduced Park Avenue to offer men "Complete Wardrobe Dressing Solutions". The name Park Avenue was influenced by an elite, high street in Manhattan and is one of the most prestigious brands in the Raymond portfolio. Today Park Avenue is among India's leading men's ready-made-garment brands. It enjoys the Raymond heritage values of trust, integrity, quality and excellence. Park Avenue has always believed in offering high standard customer service and delight. Keeping these values in mind, Park Avenue exclusive brand outlets imbibe a warm and friendly ambience, trained sales staff to help and guide customers and exclusive collection offerings to deliver the best brand experience to the consumer.



Suits and jackets collections

The Park Avenue regular suits and jackets range starts with a price point of ₹6,999 and goes up to ₹22,000 and the super-premium range spans from ₹25,000 to ₹45,000. This is made with floating half and full canvas. There is growing demand for ceremonial or occasion suits.

The corporate/business suits majorly continue to have 2-button single-breasted styles and are cut close to body but with wider lapels both in peak and notch styles. Double-breasted suits are for power dressing. Innovations include jacquard patterns floral-geometric in combination/three-piece suits with variations of shawl collar and more of textured patterns are in trend.

Manufacturing and design capabilities

Suits are made at state-of-the-art manufacturing facilities with each piece going through over 100 operations which are managed by highly skilled operators and computerised pattern machines. The design team boasts vast experience and fresh prodigious talent from top fashion institutes. They specialize in tailored clothing and have wide exposure to international textile

and fashion fairs, and most importantly also to international fashion retail capitals like Paris, Milan, New York and London. The design team is in constant touch with domestic retail teams and regularly connects with consumers too.

New Park Avenue brand identity

Park Avenue will be revealing its new identity very soon and reopening its first new identity store in Delhi. The colour scheme, primarily black and grey and part grungy, is very functional. The store will look more like a photo studio where a person can come and experiment. There would be very technical use of lighting, fluidity in space, and the display of clothes will be seamless and hanging, to empower touch and feel of the product. Store will also incorporate a special digitally-themed navigable avenue.

Brand expansion plans

By the end of this financial year, there will be around 4 to 5 stores of the new brand identity. And by FY19, including renovations, at least 30 stores of new identity will be launched. At present Park Avenue stores are in tier -I and -II cities and going forward the brand will be expanding in tier -II and -III cities.



BRAND UPDATE

- > Name of Company: **PARK AVENUE**
- > Country of Origin: **INDIA**
- > Headquarter: **MUMBAI**
- > No. of EBOs: **89**
- > No. of SISs: **700+**
- > No. of MBOs: **1,000+**
- > No. of LFS: **225+**
- > Brand website: **WWW.RAYMONDNEXT.COM**





PEPE JEANS

Betting big on India

The brand believes that last few years has seen the retail industry grow in leaps and bounds, given the rate at which India is developing and the entry of several new players. Even the non-metro markets are now well aware of the latest styles and trends due to internet penetration in regional areas. The Indian consumer base is now on par with the global counterparts, they are a lot more evolved with their shopping choices and they are very fashion conscious.

Customer at the core

Pepe Jeans' approach is very simple. They stand for certain values and as long as they are able to make the consumer understand that their price product equation which is the value aspect that Pepe Jeans is offering is better than anybody else is what matters. Their consumers look for a great fit, quality products and a sharp pricing. Keeping in mind the end customers and staying true to their values of a cool denim brand is all that matters.

Winter fashion evolving

A couple of years ago, winter wear wasn't as diversified compared to the range that exists now. Winter wear mainly revolved around sweaters, heavy woolen wear and jackets that only provided function and not much of style.

Founded in 1973, Pepe Jeans is a brainchild of the Shah Brothers from Kenya - Nitin, Arun and Milan Shah who revolutionised London's fashion scenario by creating stylish and trendy jeans unlike the customary looking denim available in those days. In 1989, Pepe entered India and quickly captured the imagination of fashion starved consumers across the country. Pepe Jeans are for the young at heart. It manufactures a wide array of chic casual wear for men, women and kids. Jeans are their core product. It also offers t-shirts, flat knits, sweaters, sweat shirts, jackets as well as woven merchandise. The accessories range consists of bags, wallets, caps, socks and footwear.



BRAND UPDATE

- > Name of Company: **PEPE JEANS**
- > Country of Origin: **UNITED KINGDOM**
- > Headquarter: **SPAIN**
- > No. of EBOs: **218**
- > No. of SISs: **249**
- > No. of MBOs: **862**
- > No. of LFS: **399**
- > Annual Turnover (FY 2016-17):
₹336 CRORES
- > Brand website:
WWW.PEPEJEANS.COM

The transition in winter wear comes now with western influence, runway trends, entry of many international brands in the Indian market. Sweat shirts now are adorned with patchwork, raglan styles that were only seen in t-shirts and bright colours as opposed to the monochromes and dark winter colours.

New collections

This season Pepe Jeans takes inspiration from the popular saying 'opposites attract'. An eclectic mix of styles comes together for the season's wardrobe, influence is drawn from the roots of London's most famous markets- *Portobello*-which is the signature style, *Notting Hill* that defines vintage and modern and *WII* which includes mix of light and dark colors.

Latest trends

Customisation has been a huge trend this year, consumers want to personalise their denim, DIY design them

and modify their basic denims to make them look as an extension of their style. To facilitate this trend, Pepe Jeans introduced its own customisation tool called, the 'Custom Studio'. This is present in their flagship stores. What this allows you to do is customise denims the way a customer likes it. From trinkets to quirky badges, to distressing tools and what's best is that one can bring in any picture they they want on their denim and print it out.

According to the brand, customisation has been big this year with the global fashion scene, it was visible on the international fashion runways too from diamonds to embroidery and various prints.

Retail strategy

Pepe Jeans is a wholesale driven company with a strong retail presence. One very important aspect of their expansion

model is based on appointing partners across regions who do distribution for them and who also open retail franchise stores. If a store in a particular region isn't performing well, it will be shut and a new store will be opened in another area taking into consideration the location and people's buying patterns.

Retail expansion

Tier -II and -III markets are very important to the brand, one cannot simply treat these markets as an extension of main markets; they're almost on par now. Present across 13 states and 21 cities across India, Pepe Jeans realises this market's potential and has partnered with franchisees and also have standalone stores across the country.

In the pipeline, they have one store that would be opening in Thane and two new stores in Kolkata.



REPLAY SQUARE



Replay Square was launched in 1994 in Ludhiana. Although a new brand, it's trendy and quality oriented jackets quickly struck a chord with its audience and established the brand Replay Square as a prominent name in the domestic market. Eventually, the brand branched itself into denims and ladies tops which also did very well in the market. By and by, the brand realised that a product like jacket would itself produce volumes in business and it would be better to concentrate on a single product identity. Since then, the brand has concentrated all its might on jackets for the young and young at heart and has garnered the patronage of a long list of clients within a diverse age bracket of 18 and to 50 years.

Jackets range

Replay Square is known for its range of men's jackets between the price bracket of ₹1,800 and ₹3,100. Its product basket encompasses a wide range of jackets in a variety of styles, designs and fits.

Innovations in jackets

Back in the day, jackets were being made in regular sizes like Small, Medium and Large but there were hardly any players who were making larger sizes like Extra, XXL or even XXXL sizes. Replay Square sized this opportunity and quickly became famous in its initial days for providing plus size jackets. Because of this factor it successfully made inroads into many good retail spaces which otherwise it takes time for a brand to enter.

Top fabrics in jackets

The brand offers a wide range of options in PU, cotton coated, self designed fabrics, etc.

Production and design capabilities

The brand's core focus on one product category, i.e., jackets, speaks volumes about its specialization, dedication and strength in making and designing

this product. Replay Square is known for making simple and sober pieces that reflect the brand's designing and collection creation skills.

Product expansion plans

The brand intends to try and focus on the men's jacket segment itself and would strengthen the product range with utmost quality and latest designing.

Distribution network

In order to execute its retail operations seamlessly, the brand works with both agents and distributors. In Punjab Delhi and Assam, it depends on agents while in the states of Uttar Pradesh, Bihar, Jharkhand and Bengal, it runs operations through designated distributors.

Core markets

Currently, the brand is supplying to around 175-200 plus retail stores through its network of agents and distributors. Replay Square's has a sound presence in the states of Punjab, Haryana, Himachal Pradesh, Delhi, Assam, Bengal, Jharkhand, Uttar Pradesh and Bihar. The brand's strongest market is Uttar Pradesh.

Online presence

The brand is present online but the the movement for jackets is quite slow.

Turnover growth targetted

The brand aspires to achieve and organic growth target of 15 to 20 percent.



BRAND UPDATE

- > Name of Company: **REPLAY FASHIONS**
- > Country of Origin: **INDIA**
- > Headquarter: **LUDHIANA**
- > Total of No. of MBOs: **175 -200+**

SHINGORA

Shingora is a high fashion premium brand established in 1986 by Mridula Jain. The word Shingora refers to a head ornament worn on the side of the head which adds beauty and glamour to a woman dressed up for any occasion. The brand was created to embellish women who are independent, smart, glamorous, confident and graceful. Right from the beginning the brand strived to establish itself as a trendy, fashionable as well as affordable alternative to the regular expensive heritage shawls that did not offer much variety.

Product range

A leading manufacturer of scarves, shawls, throw blankets, cushion covers, shrugs, ponchos, ties and belts, the brand stylishly covers the needs of the entire family. Shingora's product range encompasses a myriad qualities in pure wool, extra fine merino wool, wool blends, silk, cashmere, etc. The price range starts at ₹1,395 for a pure wool stole.

Product expansion plans

Shingora is launching a range of wraps and ponchos this season. The brand is also coming up with running meterage which is its core area, since it has an in-house facility for same.

USP Pashmina

Pashmina is derived from a special goat which is present only in higher ranges of Leh/Ladakh therefore sourcing authentic yarn suppliers to weaving and finishing is a huge task. It is woven on handlooms and especially processed to keep its original handfeel and softness intact.

Production and design capabilities

As a vertical unit, Shingora is

well equipped with in-house facilities for yarn dyeing, weaving, printing, dyeing, packing, etc.

Core markets

The brand's core market is North India, because of the winter season. It also has a strong presence in the western and eastern parts of India.

Export markets

Shingora exports to many countries and boasts of a long list of leading international brands as their clients.

Retail expansion plans

The brand is planning to expand its shop in shops. As of now, it has 45 SISs and it plans to expand its retail footprint through this retail format.

Success through online retail

Shingora has a very strong digital presence. Apart from its own e-shop, the brand is also present on all major e-commerce portals like Myntra, Jabong, Amazon, etc.

Turnover growth targeted

The brand is expecting a minimum growth of 40-50 percent.



