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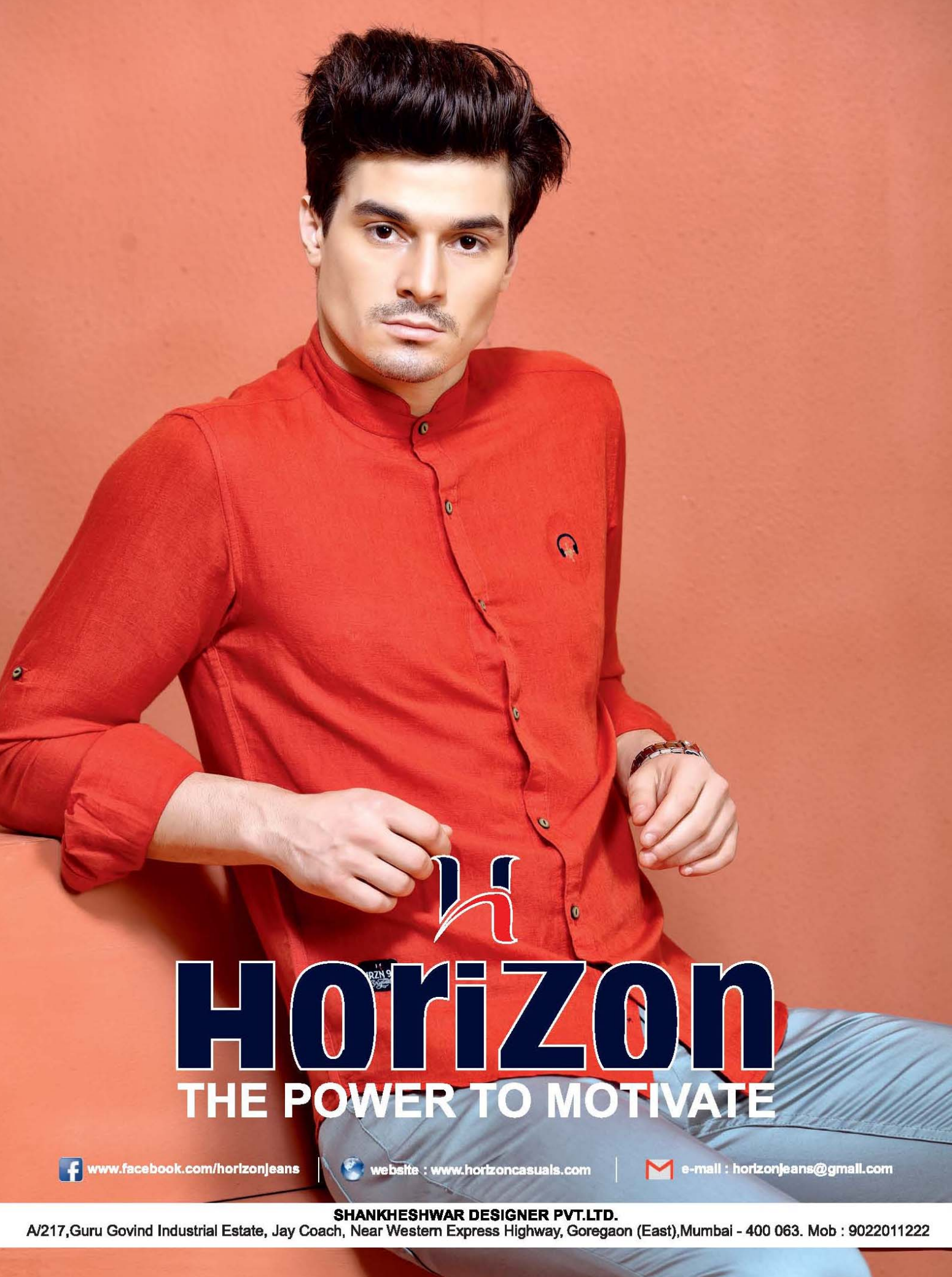
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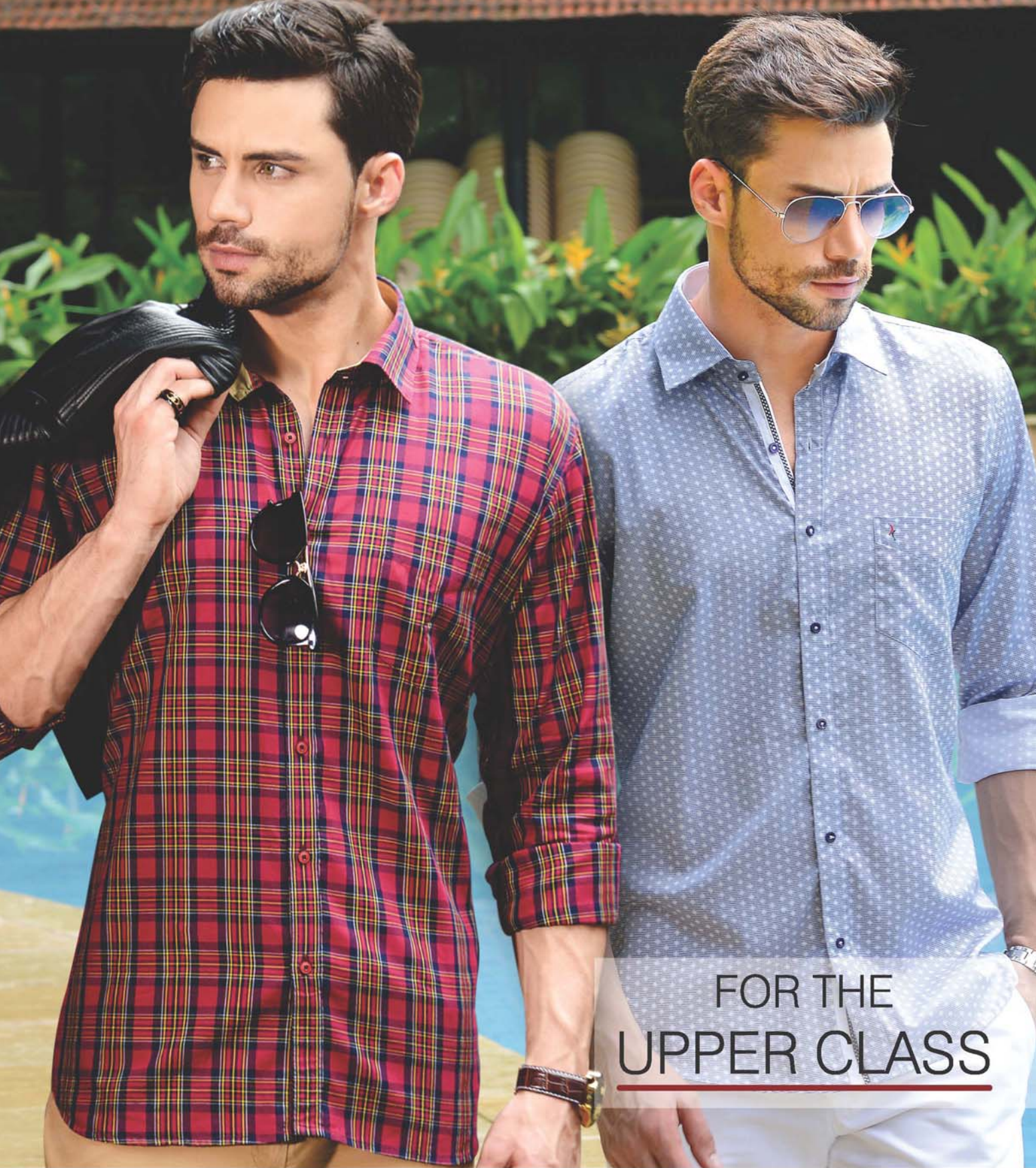
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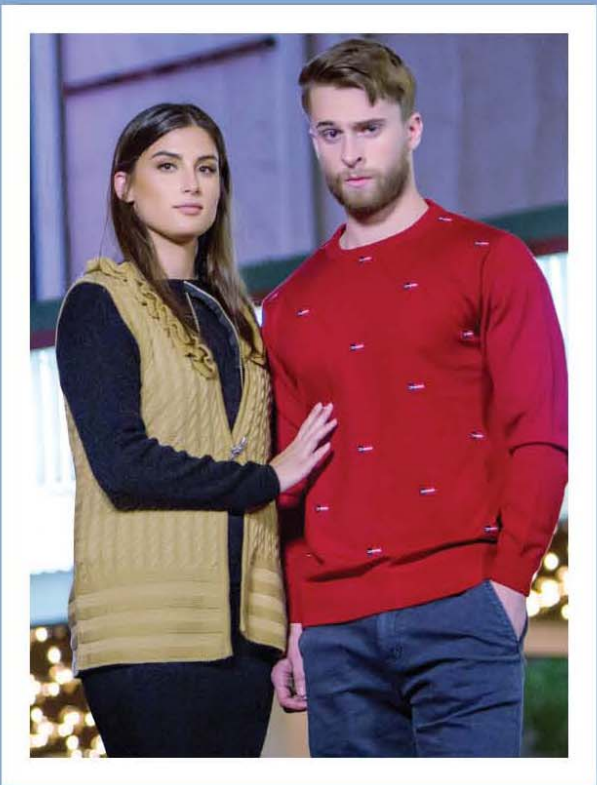
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BRIGADE

Dear friends,

Welcome to summer! It's time again for the lightweight looks, and the easy, breezy fashion. In short it's time for knitwear!

As a tradition, knitting is thousands of years old.

Even in modern times, some form of knitwear evolved and spawned a new fashion category in every decade, till about the 80s—when its adulation showed slight signs of fading. But after that phase, the evolution of traditional knitwear really paced up and gained popularity. The market was bombarded with unfathomable options, that were more detailed, stylish, easier to care for, and above all – were pocket friendly as well. More recently, knitting has seen continued innovation. Developments in knitting, and advanced treatments such as digital printing, glossy foil prints, inkjet printing, flocking, and burn-outs have heated up the market. The segment got a further boost as the world was swept by the casualization trend.

Even in India, which was traditionally always strong in wovens, knitwear already is a huge ₹68,932 crores market and is expected to grow at a promising growth rate of 9 percent over the next decade to reach ₹1,61,700 crores by 2027.

In this issue of IMAGES BoF, in addition to detailed dedicated articles that span defining and

sizing the market, prevailing trends, threats and opportunities in the major segments of knitwear including t-shirts, innerwear, winter wear, leggings, sleep & lounge wear, knitted bottoms, etc.; we also present the perspectives of veteran retailers and distributors about this fast growing segment.

Additionally, we also look at some of the most prominent brands across all the sub-segments within knitwear. Silvia Tallon from Reebok also spells out how the modern fitness mantra has provided a major thrust to the knitwear industry in India.

As part of our agenda for FY-18-19, we also debut a new section that highlights fashion innovation—right from showcasing unique start ups, novel VM concepts, to interesting technological applications in fashion businesses in India. This issue showcases Raymond Mini TRS, xPlusDernier Cri and Sygnal as the first three brands to grace this section. Also to foster the era of superior service for customers in India, in this issue, are reports on three prominent Consumer Experience Forum sessions of IFF 2018. This includes insights from global leaders WGSN.

I hope you enjoy reading the issue !!!



Amitabh Taneja

>

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LETTERS TO THE EDITOR

The magazine always carries relevant content. The article "Review of the Indian Denim Market: Its Challenges & Key Opportunities" was an interesting read, informative and covering the retail perspective from a brand's point of view.

-Anupama Sinha, Entrepreneur, New Delhi

The article "The Evolving Indian Luxury Market" was a good read. The concept is still evolving in India and the views shared by the writer on the Indian fashion industry were put together very well. I am looking forward to more such high fashion articles.

-Priyanka Palikar, Fashion Designer, Mumbai

India Fashion Forum (IFF) has over a period of time become a platform for helping evolve the fashion industry. I look forward to the IFF every year and each issue that you write about the event is worth archiving.

-Kamini Dutta, Entrepreneur, Chennai

Once again, this month, IMAGES Business of Fashion has covered a set of deserving brands from the fashion and retail industry.

-Arun Trivedi, Businessman, Mumbai

My friends and I are avid readers of your publication. The treatment of all the topics in every issue are very informative for fashion students like us as they provide a detailed overview of the latest trends in the business of fashion.

-Shilpi Sinha, Fashion Student, New Delhi

The article on the Anita Dongre Foundation that launched its production unit in Jawhar (Maharashtra) for empowering local women was very enlivening. It inspires us all to go beyond the call of duty and giving back to the society.

-Poornima Mehra, Fashion Designer, Mumbai



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Stores



Wrangler

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CATEGORY STUDY

THE INNER WEAR BRAND MARATHON

Nischal Puri outlines how the inner wear marathon is expected to unleash a new fervour and new era of retail and space competition in India.

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IFF 18 - CX SESSIONS

“CX Session: Connecting with the Consumer & Fostering Customer Relationship”

The IFF 2018 session aimed to understand what drives, changes and excels the customer relationship with the brands along with connecting with the consumer and elucidating on customer experience.

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CX Session: Customer Support is Everybody’s Busines

Sathyanarain Muralidharan, Head of Field Marketing - India and South East Asia, Freshworks, illustrates on a pit stop model for customer service in the click and mortar business.

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FASHION START UP

xPlus Dernier Cri: The Curvy Cauldron

A look into the startup that focusses on plus size fashion for men, women and kids.

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DESIGN CONCEPT (VM)

MINI TRS: HAR SHEHAR MEIN RAYMOND

Mohit Dhanjal, Director - Retail, shares the passionate story of the new asset-lite Raymond shops that are taking emerging towns and cities by storm.

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TECH INNOVATION

SYGNAL: T-SHIRTS THAT LIGHT YOUR THOUGHTS

IMAGES BoF talks to Sumil Shah, Co-Founder, Broadcast Wearables Pvt Ltd., an AI based firm, that is creating ripples across the globe with it’s blend of technology infused fashion.

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IFF 18 - FASHIONSPACE

IFF GRAND FINALE: How Shopping Centres Make Fashion So Much More Exciting for Consumers?

This one of a kind session at IFF 2018 witnessed representatives from India’s top malls in discussion with the heads of popular fashion & lifestyle brands across the country.

Pg No.62-63





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Wrangler's collection includes distress denims, biker graphic tees, printed shirts and accessories that appeal to the discerning life style consumer.

Store Theme

The Wrangler store stands geared up with the season's latest collection inspired by a spirit of freedom and adventure. Through the launch of this new store, Wrangler promises to capture the new generation of denim lovers and focus on premium casual wear.

Store Interiors

Reflecting international design aesthetics, the flagship store highlights unique product innovations and brand story telling at its best. The new Wrangler store is the ultimate denim destination for shoppers looking for an international shopping experience.



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VAJOR

BRAND:
Vajor

PROMOTER:
NR Ventures Pvt. Ltd.

LOCATION:
Delhi (Ambience Mall,
Vasant Kunj)

SIZE OF THE STORE:
1,500 sq.ft.

Collection

The store is equipped with the best of Vajor clothing, footwear, accessories, and decor along with a segment of Vajor Humane from the brand's most recent collections.

Store Theme

The store is a physical render of the Vajor website, clean, fuss-free, effortless to browse, and equipped with the most coveted modern Bohemian fashion and lifestyle products. The Vajor store converges nature with a next-gen omni-channel experience, hence, blurring the lines between online and offline.

Store Interiors:

In an attempt to bring in user-friendly and cutting-edge technology, Vajor has opened exclusive brand stores in Pune and Chennai this year, and launched a store in Delhi as well. One unique aspect of the store is the dedicated "Story" zone wherein, each month, a section will be dedicated to narrate the story behind that month's collection through mediums like video screen, mood boards and a selection of key products. Each Vajor store incorporates a touch-screen where customers can actually take a virtual tour of the brand through their website and make any and every form of transaction. One can browse products online, get the touch and feel of the merchandise in store and then order at their convenience online or offline.





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THE INNER WEAR BRAND MARATHON

The man's innerwear section has witnessed tremendous traction and metamorphosis in the last few decades. Today, the inner wear marathon is expected to unleash a new fervour and new era of retail space competition.

By Nischal Puri
MD, Horizon Consulting India; Director,
Artimas Fashions Pvt. Ltd., & Founder
and Director, Brandis.

Very few consumer categories over the last decade have witnessed monumental action and path defining changes. Very few consumer categories over the last decade have seen eruption of contenders and challengers who have changed the rules for the existing incumbents. Very few consumer categories have witnessed leviathan scale of category re-segmentation and new rules of branding and retailing.

One major product category that perfectly reflects this dynamics is indeed the mobile handset market. Pegged at ₹1.36 lakh crore in 2016, the category continues to grow at 13.7 percent and ensures new entrants re-defining the consumer choices and market dynamics. Mobile handset players are witnessing change of their fortunes by every quarter. New brand launches are re-writing the consumer preferences, and even the top player is finding its market share witnessing changes every quarter. A category that perhaps has the same level of entropy and the same level of action is the men inner wear. The category is pegged at ₹13,500 crores in 2018 and has witnessed a 13.7 percent growth over last year.

The decades of the 70s and 80s for the men's inner wear were the evolving decades, while the manufacturers were beginning to use the logos and consistent names which eventually evolved them as inner wear brands. The consumers were still to give any serious consideration on the type or name of the inner wear, very true to the functional category. The product was to deliver certain deliverables and that was it. Nothing more and nothing less was expected.

The decade of the 90's was about **unleashing of the consumer power** in the Indian economy which influenced the men's inner wear segment also. The manufacturer labels were now seriously evolving into brands, mass communication was being engaged and price as a function to buy was slowly but surely losing its grip. If 90's could be regarded as the beginning of the forming of the exponential curve then the 2000s can surely be regarded as the breakthrough decade. Indian inner wear segment witnessed some serious consolidation and global players got interested in the category. The segment is being subjected to horizon redefining and landscape evolving changes recently. The category that had found equilibrium earlier with different brands settling in different price point brackets of economy: middle, premium and higher premium, is now at the threshold of another vital change. A change that is expected to redefine the category in the next decade. The men's inner wear marathon in its true sense has begun now and the brands that have some advantages might find it difficult to hold their post in the times to come.

The significant change the category is observing is the spurt of licence

deals, arrangements where the existing incumbents are aggressively shopping for brands and are initiating brand licence deals. A trend which was restricted to very few in the earlier decades is now becoming the norm.

Be it Hanes, FCUK, Fruit of the loom, Pepe, CK or Ed hardy besides many more all these brands have finally decided not to go solo and have teamed up with a strong partner.

This new trend that was restricted to Jockey and Levis in the earlier decades has found the fancy of many corporates and brands. In my opinion, the brands have realised that to crack the inner wear market code its imperative to go with a partner who has precedence of having deciphered the code earlier for their brands. The arrival of strategic relationships and symbiotic synergization of the competencies amongst corporates and brands is indeed a welcome change.

The inner wear segment has over the years been operated as fiefdom, the stronger brands were successful in thwarting the entry and establishment of new upcoming brands. The new brands were facing difficulty in perfecting the value chain and by the time they were close to arriving at the break even, the earlier mounted losses disabled them to invest further. In light of the new developments it is expected, that the cohabitation will ensure that the brand gets best of both the worlds, the brand pull, coupled with the operational expertise of the partner.

The consumers have been deprived over the years of innovation and technically superior products. The category had become a bastion of the

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THE INNER WEAR MARATHON WITH MANY NEW INCUMBENTS WILL ALSO ENSURE UNLEASHING OF MANY OPPORTUNITIES. THE DISTRIBUTOR FRATERNITY HAS BEEN ON A LOOKOUT FOR OPPORTUNITIES THAT CAN HELP TO GROW THEIR BUSINESS. IT IS EXPECTED THAT WITH MULTIPLE BRANDS RE-ENTERING THE MARKET THE OPPORTUNITIES FOR THE DISTRIBUTORS WILL ALSO WIDEN.

few and the strong brands that were enjoying the monopolistic supremacy, eventually the consumers were left with no power of choice. Monopoly in any category and in any segment ensures that the consumers end up getting a raw deal. The supremacy of some of the brands in the middle and premium segment had reached unhealthy levels. The retailers and the consumers have been clamouring for new incumbents. The new trend is indeed a strong ray of hope that the category will be freed from the vulture like claws of the monopolistic players. We expect substantial democracy to return in the segment with the consumers and the retailers getting enough choice and more product styles and types.

The inner wear marathon with many new incumbents will also ensure unleashing of many opportunities.

The distributor fraternity has been on a lookout for opportunities that can help to grow their business. It is expected that with multiple brands reentering the market the opportunities for the distributors will also widen. Indian hosiery industry has more than 8000 distributors engaged in ensuring that the brands reach the Indian diaspora. New opportunities are expected to attract new business houses also to try their hand in inner wear distribution.

Manpower Expansion

Inner wear category has over the years suffered with inability to attract better talent. While the economy segment brands never relied on the skilled manpower, the middle and premium segment brands were to satisfy themselves with the extremely limited talent pool. With the new emerging trend taking concrete shape, it is expected that the manpower from other

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related industries will get attracted to the inner wear category and will also enhance the knowledge base and inclusion of FMCG like distribution and retail management systems and practices. The brands will have to devise their own sales and marketing strategies to ensure that they do not become replicas and that the sales practices are unique and not inspired from other incumbents.

The inner wear marathon will also unleash a new fervour and new era of retail space competition. As the retail space is finite, the battle for the same will intensify in the years to come. It is expected that newer innovative retail cajoling schemes will be launched ensuring the retailer is wooed and well taken care of.

All in all the race for domination will intensify and will also ensure that the existing players get an awakening call. The men's inner wear segment is at the threshold of the new reality and it will be extremely interesting to see the shift in the market share.

The action in the ₹16,000 crores women's inner wear segment is more somber though. The category is still to witness a consolidator. The highly fragmented women's inner wear market is slow to adopt to change and equally slow to welcome new players. While brands like Amante and Twitch did attempt to become stronger players, success has

THE MEN'S INNER WEAR SEGMENT IS AT THE THRESHOLD OF THE NEW REALITY AND IT WILL BE EXTREMELY INTERESTING TO SEE THE SHIFT IN THE MARKET SHARE. ALL IN ALL THE RACE FOR DOMINATION WILL INTENSIFY AND WILL ALSO ENSURE THAT THE EXISTING PLAYERS GET AN AWAKENING CALL.



eluded them. The lingerie landscape is perhaps more rocky with high friction in comparisons to men's inner wear. The consumer is very slow to evolve and is simply not convinced to divorce its price sensitivity. The glory seems to be still in the economy end of the market while the premium segment is more of a black hole. Women's inner wear market will perhaps take another decade and more concentrated efforts by the players in terms of perfecting the price, quality and distribution reach equation.

Perhaps one of the reason for slower pace of consolidation in the women's inner wear market vis a vis the men's inner wear market is the frugal marketing spends that the players have engaged in. Women's inner wear brands have remained pygmies and the ever prevalent unorganised market has ensured price to availability equilibrium not leaving enough gap in consumer need satisfaction. It would need a more aggressive player determined to invest heavily in marketing and prepared to take beating in the bottom line for some years before a consolidator can emerge.

The men's inner wear marathon has begun and this time the rules and players are different. The race to grow market share will only become more competitive and a new Samsung, Redmi, Xiaomi is expected to emerge soon.

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ABOUT NISCHAL PURI

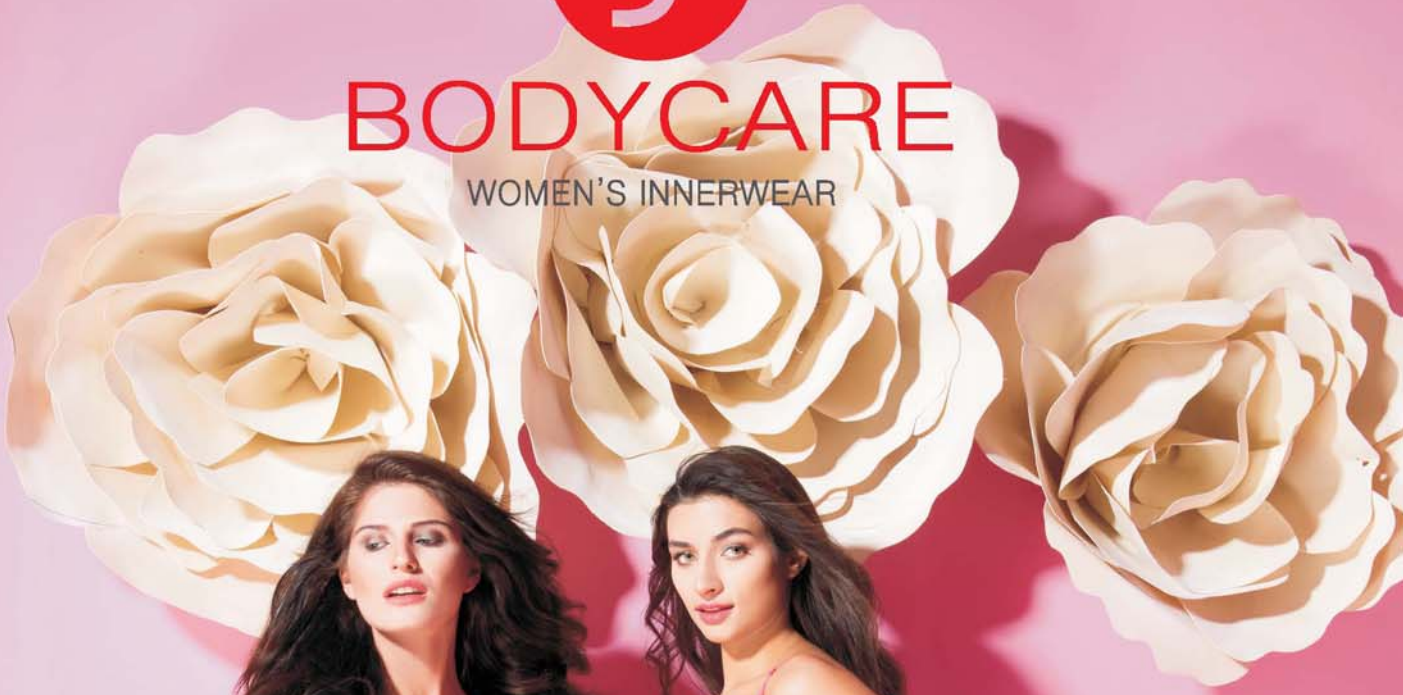
(MD, HORIZON CONSULTING INDIA; DIRECTOR, ARTIMAS FASHIONS PVT. LTD., & FOUNDER AND DIRECTOR, BRANDIS)

Nischal is a leadership activist and brand creator who often incites and challenges customary organizational and consumer beliefs, offers guidance to decision makers; helps reframe beliefs aligned to global best practices relevant today and derive optimal value from a business ecosystem, serial entrepreneur has launched apparel brands and is currently engaged in brand consulting besides launching brands.



