

IMAGES

BUSINESS OF FASHION

December 2017 | Volume XVIII // No. 12 // ₹ 100

12

Issue No.

www.imagesfashion.com

YEAR-END FASHION ROUNDUP

THE BEST OF 2017

GLOBAL
BRANDS

THAT ENTERED INDIA

BIG BRAND
LAUNCHES

& BRAND EXTENSIONS

THE BEST OF
INDIAN
FASHION
DESIGNERS

EXCLUSIVE

Celebrity
Brands
in India



Dear Friends,

As the year concludes, we can't help but reflect upon how 2017 was a fruitful year here in the Images BoF base camp. Early in the year we launched the first ever book on *Women's Fashion Lifestyle in India*. This was followed by the *India Business of Fashion Report 2017* that was launched at the IFF. On the magazine front, a few special issues come to mind—*The Brands in India Special* (January), *Women Fashion Leaders* (March), *Meet The Masters* (April), and the *big Denims Special* (July). We worked round-the-clock for these ones; and justifiably they brought back the most overwhelming response from readers.

In this, our final work of the year, we embark upon a roundup of some significant events that occurred in the Indian fashion this year. The *2017 Fashion Wrap Up* encapsulates all the global brands that were launched in India along with the major brand launches and extensions by domestic players. We also begin the wrap up with an special overview of the best that came from the Indian independent designer's fraternity.

The year proved to be significant in terms of global brand launches although the economy was still reeling under the effects of the government's demonetization move. A long list of brands like Simon Carter, Bally, Under Armour, Miniso, Steve Madden, Kate Spade New York, Fruit of the Loom, Springfield, Women's Secret, etc., all launched themselves in India thanks to the relaxed policies and increasing confidence in India partners. The success of Bestseller's Indian subsidiary has encouraged the launch of more brands from their stable like Selected Homme and Junarose into India. Even brands like Mango and Espirit that had earlier exited the Indian market have been assuaged by belief in Myntra to relaunch themselves. We also look at which brands can be expected to come in next by looking at the entry applications that were made to the government. There was vibrant action in the domestic space too with a profusion of organizations launching new brands and

established brands extending themselves. This is a healthy reflection of the Indian consumers' new-found fashion awareness and penchant for branded apparel. All in all, there is now a concoction of new names including - Alcis, Berleigh, Game Begins, Glamour Mafatlals, Lingerie Shop, OPT, Rock, Steele, Wooba, XYXX, etc. The need for well positioned and focused brands was even felt on-line with Flipkart launching three brands of their own. Myntra chose to promote some. At Images BoF, our attempt was to present the launches and extensions is such a way so-as-to showcase what is critical to creating a fashion brand in India today. Apart from this, we also have a special feature that outlines why more and more online players are now choosing to establish themselves in the physical retail.

Another recent phenomenon in India is that celebrities no longer just appear in the advertisements but have begun taking active stake in our fashion industry. Do read the special feature to know what our divas like Deepika Padukone, Anushka Sharma, Shraddha Kapoor, Rhea and Sonam Kapoor, Kriti Sanon, and our most loved heroes like Sachin Tendulkar, Salman Khan, Hrithik Roshan, MS Dhoni, Yuvraj Singh, Virat Kohli, and Karan Johar, are up to, even as we welcome them into our fold.

I thank and congratulate all the contributors, participants and the entire Images BoF team for bringing out not just this mammoth December issue but for all their support throughout the year. I hope our readers enjoy this issue, as much as we enjoyed making it for you.

Here's wishing you a very Merry Christmas and a Happy New Year!



Amitabh Taneja

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

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Cover Picture Courtesy:Seven

Stores



Paralove

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Fashion Business



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Indian celebrities that have hitherto associated with brands only as brand ambassadors, are now taking up substantial interest and stake in the fashion lifestyle business. Images BoF highlights this amazing new development.