BRAND UPDATE

- > Name of Company: **SHINGORA TEXTILE LTD.**
- > Country of Origin: **INDIA**
- > Headquarters: **LUDHIANA**
- > Total no of EBOs: **2**
- > Total no of SIS: **45**
- > Total Retail Space Occupied: **1,000 SQ.FT.**
- > Total no of MBOs: **600**
- > Total no of LFS: **100-150**
- > Brand website: **WWW.SHINGORA.NET**



SHIVAM SHAWLS

Shivam Shawls was launched in 1977, a time when Indian women had very few choices when it comes to shawls. Back in the day, there weren't many shawl manufacturers and the brand established itself as a leading name in its field. Today, after four long decades of existence, the brand is still growing strong although it claims that the domestic growth in this segment as a whole is very slow.

Product range

The core strength of the brand is shawls and strolls. The dimensions of these are between 40/80 inches and 27/80 inches. The entire product basket is priced between ₹215 and ₹5,000.

Product expansion plans

Although Shivam Shawls have no plans of starting a new product line as such, it does launch new design elements in every season with fresh colour themes. This year too, the brand has launched an exquisite collection that features contemporary colors, designs and intricate detailing.

Production and design capabilities

Design wise, the brand is armed with a talented pool of designers that function under a head designer, who is a veteran of the industry with years of experience under his belt. The brand utilises high end machinery to mitigate human errors. It also has a team of craftsmen and artisans who carry out the various hand work and Kashmiri work on selected collections.

Change in demand

Shivam Shawls believe that the shawls industry is traditionally led and is just sustaining with only a few players. The growth levels are organic and it's restricted to its customer base.

Distribution and core markets

The brand executes all its bookings in June and majorly supply products through agents. It has 6-7 agents in its network which are dealing mainly in the markets of North India.

Retail expansion plans

As of now, the Shivam Shawls is mainly concentrating on the Northern market. It is also supplying to Sholapur and Aurangabad where it plans to penetrate thoroughly very soon.

Success through online retail

Shivam Shawls have hitherto banked only on traditional retail formats but the company is open to explore the online platform to keep pace with changing times. The company plans to launch itself in the digital retail sphere very soon.



BRAND UPDATE

- > Country of Origin: **INDIA**
- > Headquarter: **LUDHIANA**
- > Total no of MBOs: **500**
- > Total no of LFS: **200**
- > Annual Turnover (FY 2016-17): **₹6 CRORES**
- > Growth in Percentage: **20% Y-O-Y**



SPYKAR

The Spykar story started way back in 1992 when it was established as a MBO brand specialising in denims. Within a very short span of time, the brand's fidelity to product quality and customer satisfaction entrenched it as a reputed western wear brand pivoted around denim. Gradually it expanded into the lifestyle space with additional focus on accessories. From a MBO-based men's denim brand to a multi channel lifestyle player with a pan India presence across all retail formats, Spykar has come a long way and today embodies the bold, the brash and the audacious.

Product range

Spykar offers a complete wardrobe for both men and women, with a strong focus on the young and young at heart. It's men's wear collection includes basic denim (₹2,299 - ₹3,199), fashion denim (₹3,699 - ₹6,299), shirts (₹1,699 - ₹3,099), t-shirts (₹899 - ₹3,199), trousers (₹2,399 - ₹3,499), and jackets (₹3,999 - ₹6,999).

The women's Autumn-Winter '17 collection includes active denims (₹1,849 - ₹2,799), basic denims (₹1,999 - ₹2,499), tops (₹999 - ₹2,599), trousers (₹1,449), and t-shirts (₹699 - ₹1,499).

Latest jacket collection

Spykar's jacket line focuses on fashion and style. The brand offers casual blazers, bomber jackets, riding jackets and utility jackets, which are available in all the trendy colours and materials. Cotton, poly-blends, and leatherite are the main shell materials that the brand utilises with different prints and wash techniques.

Best creation in jackets

The brand's casual washed blazer is a trendy well-fitted blazer with mild wash and subtle details. The brand considers it a perfect jacket for all occasions; may it be office or casual outing with friends.

Top fabrics

Apart from denim and indigo dyed fabrics, cotton and cotton-blends, leatherite and poly-blends are the

fabrics that the brand majorly uses for jackets.

Core domestic markets

The brand has a pan India presence with more than 1,200+ MBOs across 330 cities.

Retail expansion plans

Breaking the confines and expanding the horizon, the brand believes in evolving and expanding its retail footprint routinely. Currently, Spykar has plans to add about 285 stores by 2020.

Potential markets

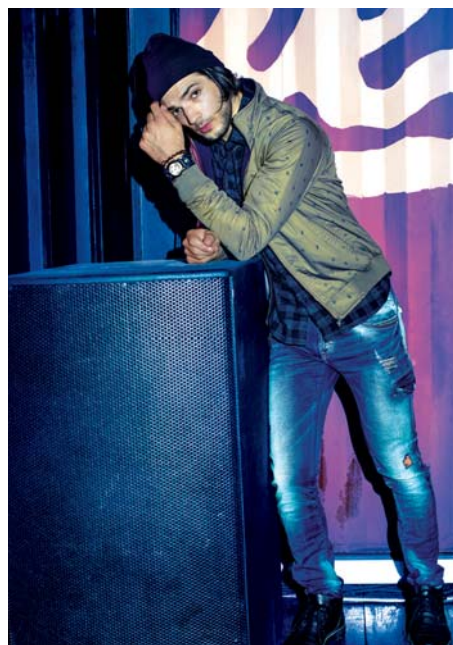
The brand believes that the tier-II and -III cities of India are still under serviced. The youth in these geographic locations have relatively lesser brand options and hence a huge potential lies there.

Online presence

Spykar is available all leading at fashion portals like Jabong, Myntra, Flipkart, Snapdeal etc. The brand has its own online store as well www.spykar.com. It's through its online presence that the brand services its tier-II and -III audience.

Turnover growth targetted

Spykar is looking at a growth rate of 30 percent year on year



BRAND UPDATE

- > Name of Company: **SPYKAR LIFESTYLES PVT. LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **MUMBAI**
- > Total No. of EBOs: **210**
- > Total No. of MBOs: **1,200 +**
- > Total No. of LFS: **5 NATIONAL CHAINS ACROSS 73 CITIES**
- > No of cities present in: **330**
- > Annual Turnover (FY 2016-17): **₹285 CRORES**
- > Brand website: **WWW.SPYKAR.COM**

SUCCESS

Success was established in the year 1996, in Kolkata (West Bengal). The brand started out as a manufacturer of trousers, but over the years, it has graduated to assemble a complete wardrobe for men. Broadly classified into formal, casual and party-wear segments, the men's wear brand is for people with a keen sense of aesthetics and sophistication.

Product range

Success provides a complete men's wear range consisting primarily of suits ranging from ₹4,495 to ₹12,995; blazers and jackets from ₹3,995 to ₹9,995; waist coats and Jawahar jackets within the price bracket of ₹2,995 to ₹3,995. The brand also offers shirts (₹1,195 to ₹1,995), formal and casual trousers (₹1,095 to ₹1,995) and denims (₹1,595 to ₹2,295).

Production and design capabilities

Success is capable of producing around 6,000 pieces of suit and blazers per month. The brand boasts of a talented team of designers and makers who are capable of new innovations as per the latest trends.

Latest product launch

The brand is planning to introduce reversible waist coats and Jawahar jackets keeping in mind its dual use. They can be used as day wear with denims and also as evening wear with formals by just reversing the side.

Innovations

The brand is using different varieties of hosiery fabrics in making blazers and jackets. This season, Success is also focused on printed fabrics with emphasis on trims, linings, etc.

USP tuxedos

The market for tuxedos is picking up with a good pace in India. Success is giving a lot of twists in tuxedos with variation in bows, designs and colours.



BRAND UPDATE

- > Name of Company: **AGWANI FASHIONS PVT. LTD.**
- > Country of Origin: **INDIA**
- > Headquarter: **KOLKATA, WEST BENGAL**
- > No. of EBOs: **25**
- > No. of SISs: **45**
- > No. of MBOs: **375**
- > No. of presence in LFS: **45**
- > Brand website: **WWW.SUCCESSMENSWEAR.ONLINE**

SUCCESS



Brand's style statement this season

Success is going all out on tuxedos, checkered blazers and indigo shirts this season. It has played a lot with accessories as well. The brand has experimented with a lot of new fabrics like hosiery too. Also, it has used different variations of trims, lining, buttons, etc.

Change in demand

Three piece suits are in demand this season. The demand for blazers have also increased as it is being considered a casual attire nowadays.

Customisation

Customisation has become the need of the hour these days. In the near future, Success has plans to come up with a couple of designer studios where half of the store would be dedicated to bespoke tailoring and the other half would remain as its ready made section.

Distribution network

The brand has 25 exclusive brand outlets mostly in the eastern region, over 375 multi-brand outlets and 45 SIS format stores in Central, Brand Factory and Pantaloons, which give Success a pan India exposure.

Retail expansion plans

Success aims to have its brand outlets pan India, and have plans to get into tier -II and -III cities.

Presence online

The brand is currently working on its e-commerce website which is expected to launch in November '17.



TT

TT is more than 50 years old and has mainly focused on the middle class segment with a value for money promise. It has evolved from a men's innerwear brand to a complete family innerwear and a casual wear brand.

BRAND UPDATE

- > Name of Company: **TT LIMITED**
- > Country of Origin: **INDIA**
- > Headquarters: **DELHI**
- > No. of EBOs: **30 (AS ON OCT. 25, 2017)**
- > No. of MBOs: **30,000**
- > Annual Turnover (FY 2016-17): **₹675 CRORES**
- > Brand website: **WWW.TTGARMENTS.COM**

Thermals range

The brand manufactures thermals for men, women and kids. The price ranges from ₹300 to ₹500. It uses three thread fleece fabric, drop needle interlock fabric and sandwich fabric in cotton, cotton blends and polyester/viscose blends.

Recent innovations

TT has introduced more styles and colour options using the same fabrics. The new colour schemes and styles are in line with latest trends and are enjoying good response.

Product launch

TT has introduced a range of casual wear range such as track suits, sweat shirts and loungers for winters.

Change in demand

The brand has witnessed positive traction backed by a solid growth.

Consumption patterns: metros vs. non-metros

The brand feels that non-metros are more conscious of the utility of the thermals as against metros, where preference is for lighter and more comfortable range.

Ratio of the sales - domestic to exports

About 90 percent of the brand's innerwear and casual wear range is sold domestically.

Marketing network

The brand, TT is being sold across different formats - online and offline - through various e-commerce portals, EBO's, MBO's and large format retail stores.

Retail expansion plans

TT's primary focus area is its EBO called TT Bazaar. The brand already has

30+ stores and has plans to take this number to 100 within a year. It is also concurrently working on the underserved markets of India and slowly building a distribution channel.