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CX SESSION: CONNECTING WITH THE CONSUMER & FOSTERING CUSTOMER RELATIONSHIP



-Bhavik Jhaveri,
Founder, Ambab Infotech

Featuring some of the most prominent leaders of the fashion retail segment, the session aimed to understand what drives, changes and excels the customer relationship with the brand along with connecting with the consumer and elucidating on customer experience. The session also deliberated on a consumer's journey from a consumer mentality to a shopper mentality along with exploring what activates brand awareness and emotional engagement with a brand to determine strategies for driving sales.

Moderated by Bhavik Jhaveri, Founder, Ambab Infotech, the panel included the following luminaries — Anil Patel, Founder & CEO, HotWax Commerce; Hrishikesh Pore, VP - Omnichannel, Metro Shoes; Dinesh Gupta, Divisional CIO, ITC Lifestyle; Kunal Mehta, GM IT - Lifestyle Business; Raymond; Ranjan Sharma, CIO & Head of Supply Chain, Bestseller; Sathyanarain Muralidharan, Head of Field Marketing - India & South East Asia, Freshwork; Shirish Kalamkar, Head - IT, Major Brands; and Tejinder Singh, COO, Arvind Internet.

Moderator: How do you think customer relationship has changed over the years, especially as the digital wave has caught up?

Ranjan Sharma: Especially in the last decade, ways of communicating with the consumer has drastically changed. Earlier, the cash table was the only place where this communication took place, but now there are various touch points where this communication happens. So, it is complicated now, whenever he wants a service we, as retailers, will have to be there for him in any channel he chooses to connect to. A customer's needs are different across physical and digital mediums and we have to curate a strategy that caters to both.

Dinesh Gupta: I think technology has a big role to play. Customers' expectations are relative - if my competitor is providing better services my consumer would start expecting the same from me. So, I think, keeping abreast of changing time, we need to invest heavily on technology to meet their expectations and enhance their experience.

Kunal Mehta: It is extremely complicated for us considering the big spectrum of people Raymond caters to; say from someone who buys a ₹1,000 suit piece to someone who pays 10 lakhs. And at the same time, we have multiple brands. What makes it more complicated is that 70-80 percent stores are franchise stores and we have to ensure the Raymond experience across all these. We implement a lot of technologies and keep experimenting with newer ones to check if it works for us or not.

Moderator: So how is Indian retail progressing in customer relationship management?

Tejinder Singh: There are two key things that have been changing. First, earlier the approach used to be spray and pray in terms of marketing, which now has evolved to cohort marketing, which now is rapidly evolving to an individual approach. Second, the consumer's first brush with a brand is changing and taking a digital



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TO FOSTER A NEW AND
ENHANCED LEVEL OF
CUSTOMER EXPERIENCE IN
FASHION RETAIL IN INDIA.



(L-R) Anil Patel, Founder & CEO, HotWax Commerce; Hrishikesh Pore, VP - Omnichannel, Metro Shoes; Dinesh Gupta, Divisional CIO, ITC Lifestyle; Kunal Mehta, GM - IT, Lifestyle Business, Raymond; Ranjan Sharma, CIO & Head of Supply Chain, Bestseller; Sathyanarain Muralidharan, Head of Field Marketing - India & South East Asia, Freshwork; Shirish Kalamkar, Head - IT, Major Brands; Tejinder Singh, COO, Arvind Internet & Bhavik Jhaveri, Founder, Ambab Infotech

first approach. The big implication for all the retailers is that a disproportionate amount of spends is actually moving to digital to just build the brand.

Moderator: Bestseller did a very successful campaign with Ranvir Singh on Jack and Jones that went to become viral. Can you share a perspective on how it touched the brand?

Ranjan Sharma: Well, that was one of the ads we worked out and it was about one hoarding in the country. And to be honest, we never imagined it would create so much of an uproar in social media. It was a mixed feeling altogether, but at the end of the day we realised it didn't work for us and we took it off.

Moderator: What do you think of technology vs manpower?

Shirish Kalamkar: Earlier customers used to be brand loyal but now we, the brands, need to be loyal towards the consumer. I will cite an example of one of our innerwear brands. During one meeting, we asked the brand head if she needs any technological assistance and she surprisingly said that she has adequate technology and the only thing she needs is dexterous manpower that can convert walks in to sales.

Moderator: Metro Shoes has been round for ages now. Do you think the roots are really important?

Hrishikesh Pore: As retailers we have to understand that we are no longer selling products; we are selling services now with the product just being a medium to deliver that service. The touchpoints could be anything but end of the day the customer is looking at an experience in any touchpoints that he selects. As an old brand what we have noticed is that the number of data streams that give information about the consumer has grown by manifolds. The main problem is that how do you integrate it and bring it into one place from where you can make some sense of the customer through it.

Moderator: So, how are brands and businesses dealing with these challenges globally?

Sathyanarain Muralidharan: First of all, social media has given the consumers a voice and a medium to talk to each other. So it is intrinsic for retailers and brands today to track mentions and exercise sentiment analysis. Secondly, from a company point of view, we need to provide teams with a common interface where there is no silo and they can track everything about a customer. It is all about

going an extra mile and ensuring an experience for your consumer.

Moderator: Omni-channel has been the buzzword for more than a decade now. My question is, is Indian retail ready for it?

Hrishikesh Pore: Both as a retailer and a customer, I would like to highlight that whoever is designing these retail trends has no idea about customer experience. I do not think this is a technology challenge, it is more of a thinking the process through challenge.

Ranjan Sharma: If you ask me if the businesses are ready, I would say, they are at different evolution stages. And so are the customers.

Tejinder Singh: I would like to add that retailers cannot build themselves overnight. It is a journey and it is going to take time. I think, retailers are ready; they are just waiting to implement it after ensuring from somebody else's experience. I am speaking it from experience, in the last year we have signed about 40 brands in India and all of them have heavily emphasized on reference checks. I think, it's more of an organisational problem than a technology challenge.





“Data helps us to know the customer better than themselves. Data can be fed into Machine Learning, which in turn feeds data into the chat bots, who can offer natural language processing based support.”

-Sathyanarain Muralidharan,
Head of Field Marketing - India and South East Asia, Freshworks

CX SESSION

CUSTOMER SUPPORT IS EVERYBODY'S BUSINESS

A PIT STOP MODEL FOR CUSTOMER SERVICE

With the fashion and retail market seeing an exponential rise in the click and mortar direction, it is crucial for the organizations to up their customer service game and keep their customers and consumers delighted at all times irrespective of the channel - online or offline. Sathyanarain Muralidharan, Head of Field Marketing - India and South East Asia, Freshworks, illustrates on a pit stop model for customer service in the click and mortar business that looks at solving customer related problems through a mix of innovation and disruptive technologies like big data, bots and artificial intelligence.

Bad customer experience is a plague that has infested retail since its inception. Customer service isn't so much a choice as it is a necessity for a company operating in the 21st century. Upholding an example of his recent visit to a retail chain that he frequents and is a loyal customer of, Sathyanarain Muralidharan elucidated on the harrowing assembly line experience he had while trying to transfer his loyalty points to another account. “I was passed on from person to person, team to team for 3 months in vain. I would have to explain my ordeal to all of them, right from scratch as every agent that I spoke to was clueless about my issue or me. There was absolutely zero collaboration amongst themselves — nobody knew what the other person was working on. To them, I was just a ticket ID, not a customer or a human being,” he said emphasising on the fact that the current customer service modal is broken.

The difference between the good and bad customer experience can be paper-thin. Retail businesses can be one bad customer service experience away from losing your customer forever. But with recent developments, a customer's metamorphosis into a happy customer is just a few retail technology implementations away.

FRAMEWORK OF A NEW CUSTOMER SUPPORT MODEL

Citing example of a Formula One race pit stop, he said, “When the vehicle stops, about 10 people who form the pit crew execute their share of the work within seconds. That's what the modus operandi of the pit stop customer model should be like. The customer comes in with an issue and we all know what to do, ensuring his conversion into a happy customer within seconds or minutes.”

But is the pit stop model viable, especially in India? With the advancements in modern technology, it very much is, by utilising tools such as Big Data, Machine Learning, Bots, Natural Learning Processes as well as collaborative tools. “Data helps us to know the customer better than themselves. Data can be fed into Machine Learning, which in turn feeds data into the chat bots, who can offer natural language processing based support,” he added.

The pit stop model focuses on people, and emphasizes the fact that communication is the most important part of customer service. “Build relationships and finally build a customer centric culture within the team/company. After all customer support is everybody's business,” he concluded.



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xPLUS DERNIER CRI: THE CURVY CAULDRON

It's slim picking for the plus size populace when it comes to fashion. Although body sizes are stealthily gravitating towards the right side of the weighing scale with each passing year, efforts to fix the issues in their fashion requirements are scant.

XPlus Dernier Cri is a one stop online solution provider for all needs pertaining to plus size fashion. Propelled with a strong conviction that plus size individuals should never be deprived of having a plethora of choice in dressing and fashion, the company showcases a diverse product portfolio, featuring the latest cuts, styles, colors and trims, to ensure that there is enough options for every plus size man, woman and child at the click of a mouse. "No compromise in clothing and fashion, so what if one is plus size?" asserts Founder and Director Sushil Modi. "We bring variety of clothing options under one roof which will suit our customer's personalized needs and provide them with interesting options to select from. Our endeavor is to make trendy, plus size apparels available for all," he adds.

xPlus Dernier Cri, which means the very latest in fashion in French, was a result of the harrowing hassles that comes complimentary while scrounging plus size fashion. "This triggered us to think seriously and come up with a definitive solution.

We thus built an online market place exclusively for all our plus size customers. The objective and focus was to concentrate on plus size segment and give them an exhilarating shopping experience without any compromise and enjoy every occasion that they wish to, at the click of a button," reveals Sushil Modi, who along with Sonal Modi came up with the platform that would allow its customers to shop by choice and not by force and compulsion.

Product Range

The company's USP lies in the latest trends that it offers in terms of designs, colors, patterns and materials of the collections it offer. As of now, the company hasn't started manufacturing yet, although plans of the same are in the pipeline. The platform harbours a wide range of plus size special brands like Veeva, Abduct India, Yahavi by Neha Nagpal, Last Inch, The Plum Tree, Revolution Plus Size, Xmx, etc., with sizes ranging from 40 to 8XL.

Market Response

The brand is very happy with the response it has received by far. Apart from a considerable amount of traffic in the website everyday, xPlus Dernier Cri also has witnessed a significant number of repeat customers. "This



gives us the confidence that we are heading in the right direction. We were able to get leading brands in the plus size space and we are thankful to our vendor partners for engaging with us. Well, our thorough research gives us the confidence to state that we are the pioneers in online market place which is exclusively for plus size needs for men, women and children," says Sushil Modi.

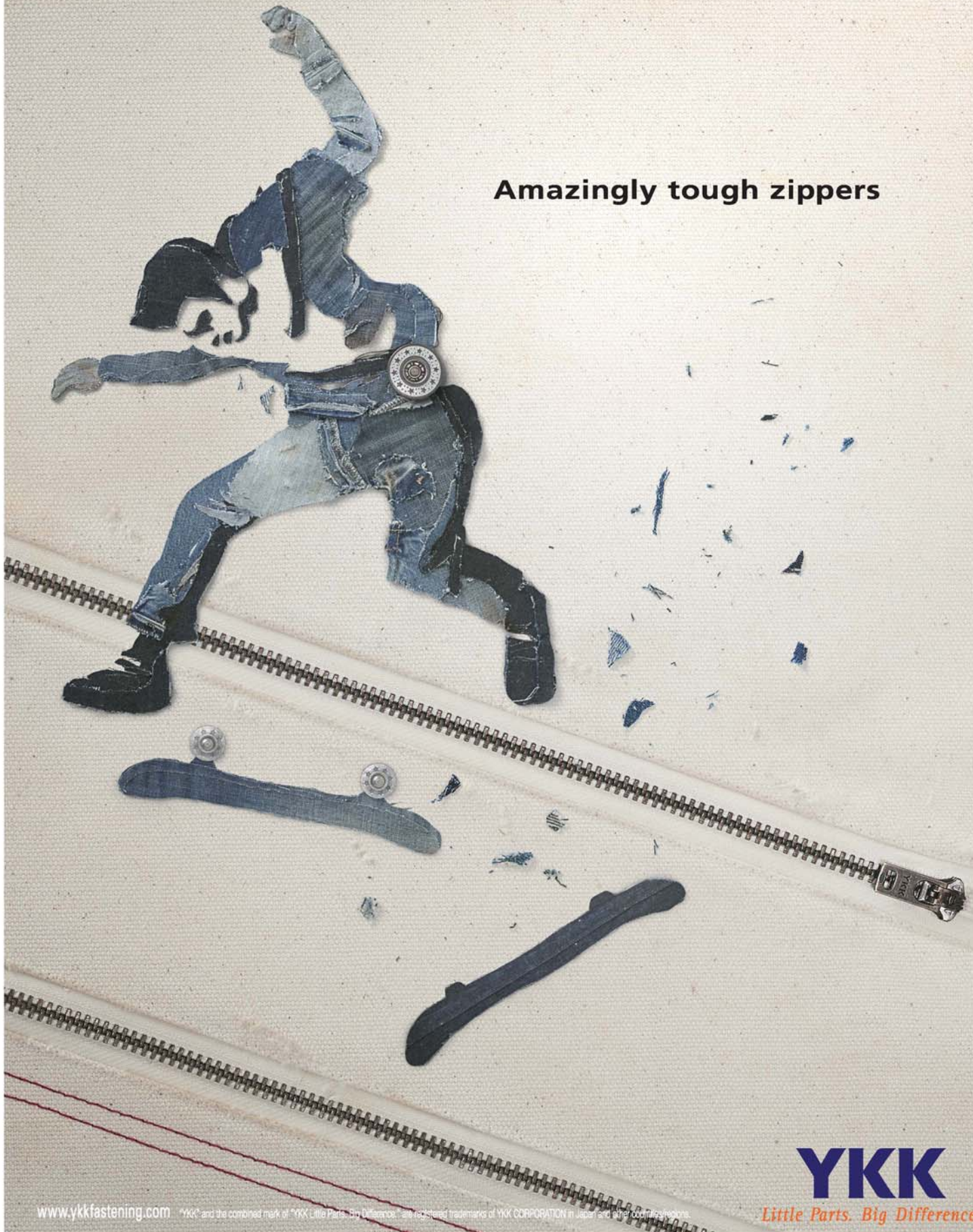
Future Plans

xPlus Dernier Cri is currently focusing to get more and more vendor partners with value proposition and take the business to the global market and have sustainable growth with scalable vision.



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MINI TRS:

HAR SHEHAR MEIN RAYMOND

A peek into the new asset-lite, modular, The Raymond shops that are taking emerging towns and cities by storm. With 106 stores launched in a year, Mini TRS is one of the fastest roll out of stores in the Indian men's fashion retail history. Mohit Dhanjal, Director – Retail, shares the passionate story.

Raymond needs no introduction! It is not a just a mere brand name; it's as much a part of every Indian's life as their pre-eminent embodiment of The Complete Man. Sure, there are other textile majors, but none comes close, let alone compare, to Raymond's ability to make a name that symbolizes 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.

In its 90 plus years of legacy, Raymond has always stayed ahead of the game and the way forward was through constant innovation and avant-garde business strategies. The latest in the line is Mini TRS (The Raymond Shop), another innovative concept that rallies the thought "Har Shehar Mein Raymond". Mini TRS, as the name suggests, are asset-lite Raymond Shops that the brand plans to launch in tier -II, -III, -IV and -V cities and towns in India in its attempt to explore the untapped potential of these emerging locations.

"As per the 2011 census, there are over 1,200 urban towns with population above 50,000 that have a potential to support an exclusive brand store. Of the 1,200 towns, Raymond already has presence in over 400; and now we plan to test the waters in the balance 800 emerging tier -IV and -V towns. With this in mind, we have development an asset-lite business model for franchisees that provides a sustainable retail model through which we propose to expand into these markets," says Mohit Dhanjal, Director –Retail, Raymond Limited.

The Concept

Spread over 800 sq.ft to 1,200 sq.ft, Mini TRS is a new franchise based agile business concept featuring modular designs and best global retail practices with local execution capabilities and an integrated digital omni-channel capability. Although the stores replicate the legacy of TRS, they require optimised investment, and reduced project time — about 45 days from signing of the franchise agreement instead of the regular 90 days. This is possible through a new age modular design with high flexibility for change. The business model is asset-lite with a sustainable and healthy ROI.



“We have developed an asset-lite business model for franchisees that provides a sustainable retail model through which we propose to expand into these markets,”

-Mohit Dhanjal,

Director -Retail, Raymond Limited.

“Having realised that small towns do not require our large format stores which involve real estate space of 2,500 sq. ft. and up to ₹2 crores investment, we tweaked the model and came out with the concept of Mini TRS, that requires less space and investments of about ₹40 lakh. We have tied up with local entrepreneurs to expand in these markets,” adds Mohit Dhanjal.

The franchise route for expansion has ensured swift growth of the concept within a very short period of time. The first Mini TRS was launched on 25th March 2017 at Bitha, Bihar and 105 more stores were rolled out till April 2018, earning the distinction of fastest roll out of stores in the Indian fashion retail history. The brand aims to roll out a total of 300 Mini TRS stores by the end of 2019.

A Revised Product Mix

The Mini TRSs feature a revamped product mix that aligns with the preferences of its target group. There will be more than 150 SKUs in these stores and along with fabrics and ready-to-wear collection, Mini TRS will also provide custom tailoring services.

“We have created a new line of merchandise for these towns which are not very expensive. All fabrics and ready to wear products feature prices that align with these markets. We have also put up a digital interface for consumers there because if you do not find anything that interests you, we will help you to look out what you like,” says Mohit Dhanjal.

Distribution Network

Raymond has an expansive distribution network that already reaches out to over 5,000 plus multi-brand outlets through direct as well as distributor and wholesaler based networks. These direct and indirect channels of distribution helps the brand to reach these emerging towns with the right product mix and faster turnaround time.

Franchise Support By Raymond

At Raymond, the essence of creating partnerships with entrepreneurs in such markets was understood very early and that has helped the brand create very strong and engaged channel partners.

The key to a franchisee’s success lies with the conduct of engagement and training programmes that Raymond provides on various subjects pertinent to modern retail like product training, customer relationship management, staff development, visual merchandising and operations, apart from evolving product portfolio that ensures the product offering is in line with the changing consumer preferences and requirements. The brand also actively engages with its franchise partners where their knowledge of their markets is leveraged through science and technology provided by Raymond to activate the brand in the local catchment and ensure superior last mile service delivery. Every franchisee is supported by an Area Manager who builds local calendarized activations and marketing plans for each outlet depending on local festivals as well as key talking points. Through a co-operative marketing pool, the activation calendar is implemented through the local franchisee and store so that they may leverage their local knowledge to maximise the efficiency of all such activities. While there are broad brand guard-rails available, each city/market develops and drives activations and promotions that are best suited for its market and customers.

Further details on Mini TRS operations and franchisee associations are available on www.raymond.in/franchisee.

Raymond which, last year, reported a total franchise revenue of ₹1,800 crores, had been reporting 9 percent growth in revenue year-on-year. This growth rate is expected to increase once the mini store format starts contributing to the overall revenue.



SYGNAL

T-SHIRTS THAT LIGHT YOUR THOUGHTS

IMAGES BoF talks to Sumil Shah, Co-Founder, Broadcast Wearables Pvt Ltd., an AI based firm, that is creating ripples across the globe with its blend of technology infused fashion. It also is the parent holding of SYGNAL, who has the distinction of producing the world's world's first programmable, touch enabled t-shirt.



IBoF: Could you please share about the concept behind your brand Sygnal?

Saumil Shah (SM): Sygnal was conceived to tap the growing appetite of the niche consumer who aspires to stand apart from the crowd. Eyeing the mindset of our clientele, we have innovated a bouquet of unique products, most of which are the first of its kind in the world.

We are an AI based wearables company on a mission to make everyday devices smart. We created the world's first programmable LED clothing line and haven't looked back ever since. We now specialize in the art, science, design and in-outs of integrating electronics with fashion. Our market offerings now range from smart fitness tracking t-shirts that tracks fitness levels without using any additional device, glow LED clothing line for women, kids, smart accessories and many more. Our latest offerings are regularly updated on www.getsygnal.com

IBoF: Tell us about your company, the people behind and their background.

SM: Sygnal is part of Broadcast Wearables, our holding company. We specialise in developing cutting edge technologies and integrate them with everyday objects using deep machine learning technology. Our team is led by Ayyappa Nagubandi, a serial entrepreneur and inventor, who has authored 12 patents and worked at the most prestigious companies in the US.

IBoF: Please elaborate why and how was the idea conceived?

SM: We have always been fashion aficionados and wanted to create a clothing line that integrates technology, and through which we could express ourselves in any way that we wanted. That is how

Sygnal's journey started and we created the world's first touch-enabled t-shirt.

IBoF: What kind of people/businesses do you think will benefit from your concept?

SM: Smart clothing will become a must have in everyone's wardrobes in the near future. It is also important to understand that as computing power grows, all devices including smart clothing and accessories would become virtual computing machines that would download designs that you like and show it up.

This changes the fashion landscape and more computing will make it's way into clothing. Businesses who foresee how technology is changing industries often tend to be early adopters and gain from the new wave of customers that adopt their products. Essentially, manufacturing and design of fashion and accessories will become more and more democratized and people who love fashion will stand to gain the most.

IBoF: Tell us about your manufacturing and designing proficiencies.

SM: We have recently launched a full-fledged manufacturing unit in Hyderabad. All the products are manufactured at our in-house facility. We are bringing in some smart automation technology to improve our processes in key production areas.

We test our technology and the endurance of our apparel before releasing them in the market. As a part of the process, we wash our clothing hundreds of times, fold it, and rough use it to ensure durability. Our engineering team has perfected the art and science of integrating circuits in apparel. We have an in-house design team that works on newer designs. We also partner and work with well-known fashion designers to offer our end users an awesome hi-tech fashion experience with great designs.



IBoF: Tell us about your retail model. Are there any plans of launching physical stores anytime soon?

SM: We market our products through both offline and online channels and work with distributors across the spectrum. Typically, we work with distributors to get our products to the retail stores in India and abroad. We encourage all resellers by creating a win-win model which ensures to safeguard mutual interests and growth. In the online space, we also offer a zero stock investment drop shipping model and are working towards launching our stores very soon.

IBoF: What are some of the indispensable tools/ technologies that keep the whole business model of Sygnal running?

SM: Artificial Intelligence is at the heart of everything that we do today. We also are working on numerous other technologies simultaneously to give our consumers the best experience possible. On the manufacturing front, we are working on some smart automations to help us cut down our overall time and improve efficiency.

IBoF: How has the response been hitherto? Would you like to highlight

any achievements that you have achieved yet?

SM: When we launched the world's first touch-enabled t-shirt, within the first 45 days, we had customers from 6 continents. We are growing at an average (YoY) of 300 percent and have nearly quadrupled our revenues in the last fiscal and expect to reach more. We also are receiving enormous interest from corporates and western markets alike for bulk orders.

IBoF: What's the most important thing you're working on right now, and how are you making it happen?

SM: We are in the prototype stage of designing eyewear that can be worn just as we do today but do all the things that smartphones do. This is a result of application of our existing technology to a different field. All we can share for now is that we are reimagining eyewear as we know today. We also are developing a unique women's accessories line that is totally integrated with our patented technology.



IFF GRAND FINALE: HOW SHOPPING CENTRES MAKE FASHION SO MUCH MORE EXCITING FOR CONSUMERS?



- Anuj Puri,
Chairman, ANAROCK.

This one of a kind session witnessed India's top malls in discussion with the heads of popular fashion & lifestyle brands across the country. The mall's side of the panel consisted of Mukesh Kumar, Senior VP, Infinity Malls; Rajendra Kalkar, President - West, Phoenix Mills; and Sunil Shroff, CEO, Viviana Malls while the brand's and retailer's panel was made up by Sandeep Kataria, CEO, Bata India; Manohar Chatlani, MD & CEO, Soch; Rajesh Jain, MD & CEO, Lacoste India; Sanjeev Rao, Director Sales & Business Development, Raymond; and Deval Shah, Business Head, Reliance Brands Ltd. The session was moderated by Anuj Puri, Chairman, ANAROCK.

Moderator: Has the online onslaught brought any changes in the malls?

Mukesh Kumar: It was sort of alarming in 2014-15, but it is over now. Slowly the pie share of malls is increasing as such if ₹100 is spent on shopping, about ₹85 goes to malls and only ₹10-15 goes to online retail. I think it's impossible to replace offline retail, unlike online offline is not just about buying, it's about an experience.

Moderator: In IFF, 2017, Raymond expressed their plan of launching 'The Raymond Stores' in smaller cities in India. So what has the response been in these cities. Also, tell us about the response you have received in your online endeavours.

Sanjeev Rao: We are present in almost all high streets and the major malls in India and since the last 4-5 years we are exercising rigorous innovations. Till now, we haven't seen a dent in our business, infact we are experiencing double digit growth in the offline space. Coming to the tier -I, II, III, IV, V and -VI locations, we selected around 470 towns to take our penetration onto a different level. In the last year, we have launched about 103 stores, in tier -III, IV, -V and -VI towns, and we plan to launch 200 more stores in these markets. What we experienced in these places is that, people are quite hooked to e-commerce because of the lack of brick and mortar stores, but when they get a physical store, they definitely prefer it to e-commerce. So, we are actually thankful to e-commerce for building the market for players like us in these smaller places.

Moderator: Phoenix is a tier-I mall developer, but of late you have been venturing into tier-II cities like Indore and Lucknow. What made you venture into these locations?