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BESPOKE

SUITS RIDE THE QUEST FOR EXCLUSIVITY IN FASHION

The inherent need for exclusivity in personal fashion is coming to the fore in India and this has fueled the meteoric rise of the organised bespoke suits market. In an exclusive study, IMAGES BoF looks at the finer nuances of the segment, as it gets inherently more organised with the entry of several exciting ideas and players.

By Shivam Gautam

Creyate

Global bespoke fashion, once a prerogative of style connoisseurs with deep pockets, is fast becoming a growing trend amongst professional men around the world. As prices fall and awareness grows, this once inaccessible market finds itself impelled to the street level making it accessible to everyone developing their very own personal brand of fashion.

But in India, things were a bit different. The country has long harboured a rich bespoke tradition. Especially, when it comes to suits, bespoke was the norm and the only available option back in the day when the garmenting industry was restricted to small-scale manufacturing until the late 1990s. Also, due to lack of size standardisation in apparel, there were few ready-to-wear (RTW) options for consumers, who preferred to buy ready-to-stitch (RTS) fabric and then tailor the garment according to their size. With the entry and expansion of international and domestic apparel brands in the early nineties, the RTW segment increased in popularity, especially in urban centres, and ever since, the segment has grown rapidly and outpaced the RTS segment of the apparel market.

THE ARRIVAL OF INDIAN CELEBRITY FASHION BRANDS

By Namita Bhagat

Famed Italian fashion designer Miuccia Prada once said, "Fashion is instant language". Well, who else can talk fashion better than the celebrities do? Forever in public glare, celebs are considered the perennial style icons. Like us mortals, they just cannot have a bad hair day or a fashion faux pas without making a headline – their entourage of experts and stylists ensure they are picture-perfect at all times. Fans emulate them, the fashion curious get inspired as well. What's more, celebrities' own personal style also becomes a talking point. Celebrities and Fashion are indeed inseparable and it was only time that the markets would realize the business potential of this heady mix, ushering the evolution of "Celebrity Fashion Brands".

The West and Hollywood have been the wellsprings of modern fashion culture and the phenomenon of celebrity-led fashion brands has also its roots in their very heart. Legendary American actress Gloria Swanson is said to have pioneered the trend with her own clothing line way back in 1950's. Various more celebrities have walked the path since then with varying degrees of success before fading into the mists of time. 2000 onwards, the trend started gaining serious momentum with a slew of Hollywood stars, International athletes, singers and supermodels making successful forays into the fashion business. From clothes to footwear to accessories, they are doing it all.

If international celebrities are doing it, can Indian icons be far behind? Of course not!

Of late, we have seen many A-listers in India turning fashion designers, fashion brand owners and entrepreneurs – some of them have launched their own fashion brands or lines in collaboration with established fashion companies, while others have made investments in or have set up their own fashion-focused businesses. With tremendous following, film stars and cricketers are the biggest influencers in India. Not surprisingly, nearly all celebrity fashion brands so far have come from them. John Abraham is the first Indian actor to release his clothing line in 2006. After a hiatus, Salman Khan launched his fashion label in 2012, followed by Hrithik Roshan in 2013 and Virat Kohli in 2014. The trend has been on the constant uptick from then on.

Celebrity advertisements and endorsements have always been there. We also have had celebs lending their name to products such as signature fragrances. But now, we are moving beyond the 'age of advertisements and endorsements' into the 'era of advocacy' wherein Millennials, Generation Z, Aspiration, Inspiration, Relevance, Resonance, Connection, Higher Purpose are the catchwords for brand success. Today's consumers don't just buy a product; they seek an idea or concept they can actually relate to. For celebrity brands, the celeb's persona, charisma and relatability are the USPs – the brand story, philosophy and core values are likewise significant, however.