Market potential

The brand sees huge business coming from Bihar, Uttar Pradesh and West Bengal in the coming year. Also, the brand sees a huge untapped potential in the online space.

Online presence

The brand admits that it has not been able to perform successfully in the online space hitherto due to problems like low value (discounts), return policy and reconciliation of accounts, which are big issues in e-commerce. However, it is the future and TT believes that it would have to work harder on it.

Turnover growth targetted

The brand looks forward to 30 to 40 percent annual growth.

X



TURTLE

Turtle is a 25 years old men's wear brand from East India. What started as a manufacturing unit producing 25 shirts a day, today shells out a complete wardrobe for men's wear. Turtle's target audience comprises men in the age group of 25 to 50 years from SEC A and B. The brand is present pan India and is being sold through 3,000+ touch points.



BRAND UPDATE

- > Name of Company: **TURTLE LIMITED**
- > Country of Origin: **INDIA**
- > Headquarter: **KOLKATA**
- > No. of EBOs: **107+**
- > No. of SISs: **2,000+**
- > No. of MBOs: **3,000+**
- > No. of LFS: **PANTALOONS, CENTRAL, SHOPPERS STOP, BRAND FACTORY, RELIANCE TRENDS**
- > Brand website: **WWW.TURTLELIMITED.COM**

Product range

Turtle's product range include shirts, t-shirts, trousers, jackets, suits, denims, blazers, and accessories.

Product launch

New product lines are launched depending on the requirement of fashion. The brand is experimenting with fabrics to give a better look and fit to its collections.

Innovations

In terms of fabrics, Turtle introduced Tencel and Modal shirts. The brand is trying to play with technical surface finishes for formal shirts and bottom wear. In this, khadi shirts have been a great hit. The stretchable lining for outerwear combined with stretch shell fabric for extra ease and comfort is their latest innovation in suits.

USP tuxedos

Turtle has 3 to 4 ranges in tuxedos for summers and festive occasions. According to the brand, the market for tuxedos in India is building up. People have started asking for tuxedos. Though black and navy blue colours rules, unlike the international scene, where eclectic colours have set in.

Latest collection

Its all about style and comfort. The brand has travel mate collection that offers wrinkle free finishes for frequent travellers. Pattern formal shirts, non-classic range, a collection in casual with the colour 'pink' as the main coordinate,

etc., are some of the style statement from the brand this season.

Retail network

Turtle has more than 100 exclusive retail outlets, is present in 2,000+ MBO's and LFS such as Central, Pantaloon, Shopper Stop, Reliance Trends, etc. The brand's strongest markets are the East and South India.

International presence

Internationally, the brand has presence in the Middle East countries.

Retail expansion plans

The brand's retail expansion plan for the next few years is very aggressive. It aims to open approximately 40 to 50 new outlets.

Presence online

Turtle is present with all the leading e-commerce portals such as Flipkart, Amazon, Snapdeal, Myntra, etc. It also has its e-commerce site www.turtleonline.in. The brand has received overwhelming response from its online presence over the years.

Change in demand

Today, fashion is in demand. Consumers style quotient is high. People are ready to experiment and are asking for something different and unique; they are ready to pay the price for it.



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VOGANOW.COM

Voganow.com is a leading online store that specialises in leather jackets, footwear, accessories and bags. Launched in 2013, this online destination houses the most trending collections from two iconic brands, Brune and Bareskin. The website focuses on leather items and has derived its name from leather itself, hence Voganow stands for "fashion-now". Similarly, Brune is synonymous to brown colour which is one of the key colours of leather and likewise for Bareskin too. It targets young entrepreneurs, working professionals, etc., in between age of 25 to 50 years.

The new line of jackets

Voganow.com has come up with some new variations in leather jackets like side zip double button collar style, buckle style closure design and double collar stitched designs.

Product range

Brune captures the classic essence of style in an array of leather accessories and shoes with a tint of formal appeal, which incorporates travel bags and formal shoes ranging from oxfords, brogues, tassels, lace ups to monk strap shoe styles. On the other hand, Bareskin offers more of a casual styling essence offering footwear category of velvet slip-ons and leather sneakers. It offer premium leather products at an affordable price. The price point for shoes and jackets starts from ₹2,999 and goes up to ₹15,999.

Top fabrics

The website deals exclusively in premium leather. All of its products are made from 100 percent genuine leather. It has added some collections with velvet, denim and canvas.

Production & design capabilities

It boasts of a dedicated team of designers who are constantly exploring new designs and inspirations. It often experiment with new styles or colours and test the market. Market testing becomes simplified as the website is a make-on-order website, so it manufactures if and when the customer places the order. If it receives a good

response and acceptance in the market, it goes ahead with manufacturing larger quantities and supply them to other marketplaces.

Change in demand

As trends are changing, men have become more fashion conscious and are not satisfied with just a black or brown shoe or jacket. They want more. Voganow.com provides them a huge variety of shoes, matching belts and wallets in fact matching office or travel bags and jackets. Since its beginning, Voganow.com has seen growth and a surge in demand for its products. Even after demonetisation, it hardly saw a dip in the sales.

International presence

Voganow.com is planning to expand in international markets by marking its presence in Dubai by end of this year at the Mercato Mall. It has recently come up with a store in Nepal and is also tapping global online space alongside.

Retail expansion plans

Initially, it started as a brand selling through online market places and its own website. In the last year, Voganow.com has diversified to offline channels as well. Now, it has dedicated walls at some of the top multi-brand stores across the country like Regal Stores, Kapsons, etc. The brand also aims to expand in tier-II and -III cities by the end of this year. It also has plans to offer a special collection for the offline market which would not be promoted through the online shopping portals.

Turnover growth targetted

Voganow.com serviced around 3,000 customers in the very first year itself. Over the years, the brand has seen tremendous growth and is hoping the same in the future as well. Its average growth rate has been above 150 to 200 percent.



WILDCRAFT

Wildcraft began its journey in 1998 as an outdoor services firm. It took people for rafting, kayaking and rock-climbing. In 2007, it decided to convert into an outdoor gear provider. Initially, it started out to assist people for the outdoors, then it decided to equip them for the outdoors instead. The term Wildcraft was framed since it wanted to assist people who are crafted for the wild.

Product range

Wildcraft is a head to toe outfitter catering in apparel, footwear and gear (comprising backpacks, rucksacks, sleeping bags, tents and other travel and outdoor accessories). The products are priced at a range between ₹500 to ₹10,000.

Latest jackets collection

Wildcraft's latest launches include down jackets, reversible jackets, wind cheaters, soft shell jackets, micro loft jackets, husky self-packable jackets, mountain jackets and various other hoodies and sweatshirts.

Most popular jackets

The down jacket made of down feather that can be packed to the size of a travel pillow is the best-selling jacket range.

Top fabrics

Nylon, polyester, cotton, robic and hypalon are the ones that are used essentially in apparels and gear. Footwear consist of nubuck leather and a mesh lining for waterproof shoes.

Production and design capabilities

The first thing the brand did when it started was to hire a designer and not a sales or marketing person. Today, it has a huge team of designers who come up with innovative technologies.

Latest product launch

The brand is launching its latest range of adventure gear early next year which would comprise rucksacks, backpacks, etc.

Change in demand

Wildcraft is witnessing demand shift from backpacks to apparel and footwear. Originally known only for its range of backpacks, it now intends to break the positioning of being known only as a backpacker brand.

Retail network

India is its strongest market where it has actively tapped tier -II and -III cities, along with key metropolitan cities that hosts its flagship stores.

International markets

Th brand has its footprint spread across 11 countries across the Middle East and South-East Asia.

Retail expansion plans

Wildcraft intends to add 40 new retail stores every year. It is aiming to be present in tier -II and -III markets to ensure travelers have access to its products.

Potential markets

North India especially Delhi and Uttar Pradesh are big markets for the brand considering that it is in apparel and footwear. Since, the brand is based out of South India, it has not tapped the potential in the markets of North India, which have great purchasing power.



BRAND UPDATE

- > Name of Company: **WILDCRAFT**
- > Country of Origin: **INDIA**
- > Headquarter: **BENGALURU (KARNATAKA)**
- > No. of EBOs: **160**
- > No. of SISs: **500**
- > Total Retail Space Occupied: **1 LAKH SQ.FT. (APPROX.)**
- > No. of MBOs: **440**
- > No. of LFS: **160**
- > Annual Turnover (FY 2016-17): **₹400 CRORES**
- > Brand website: **WWW.WILDCRAFT.IN**

Online presence

The brand is present across all major e-commerce market places platforms (Myntra, Flipkart, Amazon, Ajo, etc.) and has been very successful. It is currently at #1 in selling gear online. Online contributes around 15 percent of the sales at present, while next year the company is expecting it to be slightly higher at 18 percent.

Turnover growth targetted

Wildcraft intends to double its sales to ₹1,000 crore in the next three years. It would be investing around ₹350 crore by 2020 for expansion and marketing.



WOODLAND

The brand 'Woodland' owned by Aero Group was started in Quebec, Canada for making winter boots. Woodland entered India in 1992 when the Indian footwear market was largely unorganized and created a new category of specialized outdoor adventure sports shoes. Woodland's product positioning was different; it was known as a rugged, outdoor leather shoe brand, the kind usually preferred by adventurers. It struck a chord with the youth and gradually started developing a product line especially for India. Since then, the brand has never looked back. The success of its shoes also encouraged the brand to enter into new segments like clothes, handbags, and the likes.



Product range

Woodland's product range now includes apparels, shoes and accessories for both men and women. It also offers outdoor equipment like tents, sleeping bags, waterproof outdoor backpacks and all that one can associate with adventure travels and sports. Most of its products are manufactured in the country plants.

Woodland jackets are available with the starting price range of ₹4,000 whereas the price range of its boots start from ₹5,000.

Innovations in jackets

Woodland's range of techno-jackets has been quite a rage among its outdoor loving customers as they are perfectly armed to combat any type of climatic condition or terrain. Also its range of leather jackets has also been very popular.

The brand has already launched GPS embedded jackets, BOA shoes, client t-shirts, and many more new technologies and innovations in products are in pipeline.

New collection in jackets

Woodland is introducing a new line of jackets, which will be extremely lightweight while providing cozy comfort against the chilly winters.

Top fabric in jackets

Leather is the brand's top fabric for jackets. It keeps one warm, mold onto the shape of the wearer works like a perfect shield.

International presence

Currently the brand is present globally in over 40 countries that include, Hong Kong, China, Australia, Europe, Middle East, Southeast Asia, South America, GCC, CIS Countries and more. It sells its products in around 1,000 stores globally. The company has set up international regional offices and warehouses in Hong Kong, Moscow and Dubai to cater to the requirements of countries in different regions as the business is growing everywhere.

