



# CONTENTS

## SECTION 1: INTELLIGENCE & INSPIRATION.....36

- 1.1** Fashion 2.0: The need for Artificial Intelligence for Fashion and Lifestyle Businesses .....38  
– *Ganesh Subramanian, Founder & CEO, Stylumia*
- 1.2** Intuition versus Artificial Intelligence .....46  
– *David R Shah, Trendforsker and Publisher – Metropolitan Publishing BV*
- 1.3** How Blockchain Is Disrupting Fashion.....52  
– *Susanna Koelblin, Business Development Manager - Textiles, Eastman Chemical Company*
- 1.4** The Human-Centric Resolution .....56  
– *David R Shah, Trendforsker and Publisher – Metropolitan Publishing BV*
- 1.5** Blending of the Worlds: Fashion consumption in India through millennial perspective .....60  
– *Kaustav SenGupta, Associate Professor, Link Chairperson and Centre Coordinator, NIFT Chennai*
- 1.6** The Localists: The Future Consumer Breed .....68  
– *A WGSN Report*

## SECTION 2: MARKETS & MOVEMENTS..... 72

- 2.1** The Indian Fashion Market 2017 .....74  
– *Amit Gugnani, Senior VP; supported by Goutham Jain, Principal Consultant; and Niharika, Associate Consultant for Fashion - Textile & Apparel, Technopak*
- 2.2** Apparel Market Polarisation and New Opportunities .....86  
– *Baqar Naqvi, Business Director and Willson Anand, Associate Consultant, Wazir Advisors*

# CONTENTS

<b>2.3</b>	Online Fashion Consumer Behaviour learnings from 2017.....	94
	– <b>Nitin Bawankule</b> , Director Sales, Google India	
<b>2.4</b>	Omni-Channel: The Future of Fashion Retail.....	100
	– <b>Amit Gugnani</b> , Senior VP; <b>Goutham Jain</b> , Principal Consultant; and <b>Niharika</b> , Associate Consultant for Fashion - Textile & Apparel, Technopak	
<b>2.5</b>	Investment Themes in the Indian Fashion Industry .....	106
	– <b>Mohit Jain</b> , Business Head – Transaction Advisory, Wazir Advisors	
<b>2.6</b>	Supply Chain in the Fashion Industry and its Upcoming Future.....	110
	– <b>Vineet Kanaujia</b> , Vice President – Marketing, Safexpress	
<b>2.7</b>	Fashion - The Prime Driver of Shopping Space in India.....	114
	– <b>Pankaj Renjhen</b> , Managing Director-Retail Services, JLL India	
<b>2.8</b>	Driving Success through 'Social media' .....	122
	– <b>Suraj Nagappa</b> , Vice President, Isobar	
<b>2.9</b>	Retail Design for Fashion: Purposeful & Personal .....	136
	– <b>Sanjay Agarwal</b> , Managing Director, FRDC (Future Research Design Company) with inputs from <b>Heather Klee</b> , JGA and <b>Nimmi Elizabeth</b> , FRDC	
<b>2.10</b>	Click to Brick: Flipping the Script.....	144
	– Team <b>IMAGES BoF</b>	
<b>2.11</b>	The Future of the Business of Women's Wear .....	152
	– <b>Jaydeep Shetty</b> , Founder & CEO, Mineral Fashions Ltd	
<b>2.12</b>	The New World Order: Curated Commerce.....	156
	– <b>Debangini Nath</b> , Fashion Director at Creyate	
<b>2.13</b>	The Indian Luxury Market - An Overview .....	162
	– <b>Nandini Kelkar</b> , Research Director, Customer Research Practice, Frost & Sullivan	
<b>2.14</b>	Beyond Disruption: Fashioning success in India's luxury market .....	166
	– <b>Abhay Gupta</b> , Founder & CEO, Luxury Connect & Luxury Connect B School	
<b>2.15</b>	Private Labels: A Changing Perspective in Indian Retail.....	174
	– <b>Amit Gugnani</b> , Senior VP; <b>Goutham Jain</b> , Principal Consultant and <b>Niharika</b> , Associate Consultant	
<b>2.16</b>	BeSpoke Fashion and the Technology Influences on it.....	178
	– <b>Tejinder Singh</b> , COO, Arvind Limited	
<b>2.17</b>	The Big Opportunity in Licensing in the Indian Fashion Market.....	182
	– <b>Jiggy George</b> , Head of India, Licensing Industry Merchandisers Association (LIMA).; Founder and CEO, Dream Theatre.	

# CONTENTS

## SECTION 3: ETHOS & INITIATIVES ..... 184

- 3.1** INDIAsize: India's Sizing Survey is Finally Here.....186  
– *Dr. Noopur Anand, Professor - Department of Fashion Technology, NIFT*
- 3.2** A Glimpse at Indian Ethnic Wear 2018 Trends.....190  
– *Namita Bhagat*
- 3.3** A Creative Fashion Merger .....196  
– *Meher Castelino*
- 3.4** Underpinning the Ethos of Indian Fabrics .....204  
– *Anupam Arya, Director, Fabriclore*
- 3.5** 2017: The Indian Designer Fashion Kaleidoscope .....208  
– *Meher Castelino*
- 3.6** Newage Bridal Wear .....216  
– *Meher Castelino*

## SECTION 4: INVEST & INNOVATE ..... 184

- 4.1** 10 Reasons to Invest in the Textile Sector in India.....226  
– *Disha Acharya, Consultant and Ayushi Puri, Associate Consultant, Wazir Advisors*
- 4.2** Indian Textile Industry: Present Scenario, Challenges and Way Ahead.....232  
– *Anubha Sehgal, Senior Consultant and Ayushi Puri, Associate Consultant, Wazir Advisors*
- 4.3** Key Issues Holding Back Textile & Apparel Manufacturing In India .....240  
– *Mausmi Ambastha, COO & Co-founder, Threadsol Pvt. Ltd.*
- 4.4** Polyester Innovation, Efficiency & Competitiveness - Walk Hand-in-Hand.....244  
– *Rakesh Bali, Senior Vice President & Head Marketing, RIL*
- 4.5** Fitting India in Fashion Industry 4.0 .....250  
– *Ram Sareen, CEO, Tukatech*
- 4.6** Jewellery: A Re-Evolving Fashion Sector .....254  
– *Sunil Nayak, CEO, Reliance Jewels*

Contributors .....258