Rajendra Kalkar: There are a profusion of reasons. One, the retailers are pushing us because they want their partnership with Phoenix to extend beyond the metros and tier-I cities. Our brush with tier-II cities was with Lucknow and Bareilly, where we acquired two malls and renovated them to Phoenix level and within 8 months the trading density has doubled, which reinforces the potential of these cities and has given us the confidence to look into other cities as well.

Moderator: Lacoste is one of the premium brands. Does offline disturb premium labels like you as like it does to mass fashion brands. Also, are mall developers meeting your expectations over the years?

IFF
2018





(L-R) Sunil Shroff, CEO, Viviana Malls; Mukesh Kumar, Senior VP, Infinity Malls; Rajendra Kalkar, President - West, Phoenix Mills; Sandeep Kataria, CEO, Bata India; Anuj Puri, Chairman, Anarock; Rajesh Jain, MD & CEO, Lacoste India; Sanjeev Rao, Director Sales & Business Development, Raymond; Deval Shah, Business Head, Reliance Brands & Manohar Chatlani, MD & CEO, Soch

Rajesh Jain: I think mall development has really reached the next level now and is at par with the other parts of the world. And offline is growing manifold since the last few years, and I think this is mainly because of the malls. Also, as you were talking, there's so much potential in tier -II and -III cities. We see that the top cities that make up our online consumer base are these cities. We have a limitation that we can't go to these places unless we have a premium retail there, and once such spaces start, we would definitely want to expand our retail footprint into these places.

Moderator: Quality malls in India are enamoured by and inclined towards International brands. Infact, they are given preference over Indian brands most of the times, while most Indian brands do better sq.ft sales than these international brands. Do mall developers have anything against Indian brands?

Deval Shah: I partly agree. Malls are modern day destinations. When we do studies of brand recognition index, most international brands, barring 3-4 brands from our portfolio, has a score of less than 50. So most of our target consumers discover them in the malls. So a large portion of the landscape in terms of the inside malls cohorts that are created, like kids zone, or Indian brands zone, etc., are created by the floor and the levels. DLF Emporio is a good example, where the ground floor, the first floor and the second floor are reserved for Indian brands, so

even if you have a great luxury brand which would fit into the second floor, they wouldn't take it. I do not believe that each brand can be at every level, because each brand fits in with the right kind of catchment and with the right ecosystem around which it works.

Manohar Chatlani: We have 61 stores in malls and 54 on high streets and we want to be where all the other ethnic players are, floors and levels does not matter for us. Zoning is more important than floors.

Moderator: Bata is a house hold name now, and I think every mall owner will want a Bata now because without a Bata store a mall's offering will never be complete.

Sandeep Kataria: Thankfully, we have had absolutely satisfying co-operation from the malls over the years and there is hardly a mall where we want to be and we are not.

Moderator: How much of floor area would you ideally allocate to fashion and how much to non-fashion, including entertainment and food in a mall?

Sunil Shroff: Right now, we have close to 11percent for entertainment and F&B. Add to 15 percent of the multiplex because we have a 14 screener, which makes it close to 26 percent but we will be happy to take to a range of 35 percent wherein we see an opportunity in increasing the size of the mall or doing a category change wherever there is possibility of a restaurant.

Moderator: Does private equity change the behaviour of a mall?

Sunil Shroff: Definitely not. The positivity carries and the encourage carries on and you scout for more malls.

Rajendra Kalkar: I think it does, because it brings a completely new knowledge base. It highlights the right ways of doing things especially when it comes to accounting processes, the dilligence, fire safety and the compliances. Hats off to the manuals that they bring in; their expertise is unreliable and it bring in a lot for us.

Moderator: What would be one advise that you will give to mall developers?

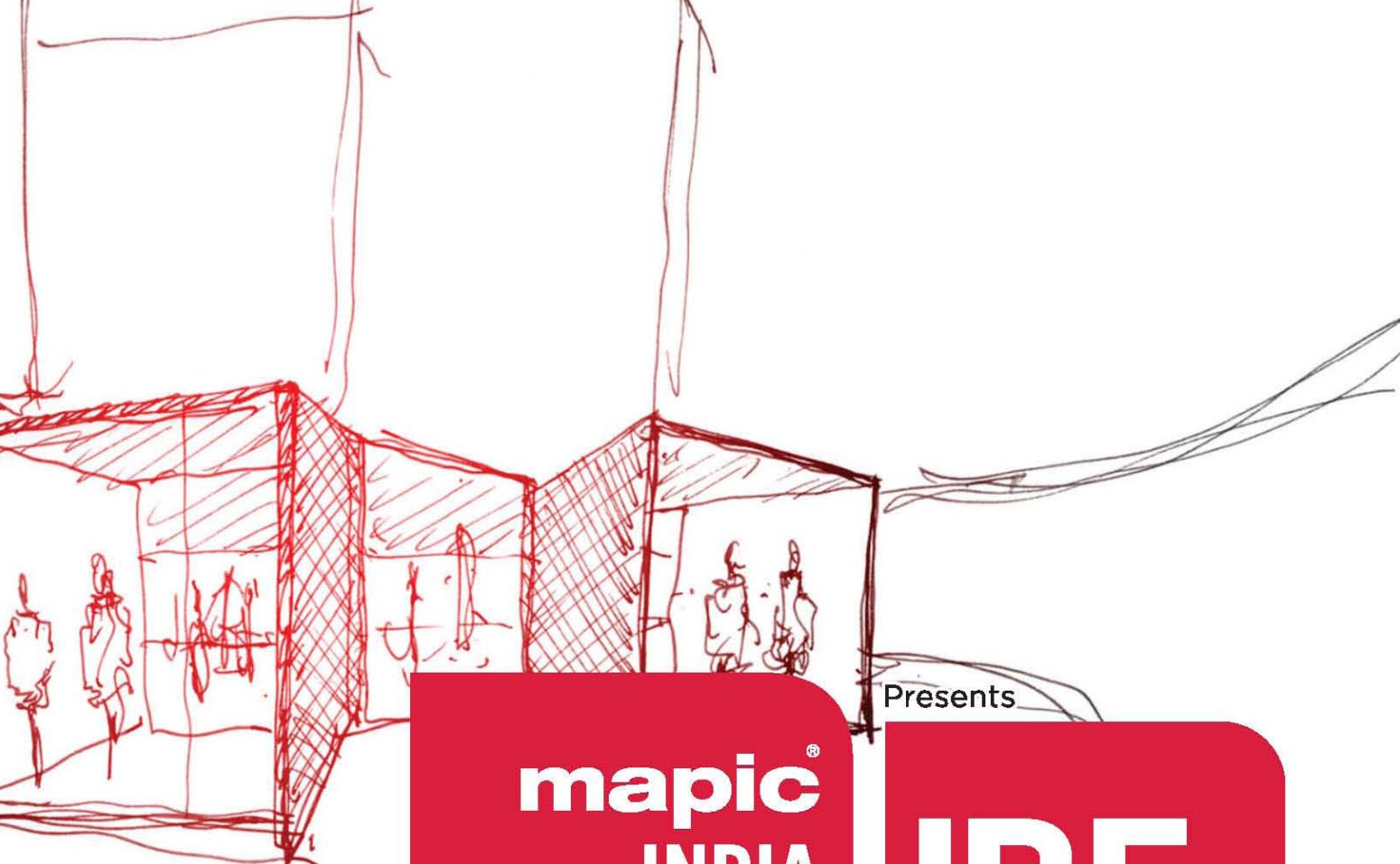
Sandeep Kataria: I would love to have more premium malls in tier -II and -III cities as my density per lakh population is the lowest in the tier -II and -II towns.

Sanjeev Rao: Mall developers need to take a balanced look at the profitability of retailers because if we don't make money they don't make money too.

Deval Shah: We keep hearing that foot falls are increasing in every mall each year but in our stores, it is actually decreasing by the year. Would love it if you could do a qualitative analysis.

Manohar Chatlani: I would ask mall developers to give space to brands that perform instead of going after international brands. Also, I would request them to give us terms and conditions as fair as the international brands get.





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Pic Courtesy: Status Quo

THE KNITWEAR STUDY

INDUSTRY TALK

INDIAN KNITWEAR MARKET: PRESENT & THE FUTURE TRENDS

The need for speed and the need for comfort have together made way for comfort wear. And today, satiating the comfort needs of customers, the knitwear industry in India has boarded the ship of holistic growth.

Pg No. 76-87

CATEGORY STUDY

THE T-SHIRTS MARKET IN INDIA

The feature takes a look at the Indian market for one of the most commonly used apparel categories over the world - t-shirts.

Pg No. 88-92

CATEGORY STUDY

INNERWEAR: A THRIVING MARKET IN INDIA

Innerwear is all poised to be a prospectively flourishing segment with a slew of comfortable and innovative products that have the modern customer spoilt for choice.

Pg No. 96-99

CATEGORY STUDY

LEGGINGS: THE BIG BANG OF A NEW COMFORT WEAR MARKET

Women today are working, playing, partying and relaxing—all within the 24 hours of a day. What could be better than leggings that enables them to do it freely and comfortably?

Pg No. 100-104



COVER RESEARCH

KNITWEAR MARKET IN INDIA

The knitwear industry in India registers a significant upsurge. Experts from Technopak Advisors size the knitwear market in India and highlight the growth of the key categories.

Pg No. 68-74



CATEGORY STUDY

AN EXPOSITION OF THE KNITTED WINTER WEAR MARKET IN INDIA

There is an increasing demand for apparel that do not just satiate weather conditions, but goes much beyond. A look into the rapidly changing winter wear segment in India.

Pg No. 106-114

CATEGORY STUDY

LOUNGEWEAR: A FAST EMERGING MARKET

Once considered only as a simple indoor wear, loungewear or sleepwear is running on the fashion ramps today. This category of apparel is hitting the Indian market with a promising future.

Pg No.116-119

BRAND WATCH

REEBOK BETS ON KNITTED ACTIVE & SPORTSWEAR

Silvia Tallon, Senior Marketing Director - India, of sportswear major Reebok talks to BoF about the increasing share of knitwear in sportswear.

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The Knitwear Study

RETAILER TALK

RETAILER'S PERSPECTIVE: RISING KNITWEAR POPULARITY

Jay Prakash Shukla, Founder and CEO, 1-India Family Mart shares insights on the bottle-necks in the knitwear industry and how he is planning to create premium zone for emerging categories in knitwear.

Pg No. 124-125

DISTRIBUTOR

A DISTRIBUTOR'S PERSPECTIVE: RISE OF KNITWEAR

Veteran distributor and proprietor, Vinod Parmar of V P Fashions elucidates on the fashion market and the increasing demand for knitwear.

Pg No. 126-127

REGION IN FOCUS

EAST INDIA LEADS THE KID'S KNITWEAR INDUSTRY IN INDIA

Knits comprise maximum pie when it comes to the most preferred fabric for kids wear. A tête-à-tête with key players from East India on the current and changing market dynamics.

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BRAND WATCH

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KNITWEAR MARKET IN INDIA

As the casualisation trend picks up momentum, the knitwear industry in India registers a significant upsurge. Experts from Technopak Advisors size the knitwear market in India and highlight the growth of the key categories.

By Technopak Advisors.

India is at the threshold of a retail revolution with the fashion retail market being one of the fastest evolving segments in Indian retail. Change in income structure, consumer tastes and preferences, the rise of a burgeoning middle class income group with increasing disposable income, increase in the number of working women, entry of foreign retailers, etc., are some of the key growth drivers of Indian fashion retail.

Currently, the fashion retail market is estimated at ₹3,22,209 crores (USD 50 bn) and is envisaged to grow at a promising CAGR of 7.7 percent over the next decade to reach the size of ₹6,74,037 crores (USD 104 bn) by 2027.

KNITWEAR

Despite being strong in wovens, Indian fashion retail is witnessing huge demand for knitwear. The knitwear market is expected to grow at a promising rate of 9 percent over the next decade to reach ₹1,61,700 crores from the current market size of ₹68,932 crores.

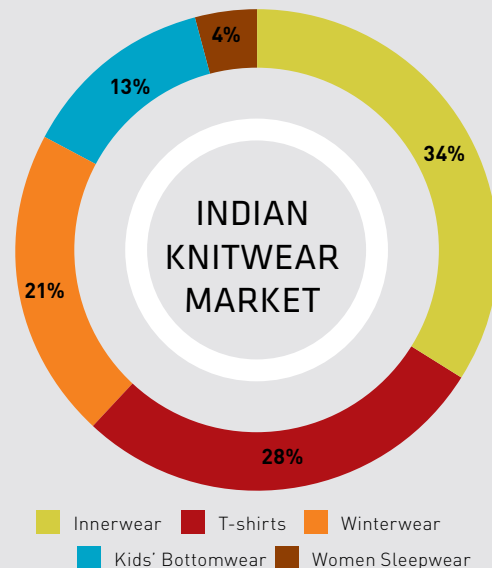
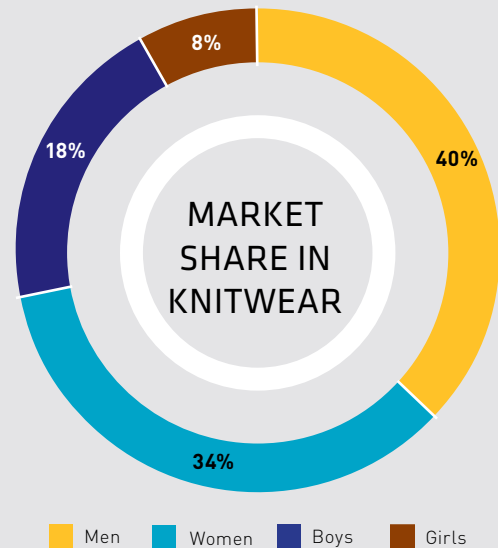
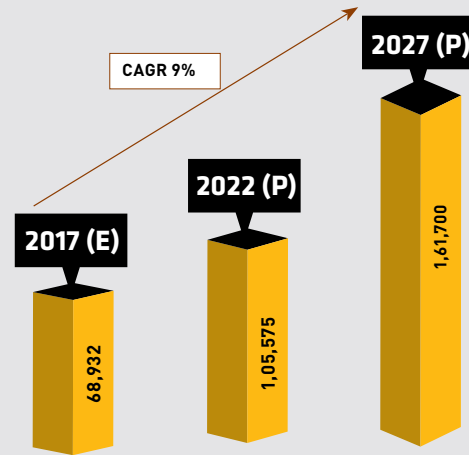
Men’s wear is the single largest category in knitwear, accounting for 40 percent followed by women’s wear, boys’ wear and girls’ wear with market shares of 34 percent, 18 percent and 8 percent respectively.

KEY SEGMENTS

The domestic knitwear market consists of various categories such as innerwear, t-shirts, winter-wear, knitted bottom-wear for kids, sleepwear, etc. The major contributors to the knitwear market are innerwear and t-shirts accounting for 34 percent and 28 percent of the market respectively.



KNITWEAR MARKET (INR CR)



Source: Technopak Analysis

The knitwear market is expected to grow at a promising rate of 9 percent over the next decade to reach ₹1,61,700 crores from the current market size of ₹68,932 crores. The major contributors to the knitwear market are innerwear and t-shirts accounting for 34 percent and 28 percent of the market respectively. Men's wear is the single largest category in knitwear followed by women's wear, boys' wear and girls' wear.

The innerwear segment is a large category in the Indian knitwear market. The current market size of the innerwear market is worth ₹27,931 crores which is estimated to grow at a CAGR of 10 percent over the next decade to become ₹74,258 crores by 2027.

The Indian innerwear market is primarily segmented into men's and women's. Currently, the women's segment dominates the market by accounting for 66 percent of the total market. It is estimated at a value of ₹18,454 crores and is expected to grow at a high CAGR of 12 percent over the next decade. The remaining is contributed by men's with an estimated value of ₹9,477 crores which is expected to grow at a CAGR

of 7 percent. The kids' innerwear market is primarily unorganized. Local MBOs and regional players are known for catering to kids' segment of the innerwear market.

Innerwear has evolved from core functional to being associated with more lifestyle attributes. Varied activities and enhanced lifestyle has lead to increased demand for fashionable, functional and premium lingerie that is sported at different occasions and activities on daily basis. The innerwear category is expected to witness more innovation and experiment in shapes and materials.

Another significant category under knitwear market is t-shirts. It is widely accepted among a wide range of customers for its soft knit fabric, fitting and versatility, making it a comfortable and dynamic category under knitwear. The t-shirt market of India comprises of polo t-shirts, knit t-shirts, Henley t-shirts, knit tops, etc. The current Indian t-shirt market is estimated at ₹23,211 crores which is expected to grow at a promising CAGR of ~10 percent over the next decade to reach ₹61,954 crores by 2027.

With an increase in the fashion conscious population and growing working women populace in the country, this segment shall continue to grow further. Even the middle aged/older consumers have also started experimenting and adopting t-shirts.

The fact that Indian youth seek a distinct look has forced t-shirt manufacturers and retailers to explore various dimensions of product innovation primarily related to product design, colour selection options, prints, etc. In addition to cotton t-shirts, the Indian fashion market is also witnessing a huge demand for polyester-cotton blended t-shirts. Polyester is the most common

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The Indian knitwear market has witnessed impressive growth in the last decade. The primary factor driving this growth is increasing adaptation to casualwear by Indians. Nowadays, casualwear is not confined only to the walls of one's residence but is being adopted in the corporate sector as well.

fibre used in the sportswear as it does not hold water and gets dry very quickly. The demand for t-shirts printed with traditional Indian designs has also gained momentum. Many retailers have started providing the option of customising t-shirts through their websites. In the coming years, the demand for organic cotton-based t-shirts and those made from recycled products is expected to pick up in select Indian cities. Such products are already in demand in many western countries.

Bottomwear is another emerging category among knitwear in India. The huge demand of leggings,

knitted churidar, pajama sets, etc., due to comfort and easy maintenance has resulted in growth of this category. Increased share of working women with their concern on low maintenance of apparel has made leggings popular among them.

Due to abundant style options, changing life styles, and increase in brand awareness and exposure to western fashion, the average Indian apparel consumer has become much more picky and aware of their fashion needs.

The other categories contributing to the knitwear market are winterwear, kids bottomwear and sleepwear etc. These categories are expected to grow at a CAGR of 4 percent, 9 percent and 7 percent respectively.

Athleisure, comfortwear are a few new emerging categories in the knitwear segment. Their increasing acceptance and huge demand among the youth will add to increase in their share in knitwear, propelling the growth of Indian knitwear market.

TRENDS AND GROWTH DRIVERS

The Indian knitwear market has witnessed impressive growth in the last decade. The primary factor driving this growth is increasing adaptation to casualwear by Indians. Nowadays, casualwear is not confined only to the walls of one's residence but is being adopted in the corporate sector as well. The emergence of start-ups with flexible or no dress codes has also increased demand of casualwear. The Indian casual wear market is booming and the rural markets will play a pivotal role in this growth story in the near future. Factors including a growing middle class population, rising disposable income, increasing brand awareness among the consumers in terms of quality and up-gradation of service standards, ensure promising future for casual wear segment. There is a



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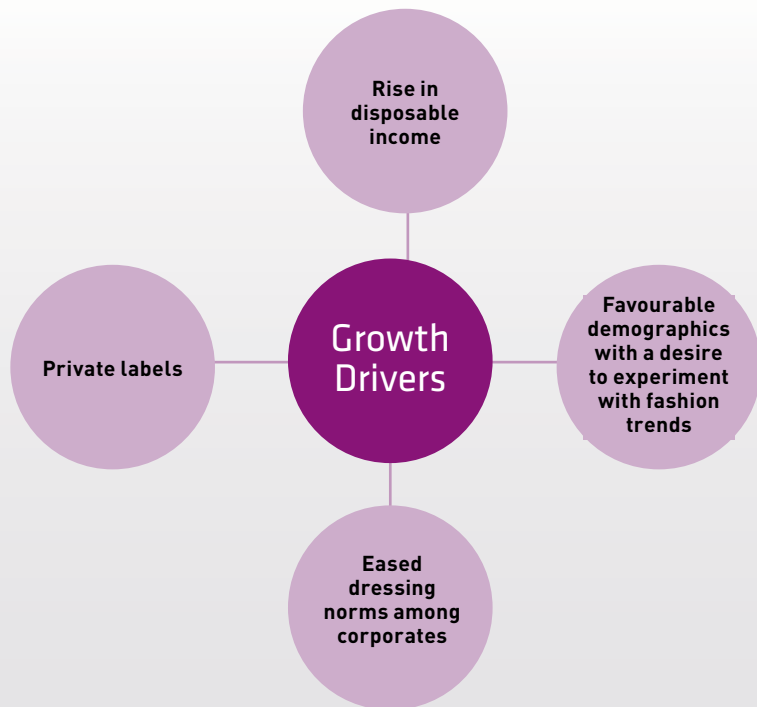
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Increasing urbanisation, higher discretionary spending and evolving lifestyle is leading to casualization of both men and women's wardrobes. Smart casuals with a few do's and don'ts are becoming more and more acceptable on a daily basis and are not strictly restricted to a Friday dressing format anymore.

Knitwear fabrics are known for the comfort they provide, moisture absorption, stretch, easy care, etc. The conversion of need based clothing to occasionwear has resulted in the emergence of new categories such as gym wear, yoga wear, etc., which is going to increase the demand of knitwear in the near future.

WAY FORWARD

The knitwear market in India is gaining share in Indian fashion retail. The change in consumer's tastes and preferences and emergence of new categories such as athleisure, gym wear, yoga wear, comfort wear, et al., has lured many brands/retailers to cater to this growing knitwear market. The increasing penetration of these categories in smaller towns and rural areas would fuel this growth.



The knitwear market in India is gaining share in Indian fashion retail. The change in consumer's tastes and preferences and emergence of new categories such as athleisure, gym wear, yoga wear, comfort wear, et al., has lured many brands/retailers to cater to this growing knitwear market.

huge scope for product innovation within the casual wear segment. India has become a market with a plethora of opportunities and brands and retailers who understand the needs of Indian customers better are expected to leverage these opportunities.

The knitting industry is making some interesting changes in the footwear category as well. Usage of flat knits in making shoe uppers has increased as it results in zero wastage, less energy consumption and higher productivity.

Exploring new segments within knitwear will also be key to the growth for brands. Brands and retailers that would keep pace with the changing fashion trends through innovation, alongwith the flair of establishing themselves through marketing strategies are expected to outpace their peers and would be positioned better to capture a higher share of the Indian knitwear market.



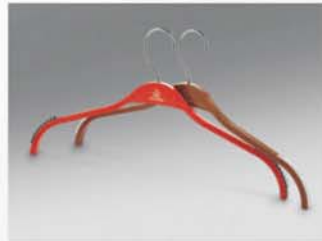


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INDIAN KNITWEAR MARKET

PRESENT & THE FUTURE TRENDS

The need for speed and the need for comfort have together made way for comfort wear. And today, satiating the comfort needs of customers, the knitwear industry in India has boarded the ship of holistic growth.

Team IMAGES BoF



Duke

Duke

The augmenting popularity of comfort wear amongst the Indian population has been noticed both at workplaces and outside. People at present, are opting for comfort while wearing t-shirts, instead of going for more of formal wear.

The Speculation

The knitwear industry in India is escalating at a rapid speed. There is an ever increasing demand for knitted apparels. Not only major brands, but numerous designers have also incorporated knits into their clothing lines. Conceivably, one of the prime benefits of knitwear is that it perfectly suits the Indian climate. Describing this growth from the t-shirt perspective, Neha Shah, Head-Marketing, Pepe Jeans said, "From a macro-perspective, the t-shirt, as a category, is very important across all consumer verticals including adults and kids. It is a very versatile segment and is now emerging to be one of the fastest growing categories in India. The knit category includes knit shirts, polo shirts, knit tops, etc., that is dominated by the men and boys' garments, contributing a huge amount to the market, while the women's and girl's segment is growing at a breakneck speed. Comfort characteristics, an affordability and cool design such as slogan tees and graphic print tees have helped further propel this segment as a whole in terms of growth," she further stated.

However, the only concern is the manufacturing front where the challenges remain, especially for the export market, as competition on price is very high from other manufacturing countries. Saurabh Singh, Head of Design - Menswear, Being Human Clothing believes that there is need for technology enhancement and social compliance for the segment to prosper further.

The Growth Drivers

One of the prime factors of growth in the knitwear industry is the mounting number of organized players. Moreover, with the online marketing boom and easy availability of assorted t-shirts, the market is definitely ceaseless. Customers are smarter than before and majority of the young population is earning more than basic incomes - this is another catalyst of the industry growth. As Vinay Mehra, Managing Director, Fifty Degree said, "In a market like India, price is a major attribute. According to a study, people choose comfort over extreme fashion. Thus, affordability at a competitive price point, comfort, style and classic designs usually do not fail a product, especially knitwear."

Providing the best of touch and feel factors, knitted is preferred over woven. Its stretch-ability and assorted designs have attracted the entire market. The best part about knitwear is its versatility. They can be worn formally as well as casually, depending on the mood and place. They also range at varying prices, pleasing all kinds of customers. Moreover, with slogan tees becoming the 'next thing', this category has captured the millennial market. People today do not look at t-shirts as basic item of clothing, but something that can express their attitude towards life. From latest catch phrases to comic characters - one can have it all.

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"T-shirt, as a category, is a very versatile segment and is now emerging to be one of the fastest growing categories in India.

-Neha Shah,
Marketing Head - Pepe Jeans



Being Human



Monte Carlo

knitwear industry is the preferences of the new generation. Moreover, with the ease of wearing and comfort bestowed by this category, people have started opting for knitwear over woven, both while working and relaxing.

Expressing his thoughts on the inclination towards knitwear, Vinod Kumar Gupta, Managing Director, Dollar said, “Despite being strong in woven, the knitwear industry in India is on a double digit growth trajectory. The industry is gearing up for bigger play in the Indian apparel industry. Trade in knitwear fared better compared to woven and there is an increased demand for knitted apparels. It has witnessed strong growth in past one year.”

Elaborating more on the subject, Kuntal Raj Jain, Director, Duke said, “Styles and designs can be changed easily and faster in knitted garments, but not in woven. Also, knit fabric has good elasticity as compared to woven



“The biggest innovations that are happening currently are in the recycled, eco-friendly fabrics, as more and more global brands are adopting them.”