Retail expansion plans

The brand has maintained a steady growth scale in its retail expansion and likes to keep the uniform progress going forward. As of now, it is planning to add another 30-35 stores in this financial year that would be an equivalent combination of small towns and metros.

Change in demand

Today, people in general show interest in active outdoor activities and outdoor getaway, which result in increase in demand. Woodland holds approximately 80 to 85 percent of outdoor adventure market share in India.

Online presence

Woodland has a strong online presence and its online sales are growing at an exponential rate. It expects it to grow to 40 percent in about 3-4 years. The brand plans to concentrate more on a seamless approach through all available shopping channels.

Turnover growth targetted

Woodland is consistently growing at a rate of 20-25 percent every year. Last year, the brand clocked ₹1,200 crores in revenues and is now targeting ₹1,400 crores for the next financial year.



BRAND UPDATE

- > Name of Brands: **WOODLAND, WOODS, AERO CLUB**
- > Country of Origin: **CANADA**
- > Headquarter: **NEW DELHI**
- > Total No. of EBOs: **600+**
- > Total No. Of SIS: **500+**
- > Total No. Of MBOs: **5,000+**
- > Total No. Of LFS: **100 APPROX.**
- > Total Retail Space Occupied: **9,00,000 SQ.FT.**
- > Annual Turnover (FY 2016-17): **₹1,200 CRORES**
- > Brand website: **WWW.WOODLANDWORLDWIDE.COM**

WOOLEN SOCKS

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Bonjour, India's first multinational socks brand, has launched its range of woollen socks. The range, designed and built keeping cold weather and fashion in mind, are available for both for men and women. These are easy to wear for a day-long use without having any grip marks on the skin.

In the women's range, two collections - Woollen 'Thumb' and 'Non-thumb' are crafted exclusively from merino wool and elastane to offer a soft touch. Merino wool is an excellent insulator, so these socks have excellent heat retention property to keep the wearer's feet warm.

The range encompasses a variety of woollen socks that are tailored in conformation to the latest style and trends.

The speciality in the men's section is the woollen rib collection. The rib in these socks feature airy lines, which facilitates the passage of air, thereby eliminating moisture and guaranteeing a comfortable feel.

Another highlight of the men's section is the woollen argyle collection, that features interesting color patterns. These designers socks in dark colour are perfect for wearing with

suits, formals and casuals and are usually available in packs of threes. Besides, these socks feature a gentle grip on the calf by using Lycra and are designed with ribs and double welt knitting technique, making them soft and skin friendly. Despite being woollen socks, these are created to maintain moisture and temperature control together.

Both the men's and women's ranges are available from ₹160 to ₹625 and are available at Bonjour exclusive business outlets and retail stores located across the country. The collection is also available online at www.bonjourretail.com.

ABOUT BONJOUR GROUP

Bonjour Group was established in 1988 and is today is a trusted brand for superior quality, style, comfort and longevity, producing Socks, women leggings, men's handkerchiefs, accessories and a special range of socks, tights, undershirts, shorts, bottoms and t-shirts. With a pan India presence, the company serves more than 8,000 retailers and through 160 distributors.



Men's woolen socks



Men's woolen crew length pack of 3



Women's woolen thumb

FASHION CREATION

WINTER WEAR FASHION TRENDS 2017/18

BOLLYWOOD IN WINTERS

FEATURES:

// RAYMOND // ASHISH SONI

INGREDIENT INNOVATION:

// LEATHER & WOOL



Textile Icon

RAYMOND: THE SAGA OF AN INDIAN WORLD LEADER

IMAGES BoF traces the, almost, century long heritage of the global leader in worsted wool - the Raymond Group.

Pg No. 154-156



Design Icon

25 YEARS OF ASHISH SONI

Veteran designer Ashish Soni reflects upon the many achievements, milestones and memories he has reaped in the 25 years of his fashion journey.

Pg No. 158-161

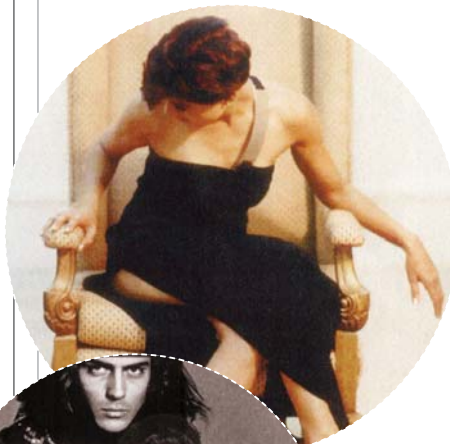


Material Trends

FW '17-18 THRIVES ON LEATHER AND WOOL

The Indian winter wear market sees increasing evolution with a new found focus on wool and leather, and innovations like never before. Meher Castelino explains.

Pg No. 162-169



Fashion Trends

WINTERWEAR FASHION TRENDS 2017-18

Shaswati Sengupta, CEO, Ingene Insights, shares how fashion in this upcoming autumn-winter season will be quite experimental, personal and outrageous.

Pg No. 170-177



Bollywood

WINTER CHIC BOLLYWOOD STYLE

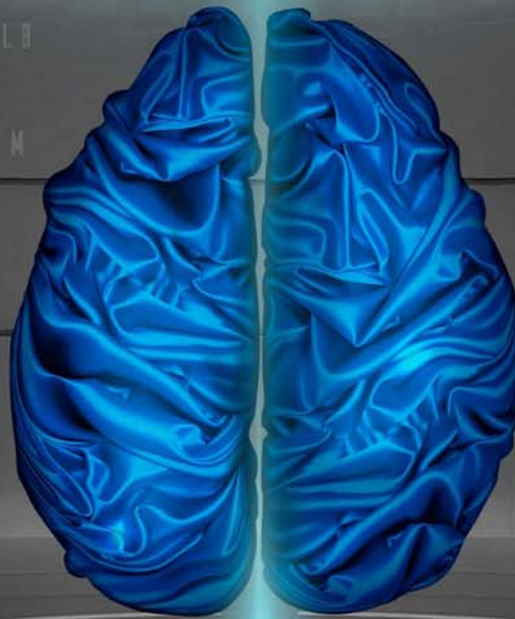
From winter wear must-haves, celebrities from tinsel town also give major outfit goals on sporting some hot trends correctly.

Pg No. 178-180



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RAYMOND

THE SAGA OF AN INDIAN WORLD LEADER

Over the last century, change has been a constant parameter in India; the entire nation and its people have grown from strength to strength on all frontiers. And, in Indian fashion, is there is a major that best exemplifies this essence? It is indeed the Raymond Group.

Raymond is not a just a mere brand name in India; it's as much a part of every Indian's life as their pre-eminent embodiment of The Complete Man. Sure, there are others textile majors, but none come close, let alone compare, to Raymond's ability to make a name symbolize a trust, and then further to a brand that spans the value chain from fabrics to ready-to-wear. The brand has indeed embossed marks of unmatched credence amongst generations spanning the common man as well as the most discerning global nomad.

Raymond's legacy dates back almost 92 years to the year 1925, when it was as a small woolen mill, by the name of Raymond Woollen Mills in Thane, that used to manufacture coarse woolen blankets and modest quantities of low-priced woolen fabrics.

In 1944, Lala Kailashpat Singhanian took over the mill. He set up a new manufacturing unit called JK Files in 1950 for making indigenous engineering files. Convinced that the new set up had a potential to snowball into something infinitely promising, the

RECENT AWARDS

- Raymond received the Most Admired Suiting Brand of the Year at the Images Fashion Awards 2008 & the Most Admired Textile Brand of the Year at the Images Fashion Awards 2009.
- The Business World Most Respected Company Award 2011 in the Apparel & Textile category.
- Raymond has been ranked 20th in 'The Brand Trust Report, India Study, 2011.
- Raymond has regularly won Export Excellence Awards at various Trade Awards.

company concentrated on what was to become a recurring pattern in the years to follow -- modernisation of machinery and infrastructure. By 1958, Raymond became the first company to blend polyester with wool and introduced 'Terool'. Terool turned out to be a breakthrough in the wool industry, providing a lightweight fabric that was made for cool and comfortable wear, and Raymond soon forayed into retail by opening the first exclusive retail showroom in King's Corner, Ballard Estate in Mumbai, the very same year. The rest, as we know is history.

The Kings of Worsted Wool

Raymond, today, is regarded as the global leader in wool. It is the world's largest producer of worsted suiting fabrics commanding over 60 percent market share in India. It is also among the few companies in the world, that is fully integrated to

manufacture worsted fabrics, wool & wool blended fabrics. Few companies globally have such a diverse product range of nearly 20,000 varieties of worsted suiting to cater to customers across age groups, occasions and styles. The company's suiting fabrics ranges from 80s to 250s. The company has also mastered the art of producing super fine suitings and blending polyester with specialty fibers like Cashmere, Angora, Alpaca, etc.

Raymond also converts these fabrics into suits, trousers and apparels that are exported to over 55 countries in the world; including European Union, USA, Canada, Japan and Australia under the various retail brands of the company.

Not just apparel, Raymond is also the largest producer of woollen blankets in the country and offers the widest range of woollen blankets and pashmina shawls. Made from pure and regenerated wool and cashmere, these are produced in an array of colours and designs in plains, dobbies and jacquards.

Manufacturing Muscle

Raymond has always stayed ahead of the game and the way forward was through modernisation of machinery and infrastructure. In the early 60s, the company earmarked total replacement of machinery with sophisticated machinery and since then modernization has become a way of life at Raymond. Then, in 1979, a state-of-the-art manufacturing facility was set up at Jalgaon, Maharashtra to meet the increasing demand for worsted woollen fabrics. Then in 1980, Dr. Vijaypat Singhania, an AMP alumnus from Harvard and a high flier in spirit and deed, took over the reins as the Chairman of Raymond. The Jalgaon plant was soon followed by another plant in Chhindwara that was set up in 1991. The new plant was a state-of-the-art integrated manufacturing facility located 57 kilometers from





OTHER MILESTONES

- **1968:** Raymond set up a readymade garments plant in Thane
- **1986:** Launched India's first Apparel brand 'Park Avenue' that provides stylish and innovative wardrobe solutions
- **1991:** To fulfil the growing demand for Raymond's products, another manufacturing unit was set up at Chhindwara, near Nagpur
- **1991:** Launched KamaSutra - India's premium condom brand
- **1996:** Raymond forayed into Denim manufacturing
- **1999:** Parx a premium casual wear brand was launched to offer customers a range of semi-formal and casual clothes
- **2000:** Mr. Gautam Singhania was appointed Chairman and Managing Director of Raymond Limited
- **2002:** Acquisition of ColorPlus
- **2003:** Silver Spark Apparel Limited was set up in for manufacturing Suits and Trousers catering largely to export markets
- **2005:** Setup of state-of-the-art jean's wear facility 'Everblue Apparel Ltd.' and 'Celebrations Apparel Ltd.' for the manufacturing of formal shirts in Bengaluru
- **2006:** Greenfield unit was set up in Kolhapur, Maharashtra to produce high value cotton shirting fabrics
- **2008:** Launched Raymond Ready to Wear
- **2016:** Launched Technosmart - The smartest fabric in the World
- **2016:** Laid the foundation stone of a Greenfield Textile manufacturing plant in Amravati
- **2017:** Makeover and reinvention of the brand philosophy of Park Avenue



-Gautam Singhania,
CMD, Raymond Limited

away from Nagpur. Built on 100 acres of land, the plant produces premium pure wool, wool blended and polyester viscose suiting. This plant has achieved a record production capacity of 14.65 million meters, giving it the distinction of being the single largest integrated worsted suiting unit in the world. Subsequently, in 2006, Raymond launched the famous Vapi Plant, the world's largest integrated composite textile mill to date. Raymond has increased its worsted suiting capacity by 14 million meters, as part of the second developmental phase of the Vapi plant. Modeled to meet international standards, the Vapi plant has been set up on 112 acres of lush green land with Hi-tech machinery such as warping equipment from Switzerland, weaving machines from Belgium, finishing machines, automatic drawing-in and other machines from Italy. These three facilities together employ approximate 6,000 people and working on a combined manufacturing capacity of 38 million meters of fabric per annum.