Even as the celebrity-led brands enjoy the patronage of their fan base and have relatively an easy start, they also have to toil to gain wider audience and reception. There are so many brands out there and the consumers are spoilt for choice, literally. It goes without saying that the new breed of Indian celebrity brand owners is sagacious and diligent. They are making well-thought-out moves with brand concepts built around their persona, unique positioning, selecting right partners, passionate commitment and involvement, product differentiation, understanding the market and consumer, disruption and innovation, to cultivate great brands and sustain them. Most importantly, they acknowledge that the product is the real hero and no amount of celeb power can salvage a bad product.

Indian Celebrity Fashion has truly arrived!

And with this has evolved a new category in the Indian fashion industry. The celebrity brands are not only affirming their presence across offline and online retail channels in India, a few have already expanded into international markets also. As many more celebs continue to launch themselves into the fashion business, it seems that the phenomenon of celebrity-led fashion brands is more than a passing fad and is here to stay.

Images BoF spotlights some of the most recognized homegrown fashion and lifestyle brands curated and/or created by our very own Indian celebrities. These brands inarguably have a distinct advantage and a bright future lies ahead of them.

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MYNTA.com



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INNOVATION

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THE GLOBAL BRANDS THAT ENTERED INDIA IN 2017

India's promising consumer ecosystem has bolstered its attraction as a top emerging consumer market. The nation, over the past few years, has opened its gate to some of the biggest brands in the fashion world and their success has continually enticed others to explore the opportunities. The Indian consumer market grew fiercely post liberalization. And, after the global financial crisis of 2008, while the world's major consumer markets – the US, Europe and even the Middle East – were reeling under immense pressure, the Indian market has not just been more stable but quite resilient. Naturally, it catches the fancy of foreign retailers and an increasing number of brands came forth to try their luck in the calmer Indian waters.

Apart from India's rapidly expanding economy and consumption boom, one of the foremost drivers that propelled the nation to this vantage is the government's continued support to relax FDI regulations in key areas of the retail sector. The UPA Government, since it came to power, has been concentrating to make India a much more open economy to the world, and has brought in radical changes to boost FDI and create a suitable climate for foreign investors. The measures seem to have borne some fruits, with India surpassing China and 29 other countries to top the 16th edition of Global Retail Development Index (GRDI) of 30 developing economies, for ease of doing business.

As expected, the big global fashion brands that enter India find comfort in partnering with major national incubators like Reliance Brands, Arvind Brands, ABFRL, Amazon, Myntra, etc. And these have been instrumental in facilitating the passage of the largest list of brands into India this year too. All, except Arvind Brands which had already announced that 2017 would be a year of consolidation and not of launches for them. While Reliance Brands helped the entry of brands like Bally, Kate Spade New York and Scotch and Soda, ABFRL brought in Simon Carter, and Amazon made available to the Indian consumers a slew of influential brands like Under Armour, Steve Madden and Juicy Couture. Espirit, that had exited the Indian market in 2012 after a lukewarm response has returned in partnership with Myntra. So too has Mango. Interestingly, Myntra will not only retail their products online but will also help the brands establish their offline presence. A select few brands have also entered India directly via their Indian subsidiaries, or found value in partners that can extend support across the value chain from manufacturing to retail.

In the following pages we feature some of the most significant fashion brands that have entered the Indian retail scene in the year 2017. Apart from these, the media was also abuzz with reports of the entry of a few other brands like Saucony, Bovet, Isaia, etc., who reportedly also launched themselves in India this year, but, unfortunately we failed to elicit their participation/confirmations by time of going to print.



WHO IS COMING IN NEXT?

IMPACT OF THE NEW LANDSCAPE OF SINGLE BRAND FDI IN RETAIL

A look at the impact that the recent reforms in foreign direct investment (FDI) in single brand retail trading (SBRT) sector and the new role of DIPP in the liberalization and rationalization of the FDI policy has had on the aspirations of global fashion brands of doing business in India.