-Saurabh Singh,
Head of Design - Menswear, Being Human Clothing

The Possible Threats

Though knitwear is an ever-evolving segment, yet there are certain threats as expressed by the brands and manufactures. Market analysis stated that major concern is the quality retail spaces in tier -II and -III cities. This has to some extent affected the sales. Another concern is the competitive market. At present, customers have thousands of choices with wide array of designs. Apart from this, the manufacturing prices and quality issues are few points that brands are focusing to put right.

On being asked about the challenges faced by the brand, Sanjay Jain, Managing Director, TT highlighted, “Stiff competition with local brands catering to smaller geographies who work on narrow margins and provide personal support are quite a concern. However, the urge to move to bigger and national brands, provides a great opportunity for brands like us.”

From Traditional Woven To Knitted Apparels

With time, lifestyle has changed and thus, fashion and preferences of people have also evolved. One of the prime reasons for this brilliant growth of the



Dollar



“In a market like India, price is a major attribute. Affordability at a competitive price point, comfort, style and classic designs usually do not fail a product, especially knitwear.”

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Managing Director, Fifty Degrees



“Stiff competition with local brands catering to smaller geographies who work on narrow margins and provide personal support are quite a concern.”

-Sanjay Jain,
Managing Director, TT

more comfortable and spending ₹400-₹500 rupees on t-shirts even if it is worn only 4-5 times.

The Global Market

Though knitwear is a booming industry in India, compared to global share, the production and consumption of knitted garments is low. Market analysis states that in India 70-75 percent of overall organized retail consists of formal wear brands, whereas globally, casual and fashion wear has a bigger share of organized retail. Moreover, the demand for knitwear is low as compared to the global market.

Some of the big players of the industry believe that India has failed to cash in on the opportunities that have come its way. There has been no significant growth in exports, while imports have gone up. Plus they also believe that the industry, at present, calls for structural changes and policy reforms in order to reach the next level. India is traditionally a woven based market. The knitted garments segment is majorly dominated by non-branded manufacturers in India.

Harkirat Singh, Managing Director, Woodland, explaining the scenario, said, “In India, the majority of regions are still traditionally dependent upon handlooms for their basic earning. People here are more comfort thirsty than being style driven, since always. Indian roots have been strong towards woven, that’s the major reason that knitted fabrics are lagging behind. Secondly, globally, man-made textiles and garments still stand high in demand. But, India is behind as there is lack of man-made fibers at competitive prices. Low technology level is another reason for low production of knitted garments when compared to global scenario.”



fabrics. The rise in awareness about new trends and upcoming fashion among consumers is prompting them to maintain their wardrobes with the latest clothing trends in the knitwear market. These garments are easy to maintain and comfortable to wear as comparison to those from the woven-market.”

The Share In Indian Apparel Industry

Karan Behal, Founder and CEO, Pretty Secrets and Bobby Arora, Director,

Status Quo stated that the industry has accorded around 45 percent to the entire apparel industry.

Speaking on the contribution of knitwear industry to the overall apparel industry in India, Aditya Udani, Owner, Garcon specified that as the market is changing hugely, majority of this country’s demographic is between the age 25 to 35 years. According to him, these people are very happy being

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Status Quo



“Competition was there and will always remain. For any brand, if they are focused on their innovations according to market requirements with regards to styling as well as pricing, there is enough scope.”

-Bobby Arora,
Director, Status Quo

Competition With Global Brands

The competition between Indian knitwear industry and the global brands is heating up evidently.

Defining the competition and the possibilities of the Indian market Bobby Arora, Director, Status Quo said, “Competition was there and will always remain, but the fact is that consumption in India is growing faster. For any brand, if they are focused on their innovations, according to market requirements with regards to styling as well as pricing, there is enough scope.”

Designer Chaitali Giri opined that any kind of positive competition is good for the Indian market. Brands need to realize the fact that international brands are choosing India as a potential market, as the demand is ever increasing. They need to understand what interests the Indian customer. It may vary from different USPs to different designs and identity. Indian brands should avoid copying; rather get inspiration from these international brands.

A point that has been noticed is the increasing prices of cotton and yarn, which is a major concern for Indian brands. Global brands are introducing comparatively cheaper pricing to draw the attention of consumers.

With intent to sustain the market, manufacturers of knitwear in India are promoting new designs periodically. Furthermore, they are adapting innovative marketing strategies to reach out to their target customers and enhance their position in the market. Models and celebrities are being employed to display the wide range of knitwear products by many organized players. Apart from this, the youth of the generation are aware of the latest trends. Therefore, many brands are trying to meet with the aspirations of these desires by introducing fresh and quirky designs, while adhering to quality of the product.

An Age Of Evolving Trends

The Indian market has witnessed tremendous expansion in the Athleisure segment and the future seems to be filled with even more possibilities. The latest trends that customers are opting have turned comfort wear segment into a thriving section. From pop colours to abstract patterns, from stretchable



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“Trade in knitwear fared better compared to woven and there is an increased demand for knitted apparels. It has witnessed strong growth in past one year.”

-Vinod Kumar Gupta,
Managing Director, Dollar



“The rise in awareness about new trends among consumers is prompting them to maintain their wardrobes with the latest clothing trends in the knitwear market.”

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“People here are more comfort thirsty than being style driven, since always. Indian roots have been strong towards woven that's the major reason that knitted fabrics are lagging behind.”

-Harkirat Singh,
Managing Director, Woodland



Fifty Degree

to quick dry fabrics, there are knits for everyone, with all tastes. This category includes cardigans, jumpers, turtlenecks and shrugs, which are made of soft knits. Furthermore, owing to its body-moulding characteristics and new creative technologies such as glossy foil prints and digital prints, there is only an upward motion for the segment.

At Jack & Jones, they believe that oversized cardigans, with light embellishments play a huge role in defining the conversion of trends. Power dressing with knits, light and comfortable joggers comprise the trend forecast for 2018. “This will be made even bigger with the arrival of the AW’18 collections,” they assured.

Sandeep Jain, Executive Director, Monte Carlo said, “Fashion has always been hotbed for innovation. It is forward looking and cyclical. Technology is transforming fashion at a faster pace than ever. Tech fabrics are the latest innovation like cool max, or performance fabrics engineered for a wide variety of uses where performance, not style of the fabric, is the major parameter.”

Additionally, RK Jain, Managing Director, Bonjour said, “The fashion industry has seen enormous growth in the last few years, whereas the knitwear segment has a small occupancy in the fashion industry. The apparel industry in India has overtaken China in exporting garments to the US. Knitwear often witnesses a high demand in the region, where the climate is often cold as the main fiber used in knitting is wool and cotton, which provides warmth.”

Innovations In Knitwear

Talking on current innovations happening in knitwear, Saurabh Singh, Head of Design - Menswear, Being Human Clothing said, “The biggest innovations that are happening currently are in the recycled, eco-friendly fabrics, as more and more global brands are adopting them. From being a niche, few years ago, they are now going big on a mass scale and their percentage in the overall market is only going to grow with each passing year.”

Knitwear, today, is more appealing and attractive compared to before. They have new-age creative technologies





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such as digital prints. Benefit of technology is the rapid production of garments, with maximum accuracy owing to improved machinery. With the introduction of tailored Athleisure, knitwear has become a sophisticated addition to the existing trend. The category sees rapid growth as it is the perfect mix of casual and formals. For menswear, washes are the key at the moment. Jacquard is another fabric that is gaining popularity. Special and fancier yarns are being introduced to make the actual product look very premium as compared to before. For ladies, indigos, washed knits and linen blends are fast-growing.

Body-mapped and seamless knitted technologies are another focus. There are fabrics in development that are embedding graphic patterns through a sophisticated seamless jacquard weave construction. Thanks to a blend of performance and natural fibers, features such as odour resistance and temperature regulation can be found in advanced knitted fabrics today.

Discussing about the latest innovations in knitwear, Sanjay Vakharia, Director & COO, Spykar said, "Seamless knitting and seamless finishing technology are two of the major innovations in the knitwear world. By eliminating the cutting and sewing processes, complete garment knitting provides a variety of advantages in knitting production, such as savings in cost and time, higher productivity, quick response production and more. The industry's knitting machine manufacturers have centered on increased energy efficiency and waste reduction, moving more towards sustainability". "The knitted technology is also been incorporated in footwear with the emerging era of knitted shoes. Many major sportswear brands now have an exclusive knitted footwear range. Knitted footwear technology is poised to enhance sustainability and walk ability alike," he added.

Fabrics Of Comfort

The prime fabrics used in the knitwear industry are blends like cotton-spandex, cotton-lyocell, etc. Manufacturers also focus on 100 percent combed cotton allowing comfort and trend.

The Indian youth aspire for a distinct look and this has forced the retailers to explore various dimensions of product design, color selection options, etc. Explaining the choice of fabric in knitwear, Karan Behal said, "In terms of comfort, modal and viscose fabric is the most sought after fabric. It feels super soft on the skin and is made using re-purposed cellulose from beech trees. It has a high value in terms of the product and is excellent for loungewear and sleepwear. When it comes to trendiness, knits with lurex fibres (in the form of stripes or sparsely distributed) is being sought after. It also adds a touch of glamour in your everyday knits."

The preference for cotton Lycra jersey is really high, as it is comfortable and lycra makes it look more lustrous and

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"Brands need to realize the fact that international brands are choosing India as a potential market, as the demand is ever increasing. They need to understand what interests the Indian customer."

-Chaitali Giri,

Fashion Designer, Chic By Chaitalibiplab



Chic By Chaitalibiplab



“Tech fabrics are the latest innovation like cool max, or performance fabrics engineered for a wide variety of uses where performance, not style of the fabric, is the major parameter.”

-Sandeep Jain,
Executive Director, Monte Carlo



“The knitwear market is changing hugely as majority of this country's demographic is between the age 25 to 35 years and prefers to spend on t-shirts even if it is worn only 4-5 times.”

-Aditya Udani,
Owner, Garcon



T T Ltd.

rich. Viscose rayon is quite popular in women's wear sector for its good drape qualities, whereas, nylon spandex is a popular quality for active wear.

Emerging Categories In Knitted Apparels

Fashion trends are ever evolving and different customers prefer different styles. Apart from t-shirts and polo-shirts, Being Human Clothing is bringing forth lot of options in track pants, track shorts, hoodies and vests. They have also introduced a line of knitted shirts, since last few years and are attracting the market with its designs and patterns. On the other hand, at Fifty Degrees, they believe that sportswear and regular casuals could soon emerge as category killers.

Another category - athleisure - is a highly demanding kind. Both teenagers and adults are opting for this category, as they desire both comfort and style. This category has wonderfully blurred the lines between functional and causal, comfortable clothing. The true beauty of this trend is that it combines both the practical aspect as well as wearability. More

than a trend, athleisure marks the change in lifestyle, moving towards health consciousness, with relaxed and comfortable outfits. Pepe Jeans has incorporated technology to make athleisure last all day. They have introduced this category in menswear and are hoping to extend it to women's wear in the coming seasons. Neha Shah elaborated, “The collection sees a host of colours from the basic blacks, whites, greys, navy's to brighter shades of reds, blues and greens. The range consists of sweat pants, t-shirts and sleeveless tees. Features/technology that have been integrated in the athleisure category includes Dry Fits Poly, a micro fiber engineered to wick away sweat from the body; it moves the sweat from beneath the surface of the fabric bringing it to the top for quick evaporation. The fabric is stretchable and allows the skin to breathe. Anti microbial finish treatment - a long lasting formula designed to penetrate each fibre of the fabric. This helps in odour reduction, making it suitable to wear all day long”. “Another segment is non-denims, which is a key category in the menswear and kids (boys) range. What makes this fabric unique is that



“Oversized cardigans, with light embellishments play a huge role in defining the conversion of trends. Power dressing with knits, light and comfortable joggers comprise the trend forecast for 2018.”

-R K Jain,
Managing Director, Bonjour (Vami)



“Seamless knitting and seamless finishing technology are two of the major innovations that aids savings in cost and time, higher productivity, quick response production and more.”

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Director & COO, Spykar



“In terms of comfort, modal and viscose fabric is the most sought after fabric. It feels super soft on the skin and is made using re-purposed cellulose from beech trees.”

-Karan Behal,
Founder & CEO, Pretty Secret



Pepe Jeans Store

it is 100 percent cotton and also has stretch properties, which gives a casual trouser look. Highly preferred by our customers, these are made for both seasons – autumn-winter and spring-summer,” she added.

Modernization Of Knitted Bottom Wear

A trend that enables one to move freely and look good is definitely a trend that is sure to stay and bottom wear is the apparel where everyone seeks stylish comfort. For bottom wear there are lot of compact fabrics with structures, double faced interlocks, which are being used to make smart knitted pants and are good way to infuse athleisure style into smart and formal wear. Beyond that, new innovations in bottom wears includes cycling shorts, boxer shorts, track pants, lounge pants, etc.

Established players like Jack & Jones stated that in bottom apparels, textured drapes, billowy styled knitwear will be central pieces in the category. The nature of knitwear will keep the look simple yet powerful and make a bold statement. They believe that the bolder the silhouette, the more impactful the overall effect.

Sanjay Jain, Managing Director, TT said, “Leggings have become a major range in the bottom wear knits segment for ladies owing to standardization of size and availability in multiple colors. Also loungers are fast picking up as sought after bottom wear for the youth.”

Therefore, the apparel market is about to experience a huge change in the bottom wear segment in knitwear. Women customers are looking for attractive fluorescent colors pallazos, pants and skirts with tops. For formal wear, people are opting for shades of grey, beige and brown, as they give a more elegant outlook.

Impending Prospects

The knitwear industry in India is poised for a promising future bolstered by strong domestic consumption. With disposable income on the rise, the retail sector in knitwear category is experiencing a rapid growth and is sure to create a distinctive impact in the global apparel market.





Duke

THE T-SHIRTS MARKET IN INDIA

Consumers' wardrobes, in India and across the world, are undergoing a distinct shift - from formal clothing to a greater preference for trendy and casual attire. The following feature takes a look at the Indian market for one of the most commonly used apparel categories over the world - t-shirts.

Shivam Gautam & Gurbir Singh Gulati

T-shirts are not just a fashion essential — they are a medium for expression and an ageless insignia of the young and the young at heart. What evolved from undergarments have today become a ubiquitous piece of clothing across the globe. It's easy to wear, comfortable, stylish, finds space at almost every occasion and hence everybody has one.

The Indian Market

According to the latest reports from India's leading management consulting firm Technopak Advisors Pvt. Ltd., the size of the t-shirt market in India is estimated to be at ₹23,211 crores which is expected to grow at a promising CAGR of ~10 percent over the next decade to reach ₹61,954 crores by 2027. According to industry reports, in the present scenario, men's wear holds a key share in the market, followed by women's wear and kidswear. At the same time, the women's segment is registering a faster growth that experts attribute to the comparatively lower base of market size and increasing acceptance of casual clothing among women. Also, t-shirts are finding a larger space in the tier-V girl's wardrobe too.

The Growth Drivers

Like elsewhere in the world, the Indian consumers' distinct shift from formal clothing to trendy and casual attire has provided a boost to the t-shirt market in the country. Comfort characteristics, easy-care properties, affordability, easy-design options and a casual look are the major driving forces propelling the t-shirt market in India. "The t-shirt market of India includes knit shirts, polos, knit tops, etc., and is specifically targeted towards the youth segment. One of the main reasons behind its popularity among youth is that teenagers are today's rational buyers

who keep every aspect in their mind before purchasing the t-shirt including colour, design, garment, logo etc., which allows their mind to take over the t-shirt design as their personality, style, and attitude," says Harkirat Singh, Managing Director, Woodland.

Although the youth of the country still remain the core consumer base, the salient features of this comfy apparel has helped the demand trickle down to all age groups today. "Definitely, consumption of t-shirts is no longer limited to the youth. No doubt, youth remain a huge base of consumers, but owing to its comfort and ease of handling properties t-shirt are popular among middle aged and older consumers," says Kuntal Raj Jain, Director, Duke.

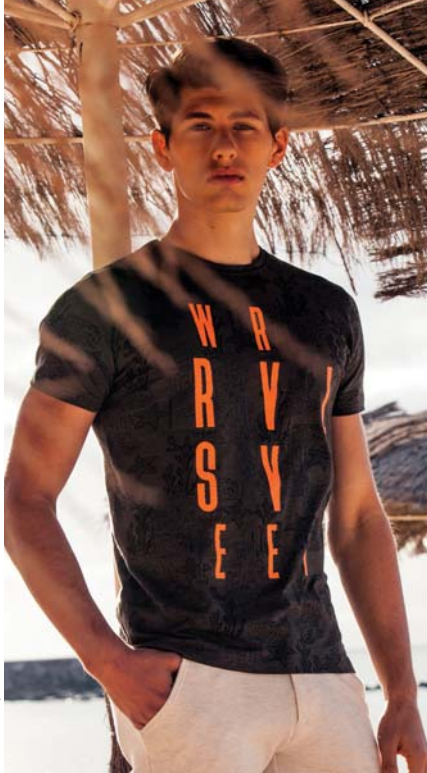
The emerging trend of occasion specific clothing has given impetus to the growth of casual wear. A peep inside casual wear stores here suggests that t-shirts have a presence that cannot be ignored and also have an ally even among the not-so-fashion-conscious people. The increasing trend of Friday dressing is another driving factor for the t-shirts market in India. "Increasing acceptance of t-shirts by corporates is one of the most noticeable trend. Even professional services companies, over the years, have relaxed their dress code to allow business casual t-shirts to office. Initially, t-shirts were being permitted only on Fridays, but with time, such relaxations have been extended to all working days by some companies and are expected to be followed by many others," says Sanjay Vakharia, Director and COO, Spykar Lifestyle Pvt. Ltd.

Experts also believe that shrinking boundaries have been instrumental in bolstering opportunities in the Indian t-shirt market. "The t-shirts market in India has huge opportunities for



Monte Carlo

Status Quo



Fifty Degree



Pepe jeans



industry players due to increasing penetration of the category into smaller towns, rural areas, middle aged consumers and women. So, I can say that the t-shirts category is one of the top high-growth categories in men's, women's and kids' apparel in India," says Kuntal Raj Jain.

Opportunities

Worldwide, t-shirts have always enjoyed special popularity amongst the youth.

In a young country like India with a median age of 27 years, this segment harbours immense opportunities for brands and retailers alike. Indian youth seek comfort and style in their clothing, which is better met by t-shirts compared to woven shirts.

A Credence Research report from March 2018 says that India is set to register the highest growth rate for t-shirts sale in the Asia-Pacific region in the next five years. "Presently, the t-shirt market is a promising one. It is a very versatile segment and is now emerging to be the fastest growing categories in India," says Neha Shah, Head of Marketing, Pepe Jeans.



"The youth remain a huge base of consumers, but owing to its comfort and ease of handling properties t-shirt are popular among middle aged and older consumers."

-Kuntal Raj Jain,
Director, Duke



"In the organised segment, the minimum price point mostly begins at ₹349 and goes up to ₹1,299 for a basic tee. The price points go up depending on style, material and brand positioning."

-Vinay Mehra,
Managing Director, Fifty Degree

Talking about the flourishing t-shirt market in India, Bobby Arora, Director, Status Quo says, "The t-shirt market is steadily growing in India each year. Brands are recognizing the power of the product and that's the reason every brand is jumping into the pool to grab its share."

"Our target audience is the non-earning youth segment yet t-shirts are our highest selling items at the stores currently," says Harkirat



Being Human Store

premium brands the price could be from ₹2,599 and can go upto ₹5,999 and in some cases can be even more. Our price range of t-shirt starts from ₹699 onwards in our stores till ₹2,499," says Saurabh Singh, Head of Design - Menswear, Being Human Clothing.

Like in any other apparel categories, styles, materials and the brand, positioning play a major role in the price points in t-shirts. "In the organised segment, the minimum price point mostly begins at ₹349 and goes up to ₹1,299 for the basic tee. The price points go up depending on the style, material and the brand positioning. The choc-a-bloc unorganised market can see the price dip to as low as ₹100," adds Vinay Mehra, Managing Director, Fifty Degree.

Preferred Fabrics

The rise of the modern discerning consumer has compelled t-shirt manufacturers and retailers to explore various dimensions of product innovation primarily related to product design, colour selection options and fabric combinations. Although fabric

Singh reinforcing the popularity of the category amongst the youth of the country.

Price Points

Easy availability and lower price of t-shirts are also one of the main reasons of this segment's popularity. Prices in this category vary from t-shirt to t-shirt and category to category including, round neck t-shirts, polo

tees, mercerized cotton tees, organic tees, etc. So the cost of making the product tends to be changing its price. As customer demands more casual wear than other categories, it impacts the price movement too. "The price points can be as low as ₹199 for a basic t-shirt, in organized retail the majority of t-shirts are priced between ₹499 to ₹999, mid premium brands have t-shirts priced from ₹1,099 to ₹2,299. And for



"Presently, the t-shirt market is a promising one. It is a very versatile segment and is now emerging to be the fastest growing categories in India."

-Neha Shah,
Marketing Head - Pepe Jeans



"The most common type of fabric used to make t-shirts is cotton in different types like combed cotton, organic cotton, pima cotton, slub cotton, etc."

-Sandeep Jain,
Director, Monte Carlo



Garcon



“The t-shirt market is steadily growing in India each year. Brands are recognizing the power of the product and that’s the reason every brand is jumping into the pool to grab its share.”

-Bobby Arora,
Director, Status Quo



Duke Store

preferences in t-shirts vary with season, cotton and cotton blends are by far the most popular fabrics. “The most common type of fabric used to make t-shirts is cotton, but it is important to mention that there are different types of cotton out there for use. Combed cotton, organic cotton, pima cotton, slub cotton,” says Sandeep Jain, Executive Director, Monte Carlo. In addition to cotton t-shirts, the Indian fashion market is also witnessing huge demand for polyester-cotton blended t-shirts. “At Pepe Jeans, the collection of t-shirts largely consists of cotton material but in order to have a variety and ensure comfort, the fabric is blended with jersey, grindle jersey, piques, mélange, etc., in men’s wear and for women’s wear viscose, crepe and poly linen blends are essential fabrics. Additionally, we also have an athleisure line that has been made with polyester as a key fabric as well as elastane

keeping in mind the high performance expectation in terms of function as they are primarily targeted towards gymwear,” says Neha Shah.

Also gaining momentum are man-made fabrics that offer stretch and fluidity. “Cotton will always be popular in India. But now you also see a

lot of blends such as cotton/poly, cotton modal, cotton spandex, etc. People like garments that are comfortable and can be stretched,” reveals Aditya Udani, Owner, Garcon.

Top Trends

T-shirts have indeed come a long way from its rise to popularity in the back in the 50s. Now, trends in t-shirts change faster than seasons. Moreover, tees are no longer a basic item of clothing, but more a means to showcase attitude and beliefs. “In the last year itself, slogan tees have captured a huge chunk of the market. A noticeable trend that has created waves in the fashion world and is experiencing a surging demand is t-shirts calling out social issues or statements that talk about equality. Much of this comes from the larger global conversation about the need to support social causes,” says Neha Shah.

According to Vinay Mehra, crew necks, solid colours, basic t-shirts, short sleeve t-shirts along with graphic and printed t-shirts are the top favourites in India. Also in demand are roundneck, V-neck, collared, and polo t-shirts along with sportswear, athleisure, dry fits. “In addition, Henley’s, round neck prints and mix and match, cut & sew collar t-shirts are trending in t-shirts right now,” says Bobby Arora.



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“Our target audience is the non-earning youth segment yet t-shirts are our highest selling items at the stores currently.”

-Harkirat Singh,
Managing Director, Woodland



“Cotton will always be popular in India. But now a lot of blends such as cotton/poly, cotton modal, cotton spandex, etc., are trending as comfortability and stretched are in demand.”

-Aditya Udani,
Owner, Garcon



“Initially, t-shirts were being permitted only on Fridays, but with time, such relaxations have been extended to all working days by some companies.”

-Sanjay Vakharia,
Director & COO, Spykar



Being Human

Adding to the list, Sanjay Vakharia said “Longline tees, sporty look, slogan tees, abstract graphics and placement tees are the current top trends and designs in knitted t-shirts.”

Printed t-shirts have managed to grab attention of Indian consumers the most. “Print and design of t-shirts nowadays have set a different and hot trend of funny quotes, famous dialogues from various popular soap operas, sarcastic statements, reflect tourist locations, mythological stories, cartoon characters, famous personalities and attractive slogans. Demand of t-shirts with embellishments, neon colors, etc., have gained a lot of attention too among the youth in recent times,” says Harkirat Singh. The athleisure trend that has been gaining momentum in the last few years has also influenced t-shirt

trends. “The athleisure/sporty look has been trending for quite some time now. Apart from this, there is a strong 90s trend which is coming back into the market. It is moving away from tight fitted t shirts to more loose/comfort fit,” says Aditya Udani.

Tees designed with movie characters and superhero prints are also having a major trend moment. “Pepe Jeans recently launched the Marvel-Avengers collection, in collaboration with Disney India. This capsule collection was strategically launched a week prior to release of the latest Avengers Infinity War movie. The collection is a mix of cool tees adorned with prints of the iconic and best-loved Marvel characters. It is currently available at leading Pepe Jeans stores across India,” says Neha Shah.

CONCLUSION

Although the t-shirt market in India is highly fragmented, the increasing brand awareness among the Indian youth is expected to drive the penetration of t-shirt brands into smaller cities and rural India, thus increasing the share of various brands within the t-shirt market. The proliferation of private labels has made t-shirts more affordable for value-seeking consumers in smaller cities. Overall, the t-shirt market in India is flourishing and is expected to register bolstered growth in the coming years.





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INNERWEAR

A THRIVING MARKET IN INDIA

Gone are the days when innerwear was positioned only as a garment of requirement. Today, amongst the core apparel categories, innerwear is all poised to be a prospectively flourishing segment with a slew of comfortable and innovative products that have the modern customer spoilt for choice.

By Niyorkona Saikia

Beautiful women and good looking men: we see them everywhere; in ads, in hoardings and in every market place. There is no denying the good looks these men and women carry, because you see them out there, dressed only in their undergarments. Yes, this is the dominance of today's underwear market in India. And its leap from underwear to 'Innerwear'!

Today, innerwear has come out of its dark closet. From being just a fundamental wear to becoming a fashion quotient, innerwear has brilliantly created a niche for itself in this contemporary market. With the rising incomes, passion for fashion and need for comfort, this segment is sure to evolve even more.