Leading by Research and Development

The Raymond Group's trend setting innovations can chiefly be attributed to the its in-house research and development team, whose innovations have become milestones in the worsted suitings industry. Raymond holds the distinction of creating the world's finest worsted suiting fabric from the finest wool ever produced in the world - the Super 250s fabric made of 11.4-micron wool. "What makes it special is the fact that this fabric is made of wool that is only 11.4 micron thick (a micron is a millionth of a meter). This is approximately a fifth of the diameter of a human hair. This fibre comes from a breed of Australian Merino sheep that are renowned for their fine fleece. The quality is far better than normal suit fabric. This is the lightest fibre with which a suit can be made. The suit fabrics of Super 250s may cost up to ₹3 lakhs/meter," says Mr. Harish K Chatterjee, VP - Manufacturing, Raymond Ltd.

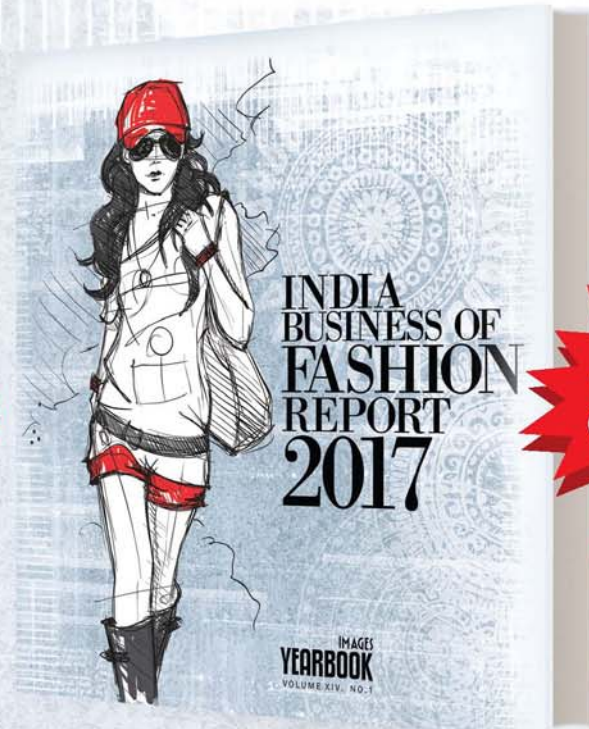
Power House Performance

From being the first company to introduce a poly-wool blend in India to creating the world's finest suiting fabric, the Super 250s made from the superfine 11.4-micron wool, Raymond has been a trailblazer since day-one. Now led by Gautam Singhania, the group closed FY17 with revenues of ₹5,509 crore registering EBIDTA margins of 7.7 percent. 80 per cent of the Group's business comes from domestic market which encompasses business interests ranging from textiles, fabrics, apparel manufacturing, fashion brand retailing to engineering, prophylactics and international businesses. As of today, Raymond has retail shops selling fabrics, apparel and fashion brands. Its apparel and textiles business network have 20,000 touch points in 600 cities and towns reaching consumers through ~160 wholesalers, 3,300 MBOs, 800 large format stores and a chain of over 1,000 exclusive stores.



THE ORACLES HAVE SPOKEN!

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This year, the book's quest for fashion divination finds support from many leading global fashion and technology pundits. The list that shed their light and deep research insights include gurus from the below organisations; amongst many others.

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25 YEARS OF
DEFINING EXCELLENCE

THE FASHION CONNOISSEUR

ASHISH SONI

By Tanya Krishna

Designer Ashish Soni is one of the foremost stars of the Indian fashion industry. He is one of the few designers who are known for their immaculately tailored western clothing for men as well as women. Born in 1971, Soni moved with his parents to Zambia, Africa in 1978. He later returned to India at the age of 15. Interestingly, although he possessed a keen sense of aesthetics from an early age, Soni didn't start his fashion career as a designer, but as a model for designer Rohit Bal.

Ashish Soni is a NIFT alumini and part of the generation that pioneered fashion design in India. In 1993, he became the first Indian designer to have a solo showcase in Delhi. Soni was also the first Indian designer to be invited to show at the Olympus Fashion Week in New York and one of the first from the country to retail at Selfridges in London.

This year marks his eponymous label's silver jubilee, and in order to celebrate his 25th year in the fashion business, the ace couturier presented his "All Black Everything" collection on Day 2 of the Amazon India Fashion Week Spring/Summer 2018. The collection showcased the colour black in all its guises by using 30 different textured black fabrics.

The veteran designer gets candid with IMAGES BoF and reflects upon his many achievements, milestones and fashion journey.





The Indian men are becoming more fashion conscious, are aware of the latest trends doing the rounds in the fashion circle and are not afraid to embrace it. I believe men are the chameleon of fashion and when given the right nourishment and freedom to express, one will be surprised by them.

Maintaining a consistent position in the industry for over two decades is quite an accomplishment. What would you attribute this to?

Ashish Soni (AS): I have been blessed to be able to sustain and see the brand grow to what it is today and the credit for this is to the people who have been part of the journey. I am grateful to all of them. I believe that if one believes in oneself and has the drive and desire to achieve the goal, nothing is impossible.

So, when did you first fall in love with fashion and chose fashion as a career?

AS: I have been fascinated with fashion since a very young age. In fact, I used to alter my school uniform pants to turn them into a better fit. Perhaps it was thus that which steered me towards fashion but I didn't really think that I wanted to become a designer at all till quite late in my teens. I was almost finishing my school and my father showed me an advertisement about NIFT announcing that it had just been set up in India and he asked me

if it would be of any interest to me. I came back and saw the whole campus, sat for numerous rounds of tests and interviews and like they say, the rest is history. Growing up, I didn't know that I wanted to be a designer. But as a young teen, I had modelled and I think the whole modelling experience really helped me in deciding that I'd rather be in the back-end than the forefront of any fashion event or show.

How have you seen the fashion tastes of Indians evolve with time?

AS: The Indian fashion scene has changed drastically over the last decade; people are becoming more experimental and are not afraid to move out of their comfort zone. Men are becoming more fashion conscious and are aware of all the latest trends doing the rounds in the fashion circle and are not afraid to embrace it. With the coming of technology, it has become easier for people to be connected and this has led to the rise of fashion influencers all across the world with massive followings and they play a huge role in determining the latest trends.

What would you like to say on the acceptance of fusion fashion by men?

AS: The world of fashion is never constant and it keeps changing with



ON A PERSONAL LEVEL.....

EVOLUTION:

Education: NIFT, New Delhi (1989- 1991)

Internship: Rohit Bal (1991- 1992)

First Show: NIFT Graduation Collection (1992)

Top Collaborations:

Chivas 18, Nokia, Vanessa G, Nexa

Causes You Are Associated with:

I contribute to a variety of charities depending upon the cause and the need.

Three Collections You Most Fondly Remember:

1. 'Sounds of Silence' collection in 2007, showcased washed and treated cottons;
2. 'Game On' collection in 2008, showcased sports inspired clothing;
3. 'Black Tie Goes Viral' collection in 2010, showcased evening wear collection that was presented at the Wills India Fashion Week Finale.

Your One Great Love: Food

Your Three Dearest Wishes: More free time, more leisure travel and a house on a beach

BUSINESS:

Brand name: Ashish N Soni

Headquarter: New Delhi

Launch year: 1992

Top retailers: Ensemble, Ogaan

E-Commerce Websites Available at:

Amazon, Carma Online, Pernia's pop-up shop

Celebrity Clients: Saif Ali Khan, Kareen Kapoor Khan, Arjun Kapoor, Ranveer Singh

Theme & Inspiration of the New Fall Winter'17-18 Collection:

My new collection "All Black Everything" is all black inspired with a lot of textures involved. For this collection, I am creating pieces for which I am well known for, like going back to my roots of original design and aesthetics.

the coming of latest fads and trends. As stated earlier, men are becoming more experimental with their choice of clothing. I believe men are the chameleons of fashion and when given the right nourishment and freedom to express, one will be surprised by them.

Tell us about the journey of Indian fashion designers. How has their influence grown on the fashion industry over the years?

AS: I believe Indian designers have come a long way and have made a mark for themselves in the world in terms of their craft and workmanship. I believe the 80s and 90s were the decade when Indian designers made a mark in the international circuit and people began to look at India as a fashion hub from a different perspective - with great potential and a wide talent pool yet to be explored.

Tell us about your collections that had major impact on the fashion industry and garnered immense popularity.

AS: All my collections have always been extremely crucial to me as each one holds a special place and meaning. It's not up to me to talk about my collections - it's not what I think; rather it's what everyone else

thinks. But in terms of taking me into the big league and helping me emboss my name, I think it's the 'Sound of Silence' collection, that I showed in New York.

You have served as the Chief Design Officer at Vanessa G. Tell us about your experience at the position and what it taught you.

AS: It was extremely fun! I met Vanessa Gounden in the summer of 2010 and I worked with her for almost 3 years as the Chief Design Officer. It was an amazing learning experience. The amount of intensity that she has in terms putting the label together, it's mesmerising and incredible. She had great vision and is focused on what she wanted the label to become and that was helpful because otherwise you will be lost and not know what the other person wants. My role was primarily to create and give the label form and reality, giving her vision a strong identity. We based the label out of London and they have a very good store on Conduit Street. The label is doing phenomenally well across the world. I feel proud that I was associated with it. It was an extremely challenging project because we were starting from scratch but whatever I brought to the table was my entire know-how of the past 20 years of my experience in the industry and it worked out well for us.