By Shivam Gautom

In June 2017, India achieved a milestone when it surpassed China and 29 other countries to top the 16th edition of Global Retail Development Index (GRDI) for ease of doing business.

Apart from India's rapidly expanding economy and consumption boom, one of the foremost drivers that propelled the nation to this victory is the relaxation of FDI rules in key areas of the retail sector.

Within the last few months, the Department of Industrial Policy & Promotion (DIPP) has approved as many as 17 single-brand retail proposals worth nearly ₹4,900 crore for food product and single-brand retail trading, including those of Amazon, Grofers and Urban Ladder. The fashion retail sector too registered significant attendance with the DIPP approving single brand retail proposals of a slew of brands like Louis Vuitton, Chumbak Design, Daniel Wellington, Actosera Active Wholesale (Zivame.com), etc.

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DOWN WITH DOWN

Today, with technologies and production process that enable the production of warm and stylish, yet totally cruelty free down alternative winter wear, it's time we say good bye to down production and products. IMAGES BoF lists seven technically advanced alternatives.

Primaloft®

Primaloft® synthetic microfiber thermal insulation is the choice of many for features like water-resistance, lightweight and highly packable.

Thermal R

Marmot's polyester-based proprietary insulation is now widely used in their garments, sleeping bags and gloves.

Omni-Heat®

Columbia Sportswear's proprietary brand of thermal insulation is touted as the highest heat retention synthetic insulation ever.

Recycled Polyester

Patagonia uses recycled polyester in their jackets that does not lose insulation even when wet.

Cocona Insulation

A unique technology that utilises coconut husk and other waste to make fibers.

Wool

Wool is making a comeback in outdoor apparel and fashion wear.

Milkweed Plant

A Canadian company has developed a lightweight, effective-when-wet, very warm woven fabric made from milkweed.

Fashion Creation



TEXTILE INNOVATION SILK DENIMS: BLENDING THE BEST OF TWO WORLDS

Bharti Sood of Images BOF, Shri K.M. Hanumantharayappa, Chairman, Central Silk Board and Silk Mark Organization of India spoke about how silk denim is adding a new dimension to denim and the fashion world.

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DOWN WITH DOWN

Today, with technologies and production processes that enable the production of warm and stylish, yet totally cruelty-free down alternative winter wear, it's time we say good bye to down production and products. IMAGES BoF lists seven technically advanced alternatives.

By Aarti Kapur Singh

When it comes to insulated winter jackets, down is considered the best insulation. Not only does it keep you warm and toasty, but it is also light and compresses very well, making it easy to roll up and stuff into the smallest spaces. But the production method of down is so cruel, it definitely makes a case for going down with down.

Down is the soft layer of fine feathers from the breast of a goose or duck that is closest to their skin and grows to form quill, but does not have the hard quill shaft found in the outer feathers of birds. Down feathers act as a natural thermal vest for birds by trapping air and preventing the loss of body heat. This is also what makes them a very popular filler material in comforters, pillows and jackets. The lightest and warmest down is grown by a sea duck found in the frigid waters of the North Atlantic and Arctic Oceans, the common eider. Eider down is obtained from wild birds, but not by the usual way of plucking it directly from the duck. The eiders use their own down to line their nest, and trained harvesters visit nesting colonies where they pick up a portion of the down feathers found in each nest. This sustainable practice has no negative effects on the eiders' nesting success, but it yields only about 44 grams of down on average per nest, and much less once it's sorted and cleaned. Eider down is of course very expensive and is used mostly in high-priced comforters and luxury clothes.

However, down is literally picked from birds after they are slaughtered for meat and in some cases, by forcibly restraining the animals while they are still alive. In both situations, the birds involved generally live short, miserable lives and die painful deaths for purposes that can absolutely be deemed unnecessary.

It is for this reason that major brands are either shunning down or looking for alternative material and practices. Animal protection lobbies, and conscientious members of the fashion industry are now creating alternatives to fur, leather and



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