Initially, the innerwear market belonged to an unorganized platform. But with the mounting need for quality and comfort, organized innerwear segments came into existence and have been growing ever since. According to market analysis by Technopak, the current market size of the innerwear market is worth ₹27,931 crores which is estimated to grow at a CAGR of 10 percent over the next decade to become ₹74,258 crores by 2027.

Between 2000 and 2008, the premium international brands began penetrating the Indian market. However, there were Indian brands that started exhibiting their new and stylish designs with an aim to capture the interest of the Indian women. Gradually, innerwear entered the retail world through EBOs, LFS and departmental stores.

The Indian Innerwear Market

The evolution of innerwear market in India is majorly rooted in urban India. With attention towards western outfits and an increasing demand for occasion and outfit-based innerwear, the market has seen a holistic boom. Today, people look for innerwear with optimum functionality and comfort. Manufacturers and

brands are focusing on innovative product line that fulfills all the requirements of the new-age customer. Speaking about the current scenario of Indian innerwear market, Vinod Kumar Gupta, Executive Managing Director, Dollar Bigboss said, "Currently, innerwear is one of the high growth categories in the apparel market in India. With modern trends and product innovations, innerwear has turned from a conventionally utilitarian item to an essential fashion constraint."

The rising purchasing power among customers and the increasing number of working women are other factors that have boosted the market. Customers are now aware of better fit, quality, specific colours and styling and more. Therefore, the growth of this segment is clearly visible in the organised retail where they are offering customers with the perfect space to choose. They are also enabling the brands to upgrade their brand outlook.

The Innovative Manufacturing

In today's age, what you wear underneath your clothes is more comfortable, more authentic, looks exquisite, and at certain times helps in boosting your confidence. With the increasing demand for comfort and style, innerwear today is being manufactured using present-day fabrics, while giving them trendy designs.

On being asked about the new manufacturing technology adoption in innerwear, Vinod Kumar Gupta said, "The innerwear industry is filled with advancements and innovation. The amount of various types of innerwear and the variations are huge in number. This category is quickly fusing innovation into its articles of clothing."

The prime sales driving factor for Dollar is its established prominence in

the retail platform. The brand indulges in introducing new-age manufacturing techniques and products and bringing out to the people. All the brands are becoming fashion driven and delivering products with multiple needs, rather than just offering basic coverage. "Every good brand aspires to make its customers happy. Over the years we have emphasized upon this attributes and brought forth products that are designed to offer comfort, as well as look good", Vinod Kumar Gupta added.

Value For Money

In India, the domestic innerwear market is experiencing a tremendous roar. Recently, the market is witnessing the advent of premium innerwear brands along with the entry of global brands. Customers do not overlook crucial requirements like quality and comfort, therefore, they are ready to pay the amount required. With increasing amount of disposable income and with the experience of international lifestyle, Indian customers are spending more on innerwear than before. Many new and established brands are focusing on introducing newer and better product line, while adhering to customer satisfaction.

Sharing his view on value for money, Vinod Kumar Gupta said that the Indian innerwear market was once highly price sensitive and people spent on innerwear very cautiously. However, the market has changed and at present the trends have all augmented. "The changing trends and influence of western fashion has changed the perception of the customers. They are willing to spend more for better and designer products. So, we are responding to these changing consumer preferences and expanding the product ranges that are value-based to cater their needs", said Vinod Kumar Gupta.



"The innerwear industry is filled with advancements and innovation. This category is quickly fusing innovation into its articles of clothing."

-Vinod Kumar Gupta,
Managing Director, Dollar



T T Ltd.



in branded innerwear has made way for the growth of both international and domestic innerwear brands in India. By adding different silhouettes to every innerwear category, brands have changed the tides for the Indian customer.

On being asked if the Indian consumer is willing to pay higher for quality and value-added products in innerwear, Sanjay Jain said, “Yes the urban consumers are willing to pay higher for quality and value added products. But, the majority of the volume comes from the rural markets or the so called semi urban markets wherein it is very price sensitive.”

According to Vinod Kumar Gupta, with the change in lifestyle and influence of western trends, the Indian consumers have become much more brand aspiring and fashion conscious. But, they are price sensitive with respect to their buying preferences. He added, “Domestic organised brands like us are at par with the international standards and offerings, if trend and quality are concerned. We offer value-based trendy products that are up to the minute.”



“The urban consumers are willing to pay higher for quality and value added products. But, the majority of the volume comes from the price sensitive rural and semi urban markets.”

-Sanjay Jain,
Managing Director, TT

Giving a more specific bifurcation of the price blocks, Sanjay Jain, Managing Director, TT said, “Price points vary based on the range and category of products. The basic mass range of innerwear is ₹60 to ₹150, the premium mass range of innerwear is ₹100 to ₹250, the premium range is ₹150 to ₹400 and the luxury range is ₹400 to ₹3,000.”

The Modern-Day Customers

The growth of the innerwear segment in India can also be attributed to the introduction of various international brands and the organized players. Customers are focusing more on quality and buying more products than before. The increasing consciousness of women customers regarding the brands and styles have also boosted the market. This candidness to indulge

New Fabrics & Trends

People desire comfort and style, both blended together and are not shy to go ahead and satiate their desires. This is similar to the innerwear market. Cotton has always been highly preferred in this segment, but today with technical advancements, we notice a wide array of comfortable fabrics being used. From nylon to organic cotton, spandex blend cotton fabric to modal and from micro-fiber to more durable material, materials used for manufacturing innerwear have come much beyond, compared to what it was.

Highlighting the advancement in technology and fabric, Vinod Kumar Gupta shared, “The stretch fabric is a new trend in the innerwear industry. It is used for the briefs as well as vests. People prefer these fabrics due to the

comfort as well as the fit of the same. Apart from stretch fabric, we have introduced trendy trunk made of micro-modal fabric.”

Vinod Kumar Gupta also added that the innerwear industry is filled with advancements and innovation. The amount of various types of innerwear is huge in number. This category is quickly fusing innovation into its articles of clothing. There is advent of new shades like pop colours, glow shine waist bands, abstract patterns,

stretchable wears and quick dry fabrics. Dollar is constantly looking to upgrade its products depending on the requirement.

The Emerging Categories

It is quite evident that there are many new sub-categories in the innerwear segment for both man and woman. With the modern woman becoming more fashion and fitness conscious and the man giving importance to their inner beauty, the market is witnessing the bloom of various sub-segments. Elaborating on this, Vinod Kumar Gupta said, “Indian consumers are becoming more conscious about their attire and outfit for every purpose. In Indian innerwear market there is an emergence of new categories like shape wear, intimate wear, active wear, racer backs and many more to come with the trend.”

Some of the other categories or trends that are gaining popularity are Prints, Spandex Blend and Bio Wash.

New Age Kid's Innerwear

Similar to adults, kids too require assorted type of undergarments.

These requirements may vary from place to place and age group. Owing to the sensitive skin of children, the manufacturing of their innerwear requires special measures.

In India, kids' apparel is one of the fastest growing markets in India. According to a market analysis, the first thing that parents consider while purchasing undergarment for their kids is its 'Fit'. Listing the second consideration are styles, designs, colours and brand name. However, lots of people opt for brands, as they ensure quality of the product. “Price” stands at a lower position indicating that consumers are ready to spend for good quality and well fitted undergarments.

According to Sanjay Jain, “The kids' innerwear is still an unorganized segment with very few brands servicing. The potential would be huge if the segment is channelized properly.”

On the same subject, Vinod Kumar Gupta said, “Market for kids' apparel is the fastest growing industry in India and the organized players are laying a strong foundation in this segment. Though there's no particular share for kids innerwear, but Indian kids' wear branded market is growing at 15 percent per annum.”

The Future

The growth opportunity for the Indian innerwear market is beyond imagination. Moreover, the growth story of Indian customer is also expected to revive. Brands are widening their reach and extending their product ranges. While elevating the fashion quotient, various international and domestic innerwear brands in India are also expanding their collection beyond just innerwear. This includes active-wear, comfort-wear and sleep-wear. Therefore, there are a plethora of prospects for all the innerwear brands in the Indian market.



T T Ltd.



Dollar





Dollar Missy



Deepee Twister



Dollar Missy



Deepee Twister

LEGGINGS

THE BIG BANG OF A NEW COMFORT WEAR MARKET

Women today are working, playing, partying and relaxing all within the 24 hours of a day. So, what could be better than apparel that enables them to do it freely and comfortably? This is where leggings play a major role. One can have style and freedom, both perfectly blended together.

By Niyorkona Saikia

The craze of athleisure is only growing with time. Major brands and manufacturers are emphasizing upon activewear garments, which includes yoga pants and leggings. Women have always been fashion conscious, but today they look for trends that help them keep in pace with the fast moving age.

Preference for leggings has gone up the scale gradually with time. There was a time when the who's who of the fashion industry could not understand the potential of leggings. But, with the introduction of different fabrics, designs and detailing, leggings today have found a distinctive position in every woman's wardrobe.

The Evolving Market

Leggings were first fashioned as a more comfortable wear. Over time women started combining it with latest trends, and today it has become one of the

must-haves. Describing about the budding leggings market in India, Vinod Kumar Gupta, Managing Director, Dollar Missy said, “When the leggings penetrated the Indian textile market, we thought the fashion would last for a couple of years, but that did not happen. With organized players moving in, leggings have now become a major segment. The legging business is growing by 50 percent a year, and is one of leading ones in this segment.”

“There was a time when legging were only worn for exercise or as tights under skirts”, said R K Jain, Managing Director, Vami (Bonjour). Today, leggings have evolved as a style statement with assorted designs and prints. Women wear leggings as bottom wear with ethnic Indian wear and casual wear. Moreover, they are available in different styles, including laced, layered, printed and solids. “The most interesting trend noticed is in contemporary ethnic wear. Working women prefer contemporary ethnic wear and they find it more comfortable to match kurtis with leggings and thus, make it every day dressing. Capris and ankle lengths are getting popularity for its trendy features and thus showing potential growth for knitted casual wear market. Leggings have conquered the market as the most convenient bottom wear; replacing traditional salwar. Crafted in super-flexi material and with easy-to-wear features, these leggings are now worn with almost all types of clothing, be it traditional or casual-wear,” R K Jain added.

The Growth Statistics

Indian women today have the choice to look good and work hard, both at the same time. And with leggings, they have found the perfect attire for their changing lifestyle. The change in lifestyle is boosting the leggings market in India and is making way for a new fashion trend.

Elaborating upon the growth of leggings in the past few years, Naveen Kumar Agarwal, Chairman, DeePee Twister said, “The growth in leggings for the past two years has been constant. A big reason for it has been demonetization and GST. 2 years lapse for any industry is a big loss. So, the people who have not forecasted it will be affected sooner or later.”

Speaking on the same, Varun More, Director, Novio said, “The growth rate of leggings has been shooting up year by year, as the utilization of leggings is also increasing day by day. Now legging is on to a market where it is more like the colour matching, like we had initially with the saree and blouse. Legging is also done in the same way where every colour has 15-20 shades. So for any brand that is manufacturing leggings at the moment is at least doing 200 to 300 colours.”

Explaining the growth, Vinod Kumar Gupta said that majority of working



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Dollar Missy



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“The growth rate of leggings has been shooting up year by year, as the utilization of leggings is also increasing day by day.”

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Director, Novio

women preferred leggings, followed by jeans, salwars, long skirts, etc. Fashion is ever-changing and organized fashion brands like Dollar Missy has increased their focus on women’s leg wear, especially leggings to grab higher share of wallet of their target customers. They have a dedicated shelf within their stores for leggings.

The Emerging Trends

Leggings are majorly paired attire, where one can mix-match it with assorted kurtas, tunics, dresses and skirts. They have emerged as a popular trend with wide variety of patterns and textures and more than 100 shades. “Leggings have more than 3 categories now, which include ankle lengths, capris, churidars, jeggings, printed leggings, winter leggings, etc.” said Vinod Kumar Gupta.

According to Varun More, leggings today are being designed with new patterns, which are printed leggings and Indigo leggings. He also added that there are more upcoming patterns that are being introduced with time. “Some designs have been adapted from the West. These are skimmer leggings,

which is an international version of ankle length. They are moving faster into the urban market, so it should be followed by rest of India as well,” he stated.

The Fabric Of Comfort

Leggings are usually made of fabric that lets the skin breathe freely and make the wearer feel comfortable. The fabric varies from lycra, rayon, modal, viscose, thick poly spandex mix or cotton. Cotton leggings are highly preferred, as it is comfort and convenience, and of course, these do not get snagged easily. Renowned brand, Dolly Missy is widely acclaimed for its cotton lycra fabric. Their range ‘Missy’ is made from 95/5 four way stretch fabric cotton lycra fabric.

Naveen Kumar Agarwal explained that cotton spandex fabric is the most preferred fabric by the customers, as it gives the wearer a soft feel along with a care-free comfort. On the other hand Varun More stated, “Preferred fabric for leggings is single jersey and mostly people are looking at the mix of 97 to 3 cotton with spandex or 95 to 5.”

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Vami (Bonjour)

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LEGGINGS



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“The growth in leggings for the past two years has been constant.

A big reason for it has been demonetization and GST. 2 years lapse for any industry is a big loss.”

-Naveen Kumar Agarwal,
Chairman, DeePee Twister



Cost-Effectiveness

Explaining the price points of Dollar Missy leggings; Vinod Kumar Gupta gave a categorical explanation stating that the brand manufactures three basic categories of leggings. These include churidar, ankle-length leggings and capris. As per the popular price points, churidar starts from ₹240, ankle-length from ₹235, printed ankle-length starts from ₹300, capris from ₹225 and printed capris from ₹295.

Likewise, Naveen Kumar Agarwal highlighted that the price points have become very vast owing to the larger number of people manufacturing leggings. He offers a price that ranges from ₹199 to ₹899 depending on the brands.

Conquest Of Knit Leggings

With the popularity and demand for leggings, it has been noticed that women today look for apparels that look stylish and bestow comfort. Considering these facts, there is no denying that knit leggings hold the potential to become the next trend of loungewear. Elaborating upon the emerging knit leggings, Vinod Kumar Gupta said, “Loungewear is comfortable clothing that can be worn in and outside your home, irrespective of age group, weather,

location or profession. These days loungewear comes under daily necessities, because everyone needs comfortable clothing. Since the market is growing constantly, Missy has planned to launch loungewear, leisure wear soon.”

According to Naveen Kumar Agarwal the proposition is yet to take a concrete stance. However, customers love experimenting and exploring. He believes that the front leaders will surely get a first mover advantage.

Varun More, on the other hand stated, “Legging is now new leisure and loungewear, because of its comfort aesthetics. So, loungewear is considered to be comfort wearing and legging is one of the best kinds of comfort wear available at lower price in the market. In fact, it is also taking a toll on pyjamas at the moment.”

Possibilities And Beyond

With rising popularity of comfort-wear, leggings are definitely climbing the ladder fast. They have become the popular choice of weekend wear. Moreover, according to a recent study, the leggings category is here to stay long.





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AN EXPOSITION OF THE **KNITTED** **WINTER WEAR** MARKET IN INDIA

We are in an age where fashion and functionality accelerates paralleling each other. With the ever-so-increasing urbanisation in India, there is an increasing demand for apparel that do not just satiate the weather conditions, but goes much beyond. This is also pertinent to the winter wear segment.

Team IMAGES BoF

The winter wear market in India is at the threshold of a strong and determined fashion revolution. Once widely positioned as functional apparel for winter season, winter wear today is blending fashion to its functionality. Conforming to the changing lifestyles and preferences of the modern consumer, the winter wear market in India has witnessed the inception of wide array of fabrics, designs and styles over the last decades. Today, the industry is at an acme of innovation in terms of styles, design and fabric and has found its position in the fashion industry.

Indian Winter Wear Market

Customers today prefer products that not only cater to the season but also ensure comfort and style. Hence, similar to the other segments in the fashion industry, winter wear preferences are increasingly gravitating towards lightweight casuals. This trend towards casual look and comfort wearing has contributed substantially to the elevated growth of knitwear compared to woven apparel.

Winter wear has, over the years, been one of the most important drivers of the Indian knitwear tree that extends out to many branches. This category in India was pegged at ₹14,475 crores in



Juelle



Duke

According to recent market analysis, the knitwear industry in India is tremendously accelerating. Rishabh Oswal, President, Oswal Woolen Mills (Monte Carlo) said, "In the past year, trade in knitwear fared better, compared to woven and there is an increased demand for knitted apparels. Knitwear constitutes about 50 percent of the domestic apparel market in India and 45 percent of the apparel exports from India. The growth of knitwear industry has been upward of 9-10 percent".

The established brands have realized the demand for knitwear and are introducing products that are specifically designed for the generation next.

Impact Of Global Warming

Owing to global warming, the winter season in India is gradually changing. Winters, at present, are much warmer and shorter. Consequently, the winter wear market in India is also experiencing a change due to the demands. Manufacturers of winter wear are emphasizing upon introducing products that suit the weather condition, while maintaining the overall appeal.

Accentuating upon the impact of global warming, Chaitali Giri said, "Few years ago winter wear was just only a functional product, but now it has changed as a fashion wear. The consumers earlier purchased hardly 2 to 3 sweaters (winter wear) and used it for years. But, now people purchase winter wear as per their occasion, as per their lifestyle and keep adding new winter clothes every winter season."

Speaking on the impact of global warming in the winter wear market, Vishal Jain, Founder and CEO, Tab91 said, "Most people think about global

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"Knitwear constitutes about 50 percent of the domestic apparel market in India and 45 percent of the apparel exports from India. The growth of knitwear industry has been upward of 9-10 percent."

-Rishabh Oswal,
President, Oswal Woolen Mills
(Monte Carlo)



Monte Carlo

2017 and is expected to reach ₹33,957 crores by 2027. The major catalysts of this growth are advent of technically advanced fabrics, international trends and disposable income.

Exceeding the expectations of the pro-urban populace, major fashion houses are introducing fabrics that keeps pace with the demands of the new generation. Talking about the present winter fashion trends and requirements of the people, Chaitali Giri, Fashion Designer, Chic By Chaitalibiplab stated, "Both knitted and non-knitted winter wear are in high demand. It varies, depending on climate, customer's lifestyle and customer's budget. The grown rate, however, is around 7-8 percent per annum."

	CHIC BY CHAITALI BIPLAB	DUKE	JUELLE	MONTE CARLO	TAB 91
Total no of EBOs	-	360+	-	230+	-
Total no of MBOs	600+	4,000+	1800-2000	1,500+	950
Total no SISs	-	50+	20	-	-
Presence in LFS	-	200+	-	-	-
Presence online	Amazon, Flipkart, Paytm & Snapdeal	www.dukeindia.com, Myntra, Snapdeal, Jabong, Flipkart, Amazon, Tata Cliq, Ajo & Trends	-	www.montecarlo.in & other leading e-commerce portals	www.tab91.com, Flipkart, Amazon, Paytm & other leading e-commerce portals

warming during the dog days of summer. But temperatures are rising in the winter too, and that means less winter. Winters for the past two years have been among the warmest, during December to March, in North India, which has impacted the sales of winter clothing by almost 30 percent. This year, retailers have already tweaked their winter products mix, anticipating a shrinking of the cold period.”

In spite of the shrinking size of winter season and its impact on the winter wear market, it is quite evident that with the arrival of fresh and innovative product lines, the knitwear winter market still stands its prominent position.

“All the clothing retailers have a stock overhang now and fierce discounting is the norm. However, we view this as a market specific issue and believe the longer term investment case remains intact. Long term growth opportunity and prospects for winter wear industry still seem good and we are in good spirits about it,” said Rishab Oswal.

The Transition From Functional To Fashion

People desire fashion and when it is blended with comfort, it becomes an impeccable tandem. Preferences for winter wear have drastically changed with time. Today, individuals do not just look for winter clothing that enhances their stance, while keeping them comfortable.



“Winter wear has changed from functional product category to fashion statement. Functionality and fashion both are important.”

-Chaitali Giri,
Fashion Designer, Chic By Chaitalibiplab

Speaking on the demand for both knitted and non-knitted products, Chaitali Giri said, “The total winter wear for both men and women has changed from functional product category to fashion statement. Functionality and fashion both are important. But I think balancing between functionality and fashion is very crucial today.”

On being asked about the importance of the balance between fashion and functionality in the winter wear category, Vishal Jain said, “The entire winter wear category has been shifted from being protective to being fashionable. People desire for clothes that make them look smart and fashionable, and also give them the



Chic By Chaitalibiplab



Juelle

demography, type of consumers and preferences.

Winter wear brands are focusing on attracting their customers by varied designs and trends. With brilliant mix of colours and styles, customers today have the freedom to explore and create their own style statement.

Kuntal Raj Jain, Director, Duke said, "For us, both functionality and fashion is important, as consumers demand both the things at same level. The balance between functionality and design allows for a successful sense of fashion."

The Upcoming Trends

There is no denying the fact that with the coming of winter, everyone wishes to revamp their wardrobe. This pleasantly mellow weather has its effect on everyone who follows fashion. They desire for clothes that will let them stay comfortable during the season and will also let them check their style quotient.

On being asked what key elements have the highest possibility to dominate the trends in knitted winter wear this year, Chaitali Giri said, "Any kind of woollen, acrylic, cashmeres and blended scarves, shawls, tides, etc., would be a complete hit this winter. Jacket styled sweaters, outfits made by wool/cashmere, blended fabrics in woven are things that we are expecting to attract people."

According to Rishabh Oswal, cardigans, jumpers, turtleneck, capes and ponchos will be trending this year. "Playing with proportions, hues and wool thickness, cutting edge asymmetry and fringe details, modern-folk geometric motifs would be burning trends in knitwear apparels this year. Also, sustainable garments will definitely dominate the industry this season," he added.

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"Light weight knits will not only continue being a huge hit this year but will also continue to enjoy increased demand in the next season."

-Guneet Singh & Japneet Singh,
Directors, Juelle

needed comfort. TAB91 range is both fashionable and endlessly adaptable. Cotton sweaters for men are breathable and stylish. Lightweight sweatshirts are simply awesome this year. The 2018-19 winter theme is 'Go with Lightweight Stuff' made of comfortable, cool fabrics and materials.

An increased number of manufacturers and retailers are now emphasizing upon products that deliver both functionality and fashion. "We now incorporate trending designs in winter wear collection. Bold prints, bright colors, vivid patterns and more are added to the sweaters to make them more of fashion apparel than just a basic warmer. Recently, we have also launched a premium winter wear collection named Luxuria, which caters to the demands of the elite and niche buyer base," said Rishabh Oswal.

Going back few decades, winter wear category only comprised of basic sweaters, shawls, cardigans and trousers. However, at present, all the winter wear brands have brought forth trendy and vibrant apparels, meeting the season's requirements and quenching the desire to stay stylish. The products that are introduced are designed and manufactured after detailed research work that is based on



“Consumers demand both both functionality and fashion . The balance between functionality and design allows for a successful sense of fashion.”

Kuntal Raj Jain,
Director, Duke



“The entire winter wear category has been shifted from being protective to being fashionable. People desire for clothes that make them look smart and fashionable, and also give them the needed comfort.”

-Vishal Jain,
Founder & CEO, Tab91

The Future Of Lightweight Knits

Over the past few years, the market has experienced a humongous shift. Today’s generation prefer light jackets and sweat shirts over pullovers and wool. Lightweight knits have also found a prominent position in the market due to their high demand.

On being asked if lightweight knit would continue being a huge hit this year, Guneet & Japneet Singh, Directors, Juelle articulated that it will not only continue, but would rather increase in the coming season.

Chaitali Giri stated that demand for lightweight knitted products will continue beyond the present year and will only increase. According to Chaitali, the main factors for its high demand are warmer winters, different trends, flowy fashion. “People love comfort wear. Apart from that, the winter season is the festive season. It is also the season of weddings. People want to maintain the trendy, fashionable and stylish look in every season, everywhere.”

What’s Next?

Manufacturers and brands are all poised for the coming winter season with exclusive collections. They have realized what the customers are looking for and are ready to bring it forth.

Chaitali Giri talks about her plan for the forthcoming season, “CHIC is focusing on hand-knitted merino woolen scarves, mufflers, stoles, shawls, capes, cape styled tops, ponchos, tides and palazzos. Hand knitted gowns and maxi-dresses are sure to change tides in the winter wear market this year. Lightweight jackets, lot of crochet work, woven fabric, anarkali styled, front open, Indian jackets with hoody and kurtis with hoody are few that will be customer’s favourite this season.”

This winter, TAB91 has emphasized on the use of Griddle, Scuba, Tensely, Modal besides regular fabrics. Vishal Jain said, “In knitting we have given range of lightweight yarns and blends in cardigans, which has been developed especially for our brand.”

Elucidating on Monte Carlo’s latest winter collection, Rishab Oswal said, “We will have a knit for everyone and for all tastes. For winter 2018, we are focusing on bright colors, interesting silhouettes, bold prints, catchy slogans and 3D structures. Ruffles, extra long sleeves, yarn play, flare and embellished texture are also incorporated in the knitwear apparels. This time around, keeping warm will look slightly more fun and stylish.”

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Monte Carlo Store

Influencing Trends

Keeping in pace with the changing trends and creating a niche has always been the foremost objective of every brand. Different brands have brought in their unique styles and products that have captured the customers' interest.

Juelle has created a stylish impact with its imported fancy yarns and newer blends. Being one of the few players to bring products that are a cut above the cliché, Juelle is one name every fashion enthusiast today knows.

Chaitali Giri, speaking on contributing towards the changing winter wear trend said, "We understand the need for style. Thus, our hand-knitted merino woolen scarves, mufflers, stoles, shawls, capes, cape styled tops, ponchos, palazzos, hand-knitted gowns, maxi-dresses and jackets have caught the interest of our customers. Apart from that we have embroidered shawl for the new brides."

Rishab Oswal, on the other hand, said, "For women, we have experimented a lot with knitted tunics, ponchos with varied necklines, floor length dresses, which no other brand has offered till date. The kind of styles and wide variety that we have in men's t-shirts and shirts is definitely

not found with other brands in the industry." With a more technically advance take on new-age winter-wear, Kuntal Raj Jain stated that they have kept it trendy by introducing 3D prints, reflectors, different embroidery and strong graphical line for a clean and vibrant contemporary look.