You are known as a person who has great faith in simplicity and originality. How do you consciously strive to evolve while remaining true to these two core values?

AS: My design aesthetics has always been "less is more" and I like to incorporate this in my day-to-day life as well. The key is to maintain a balanced life and I do personally believe that as a personal endeavour, one needs to grow spiritually and needs to have a connection and understand the energies that surrounds us and respect them and start understanding the way the universe functions. I also believe





whether its spiritual or otherwise, being connected to some form of energy helps your intuition.

You are primarily known as a men's wear guru. Tell us about some of your significant creations for women and the primary feature or trait of your women's wear range?

AS: I believe that garment made should be of the finest quality with great emphasis on the quality, design, cut, and silhouette whether it's a men's or women's wear piece. I do like to experiment and I am a fan of androgynous dressing. My primary feature would be making sharp tuxedos and pants suits for women as well.

What are your views on fashion going digital?

AS: Everything is digital these days – to know the latest trends across the world it's just a click away. With the advancement of technology and the availability of smart phones, the world is more connected. The internet is a phenomena that has hit fashion in terms of becoming a platform for us to represent what we do. Of course, it has made life easier and much more accessible and made connecting with people across the world easier by ten folds. Anything you want to say or put or display, you can put it out there and people will react to it and you get instant reactions on what people's thoughts are. I think there's a negative aspect of it too. One big negative aspect is that there's an overdose of trend. There are too many people calling themselves trend gurus. The sad part of it is that something that could become a very strong identity in terms of fashion and a product perhaps of longevity is no longer there. It's a trend today and not tomorrow. Fashion is becoming a fad. On the other hand, communication with the consumer has become much easier; young designers no longer need tremendous amounts of

budget to make catalogues and reach out to new customers.

Tell us about your future plans. Where do you see yourself in 5 years from now?

AS: These last 25 years have been a wonderful learning journey. With that being said, I believe now is the time to bring luxury fashion to the masses and reach out to a wider audience. We are in the process of creating, putting together and selling a new brand that will address the bottom tier over the next few years. It's more in the likes of a mass brand. At the same time, I will be working on my current brand 'Ashish N Soni' to become a more premium brand and use it as a parent brand, but with the revenues and longevity in terms of business coming from the mass brand.

Summarise your 25 years of journey in fashion in a few words. What advice would you give to upcoming designers?

AS: From 1992 to the beginning of 2000, I only did men's wear designs. It was tough, it was financially difficult also because I didn't work on women's wear and that's where the money was. The lehengas and sarees were where the money was. The next decade, 2000-2010, I refer to it as my 10 years dedicated to women's wear, where the beginning of it all was fashion weeks. Then I started selling across various outlets, doing trunk shows and fashion shows. I showed my collections in New York Fashion Week and this helped me in taking my business abroad. Post my Vanessa G stint, in 2012, my focus has been my men's wear brand and we tried to make it as premium as we possibly could – improving the quality, putting it through various processes and making sure that we deliver the best suits possible. That's how I'd like to sum it up.

My advice to the upcoming designers would be – *live your lives with no regrets, if you want to do something, take charge and act upon it.*





Pero



Pero



Lotus Sutra by Karishma Jamwal at LFW-WF 2013



Troy Costa



Nitin Chawla at LFW-WF 2015

F/W '17-18

THRIVES ON LEATHER & WOOL

The Indian winter wear market sees increasing evolution with a new found focus on wool and leather, and innovations like never before.

By Meher Castelino

While the world may have four distinct fashion seasons, India has its own fashion calendar because of the weather. The North is fortunate to have four seasons; the rest of the country pays homage to summer around the year. Therefore it is quite unlikely that designers create collections that are totally appropriate for autumn-winter and instead digress into festive and bridal wear.



to catapult designers on to the international ramp after successfully winning the coveted award.

In 2013, Woolmark announced Rajesh Pratap Singh as the first Indian wool ambassador at Wills Lifestyle India Fashion Week Autumn/Winter 2013. His collection inspired by The Wool Lab Autumn/Winter 2013-14 and created a stir in the country as the designer worked with Merino wool and brought it to centre stage.

Rahul Mishra created history in 2015 by being the first Indian winner who gave Merino wool a fragile treatment that could be worn even in summer. Suket Dhir went on to bag the International Woolmark prize in 2015-16 for men's wear in Florence. Once again it was innovations in wool using the traditional technique of hand tied and dyed wool yarn along with Kasuti embroidery and contemporary shapes that created the winning collection.

In 2016 Nachiket Barve and the Bounipun label by Zubair and Renni Kirmani won the International Woolmark award for women's and men's wear from India, Pakistan and Middle East region finals giving the yarn a further boost.

Nachiket's mix of felted appliqués, hand embroidery and digital prints for dresses was an amazing experiment, while Bounipun brought Kashmir craft practices to the forefront. Once again in 2017-18 it was Ujjawal Dubey's label Antar Agni that won the regional finals in Dubai with his dove grey layered and draped men's wear collection inspired by India's Rabari people. Ruchika Sachdeva with her Bodice label won the women's wear spot for the region with her hand-spun fabric mixing it with paper yarn along with kantha embroidery.

IN THE BEGINNING

The first Indian designer who dared to create woollen jackets and sell them successfully in the heat of Mumbai was Shahab Durazi in 1988. This award winning star graduate from the Fashion Institute of Technology, New York and Parsons Institute of Fashion, created a sensation when brought the woollen jacket onto the Indian fashion scene. Soon designers like Ravi Bajaj and Suneet Varma designed amazing wool garments for men and women.

INTERNATIONAL WOOLMARK CONTESTS

Wool and leather two good mediums for winter have very few takers but thanks to the many promotions by the International Woolmark Awards in the form of contests, it has helped





Ashish Soni



Arjun Saluja



Eka



Rohit Kamra



Shantanu Nikhil

DIFFERENT WOOL & LEATHER OPTIONS

There are different types of wool that are popularly used by designers starting with sheep's wool made from sheep fleece, Merino wool from the Merino sheep, Mohair wool from the Angora goat, Angora wool from Angora rabbit hair, Cashmere from the cashmere goat and Alpaca from the Peruvian Alpacas. Pashmina is of course from the Changthangi goat that lives in Tibet. The most prized wool, which is banned now, is the Shahtoosh known as the king of wools that is turned into exquisite shawls, which are from the endangered Chiru. The various weaves in wool that are favoured are tweed, hound's-tooth, herringbone, Glen checks and Harris tweed.

When it comes to leather, which is not used so often except for trims and a few fashion garments there is sheep and lamb from which nappa, suede, chamois, skiver and double face is obtained. From the cow it is nappa, nubuck and split leather, while from the goat, kid and pig it is full grain and suede. Exotic and fur bearing animals offer snake skin and mink. Of the above, nappa, suede and nubuck are the most popular for garments.

MEN'S WINTER WEAR

When it comes to winter clothing, men tend to favour wool more than women since the shirt, trouser, suit and overcoat are suitable to woollen fabrics.

Since wool and leather are popular for men's wear Indian designers have given them more creative touches. Arjun



Dhruv Kapoor at LFW WF 2015



Dhruv Kapoor at LFW WF 2015



Ka-Sha at LFW WF 2015



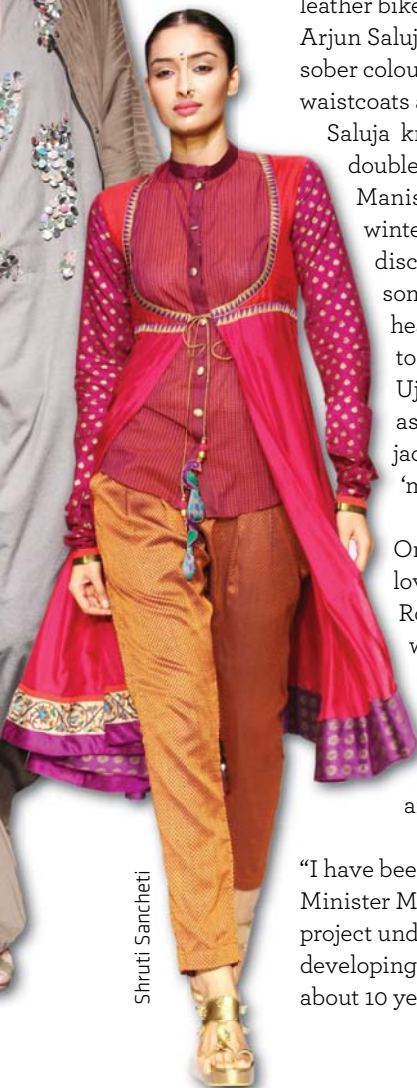
Vineet Bahl



Troy Costa



Ra Ra Avis



Shruti Sancheti

Khanna, India's well-known men's wear creator prefers to concentrate on leather bikers with metal detailing. Arjun Saluja's creations are layered in sober colours with pants, flared kurtas, waistcoats and jackets. For winter,

Saluja knee-length woollen coats or double-breasted trench versions.

Manish Bansal has sharply cut winter jackets in brown with discreet contrast touches or some with wild prints on heavy fabrics. When it comes to the Antar Agni label by Ujjawal Dubey, it is woollen asymmetric kurtas and jackets that have turned into 'must haves' for men.

One of the designers who loves working with wool is, Rohit Kamra from Jaipur who has presented woollen collections for winter as well as wedding wear in his favourite khadi wool, which has a great texture and feel.

"I have been associated with Chief Minister Mrs. Vasundhara Raje's project under Govt. of Rajasthan on developing khadi in Rajasthan since about 10 years. In fact, wool khadi

is one fabric, which is only made in Rajasthan. The regions of Bikaner, Barmer and Jaisalmer have been spinning wool yarn and weaving it on handlooms. I am totally in awe of the versatility, which this fabric offers. If marketed well, wool khadi of Rajasthan can replace English flannel. The best part of khadi as a story is that by wearing one outfit we are providing livelihood," revealed Kamra.

Whenever he gets a chance to create a collection it is normally from wool. "Wool is my favourite fabric. I have used it in most of my collections. Since all my inspirations are derived from royal equestrian and military influences, I also use leather but most of it is faux leather or fabrics that feel like leather," he informed, whose men's wear has a sharply cut regal silhouette.

Informing about the different types of wool he has used, he continued, "I have used all counts of virgin wool but I love using flannels and tweeds as they exude a very masculine character."

According to Kamra there is a myth around wool, which has been unknowingly spread, in the past few

>



Mayank Anand Shradha Nigam at LEW WF 15



Ilk



Huemmn

years. It has been deemed that since India has less of winters, so woollen apparel is not the best buy. But virgin wool was considered as one of the best fabrics for all weather. "It has all insulating properties and is suitable for most temperatures. I remember my grandfather's generation wearing light virgin wool trousers in deep summers," he recollected.