Fashion Innovations

Technology and innovation is an integral part of almost every aspect of our life. Hence, clothes are no exception. At present, there are many brands that are focusing on innovation in fashion. This is one podium that not just boosts the latest trends, but also helps brands in staying a step ahead of their competitors.

Talking about innovations happening in knitted winter wear, Chaitali Giri said, "From last few years, people are interested in any kind of comfort wear, comfort styles, easy to handle and care, and of course pocket-friendly price range. Apart from that, people are starting to purchase more clothes than before. Lifestyle has changed and every day is an occasion. There is a change in weather and change in lifestyle and there is a reflection of these reasons in the clothes. And thus it makes way for innovating newer, better and more comfortable wear. Some fine examples are the assorted scarves, knitted shawls, hats with mufflers and more. There are stylized woolen knitted tunics, ponchos and cape styled winter wear amongst few more where every design is scrupulously planned and created."

Putting forward his opinion on innovation and fashion, Vishal Jain said, "There are many innovations happening around the fashion industry, even in the winter wear section. Such as automation in the machinery, computerized knitting techniques, three-way transfer with split stitching

>

Tab 91



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function, bird's eye, square, mini jacquards and full jacquards meshes are now quite popular in the market."

Elaborating on the topic, Rishab Oswal said that knitting technology has made great advances in recent years. "Innovative designs are being undertaken by fashion designers and other practitioners. Elements of hand crafts, including chunky textured sections, crochet or lace constructions can be seamlessly added to knitted fabrics along with twisted, inter-looped or draped effects, giving exciting possibilities, not available to most woven or non-woven fabric constructions. Fabric and garments can be created in the round and simultaneously shaped to fit," he added.

The Future Of Wool

With warmer winters and need for comfort, people are starting to opt for lightweight knitted winter wear. Market analysis states that wool today is primarily promoted as an all season fabric, as with advance technical



Monte Carlo

Tab 91



production woolen clothes are now produced to cater to both extremely cold and milder climatic conditions. Consequently, all the major winter wear brands are replacing heavy woolens with light ones.

Highlighting on the future of wool, Chaitali Giri said, "Wool is now being promoted as an all season fibre. We understand that 'Necessity is the mother of invention'. Therefore, I think sometimes a style is converted and a fashion is created by our necessity. Wool is being used as an embellishment material. People prefer wool blended fabric even during the summer season. Like the way a market is modernized according to the demand, similarly, every product needs to be upgraded according to the customer's requirements. Thus, a lot of woolen manufacturers are now focusing on products that meet with the customer expectation, while keeping the trend alive."

Conclusion

With the upcoming winter season, the Indian winter wear market is all set to create testimonials of fashion. Brands are ready with their exclusive winter collection. Be it the festivals or the weddings, winter wear brands are emphasizing it on all. The market has something for every customer.

This revolutionizing Indian winter wear market is sure to warm up with intricate designs, innovative styles, abstract colours and more. Some keep it classy while some like to keep the fashion - Radical!



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LOUNGEWEAR

A FAST EMERGING MARKET

Once considered only as a simple indoor wear, loungewear or sleepwear is running on the fashion ramps today. This category of apparel is hitting the Indian market with a promising future.

Team IMAGES BoF



Loungewear is an upcoming trend that has already contributed generously to the Indian apparel industry. This blooming apparel trend is a result of the ever-evolving lifestyles of people. We live in a fast moving world, where everyone has to work more, travel more and party more. Thus, loungewear, a quick-fashion option is gaining much popularity. Moreover, with the internet world, it is evident that from a Hollywood celebrity to the girl-next-door, women around the globe are exploring different style verticals with their assorted loungewear collection.

Today, we see celebrities flaunting their loungewear at the airport and on the street. In fact there are many new-age workplaces that allow employees to wear loungewear even at work. Many brands are even twisting the style, giving it a more fashionable edge. Few to name are brands like Alexander Wang and Chloé, who have upgraded the tracksuit and lounge-pants to luxury cashmere and silk twist. Some of the hyped collections of loungewear that are rapidly gaining esteem are pull-overs, hoodies, slip-dresses and pajamas. In fact, international fashion houses like Dolce & Gabbana and Dior that are widely known for their formal evening-wear are now introducing sexy comfortable apparels for parties.

Loungewear/Sleepwear Market In India

Loungewear is everything from slouchy old jumpers to tracksuits and trousers - everything that is comfortable and relaxing. But, the concept of loungewear has gradually changed with time. What was once just indoor wear for people has today become a style statement. Elaborating upon the loungewear and/or sleepwear

market in India, Karan Behal, Founder & CEO, Pretty Secrets said, “Loungewear market is really growing and people are thinking of sleepwear as an item missing from their wardrobe. It is growing at roughly 20 percent CAGR.”

The Indian market for sleepwear is emerging quickly as a fashion segment. The exclusion of export taxes and import limitations has also boosted the market along with organized players playing a vital role. Major organized players are trying to bridge the gap between ready-to-wear and slouchy sleepwear by introducing varied styles of loungewear. Speaking on the market prospects, Hitesh Ruparelia, Director, Sweet Dreams stated, “The sleepwear market is emerging quickly as a fashion segment, and has, over the last decade, observed the existence of organized players. Sleeping dresses are becoming as important as office, casual, party or sportswear. The growth in retailing and the rising level of fashion consciousness has supported sleepwear move into a higher market step, though the market today is still largely in the unorganized sector. No wardrobe is complete without it.”

The Need For Comfort & Style

Coming back from work, people want to put on something relaxing; they want something that would allow them to sleep in comfortably and, if required, leave the home to hang out with friends. Young adults and teenagers majorly prefer loungewear as their every-day hangout attire. Explaining the rising demand and the present day customer psyche, Karan Behal states that the reasons for the rising demand for loungewear includes the fact that consumers are more conscious about right sleepwear and the need to be presentable all the time in today's fast paced life. “Luxury sleepwear markets are growing because of customers need/want for better fabric”, he added.



“Loungewear market is really growing and people are thinking of sleepwear as an item missing from their wardrobe. It is growing at roughly 20 percent CAGR.”

-Karan Behal,
Founder & CEO, Pretty Secret



Pretty Secrets

Apart from this, the loungewear section is evolving rapidly as a fashion segment. "Sleeping dresses are becoming as important as office, casual, party or sportswear. There is a large segment of consumers who wish to wear high quality nightwear with features that match international standards. Fashion awareness is high in almost every part of the country. Also innovations in styles and fabric play a major role", said Jayakar Shettigara.

Manufacturing Comfort With Style

As it is quite evident that loungewear is now considered a high-fashion look that can be worked outside the bedroom, many manufacturers and brands are focusing on the type of fabric and design to use. From organic cotton to soft knits, one can find wide array of options that suits their desire. Explaining about the innovations used now-a-days for manufacturing knitted loungewear and sleepwear, Karan

Behal said, "Loungewear and sleepwear innovations constantly strive to make the fabrics softer and friendlier to the skin. Innovations are also made to bring the most comfortable fit and a barely there feel to the wearer. And at the same time it should ensure it carries an aesthetic value. Body-mapped and seamless knitted technology is a major focus. There are fabrics in development that have embedding graphic patterns through a sophisticated seamless jacquard weave construction."

Every brand is introducing loungewear that is softer, comfortable and made of stretchable fabric, without overlooking the style element.

Preference Of Fabrics

People look for comfort and want to look good even when they are relaxing at home or with friends. This has definitely boosted the loungewear market.

Brands have brought forth loungewear with fancy design and details, trims, embroideries, floral motifs and laser cut. These are on high demand. There is also a huge craze for leggings with long tunics. Manufacturers are emphasizing upon raising the range and functions of designs. Karan Behal explained the present day fabrics preferred by the customer. He said, "Fabrics such as single jersey, looper fabrics, double jersey, circular knits, fleece lined knits, ribbed knits and knits with lycra mixed are preferred for loungewear and sleepwear."

Pretty Secrets makes sure every product undergoes several washes that include anti-bacterial wash, softener wash, aromatic washes and many more, which adds value to the end product. "These are usually preferred in the current market for loungewear and sleepwear as the customer's comfort is essential to any brand", he added.

Furthermore, Sweet Dreams focuses on loungewear made of rayon, satin, cotton



Sweet Dreams

Sweet Dreams





Pretty Secrets Store

athleisure categories are emerging segments in loungewear category.”

The prime reason for these demands is the changing lifestyles of people. The loungewear has categorized extensively into active wear, athleisure, travel wear, gym wear and more.

The Latest Trends

Loungewear is a present day thriving market in India. With time, the brands and manufacturers are concentrating on including more designs based on the characteristics of yoga apparel, but also simplistic, ambiguous garments with an increased emphasis on comfort. This evolution in this apparel segment is also estimated to include more multi-way designs, embellishments and conservative cuts in neutral tones for adaptability. Describing about the trend of moving beyond functionality and current designs in loungewear, Karan Behal said, “Sleepwear and loungewear styles have grown so classy and accessible to the public that in recent years we have even seen celebs and style icons increasingly styling themselves with loungewear in public eye. Sleepwear to street wear is an ongoing trend, with collared suits and loose straight satin pajamas, or an overlapping wrap with matching pajama set. Chemise and lacy satin night dresses are worn like short dresses. Several such styles are being promoted as outerwear when in fact the product is just loungewear with class.”

The Hopeful Future

Concisely, the future of loungewear market in India looks promising. Understanding the psyche of the Indian consumer, brands are introducing products that are exceeding the expectations, while adhering to trend and comfort.



Sweet Dreams

fabrics and polyesters, as they are soft, comfortable and flexible, something that every customer requires.

The Sub-Categories Something For Everyone

Indians today love experimenting with different styles. And when their style is blended with leisure – nothing can go wrong. Talking about the loungewear styles that people are looking for today, Karan Behal highlighted that many people love mix-max loungewear. Today the market is witnessing a brilliant display of assorted designs meant for different buyers. He added, “It’s not just tops and pajamas. We can see hooded sleep shirts, joggers with loose ribbed sweatshirts, strappy rompers, collared suit pajama styles and classy wraps. Semi-formal and



“Sleeping dresses are becoming as important as office, casual, party or sportswear. Consumers now wish to wear high quality nightwear with features that match international standards.”

-Hitesh Ruparelia,
Director, Sweet Dreams



REEBOK BETS BIG ON KNITWEAR

The increasing trend of casual and sportswear along with the modern consumers' growing interest in exercise, outdoor activities and fitness has provided a major thrust to the knitwear industry in India. Silvia Tallon, Senior Marketing Director - India, of sportswear major Reebok talks to BoF about the increasing share of knitwear in sportswear.

By Shivam Gautam

Reebok is a pioneer of the fitness industry in India. The brand boasts a rich storied heritage and connects with the fitness enthusiasts wherever they are and however they choose to stay fit – whether it's training, running, walking, dance, yoga or aerobics. Championing its 'Fitness is Life' philosophy and representing 'Tough Fitness', Reebok defines strength, fearlessness & will power. Through its innovative product range, strong assets, robust marketing plans and smart associations the brand has successfully connected with consumers and have strengthened Reebok's position as a leading fitness brand. The brand is present pan-India with over 172 stores in 85 cities

IBoF: Walk us through the success and the milestones that the brand has achieved as of yet.

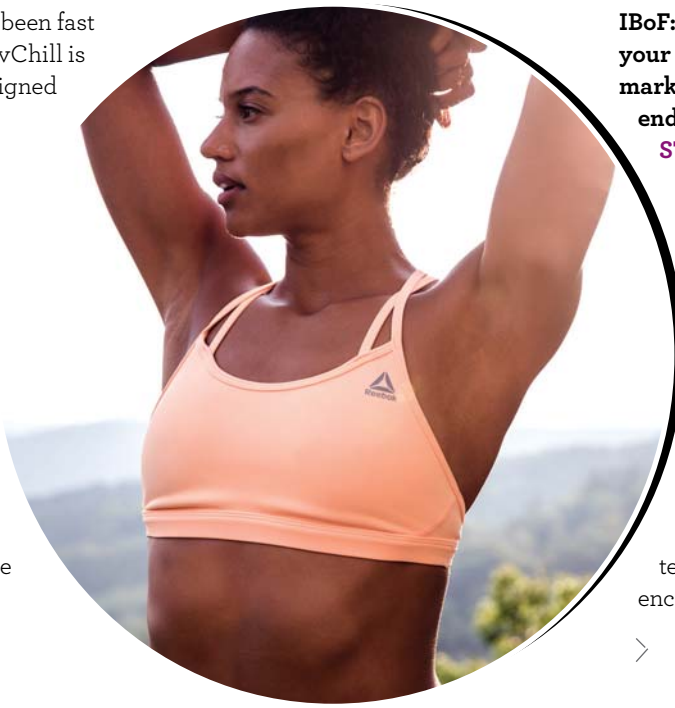
Silvia Tallon (ST): The most defining campaign of the brand has been the 'FitToFight' initiative. Launched in 2016, 'FitToFight' celebrates the struggles, dreams, and triumphs of unsung real life 'women heroes' who have overcome physical, mental and social barriers. The brand's strong connect with women helped develop this campaign and endorse their empowerment. The initiative introduced actor and powerhouse Kangana Ranaut and witnessed countless powerful and motivating 'FitToFight' stories from women across the country, including Paralympian Deepa Malik and Bollywood stunt woman Geeta Tandon. Concluding this endeavour, these brave hearts were awarded at the first 'FitToFight' awards hosted by Reebok.

The overwhelming response gave us the impetus to build the 'FitToFight' platform further with the GirlsDontFight campaign in 2017. With the prevalent socio cultural context, our aim was to create a compelling narrative that challenged gender perceptions with a fight against prevalent societal evils – eve teasing and inequality in pay. We also reiterated how physical fitness translates into strength of the mind too.

Reebok has been awarded over 30 industry awards for 'FitToFight' campaign in 2017 across several categories. Recently, Reebok released a film on this women's day by the name 'Bruises Can Be Good » it was a digitally lead campaign that encouraged people to sign petitions online to make self-defence classes necessary for female students in school. Reebok won a gold and a bronze for this film at the reputed CLIO awards.

IBoF: Tell us about your current product portfolio. Which are your core top selling lines?

ST: Reebok has a dynamic range in its Spring Summer 18 collection with a mix of bold and graphic prints across categories. Catering to the consumer choices, our Spring Summer'18 collection is a fun and edgy take on workout apparel. Ideal for all shapes and sizes, the range celebrates bold prints, neon colours meshed with technology that enhances movement and comfort with style. 2018 has been big on running with launch of our flagship running shoe Flexweave and Floatride. Both these shoes boast the latest in tech for Reebok and have been fast movers at our stores. ActivChill is our fabric technology designed with a texture that allows breathability and ensures a sweat and fuss free workout! While fitness is our priority, Reebok is also going bold in its athleisure wear with classic silhouettes and style. Our Classic range boasts of some of some recent high end, fashionable launches such as the Workout Plus and Club C Leather that redefine the casual look of the wearer.



IBoF: What are the new additions you will be making soon to your collections?

ST: We recently launched a brand new upper technology with Flexweave and a new bottom with Floatride. You'll soon see latest tech from Reebok coming from Liquid factory. 3D printed shoe is also something that you'll see soon from us.

IBoF: Tell us about your current retail network. Which are the markets that you are strong in? What is your presence online?

ST: With the FitHub store expansion, we have a strong foothold in the North with wide presence in the Punjab and Maharashtra market making the latest premium fitness gear available to growing fitness communities in cities. While our predominant focus has been the metro cities, we are gradually penetrating smaller markets with product launches planned in FY 18.

We are also scaling up our business and are heavily focusing on e-commerce. While we have our own channel for e-retail - Shop4Reebok, strategic tie-ups with leading e-commerce players such as Flipkart,

Jabong and Myntra that are further accelerating our growth. We are looking at interesting additional associations and partnerships that will help Reebok attain and sustain market leadership. The brand will have varied offerings across all categories in 2018.

IBoF: What are your retail expansion plans for the next 2-3 years?

ST: We are planning to open more EBOs across India while focusing on non-winter markets like south and west India.

IBoF: What are the omni-channel initiatives your brand has initiated? Kindly tell us about the progress and results they have brought?

ST: We launched the Shop4Reebok website in December 2014 and the platform to serve as a one-stop destination for all fitness requirements ranging from Running, Training and Walking to Studio activities such as Dance, Yoga and Aerobics. Shop4Reebok also offers consumers free shipping on purchases with fast and free returns for a hassle-free and smooth shopping experience.

IBoF: Tell us about the causes/issues your brand endorses or special marketing alliances with celebrity endorsers/movies, etc

ST: Reebok has a fleet of ambassadors globally and are well complimented by some of the top names in India. With Shahid Kapoor, Kangana Ranaut, and Malaika Arora, we are talking to the Fitgen in the athleisure space.

IBoF: Textiles industry is a key industry in India. How do you feel is it growing?

ST: The future for the Indian textile industry looks promising, encouraged by both strong domestic



consumption as well as export demand. With consumerism and disposable income on the rise, the knitwear sector has experienced a rapid growth in the past decade with the entry of several retail chains like GAP, Zara and H&M among others in the Indian market. With higher disposable income, we see a demand for products creating a huge domestic market. The domestic market for apparel and lifestyle products, currently estimated at US\$ 85 billion, is expected to reach US\$ 160 billion by 2025. [<https://www.ibef.org/industry/textiles.aspx>]

IBoF: According to you, what are the major growth drivers in the knitted wear segment?

ST: A surge in the fashion consciousness of today's consumers has spiked growth in the knitwear segment with a growing urban and cosmopolitan culture, the market has seen a huge influence of Western trends on fashion in India. We see a splash of varied prints, colours and styles dominating the otherwise conventional knitwear segment with many brands catering to the Gen Z's savvy choices in fashion.

IBoF: Traditionally, India is a woven-based market, is the market changing for knitted apparel?

ST: The Indian apparel industry has been seeing rapid changes specific to consumer needs and preferences. While traditional weave is an intrinsic part of the apparel segment, knitted garments are seeing an increase in demand owing to changing styles. Knitted apparel brings together a range of colours and design that are great in comfort and style.



IBoF: With global brands coming in, what is the competition like especially in the knitwear wear segment? How are Indian players coping and scoring?

ST: The Indian knitwear market is a budding one, the caveats to this are geographical in nature, since the knit material works best in dry and relatively cool regions. Indian companies are focusing on expanding this materials market in the north regions with a greater push during the winter season. Global corporations are also entering the Indian market, which is increasing the competition in the retail sectors. One means being used by Indian corporations to mitigate this is by collaborating with these international brands to provide knit solutions with an Indian twist.

IBoF: Please elaborate on the current trends in knitwear segment.

ST: With our rapidly evolving and fast paced lives, fashion has seen a major transformation. People need clothes that are versatile and easily adaptable from night to day. In comes Knitwear, with its body hugging and sculpting properties this new fabric has taken the world by storm. Emerging as a new caveat in high street fashion with the hottest actors and actresses dipping into this region of comfort meets sexy. This is a trend we can expect to see stay for a long time!

IBoF: What are the innovations that are currently happening in knitwear?

ST: 21st century fashion is all about comfortable yet sexy. The best tech in this field creates pieces that provide support in all the right places while amplifying and toning the body. All of this comes wrapped in a comfortable, breathable material that you can work out, take naps and chill in.

IBoF: Which fabrics are the most sought after for knitwear considering the comfort and trendy-ness?

ST: Different varieties of fabrics use different kinds of natural fibers. The kind of fabric depends upon the degrees of built-in stretch, if they unravel or get wrinkly or a tendency to shrink. The different kinds of fabrics include jersey, double knit and sweater knits.

IBoF: Apart from t-shirts and tops, what are the new emerging categories in knitted apparels?

ST: Knitwear is currently expanding into outerwear -- jackets, shrugs, caps, gloves, etc.. The focus is to reinvent colloquial pieces that have been relatively static with respect to the material they're made of and add a knit twist to them, elevating them to the next level.

IBoF: What are the new emerging innovations in bottom wear in the knit segment?

ST: Some new innovations being made are: Incorporating seamless technology into the production of knit pieces. This, along with working on polymer integrations into the knit fabric to help make the material more sweat wicking in nature and hence more adaptable to humid and hot regions are some of the most anticipated innovations in this field.



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RETAILER'S PERSPECTIVE

RISING KNITWEAR POPULARITY

Recipient of Images Most admired Fashion Forward Retailer of the Year and Images Most Admired SoloX Fashion Professional of the Year at India Fashion Forum 2018, 1-India Family Mart is an emerging fashion retailer. Images BoF talks to Jay Prakash Shukla, Founder and CEO, 1-India Family Mart to understand the growing popularity of knitwear among the consumers. He shares insights on the bottle-necks in the knitwear industry and how he is planning to create premium zone for emerging categories in knitwear.



The growing popularity of casual wear has infused momentum in the knitwear segment. Also, the latest penchant towards active wear and athleisure has further bolstered the demand of the segment which now is pushing beyond the metros. Jay Prakash Shukla shares his opinion..

IBoF: Do you see an upward shift in knitwear based fashion products as compared to woven based products?

Jay Prakash Shukla (JPS): The knitwear industry in India is on a double-digit growth trajectory. The industry has witnessed strong growth in past one year. Knitwear currently constitutes 50 percent of the domestic apparel market and is growing upwards of 9-10 percent. Today, the knitwear industry is spread across the nation. It used to be Tirupur and Ludhiana earlier, however now, there are good knitwear companies in Bengaluru, Gujarat, Rajasthan and Vapi too.

The overall increasing income of the middle class and their soaring aspirations are changing the dynamics of the apparel market. By 2025, the middle-class consumers, which will form 48.5 percent of total targetable customer base, will contribute to about 55-60 percent share of total apparel market size.

IBoF: What is the reason for this shift, according to you?

JPS: Knitwear has become more appealing and attractive due to the adoption of new creative technologies such as glossy foil prints and digital prints. Technology has also opened up new possibilities such as technical textiles, for products such as fish net, fruit net, which are not only used for apparels but for also many other utility products. Another benefit of technology is the rapid production of garments, with maximum accuracy owing to improved machinery. These garments are easy to maintain and comfortable to wear.

Another prominent reason behind the demand for knitwear is the rising popularity of sportswear, which is expected to increase considerably due to the involvement of people in sports activities because of the lifestyle stress.

IBoF: What was the ratio of sales of knitwear to woven five years ago and what is it now?

JPS: In 2014-15, knitwear exports from Tirupur touched ₹21,000 crores (3104.3 million USD) as compared to ₹18,000 crores (2660.9 million USD) in 2013-14, with a growth rate of 15.52 percent in rupee terms. The share of knitwear exports from Tirupur in India was 44.29 percent. Nearly



every international knitwear brand in the world has a strong production share from Tirupur. Some of the world's largest retailers including C&A, Switcher, Wall-Mart, Primark, Diesel, Army, Tommy Hilfiger, M&S, Fila, Respect, H&M, HTHP, Whale, Nike and Reebok import textile items and clothing from Tirupur. Knitwear exports from India will cross ₹50,000 crores (7388.0 million USD) in 2018.

The youth population in the country also prefers to wear knitwear garments and is also quickly catching up in tier-II and -III cities.

IBoF: What do you think are the main bottlenecks of the knitwear Industry in India.

JPS: Rising cotton and yarn prices is the most immediate one. Strong competition from global brands is another challenge. Another problem is that the industry is fragmented. Processing is one area where the country lags and players can enhance the value of products by applying innovative finishing techniques.

Bangladesh today is one of the biggest reasons for decline in India's knitwear industry. What helps Bangladesh and gives them an edge over India is

the cost, their wages costs are lower. It is able to give cheap products at lower costs. However, the impacts are short term considering the cost of procurement from Bangladesh.

With a sound policy direction and support from the government, textile trade in India have the potential to grow beyond ₹1,00,000 crores (14,780 million USD) by 2020.

IBoF: What would be total knitwear sales in across your stores?

JPS: We have registered a strong demand for knitwear across our stores. For FY 2017-18, the sales figures stood at ₹43.09 crores. In FY 2016-17, we witnessed about ₹16.18 crores of sales and in FY 2015-16, we had recorded sales of ₹4.47 crores.

IBoF: Do you have a separate merchandising team for sourcing knitwear?

JPS: We have a team of people overseeing merchandising and amongst them the team looks after sourcing for knitwear.

IBoF: Are returns in knitwear more than, equal to or less than woven based products?

JPS: We definitely have seen good margins from the knitwear sale compared to woven. Margin of

knitwear was 34.04 percent while margin of wovens was 31.66 percent during FY 2017-18.

IBoF: What are the top 5 selling categories in knitwear in summer across men's wear, women's wear and kidswear.

JPS: The top 5 selling categories in FY 2017-18 for knitwear in summer have been younger shirts, infant baba suits, junior t-shirts, infant frocks and junior girl frocks.

Apart from this, we have seen good demand for ladies t-tops, ladies leggings, ladies pyjamas, ladies capris, ladies hot pants, men's shirts, pyjamas, bermudas, and men's Jamaicans.

IBoF: What are the top 5 selling categories in knitwear in winter across men's wear, women's wear and kidswear.

JPS: Infant baba suits full sleeve, younger winter tops, junior boys' winter t-shirts, full sleeve younger boy's t-shirts, are the best selling categories in kidswear.; sweaters, kurtis, full sleeve t-tops, full sleeve tops, and winterwear tops in women's wear; winter t-shirts, full sleeve winter t-shirts, full sleeve sweaters, pajamas, and short sleeve sweaters in men's wear.

IBoF: What are the fastest emerging product categories in knitwear across men's wear, women's wear and kidswear.

JPS: I think the fastest emerging categories in knitwear are half sleeve men's t-shirts, men's winter t-shirts, ladies t-tops, men's full sleeve t-shirts and men's pyjamas.

IBoF: What are your plans for launching new knitwear categories?

JPS: Currently we are not planning to launch any new category in knitwear, however we are planning to create a premium zone for emerging categories.





A DISTRIBUTOR'S PERSPECTIVE

RISE OF KNITWEAR

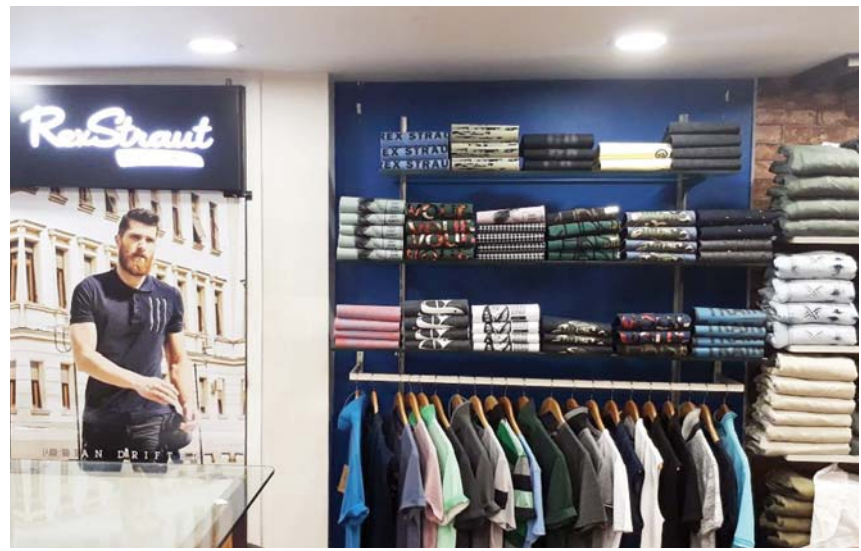


-Vinod Parmar,
Distributor & Proprietor, VP Fashions

Both brands and retail stores in India appreciate the importance of a fashion distributor that works with them as an intermediary in the channel. Images BoF talks to a key distributor from the East India who supports a wide range of national and international fashion brands in the region. Veteran distributor and proprietor, Vinod Parmar of V P Fashions elucidates on the fashion market and the increasing demand for knitwear.

IBoF: Tell us a bit about your background and how did you enter the distribution business?

Vinod Parmar (VP): I started as a sales person with Sumangal, Kolkata in the year 1990 and then moved on to work as a sales and marketing manager in one of the leading distribution houses of East India. At that time, I handled purchase, sales and marketing for brands such as Levis, Killer Jeans, Easies, Lawman, Nike, Adidas and Jockey. After gaining significant experience in the trade, I started my own distribution house, VP Fashions in the year 2003. Today with an area of over 4,000 sq. ft. for storage capacity and a team of 14 people, VP Fashions is one of the leading fashion distributors of Eastern India.



IDEAL PRICE RANGE FOR KNITWEAR - VINOD PARMAR

Men	Price Range		Women	Price Range	
	Min	Max		Min	Max
Basic t-shirts	₹499	₹899	Basic t-shirts	₹499	₹899
Printed-shirts	₹899	₹1499	Printed-shirts	₹899	₹1499
Value added t-shirts	₹1099	₹1799	Value added t-shirts	₹1099	₹1799

IBoF: Do you see an upward shift in knitwear based fashion products as compared to woven based products?

VP: Knitwear products have emerged as the most preferred garments for the new generation now due to their comfort and price factor. As compared to woven it always has an edge.

IBoF: What is the reason for this shift, according to you?

VP: The first and foremost reason for the shift towards knitwear is the price followed by its durability, easy to use and comfort. Today, people prefer a good sober t-shirt from a brand like Being Human Clothing, Tommy Hilfiger, US Polo Assn., or a FCUK rather than carrying shirts even for formal meetings. A good t-shirt can be as good as a shirt for work wear. It is easy to manage as it doesn't require proper ironing all the time, easy to clean, durable and gives you more relaxation throughout.

IBoF: How has the ratio of sales of knitwear to woven behaved in the past five years?

VP: The sales of knitwear has been

growing consistently over the last few years and has multiplied manifold in the span of last 5 years.

IBoF: Which are the major brands you handle and for which territories?

VP: I handle a total of 15 brands. French Connection, FCUK, Being Human Clothing, Motocult, Deal Jeans, R&C, Rex Straut, Lemax, Kapok, Rugby, Lintaaz, Wedding, Tales & Stories, Tricci, N&D and Valentine.

I manage FCUK for entire east India, Being Human Clothing for Bihar, Motocult for entire East India, Rex Straut for Jharkhand and West Bengal and Rugby for West Bengal.

IBoF: In the territory that you service, which major cities have shown the maximum acceptance of knitwear?

VP: The maximum sales comes from the metro cities followed by tier -II and -III cities. Big cities like Kolkata, Bhubaneswar, Patna, Guwahati and Ranchi account for the most sales.

IBoF: What do you think are the major influences that have led to

these changes both in large cities and towns?

VP: The most influential factor that has led to these changes is obviously the price and again the comfort level and longevity of the products play its part. Also due to digitization people are more aware of the brands coming in along with the features they offer and the price range so its easier for people to pick and choose.

IBoF: How important a factor is pricing in knitwear? Or do you think that prices are not so important but it is actually the value additions that bring volume?

VP: Pricing is the prime factor that influences the sale for any product. The other things that matter are the brand value and the value additions the product has. There has to be proper balance of pricing with the value additions for a brand to be successful in the market.

IBoF: Which knitwear categories are top selling across men's wear, women's wear and kidswear?

VP: For knits, the most selling products are the inner wears followed by t-shirts and lounge wears.



EAST INDIA LEADS

THE KID'S KNITWEAR INDUSTRY IN INDIA

By Zainab S Kazi

Kid's wear is one of the trickiest categories in the genre of clothing and what makes it challenging is the target audience it caters to. Besides having to meet with the 'comfort and quality' criterion without any compromise, the kid's wear segment faces another challenge of offering clothes that are 'value for money' as the issue of children outgrowing the clothes looms large and often mars the buying decision for expensive clothes. By far, knits comprise maximum pie when it comes to the most preferred fabric for kids wear and this has led us to have a quick tête-à-tête with key players from East India on the current and changing market dynamics for kid's knitwear segment within the kid's wear category.

So what makes knitwear the most preferred choice for fabrics in the kids wear segment? If we have to ask any industry expert this question, the response to this shall stand unanimous - comfort, quality and most importantly, value for money. And what makes Kolkata don in the cap of a leader in this category? Pradeep Arora, Director, Zero shares, "Kolkata is becoming the hub of knitted garments as almost 80 to 90 percent of the kid's wear in 100 percent knit fabric is being produced here. In comparison to Tirupur (Tamil Nadu) the speed of production is much faster here." Arora is optimistic that with the setting up of the Hosiery Park, things will change and it will be much easier to do business in Kolkata. He adds, "A lot of new players have entered the knitwear industry. Similarly, a number of process houses have been set up in Kolkata. In totality, all this is adding to the development of the knitwear industry."

Kids Prefer Knits

Elaborating on the reason for this, Ansul Agarwal, Managing Director, Eteenz shares, "Besides offering softness and elasticity, knit fabrics are a hit with fashionistas owing to their comfort and visual appeal." Reiterating this, Vidhan Chabra, Head - Business Development, Toffy House shares, "Knit offers comfort. The stretchability and flexibility of the fabric makes it a preferred choice for kids apparel." Adding to this, he says, "The scope under knit is unlimited. And a knitted fabric will always be the preferred fabric for the infant wear segment because of the stretchability of the fabric."

The above accentuates the salient features of knitwear leaving no room for surprise when major brands launch their kid's wear segment with majority of it falling under the knitwear category. A case in point here is the launch of kid's wear by Mandhana Group's Being Human brand where the maximum share was that of knitwear.





Toffy House



Toffy House



Toffy House

capita income as disposable income has increased along with fashion trends playing its role. Now people want different clothes for different occasions and are more exposed to social media and television advertisements.”

Commenting on the emerging category within knitted kidswear, More shares that knitted jogger pants have taken over the market in the last couple of years and that it now occupies third highest position after innerwear and t-shirts.

Growing Strong

According to Agarwal, It is estimated by market studies that kids wear is going to be the fastest growing segment. Citing the reasons for this, he shares, “Increasing media awareness, growing amount of disposable income due to double income families, and growing brand consciousness among kids are the major accelerators in the market for kid’s wear.” Varun More, Director, Appleeeye attributes the reason for the growth of knitted kid’s wear due to its high cotton content. Elaborating on this, he shares, “In

India knitwear is primarily cotton based and due to its climatic condition and geographical position cotton cultivation in India is huge which is why the knitwear industry is picking up so fast. The second reason for knitwear industry to grow is price competitiveness as knitwear is comparatively cheaper than woven.” He makes an interesting point on the segment’s growth in accordance with the per capital income, “The per capita consumption has increased in accordance with the per

Fabric Fundas

In the knit fabric category, there are several types of knit, varying from lightweight to medium weight. More shares his views, “Top selling fabric is always sinker and interlocks with fancy yarns like injection and PQ trending up. For winters we have freeze, Two Threads, French Terries, etc. Indigo fabric is also in use at the moment with Indigo t-shirts and joggers showing a good demand.” He foresees the



Appleeeye

>



“Kolkata is becoming the hub of knitted garments as almost 80 to 90 percent of the kid’s wear in 100 percent knit fabric is being produced here.”

- Pradeep Arora,
Director, Zero



“Knit offers comfort. The stretchability and flexibility of the fabric makes it a preferred choice for kids apparel. The scope under knit is unlimited.”

-Vidhan Chabra,
Head & Business Development, Toffee House



“Media awareness, growing disposable income and brand consciousness among kids are the major accelerators in the market for kid’s wear.”

-Varun More,
Director, Appleeey



“Besides offering softness and elasticity, knit fabrics are a hit with fashionistas owing to their comfort and visual appeal.”

-Ansul Agarwal,
Managing Director, Eteenz



Eteenz

growth only getting stronger for these in the next two years. Chabra adds, “Interlock, Single Jersey with spandex and loop knits are the most popular knits in demand.” According to Arora, “Sinker and interlock knit fabric are the preferred fabrics for a kid’s wear apparel. Rib knit fabrics are also popular but in India people do not like it much. Jacquard knit and jacquard rib knit fabrics are the other popular upcoming fabrics for kids garments.” Talking about colour preference, Arora stresses on the fact that unlike adult fashion, the trends in colours are difficult to predict. He shares, “We offer various shades in a colour in a particular season. For example, we have 6 types of blue shades at any given point of time.”

Beating the Roadblocks

Like any other industry, this one too comes with its share of challenges and roadblocks. Chabra minces no words when he shares that improvement of the fabric quality using the latest and international technology, accessories and value addition/trims as well as supply chain is the need of the hour.

He adds, “The industry needs more wholesale malls to attract international cash and carry buyers.” Arora is of the opinion that with so many players in this segment, until and unless one is making quality products and offering the same at a reasonable price, it is going to be difficult to survive. He accentuates the need of keeping oneself updated with international trends and standards keeping in mind the mind boggling speed at which fashion is changing/evolving.

Tapping on the Opportunity

India has a huge advantage of gaining a top position in the manufacturing of knitted kid’s wear and this is well explained by Chabra in his concluding remarks, “Since China and Thailand are unable to offer baby and kid’s apparel at a reasonable price anymore, India is the only option left for the huge number of international buyers, due to its high cotton produce and ready infrastructure. Further, since most of the international baby and infant wear brands have failed to make a mark in India, Indian brands have a market ready for them to explore.”

×



Zero



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/// APPLLEEYE ///

Company: Stitchfab India Pvt. Ltd. | **Key Category:** Kidswear

Launched by Stitch Fab India Pvt. Ltd., Appleeeye is a modern kidswear brand. The brand adheres to international standards. It offers intricate designs and has set new trends in kids' fashion. The brand's USP lies in its international standards and trendy designs that it shells out at affordable prices. Appleeeye is present all over India through its chain of MBOs and EBOs.

Target Consumer

The brand manufactures infant and kids products for the age group of 0 to 16 years.

Product Basket

Appleeeye has an entire range for boys including bottom wear, shirts, t-shirts, jackets, sweatshirts, wind cheaters, pullovers, etc. The brand's girls' range comprises capris, shorts, leggings and pants along with an entire range of outerwear. The infants range encompasses shorts, full pants, front opens, boat necks, envelope necks, etc.

Retail Mapping

Appleeeye has pan India presence with the metros and tier-I cities taking the lead. It is also present with all leading e-commerce sites like Flipkart, Amazon, etc.

Domestic Retail Expansion Plans

The brand is planning to open more EBOs across the country along with expanding its presence in LFS.

Brand Engagements

The brand is very aggressive on its B2B and B2C front along with a strong social media presence. Appleeeye's Facebook page boasts of 65K likes.



KEY INFOGRAPHICS

- > Total number of doors
 - EBOs: 8
 - SISs: 25
 - MBOs: 2,000
- > States present in: **Pan India**
- > Total retail space: **17,000 sq.ft**



/// BEING HUMAN CLOTHING ///

Company: The Mandhana Retail Ventures Ltd. | **Key Category:** T-shirts

The apparel brand with a cause, Being Human Clothing was launched in 2012 by Salman Khan and is being globally licensed by The Mandhana Retail Ventures Ltd. Royalties from merchandise sale supports the initiatives of Being Human - The Salman Khan Foundation in India. The foundation helps in aiding the twin causes of education and healthcare for the underprivileged. The unique business model finds an instant international connect, acceptance and appreciation. The brand's combined ethos of celebrity, charity and fashion has been a catalyst in taking its reach to 600 points-of-sale in 15 countries in a span of 5 years.

Target Consumer

Anyone who believes in the ethos's and are influenced by them is a Being Human Clothing's psychographic target audience. The brand primarily target customers in the age group of 18 to 35 years, residing in metros, tier -II and -III towns in the country.

Product Basket

The brand's knit product portfolio is vast right from basic printed t-shirts to mid-fashion and fashion lines. In core categories, it has two range - printed basics and basic stretch t-shirts. In its mid-fashion line, it offers immense innovations in terms of print techniques, embellishments and fabrics. In the fashion line, it has two ranges - one is based on premium fabric and minimalist styling and the other is driven by the latest trend, exploring new fits like longline, boxy, fashion vests with deep armholes, etc. The top selling lines are t-shirts and denims.



Latest Collection

For the Spring Summer 2018 collection, the brand has worked on four distinct themes. These are Neo Sports, Synthetic Reality, Hyper Indigo and Minimal Future. Each of the themes follow very distinct trends. Neo Sports is part of the brand's athleisure line and takes elements from active wear and racing sport. Synthetic Reality is driven by hyper real graphics and a colour palette of deep tones. Hyper Indigo as the name suggests is an indigo based collection where experimentation with a lot of wash effects and treatments on indigos will be seen. Minimal Future is also part of its athleisure line in a sophisticated minimalist avatar with a pastel colour palette.

Collection Expansion Plans

This year, the brand has introduced a collection of fashion vests. In near future, it will be increasing its organic and eco-line and come up with a limited edition capsule collection. Currently, it has few styles which are made using certified organic cotton.

KEY INFOGRAPHICS

> Total number of doors

- EBOs: 61
- SISs: 204
- MBOs: 61

> Number of states present in: 21

> Number of cities present in: 87

> Total retail space: 52,949 sq.ft.

Retail Mapping

The brand has launched exclusive stores in 45 cities in India. It is also retailed across multiple channels including shop-in-shops, distributor networks and e-commerce websites internationally and in India.

Domestic Retail Expansion Plans

The brand is planning to open more exclusive brand stores across India. Also, it will focus more on tier -II and -III markets.

International Markets

Being Human Clothing has stores in France, Fiji, Nepal, Mauritius and the Middle East.

Omni-Channel Presence

The brand is set to launch its e-commerce website this year and implement a robust omni-channel strategy.

Brand Engagements

The brand recently launched a digital campaign, #DenimCode wherein it partnered with eight influencers from across fashion, travel, lifestyle, dance and entertainment to promote its Spring Summer 2018 denim range. Moreover, the brand's loyalty program enjoys more than 6 lakh membership, with repeat percentage reaching more than 20 percent. It sends customised offers and promotions to the loyalty members based on their purchase history.



/// BONJOUR (VAMI) ///

Company: Zonac Knitting Machines Pvt. Ltd. | **Key Category:** Leggings & Socks

A premium aspirational brand, Bonjour specialises in fine cotton socks, handkerchiefs and tights that cater to the mass market. Established in the year 1989, the brand today has become one of the most respected brand for its quality standards. Design, versatility and innovation have been the key grounds behind its success. It utilises patented technologies to produce hygienic products and matches the most stringent global quality norms. Even the raw materials are procured from the country's best spinning mills.

Target Consumer

Since the brand is in the mid-premium segment, it caters to people from Section A, B and some of its collection to the Section C of the society.

Product Basket

Bonjour offers socks, tights, leggings and handkerchiefs. It sells more than 200 varieties of products.

Latest Collection

Bonjour is coming up with a wide variety of socks, leggings and shape wear products in its upcoming collection.

Collection Expansion Plans

Bonjour is planning to come up with 3 to 5 more unique and different designs of socks, in each category.

Retail Mapping

Pan India, Bonjour deals with more than 150 distributors and more than 10,000 retailers.

Domestic Retail Expansion Plans

Bonjour is planning to open more EBOs across India. Also, the brand is focusing



more on non winter markets like the South and West India.

International Markets

Such has been the popularity of the organisation that they have spread their reach to the United States, Gulf countries and other European markets, thereby cementing Bonjour's name in the global space.

Brand Engagements

For engaging its customers, Bonjour uses various mediums like Facebook, Twitter, Youtube, Pinterest, LinkedIn, etc. On these mediums, the brand publishes blogs, photos, videos as well as gifts.



KEY INFOGRAPHICS

> Total number of doors

- EBOs: 13

> States present in: **Delhi NCR, Maharashtra, Madhya Pradesh & Uttar Pradesh**

> Cities present in: **Indore, Lucknow, Gurugram, Noida, Mumbai, Pune, etc.**

> Total retail space: **10,000 sq.ft**

/// CHIC BY CHAITALIBIPLAB ///

Company: Butique Dishari | **Key Category:** Woollens

Launched in 2016, Chic by ChaitaliBiplab is a ready-to-wear label crafted for “her” only. It is synonymous with timeless wear wherein luxury blends with comfort effortlessly. In a short span of time, it has aspired to gain its customers’ appreciation and satisfaction. With an in-house production facility, the brand successfully offers good quality timeless apparels at reasonable price range.

Target Consumer

The brand enjoys outstanding popularity among women between the age bracket of 20 to 40 years. The core target audience comprises working women who are highly fashionable yet can’t carry overdone designs and heavy clothes. It is the perfect choice for women who prefer a hint of the Indian smell and heritage in their collection albeit with keen sensitivity towards cost effectiveness.

Product range

The brand offers timeless apparels, which are made by well trained and experienced workers under the guidance of the designing team. The brand’s product mix comprises tops, kurtas, shirts, jackets, dresses, maxi dresses, skirts, pants, palazzos, salwar-suits, lehengas and sarees. It also offers accessories such as scarves, batua, etc.

Latest Collection

The brand’s Autumn-Winter 2018-19 collection focuses on authentic prints and exclusive embroideries, which has been extensively used on wool and cashmere blended fabric, silk, tussar, woven cotton and cotton knits and velvet including sweatfabric. Offering casual and comfortable style, the collection displays timeless classic colours.

Collection Expansion Plans

Currently, the brand offers palazzos, tights, skirts, shirts, kurtis, jackets, dresses, maxi dresses, gowns, ponchos, cape styled bodices, tops, lehengas, sarees, including hand knitted products. It has plans to introduce an elaborate range of office wear for women under pocket friendly price range.

Retail Mapping

The brand has presence in more than 600 multi-brand stores. Its products are also retailed through leading online stores.

Domestic Retail Expansion Plans

Chic by Chaitalibiplab is retailed through many online stores and MBOs. In the coming 2 to 3 years, the brand has further plans to expand its presence in other parts of the country where they have no presence yet. Furthermore, it will appoint franchise partners to increase its presence.



/// DUKE ///

Company: Duke Fashions (India) Ltd. | **Key Category:** T-shirts

Renowned knitwear brand, Duke is known for its standardized fits, superior quality, wide range and 'fashion-right' styles in its segment, making it the trusted brand amongst consumers. Duke is equipped with a complete vertically integrated garments manufacturing plant, with knitting, dyeing, processing, finishing, mercerizing, compacting, embroidery and printing under one roof. It's USP is to provide International Quality Garments with contemporary styling at an affordable price range for the masses.

History

The journey of Duke began in 1966 when Komal Kumar Jain started making t-shirts in a small setup by the name of 'Deekay Knitweares' in Ludhiana (Punjab). He quickly turned his passion for quality and design into the business of making casual wear. He realised that in India there was a huge market for knitted t-shirts. Subsequently, he planned a knitting unit where he could manufacture world class t-shirts, and started selling t-shirts under the brand name, Duke. Since then the brand has been further developed, taking influence from the latest International fashion trends, and is now a truly a pure Indian fashion brand with a pan India presence and abroad.

Milestones & Successes

The commitment to excel and a visionary approach has taken Duke to inexorable heights. Duke has been conferred with the President's Award; three National Awards – two for Excellent Quality Readymade Garments and one for Outstanding Entrepreneurship. The brand has been

felicitated with Indian Power Brand at Las Vegas USA; Make in India -National Productivity & Innovation Award; ET Business Knights Award; ITID National Award for manufacturing quality garments; Udyog Patra by Govt. of India; Employee Safety Award by Punjab Govt.; CICU - Best Brand Year 2018; Flipstar Award by Flipkart; Hypercity Unite Award by Shoppers Stop and many more.

Target Consumer

Duke targets modern and premium-to-mid-premium Indian youth. The brand caters to men, women and kids across all age groups.

Product Basket

Duke offers a full range of clothing for men, women and kids. Its product basket comprises t-shirts, sweaters, sweatshirts, jackets, shirts, track suits, denims, lowers, trousers, lounge wears, thermalwear, Bermudas, accessories, innerwear, shawls, stoles, lohis and footwear for men.

Latest Collection

The Duke Fall-Winter 2018-19 collection offers a gamut of stylish options in lush fabrics, trending colours, designer patterns and prints. With selections ranging from stylish t-shirts, sweatshirts, sweaters, jackets and thermals, to dapper cardigan and dressy tops, the Duke Fall-Winter collection is perfect for men and women, alike. Involving a unique and creative design process, the new collection revolves around several interesting concepts and promises to offer a global fashion statement.

Collection Expansion Plans

Duke is expanding into different segments. But primarily, the brand is



KEY INFOGRAPHICS

> Total number of doors

● EBOs: 360+

● SISs: 50+

● MBOs: 4,000+

> Number of states present in: 29

> Number of cities present in: 250

focusing in its footwear segment. The expansion will create a centralised, multi-product engine for wholesale and retail distribution, supporting Duke's long-term business growth in India.

Retail Mapping

The brand's products are exclusively placed at big chain stores like Central, Reliance Trends, Reliance Market, Arvind Retail, Easyday, Metro, Best Price, Total Superstore, Aditya Birla Retail, Hypercity, Brand Factory, etc., and doing online business on Myntra, Snapdeal, Jabong, Flipkart, Amazon, Ajoio and www.dukeindia.com.

Domestic Retail Expansion Plans

The brand's robust retail network comprises more than 4,000 MBOs and more than 360 EBOs across major cities in India.

International Markets

The brand has presence in Nepal, Bangladesh and Sri Lanka. Also, they are looking for expansion in the Gulf countries.



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/// ETEENZ ///

Company: Dhananjai Lifestyle Ltd. | **Key Category:** Kidswear

The legacy of Eteenz dates back to 1977, when the brand's parent holding, Dhananjai Lifestyle Ltd., started manufacturing high quality kidswear. Today, Eteenz is known for offering exclusive character merchandise at right prices. The brand's core categories are t-shirts, bottoms, frocks and many more. Based out of Kolkata, the brand is present across all the major channels of sale such as distributorship, large format retailers, multi-brand stores and exclusive outlets, private labels, e-commerce, export businesses.

Target Consumer

Eteenz targets kids from 6 months to 14 years. The products range starts from ₹199 and goes upto ₹599, which according to the brand is a sweet price point a customer who does not have enough resources would not have other option than to buy from them.

Product Basket

Eteenz is known for offering exclusive character merchandise at the right prices. The brand's core categories are t-shirts, bottoms, frocks, etc. The brand also offers other apparels like trackpants, joggers, shorts, co-sets, capris and nightwear. Its top selling range comprises t-shirts, joggers and nightwear for both boys and girls.

Latest Collection

The latest collection features digital prints on garments either through HD printing technology or other machines. Its range of printed nightwear for both boys and girls is extremely popular.

Collection Expansion Plans

Eteenz is on the verge of launching a new brand called Birthday Girl and Birthday Boy, which will be an exclusive party wear clothes brand.

Retail Mapping

Apart from being present in MBOs pan India, the brand has a sound online

presence on sites like Amazon, Flipkart, Udaan, Snapdeal, Paytm, Homeshop18, Jabong, Firstcry, Hopscotch, et al.

Domestic Retail Expansion Plans

As of now, the brand plans to strengthen its presence by opening more EBOs across India.

×

KEY INFOGRAPHICS

- > Total number of doors
 - MBOs: **2,000**
- > States present in: **Pan India**



/// FIFTY DEGREE ///

Company: V3 Exports | **Key Category:** T-shirts

Launched recently by V3 Exports, Fifty Degree is a casual wear brand offering trendy knitted t-shirts. Offering a classic yet versatile staple, the brand's t-shirts encompasses streetwear style to lounge wear range to board room meetings. Its array of basic t-shirts are crafted to fit effortlessly without compromising on the style.

Target Consumer

The brand targets consumers who demand comfortable fit and want to look stylish without much effort.

Product Basket

Fifty Degree offers t-shirts and polos under four distinct categories -- formals, basics, sports and casuals.

Latest Collection

The brand's latest collection revolves around basic t-shirts range. Focusing to cater to the spring-summer need of the consumers, the brand is offering summer palettes such as blue, white and from the vibrant family of red, yellows, etc.

Collection Expansion Plans

According to Fifty Degree's latest campaign, it will move from basic to no-more-basic range. The brand will introduce its collection in the kidswear soon.

Retail Mapping

A new entrant in the market, Fifty Degree aims to take its first retail steps through kiosks. The brand is geared up to go online by June to reach a huge fashion-hungry aspirational class in India's tier -I and -II markets, which is teeming with opportunities.

Domestic Retail Expansion Plans

Fifty Degree has ambitious plans for the next couple of years. The brand will soon come up with exclusive brand outlets across the country, with more focus in the South and West India, where winters are shorter and summers are longer. The brand is also looking at building its presence through multi brand outlets and shop-in-shops.

International Markets

V3 Exports, the parent company of Fifty Degree, exports to the Gulf and a few European countries.