For many of the new-age designers, wool is not the first choice due to the high tech fabrics, which are now available and considered trendy. "The influx of new age yarns and latest fabrics lure all designers, as it's easier to create a look. It is challenging to create a new look in wool. Unfortunately at times it is considered obsolete for the new generation designers and buyers. A new dimension in textiles and treatments can surely give new life to wool," shared Kamra.

Designer Nitin Chawla's designs are for cold climes with his kurta inspired hoodies, pants and tunics topped with glitzy biker jackets that will keep the male dresser warm. Sabyasachi Mukherjee's sherwanis with heavy

tonal embellishments will work for the dipping mercury, while Sahil Aneja's long, leather biker's jackets will be stylish additions in the male wardrobe.

When it comes to traditional creations, the designer duo, Shantanu and Nikhil create draped kurtas inspired by the 1919 Mutiny, which are ideal while the addition of a leather or woollen waistcoat makes an impact on their garments.

Men's wear specialist Troy Costa works with windowpane checks for double-breasted suits or just plain wool for a tuxedo jacket. Dhruv Kapoor's woollen coat with a hood is one of the garments that will be ideal for winter wear.

WOMEN'S WINTER WEAR

Winter wear in India may not necessarily revolve around wool and leather for women. Indian designers innovate with layering, which has gained acceptance among the fashion fraternity, which in turn uses heavy cotton, quilting, machining and intense layering of 3 to 4 garments to combat the declining mercury during winter months. Layering is the most favoured form of dressing for women.

Women's wear alternates between extreme layering and woollen

leatherwear. Abraham and Thakore prefer a layered look with shirt, palazzo and floor length coat, while designer Arjun Saluja goes for a military style thigh-length coat or a layered look with tunic, kurta, pants, biker's jacket or maxi skirt. Ashish Soni's black and white story also has the layered version with loose trousers, shirt and oversized trench coat or a mini checked blazer.

Blends in wool are popular for women's wear so Gaurav Jai Gupta for Akaaro has experimented with cotton and steel and for Lakmé Fashion Week Winter Festive 2017. He moved into unconventional reversible Merino wool weaves especially woven in Haryana, West Bengal and Gujarat. There was a mix of wool-khadi, wool-silk and wool-zari for multiple separates, jackets and even sarees. Rina Singh of EKA also brought in linen-wool for this season for layered shifts, dresses and jackets.

While Chola may not use wool, the layering is so intense with flowing maxis, jackets, jumpsuits or coats that it keeps the wearer warm. Dhruv Kapoor favours layering with quilting and adds faux fur. Dhruv Vaish adds a mini wool-leather cropped jacket to the shirt and pants, while the Good Earth label prefers oversized layering to create a set of warm garments.

Designers Hemant and Nandita give formal wear layered additions but Huemn adds a boyfriend shirt, pant and bomber jacket. Ilk keeps it feminine with layering; Ka-Sha one of the designers who believes in extreme layering has 3, 4 or even 5 garments all merged into one outfit. Quilting machining and padding are for dresses, coats, jackets, kurtas and skirts from the Ka-Sha label.



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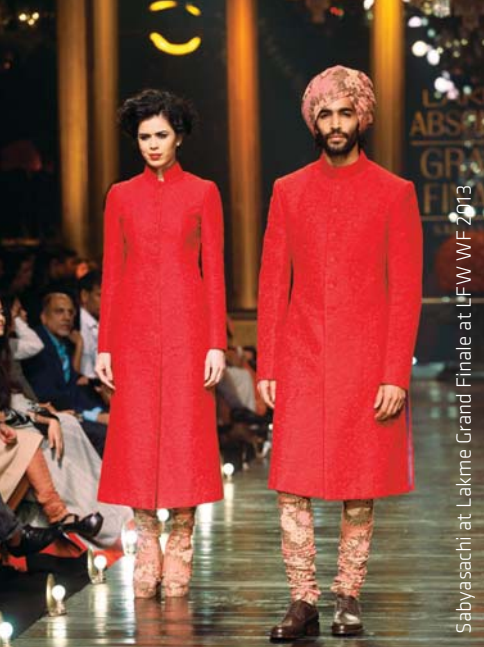
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Sabyasachi at Lakme Grand Finale at LFW WF 2013



Payal Khandwala at LFW WF 2013

Nachiket Barve who created great garments for the International Woolmark contest shares his thoughts “I have been using wool over the last 5-6 collections in various formats. I have been doing work with wool over seasons, but increasingly winters are shorter and are really felt only in the northern parts of the country. Wool also requires skill to work with from a technical point of view. I have worked with wool in three ways; yarn for weaving to create fabric, yarn for embroidery and Merino wool felt. I have been working with Merino wool extensively for these collections.”



Good Earth



Rohit Kamra

Giving a new look to wool Bharve continued, “There was a mix of hand woven and power loom processed wool.” He felt, “I think there’s a perception that wool works only for cold climates; and I feel not enough research and development has been done to create tropic friendly wool garments. Then there’s also the price factor as wool is expensive.”

Working with wool can be quite interesting as he revealed, “It is a beautiful but challenging material to work with. The fact that it is natural and biodegradable is a big bonus. The disadvantages are the fragility and the fact that customers don’t really value it as much.”

Karishma Jamwal is another designer who prefers wide trousers, tunics and capes, while the designing duo Mayank Anand and Shraddha Nigam go for a multi layered winter look. Chirag Nainani’s winter offering is a jacket, maxi skirt and woollen scarf. Nikasha ensures that formal wear when layered is ideal for cold climates. Payal Khandwala’s draped garments work well for cooler nights. Pero has got the woollen fabrics specially woven, while Rara Avis brings muted sober hues for layered garments. Shruti Sancheti’s layering in silk is a formal look for winter.



Nachiket Barve



NIKASHA

The Gen Next label Saaksha and Kinni at Lakmé Fashion Week Winter Festive 2017 offered a glittering layered look but Sahil Kochhar’s quilted bomber and maxi are ideal for winter wear. Designer Sneha Arora gives a masculine, military inspired look to her winter wear with midi skirts, jackets and camouflage coats in deep tones of rust, khaki and brown. Vineet Bahl goes for the total winter look with ski pants, fur edged poncho and long-sleeved cardigan.

It is encouraging to see that Indian designers are just moving into the true winter fashion creative category for the local market, although there is a thriving business in leather and woollen garments for export from many Indian companies.





WINTER FASHION TRENDS 2017-18

DESPITE THE OMNIOUS MIX OF UNPREDICTABLE WEATHER AND POLITICAL UNREST, FASHION IN THIS UPCOMING AUTUMN-WINTER SEASON WILL BE QUITE EXPERIMENTAL, PERSONAL AND OUTRAGEOUS.

BY SHASWATI SENGUPTA, CEO, INGENE INSIGHTS

This Autumn Winter 2017-18 will be so much fun, glamorous, edgy and funky with the combination of brocade, silk, velvet, sequins, zari embroidery, plaids, fake furs topped up with translucency and plastic surfacing! This season will be ruled by oversized sweaters, chunky knitwear, long capes, anything that is easy wrapping, classic long overcoats, loose pyjama style high waist trousers, lots of layer playing, translucent leggings, silver leggings, long loose shirts/tees/dress with quirky print. The tribal motifs, celestial motifs and florals will dominate in the sweaters and in the casual jackets the adornment in back will be more.

The large collar will be a prominent feature. The double breasted suit of 80's and midis will make a comeback. Lots of experimentation will be seen in 'mix-n-match' textures as well as in materials such as plaid patch incorporated to sweater, plaids with velvet, sweater with velvet front panel, brocade incorporated with leopard print, classic suit with crystal embellishment in arms, parka with hint of floral print and so on.

The major colour players are silvery grey, olive, red, light pink with the companion of blue, plum, burgundy, orange, yellow, white and black. The combos that will rule would be like nude with pink, yellow with nude, olive with burgundy, classic red and black, orange and blue, blue with olive, white with silver. Jackets with hoodies and round caps will be prominent feature. The Summer 2017 trend of "political protest slogan" will continue in this season also, but will be reformed more to women power, rights and feminism. To sum up this Autumn Winter 2017-18 will not be boring at all, instead we will witness an action packed mix and match season!

ABOUT SHASWATI SENGUPTA

Shaswati Sengupta is the CEO of Ingene Insights Consultancy. She has worked on both trend and market research for Nike, British Council Library, Vodafone, Facebook, NTT Data and with various other international research agencies. She is an avid lover of travel, cultural studies, art and human psychology. She is proactive as a social facilitator and is engaged in managing a charitable trust (Inklink Charitable Trust www.inklinktrust.wordpress.com) which is for the education of underprivileged children and skill up-gradation for the crime affected women.

TREND: OVERSIZED SWEATERS



TREND: LONG AFFAIRS



TREND: CHECK-MATE



TREND: SILVER FEVER



TREND: OLIVE LOVE



TREND: RED ALERT



TREND: HIGH WAIST PYAJAMA



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TREND: LARGE COLLAR LOVE



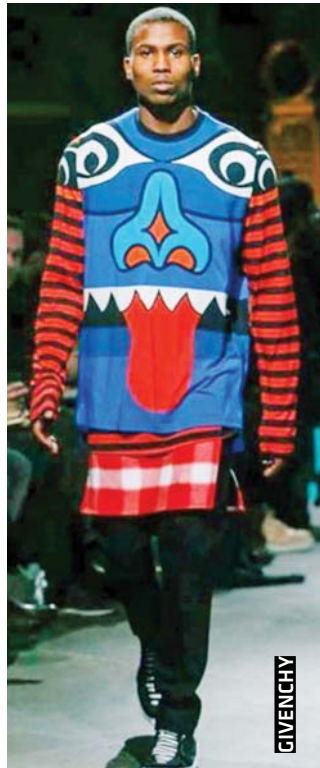
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TREND: **VELVET LOVE**



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TREND: BOHO TRIBE LOVE



TREND: PINK FLUID



TREND: PROTEST TEES



WINTER CHIC

BOLLYWOOD

STYLE

Who said winter was all about frumpy dressing? Taking cue from some of Bollywood's celebrities, there are several ways you can face the chills in style! From winter wear must-haves, celebrities from tinsel town also give major outfit goals on sporting some hot trends correctly.

By Aarti Kapur Singh



ARJUN
KAPOOR



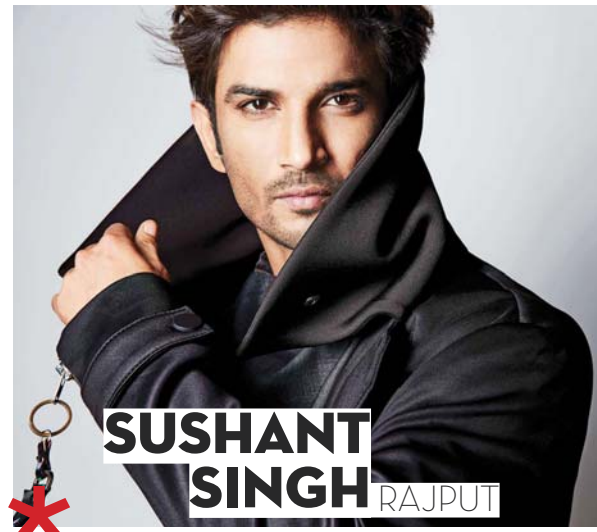
“I cannot layer my clothes because I am broad and used to be fat at one point. So it has to be one garment that keeps me warm. Mumbai doesn't see harsh winters. So I stick to shirts in thick material. If I have to wear jackets, I wear leather jackets or parkas.”



SONAKSHI
SINHA



“A leather jacket is versatile, chic and will make you look like a total hottie. It's a winter wardrobe must-have! I cannot travel without at least two of my almost two dozen leather jackets!”



SUSHANT
SINGH RAJPUT



“I love the cold weather. So it doesn't bother me enough to want to go overboard with woollens. But yes, given a choice, I do love active wear and athleisure clothing. So it's mostly sweatshirts and jackets for me. We were shooting in extremely cold conditions in Kedarnath recently and I did need heavy parkas there. For formal events I prefer tailored jackets more than Indian wear.”



“I love leather jackets and am always looking for opportunities to wear them. The look becomes even more rugged if the jeans are frayed or distressed. I spice up my look by wearing a leather jacket on a basic t-shirt and jeans combination or wear a simple tee or a pullover with a fitted distressed denim, and layer it up with a classy leather jacket. If it is really cold, a muffler or scarf and gloves complete the look. Though I like the leather to be the statement in my winter look.”

RANBIR KAPOOR



ALIA BHATT



“It is not so hot in Mumbai, but I freeze during flights or outdoor shoots. So layering my clothes is a great idea. I start with a light jacket or shrug over a basic tee and carry a warmer jacket in my hand just in case. I am actually so used to layering my clothes, that I often wear even formals like this - just in case the air-conditioning is too strong.”



ILEANA D'CRUZ



“Oversized cardigans are my winter saviours! But I can't be wearing them to formal dos or all the time. In which case, I usually wear capes and also rely on heavy fabrics. The best thing about a cape is that it can be worn on almost anything. Velvet and scuba not only make your look royal, but they fall like a dream and add silhouette to your frame as well.”





RANVEER
SINGH

“I can only say, lay to slay! Layering is the best way to stay warm and look hot. Over a t-shirt, over shirts, I have even worn jackets over skirts! I love the fact that winters allow me to experiment with jackets - both formal and informal - to play with different looks. It is fashionable as well as practical. I am a big fan of hats, caps, berets and the like. While I wear them all-year long, in winters, I get the opportunity to wear smart mufflers with corduroy jackets and pants. I also live for jackets - leather, denim, bomber - anything! So yes, jackets are my winter wardrobe essentials. For formal dos, I completely dig bandhgalas and have quite a few of my own.”

“I am totally a cardigan person. So instead of wearing bulky coats and cardigans that make anybody look larger than they are, I prefer long, cascading cardigans. You can tie it up or let it hang loose, over your basic tees and tank tops, even over dresses and shorts. I love them in basic colours like navy blue, black and grey. The simple button down cardigan also works wonders for the winter. If I am shooting in a really cold place, I like to wear bomber jackets. Although oversized cardigans look great with almost anything, you can pair it up with a pretty lace or chiffon dress for a romantic look. Add a belt to cinch the waist, and give you a more structured look.”



JACQUELINE
FERNÁNDEZ



DEEPIKA
PADUKONE

“The trench coat is a classic piece of clothing that a girl can always depend on, irrespective of the weather. Whether you are wearing jeans, a dress, or a skirt, the trench coat is versatile enough for all outfits. And it is perfect for times when there is slight rain with the cold weather. My favourite things to pair with a trench coat are structured pants or tights, a chic bag and booties. It would make you look nice without making you look too bulky. I also love the idea of printed trench or long jackets. If I have to wear ethnic, pure silk in Banarasi or Kanjeevaram sarees are my go to option, though I have started taking a shine to velvet lehngas and skirts of late as well.”



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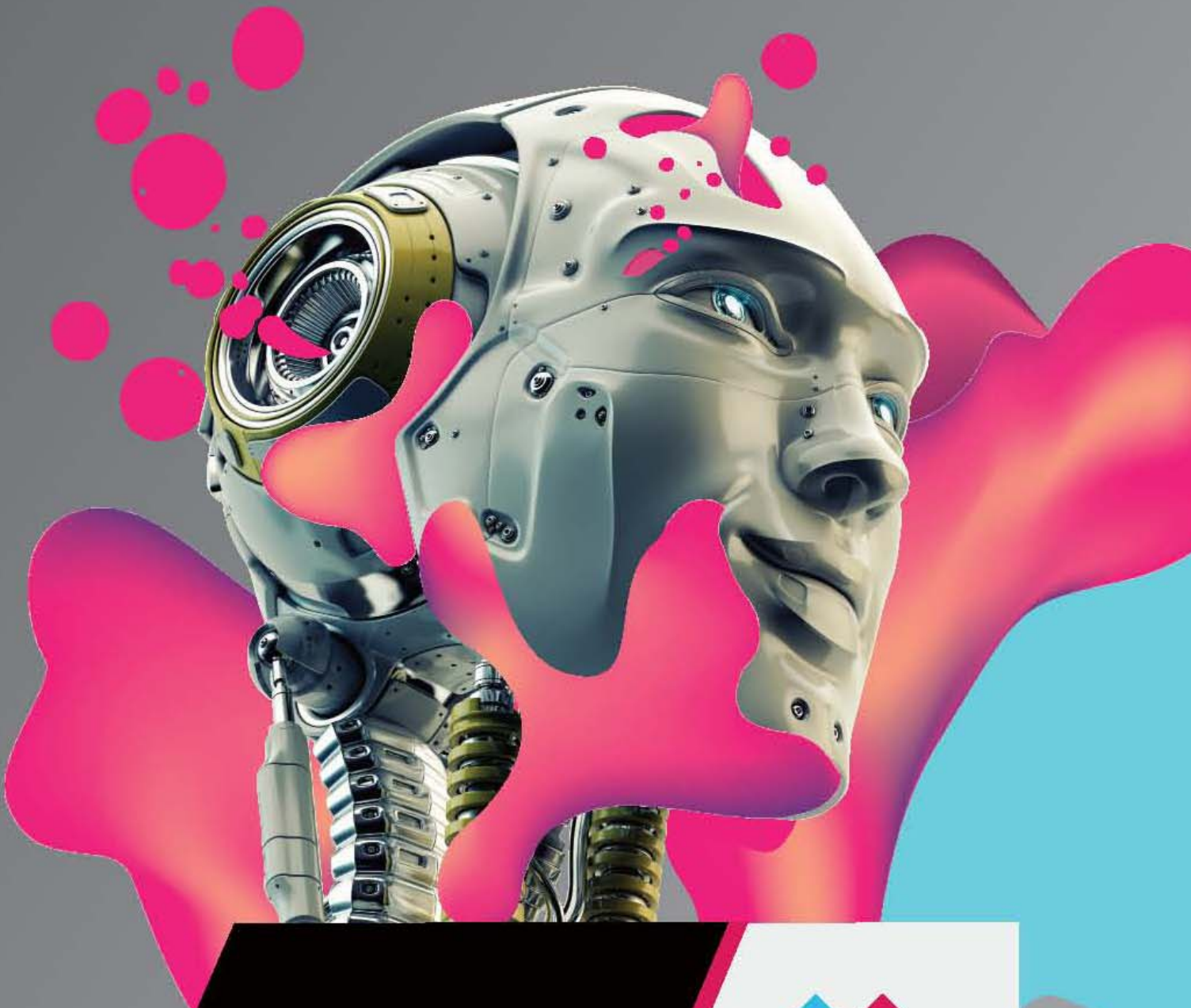
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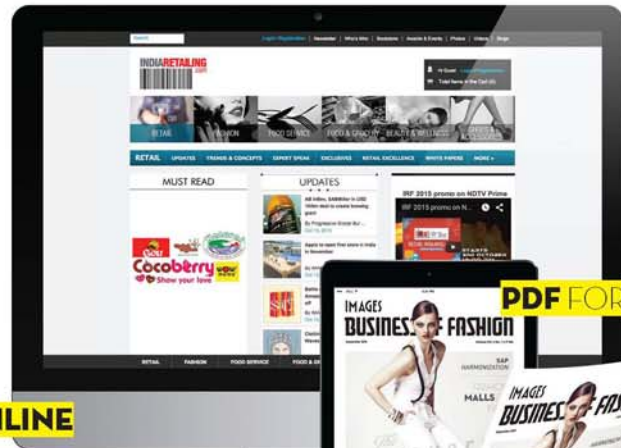
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| 4 | Special Invite for IFF Power Breakfasts, Networking Lunches, Awards & Gala Dinners | NA | 2 Invites | 2 Invites | 4 Invites | 6 Invites | 2 Invites | 1 Invite | 2 Invites | 2 Invites |
| 5 | Lounge Access at India Fashion Forum for B2B Meetings | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| 6 | Research Reports & Publications (Print/ Online) | FOC up to Rs.2,000 | FOC up to Rs.5,000 | FOC up to Rs.10,000 | FOC up to Rs.20,000 | FOC up to Rs.30,000 | FOC up to Rs.10,000 | FOC up to Rs.3,000 | FOC up to Rs.10,000 | FOC up to Rs.5,000 |
| 7 | Images Fashion Awards | 2/3rd waiver on awards nomination fee | 2/3rd waiver on awards nomination fee | 2/3rd waiver on awards nomination fee | 2/3rd waiver on awards nomination fee | 2/3rd waiver on awards nomination fee | 2/3rd waiver on awards nomination fee (in applicable category) | 2/3rd waiver on awards nomination fee (in applicable category) | 2/3rd waiver on awards nomination fee (in applicable category) | 2/3rd waiver on awards nomination fee (in applicable category) |
| 8 | Presence on India Fashion Forum Website | URL Link | URL Link | URL Link | URL Link | URL Link | URL Link | URL Link | URL Link | URL Link |

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

Additional Benefits:

- ▶ Special Packages to join IFF delegations for national & international retail trade shows.
- ▶ Special packages for members for Print Ads in relevant magazines.
- ▶ Speaker/Panel discussion opportunities subject to availability of slots
- ▶ Priority in processing of your application for 'TRUSTED MARK' Certification.
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