Brand Associations

Popular television actor, Gaurav Chopra was roped in by the brand as its brand ambassador. Bringing him has been a good decision as it gave the better an instant acceptability and recognition in the market.

Brand Engagements

The brand's first campaign is running successfully. At present, it is focusing to ensure that the brand is present across all platforms, especially on the social and digital media.



/// FORCE NXT ///

Company: Dollar Industries Ltd. | **Key Category:** Innerwear

Over the years, the demand for men's innerwear has changed a lot; innerwear features more innovation and style these days. Dollar Industries Ltd., tracked this demand and launched a brand that would fulfil the rising demands of this category. Force NXT, launched in 2015, is a premium men's innerwear brand offering a wide range of products that conform to the needs of the modern man. As one of the leading brands in the knitwear and hosiery sector, Dollar Industries Ltd., today holds an enviable 15 percent share in the Indian knitwear market and exports close to 9 percent of its total textile production.

Brand's USP

Force NXT's collection is crafted to hit the fashion nerve of the Gen-Y male.

Target Consumer

Force NXT's core customer encompasses the youth and adventurous men between 20 to 40 years of age, who love to experiment and explore new fashion conventions.

Product Basket

Force NXT has three ranges which are classified as Finez, Relaxz and Flexz. While Finez comprises ace briefs, urban and rocky briefs and trunks, fine vests, pulse V-neck tees and crew fine tees, Relaxz comprises rib briefs and trunks, classic trunks, rib vests, derby vests, parker vests and fashion tees. Flexz, on the other hand, features the flagship products from Force NXT. A range known for its styles and vibrant colours, it comprises metro briefs and trunks, zebra briefs and trunks, bold briefs, modern trunks, as well as style briefs and trunks.

Collection Expansion Plans

The expansion plans regarding the brand's collection and product category completely depends upon the fashion trends and consumer demands. Currently, the fast fashion approach has influenced the Indian consumers profoundly. The brand's products are unique and innovative in its own way. It can be seen in the bold graphic prints in the designer t-shirts and the pop-colours, abstract patterns and glow shine waist bands in briefs and trunks.

The brand's newest collection of innerwear, called Denimyte, is modish, looks like denim but feels like a second skin. Another new collection in briefs, called 'Phoenix', is styled from 95 percent combed cotton and 5 percent elastane with attractive cuts, prints, tints and smart waist bands. Relaxz's rib brief with finely knit super combed cotton and specially treated quick dry fabric feels close to the skin and gives unmatched comfort.

Retail Mapping

The company is adding new retail points almost every day. At present, the brand has presence in more than 1,000 MBOs in 15 states. It has plans to expand to new markets and is keeping its options open for new opportunities by developing new sales channels and building new branding strategies.

Domestic Retail Expansion Plans

The brand has plans to set up exclusive brand stores. Since Force NXT is an ultra premium brand, its primary market lies within the metropolitan cities, tier -I and -II cities, where consumers are brand aspiring and fashion conscious.



KEY INFOGRAPHICS

> Total number of doors
● MBOs: **1,000+**

> Number of states present in: **15**
(mostly in North India)

Online Presence

The brand had launched its e-commerce site www.shopnxt.in three years ago. Apart from it, its products are available on all the major e-commerce platforms.

Brand Associations

Celebrity endorsement and associations has helped the brand enhance sales figures over the years. Dollar Industries' buoyant growth in the last six years with its mega star brand ambassador, Akshay Kumar and the Ironman of Indian fashion, Milind Soman for its brand Force NXT, have lifted the brands to the extreme stature that they carry today.

Brand Engagements

With the implementation of social media there has been a great increase in business along with brand recognition, globally. The brand utilises its social media profiles as the gateway to reach its potential customers.



/// GARCON ///

Company: Kaytee Corporation | **Key Category:** T-shirts

Launched a few years ago by Kaytee Corporation Pvt. Ltd., Garcon is a high-end fashion label catering men. The company is an export house and holds 40 years of experience in the intricate art of t-shirt making. The brand is able to leverage upon its knowledge of the export market and implement it in the t-shirt designs. With an in-house manufacturing unit, the brand boasts of delivering high quality at prices which are extremely competitive.

Target Consumer

Garcon targets young boys and men between the age group 18 to 40 years. Demographically, the brand caters to tier-I cities and is also available in tier-II and -III cities, especially those in the North East Indian states.

Product Basket

The brand's product range comprises t-shirts, polos, knit shirts, sweatshirts, joggers, hoodies and bomber jackets.

Latest Collection

Athleisure has been a big trend over the last two seasons. The brand has continued this range as a big theme in its latest collection. It also witnessed a huge emergence of 90's theme trends with a lot of colour blocking, influx of various colours, etc.

Collection Expansion Plans

The brand has plans to add knit blazers, as well as, knit woven items under its present product assortments.

Retail Mapping

Currently, Garcon is an online-only brand, and its products are easily accessible to everyone in this country.



The brand is present in all major e-commerce platforms as well as on its own website. Initially treading the beaten path with brick-and-mortar store, it faced several challenges from timely payments to supply and logistic. Then, it decided to move the entire business online and this has worked for them.

Domestic Retail Expansion Plans

Garcon has plans to open exclusive brand stores across the country. It will open its first store from the home city, Mumbai (Maharashtra) and move within the metro cities.

International Markets

Being launched by an export company, Garcon has been well received in the international markets. This June onwards, the brand will be seen in some stores at London (UK). The next plan is to sell the brand online through several international e-commerce platforms.

KEY INFOGRAPHICS

> States present in: **Covering the states through e-commerce**

> Average sales per sq.ft. per month **4,000 pieces**

Omni-Channel Presence

At present, Garcon is an online-only brand and has presence in all the leading e-commerce platforms including its own webstore. It is seeing great sales through this medium.

Brand Engagements

The brand indulges in target marketing through social media such as Facebook, Instagram and Google ads.



/// JACK & JONES ///

Company: Bestseller India | **Key Category:** T-shirts

Jack & Jones is one of Europe's leading producers of men's wear with more than 1,000 stores in 38 countries and its clothes are sold by thousands of wholesale partners all over the world. Jack & Jones is nowadays defined and represented by four unique brands – Jack & Jones Vintage Clothing, Premium by Jack & Jones, Originals by Jack & Jones and Core by Jack & Jones. They all offer a full range of clothes, accessories and footwear for every man and every occasion. Within a span of few years, the brand has successfully identified its target group and established an indelible brand recall amongst the fashion conscious youth.

Brand's USP

Over the years, Jack & Jones through its marketing activities has built a perception of being a disruptive, rebellious and edgy brand. With its latest marketing campaign, 'Don't Hold Back'; the brand communicates call to action towards shunning all inhibitions and following one's gut irrespective of what the world says or its obvious consequences. This campaign resonates the way of life of today's youth and the merchandise offered allows the male consumers to incorporate this attitude in their daily life.

Target Consumer

The Jack & Jones target audience are millennials in the age group of 18 to 28 years who are true representatives of the persona of the brand that is ultra-modern, edgy, rebellious, unique and don't ever hold back. They are confident individuals who are expressive, sporty, trendy and fashion conscious.

Product Basket

Jeans are still regarded as the backbone of Jack & Jones' business. The brand continues to have an elevated level of expertise when it comes to the craftsmanship, quality and design of jeans. The brand has also diversified into various product categories such as accessories, shirts, t-shirts, pants, shorts, winter wear, trousers and inner wear. Jeans, t-shirts and shirts are its top selling categories.

Latest Collection

With the Spring Summer 2018 collection, Jack & Jones has brought to life various themes that pay homage to cultures while invoking nostalgia.

Inspired by the land of the rising sun, the 'Tokyo Story' highlights elements of the traditional Japanese culture. From dragon and tiger printed shirts in woven fabrics to splatter polo tees which incorporate the wabi-sabi philosophy, the collection seen in shades of indigo and olive is fun, eccentric and spunky. It involves a lot of cutting edge structure, patchwork and detailing.

The 'Wild Life' collection gives last season's military camo trend a fresh twist by mixing summer florals in it. Influenced by the American military uniforms, the collection largely uses cotton blends in olive and rust with a hint of orange.

Paying tribute to the 90's iconic fashion styles, the '90's Nostalgia' collection brings back tennis tees, raglan sleeves, colour blocking and chain detailing. From stripes to vintage checks, conversational prints to doodles, it's



everything a millennial could ask for. The collection has a retro vibe with its palm tree prints, salmon pinks and shades of blue perfect to sport for the summer.

Collection Expansion Plans

Apart from jeans and t-shirts, the brand will put special focus to Jack & Jones Premium to expand its range in

terms of width and depth. It has seen encouraging response in this section and will invest resources to bring the best tailoring products for Jack & Jones Premium.

Retail Mapping

Jack & Jones has 67 exclusive stores and 329 shop-in-shops spread across the country. The brand has a strong presence in all the metro cities and are expanding rapidly within the tier -II and -III markets. It is also present on the leading online portals and have an exclusive website, www.jackjones.in.

Domestic Retail Expansion Plans

Jack & Jones plans to expand its presence in tier -II and -III markets. There is a huge untapped potential in these cities, owing to the evolving needs of young consumers who are influenced by pop culture and high fashion trends.

Omni-Channel Presence

Jack & Jones' omni-channel strategy is designed to cater to the needs of today's consumer. The focus is to give consumers the comfort they need to shop anywhere and everywhere with minimum efforts. The partnership with Tata Cliq is one of the strategic alliances in the omni-channel approach, the collection is loved on the Tata Cliq website, and the customers have an option of either getting the products delivered within six hours to their home or order online and collect the product from the store. The focus is to be as close to the customers as possible.

Brand Associations

Jack & Jones' communication strategy is honest, straight forward and much like its target audience. To reach out to their desired demographic, it works continuously to connect with men across music, sports and popular culture. It created All Star Jamm, offering its customers access to

musicians they generally wouldn't be able to see at the Jack & Jones flagship stores. Similarly, its #DontHoldBack campaign brought music to the fore. The brand also associated with and sponsored the Chainsmokers - Road to Ultra concert recently held in Mumbai and Delhi.

In the past, Jack & Jones collaborated with Mumbai Indians to celebrate the fandom of cricket and IPL in the country. This year, it invited the world's greatest rebounder Kenneth Faried at one of its flagship store in Delhi and launched the exclusive NBA collection.

The brand is abreast of latest in the world of millennials. After the Pokémon euphoria in the country, it treated Pokémon fans with an exclusive collection that comprised Pokémon t-shirts, jumpers and accessories. The brand also launched a few masterpiece collections to celebrate the Legend of Pirates of the Caribbean and Mickey Mouse.

Brand Engagements

Jack & Jones is a millennial friendly brand with an audience that looks at consuming news and fashion on the go. The brand engages with its consumers through innovative digital campaigns, social media contests and activities season after season that establishes brand loyalty among existing consumers while attracting new ones.



KEY INFOGRAPHICS

> Total number of doors

● EBOs: 68

● SISs: 372

> Number of cities present in: 99



/// JUELLE ///

Company: Juelle Retail Pvt. Ltd. | **Key Category:** Woollens

Launched in 2009, Juelle is a winter wear brand. Within a very short span of time, the brand has created a niche for itself in the women's wear segment and is positioned at more than 2000 leading stores across India. Juelle offers high-end fashion to Indian women integrating traditional as well as international trends. It is a value for money brand that offers high end, casual, modern, urban and chic fashion at affordable prices. The brand believes that fashion is synonymous with change and newness.

Target Consumer

Being a young, fashionable, trendy women's wear brand, Juelle is more popular amongst girls and ladies, who are between age group of 18 to 35 years.

Product Basket

Currently, the brand's product mix comprises of tops, sweatshirts, sweaters, coats, jackets, dresses and gowns. Amongst all pre-winter fashionable range, tops and sweatshirts are their hot selling products. Sweaters and sweatshirts are their core line of products.

Latest Collection

Juelle's latest collection screams of freedom. The story of a girl on the move will make you fall in love once again. Dripping in bright colours, the brand's collection is synonymous with the words feminine, fun and funky.

The new winter wear range is trendier, fashionable and in sync with the global winter collection. Juelle is introducing

light weight fabrics with special slub yarns in all categories including pre-winter range. Also, embroidery concepts are in-trend a big way.

Collection Expansion Plans

Looking at the changing trends, Juelle has changed the designing and styling of sweaters to short length, long sleeves, round neck fashionable sweaters, which can be worn by younger age group too. The brand is introducing swede fabric in some categories such as jackets, coats and dresses. This year, it will introduce a complete range of long pre-winter tunics. The collection of casual chic one-piece dresses has been revamped. A complete range of lowers has been introduced keeping in mind the young, fast moving, fitness freak females.

Retail Mapping

Juelle retail market is purely based on their multi-brand stores. It has a very strong brand positioning in the North India. The brand's North-East and East markets are also growing significantly. Nowadays, metros are comparatively more saturated, where the approach of big international brand has been increasing. However, in tier -I and -II cities, the thrust for fashionable brands is still alive. The buying power of consumers in tier -I and -II cities has increased and it is easy to position the brand in these areas.

Domestic Retail Expansion Plans

The brand is planning to increase its MBO's presence in areas where it is not present such as B and C cities.



KEY INFOGRAPHICS

> Total number of doors

● SISs: 20

● MBOs: 1,800-2,000

> States present in: **Pan India**

> Same store sales growth percentage:
15-20%

/// LEAGUE ///

Company: HI Fashion Pvt. Ltd. | **Key Category:** T-shirts

League is a new age casual wear brand for men. Catering to all age groups, the brand follows the highest quality standards and offers its products at highly affordable price range. It had started its network from the urban cities in India, but due to attractive price and its sustainable quality, it saw the real demand coming from smaller towns and cities, where the brand was much accepted and appreciated.

Target Consumer

The brand targets men, who want to look casual, fresh and in line with growing Indian fashion.

Product Basket

League's product mix comprises casual wear such as t-shirts, track pants, sports shorts etc. It specialises in basic round neck, V-neck, printed round neck, polos and sleeveless t-shirts.

Latest Collection

The brand's latest collection offers t-shirts in new summer pastel shades. The t-shirts range will allow the body to keep cool in summer such as its short sleeveless tees. Also, its Henley t-shirts flaunts a cool look and also adds as a formal wear.

Collection Expansion Plans

League has plans to expand its core range in women and kids by the end of the next year.

Retail Mapping

League is expanding its presence in tier -II and -III cities rapidly, while adding

4 to 5 small cities each month. It has an enviable presence in all the major e-commerce sites including Flipkart, Amazon, Snapdeal, Paytm, Limeroad, Shopclues and its own site www.leaguefashion.com.

Domestic Retail Expansion Plans

The brand is planning to partner with more multi-brand stores across India. Also, it is in talks with mall developers to open exclusive brand stores in smaller cities to expand its footprint in fast growth areas.

International Markets

League is in talks with major multi-brand retailers, large format stores in Nepal, Sri Lanka and UAE, and it has plans to set up a strong network overseas in the next 12 to 18 months.

Brand Associations

The brand has been associated with many local campaigns, sponsorship events and road shows with its network partners.

Brand Engagements

League has presence on all social media platforms and regularly runs events and special programs for its customers who take part in its quizzes and online games.



KEY INFOGRAPHICS

> Total number of doors

- SISs: 100+
- MBOs: 1,800+

> States present in: Maharashtra, Goa, Gujarat, Karnataka, Tamil Nadu, Kerala, Andhra Pradesh, Madhya Pradesh, Chattisgarh & Rajasthan

> Cities present in: Mumbai, Bengaluru, Surat, Ahemdabad, Bharuch, Chennai, Coimbatore, Thrissur, Palakkad, Raipur, Jabalpur, Nashik, Pune, Nagpur, Hyderabad & Vijaywada

> Total retail space:
2,50,000-3,00,000 sq.ft.

> Average bill/ticket size: ₹800

> Same store sales growth percentage:
15-20%

/// LACOSTE ///

Company: Sports and Leisure Apparel Ltd. (Lacoste licensee in India) | **Key Category:** T-shirts

In 1933, René Lacoste, a French tennis legend set up a company to manufacture the logo-embroidered shirt. He had designed this for his own use on the tennis court. This was the first time that a logo appeared on the outside of an article of clothing - an idea which has since become extremely successful. This shirt revolutionised men's sportswear and replaced the woven fabric, long-sleeved, starched classic shirts. Today, it continues to offer the same quality, comfort and solidity on which it built its name.

Lacoste entered India through a licensee agreement with Sports and Leisure Apparel Limited (SLA), which was incorporated in the year 1992 and is in the business of manufacturing and marketing of a wide range of men, women and children's sports and leisure apparel and marketing of footwear, other allied items and accessories under the brand name "Lacoste and Lacoste Live". A leading player in the premium casual wear market, the Crocodile brand is today present in 120 countries through a selective distribution network.

Target Consumer

Lacoste's target audience comprises men and women in the age group of 18 to 45 years and beyond belonging to the SEC A category. Its patrons appreciate tradition and the assurance of good taste that the brand provides through its products. Lacoste products assist these individuals in expressing better, to the outer world, their life-style that encompasses elegance, refinement, comfort and quality.

Product Basket

The brand's product portfolio entails apparel and accessories, leather goods,

watches, sunglasses, perfumes, footwear and underwear. Lacoste Polos are its best sellers, they are a timeless classic with countless different expressions, designed and reinvented for those who live their life as a beautiful sport.

Latest Collection

Lacoste's latest Spring-Summer 2018 collection comprises Modern Heritage Collection, The Paris Polo, Spring Bloom Collection, Roland Garros Collection and 85th Anniversary Re-edition Collection and more.

Modern Heritage collection is a modern take on Lacoste's sporting heritage is expressed through athleisure pieces that combine freedom of movement and an easy-to-wear elegance. Fabrics are soft and natural, textured or technical for a wardrobe of contemporary essentials. Lacoste's iconic colors - reds and blues - are played down, explored in subtle shades that go perfectly with a palette of natural neutrals like sand, khaki, antelope, aloe and white.

In Spring Bloom Collection, lightweight seersucker, petit piqué and denim are combined with more fluid fabrics for a light and breezy feeling. Hand-drawn graphics and happy colours keep things fresh, while styles are effortlessly cool. Warm reds combine with intense yellows and greens for a burst of positive energy in the Spring Bloom colour palette.

The Paris Polo is the new polo, when paired with a blazer makes an ideal alternative to a shirt. Crafted in supple stretch pique, with a reinforced collar and hidden buttons, it delivers a clean, contemporary look.



KEY INFOGRAPHICS

> Total number of doors

- EBOs: **38**
- SISs: **9**
- Others: www.lacoste.in & **Myntra**

> States present in: **14** (Chandigarh, Delhi, Gujarat, Haryana, Karnataka, Maharashtra, Madhya Pradesh, Punjab, Rajasthan, Tamil Nadu, Telangana, Uttar Pradesh, West Bengal & Goa)

> Cities present in: **18** (Amritsar, Bengaluru, Chandigarh, Chennai, Delhi, Ghaziabad, Gurgaon, Hyderabad, Indore, Jaipur, Jalhandar, Kolkata, Ludhiana, Mumbai, Noida, Pune & Surat)

> Total retail space: **66,554 sq.ft.** (EBOs) & **4,271 sq.ft.** (SIS)

The Roland Garros' dynamic graphics pay tribute to the longstanding relationship between Lacoste and Roland Garros. Tennis heritage plays a powerful game in these wearable pieces. The 85th Anniversary Re-edition Collection exhibits journeying through time and design since 1933.

Collection Expansion Plans

The brand's Fall Winter 2018 collection will be available from Aug'18 onwards and will unveil fresh and exciting styles. Also, there are some truly revolutionary product launches in the pipeline.

Retail Mapping

Lacoste follows a selective distribution policy which is essential to keep the exclusive positioning of the brand. Lacoste believes in providing a superlative experience to its customers and hence is very selective about the retail areas and the stores within that retail area. The distribution strategy is led by one or two flagship stores in each of the key cities such as Delhi, Mumbai, Bengaluru and Chennai, with approx.



1,200 to 1,500 sq.ft. boutiques in the other key retail developments. The brand is present in the international markets across 120 countries. It has a pan-India presence across 14 states and 18 cities.

Domestic Retail Expansion Plans

Delhi and Mumbai being the most important markets, the brand has much deeper penetration in these markets and intends to expand further. It is keenly watching the premium developments in tier-I and -II cities both in terms of consumer demographics and psychographics and also relevant retail developments. It started entering cities near metros a couple of years back and have received a good consumer response in those cities as well.

International Markets

Lacoste is today present in 120 countries through a selective distribution network. Two Lacoste items are sold every second in the world.

Omni-Channel Presence

Lacoste also has its digital flagship store that aids its sales in the country while offering convenience to its patrons. It has partnered with Myntra last year and has received a good customer response also. It is presently evaluating more options to enhance its omni-channel presence.

Brand Associations

Novak Djokovic: The New Crocodile:

René Lacoste and Novak Djokovic, these two legends share the same values of fair-play, tenacity and elegance. In 1933 tennis player and inventor René Lacoste, nicknamed the Crocodile for the tenacity he displayed on the court. Now, Novak Djokovic is the Lacoste style ambassador, not only on but also off the tennis court. His relaxed elegance and inventiveness are a perfect match for the French brand's DNA and its sports-inspired creations. The Novak Djokovic collection is a line of performance products that fuse functionality with style.

The brand film, Timeless:

Lacoste presented its brand film "Timeless" at the heart of its new campaign. This epic cinematic fresco

is set in the 1930s where a man experiences love at first sight. He sets off on the trail of a mysterious woman, jumping on the train she is riding. But as soon as he reaches the first car, he finds himself in the 1940s. Determined to find her, the hero begins a frantic quest that takes him through carriages and eras, until he ultimately arrives in the present. Over time, styles change but the polo retains its timeless elegance.

Lacoste x Save Our Species:

Lacoste will support IUCN's SOS partnership to help fight the extinction crisis by championing 10 of the most threatened species in the world. The brand has created 10 limited edition polo shirts, where its iconic crocodile leaves its historic spot to those animals. The number produced in each series corresponds to the remaining population sizes in the wild as estimated by IUCN species experts.

Save Your Logo Campaign:

Lacoste is also the first company to support the save your logo campaign, which allows private companies or institutions to contribute to the preservation of the animal that represents their logo. Today, through save your logo campaign, Lacoste contributes to the protection of biodiversity on the planet in its commitment to saving crocodiles, alligators, caimans and gharials.

Brand Engagements:

Lacoste uses effective CRM tools to interact with its Club Lacoste members and engage with them over personalised communication post analysing its database for consumer purchase behaviour, transaction frequency, purchase value, etc. It has also invested in running extensive sponsored ads on Facebook showcasing over hundreds of styles available at Lacoste.

It collaborated with top bloggers in the country and style them to showcase its wide array of collection via their social media posts and blogs.



/// LUX COZI ///

Company: Lux Industries Ltd. | **Key Category:** Innerwear

Lux Cozi is among the top players in Indian hosiery market with their strong presence in mid-to-economy segment. It is a “value for money product” brand which offers great comfort and style at very pocket friendly prices. Today, Lux Cozi proudly boasts a series of stylish products catering to the needs of men, women and kids.

Milestones & Successes

Lux Cozi has received much appreciation from various groups for its uncompromised quality and top most performance. Some of it includes – Asia’s Most Admired Brands - 2017-2018, Asia’s Greatest Brands - 2016, The World’s Greatest Brands & Leaders - 2015, The Admired Brand of India - 2014-2015, Master Brand - 2014-15 and Asia’s Most Promising Brand - 2013-2014, to name a few.

Target Consumer

Lux Cozi is synonym for “people brands”. The brand’s core consumers are those who believe in paying for uncompromised quality at very pocket friendly prices.

Product Basket

Today Lux Cozi proudly offers stylish range of innerwear for men, women and kids. The Lux Cozi White RN vest is by far the best selling product among all its products. Lux Cozi Bigshot is another one of the most favoured consumer products in boxer and briefs. The Lux Cozi Glo collection too, like its other products is strengthening its market position in the inner wear segment. Apart from men’s innerwear products, the female products brand, Lux Cozi

for Her is also getting appreciation from the market with its stylish product offerings comprising camisoles, racer-backs, panties and slips.

Retail Mapping

Today, Lux Cozi is one of the most widely distributed and retailed brand in India. The brand is retailed through more than 450,000 retailers across the length and breadth of the country marking its presence even in the remote parts of the nation. Due to its humongous marketing and promotion campaigns, Lux Cozi enjoys a wide presence in almost every city of India. As for the online presence, all its products are available at e-commerce platforms including Flipkart, Myntra, Amazon, Limeroad, Paytm, etc.

International Markets

Internationally, the brand is present across 48+ countries whose dominant geography includes Middle-East, South Africa, Australia, America (USA) and Europe. Recently, the company has forayed into the markets of Oman with a promise to offer the best to the customers from the vast portfolio of its brand.

Brand Associations

From the very beginning Lux Cozi believes in associating with such faces whose persona matches the brand’s values and that help its customers to get connect with the brand easily. Its current Brand Ambassador, Varun Dhawan for Lux Cozi and Amitabh Bachchan are the best examples of this concept. Recently, the brand has tied up a lot of media activities with these superstars that has enriched the brand loyalty among its customers and has further strengthened the bond of the brand with the masses.



KEY INFOGRAPHICS

- > States present in: **Pan India**
- > Cities present in: **Pan India**
- > Point of Sales: **4,50,000**

Brand Engagements

As a consumer driven brand, Lux Cozi understands that online retail is the “most impactful” medium to connect with Generation Y, in today’s era. Therefore, more emphasis has been laid on the e-commerce and social media promotions in the last few years as the online presence makes the brand more accessible for new customers, and more familiar and recognizable for existing customers.



/// MONTE CARLO ///

Company: Monte Carlo Fashions Ltd. | **Key Category:** Woollens & T-shirts

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.

Target Consumer

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 Basket

The brand offers a wide range of shirts, denims, trousers, t-shirts, sweat shirts, sweaters, jackets, shawls and track suits. Its core product comprises sweaters, sweatshirts, denim, jackets and t-shirts.

Collection Expansion Plans

Monte Carlo has launched a new workout and sportswear brand called, Rock It. The new brand will be retailed through exclusive brand stores and popular e-commerce channels initially. Targeted at young consumers who are fashion conscious. The Rock It portfolio includes over jackets, sweat pants, knitted lowers, woven lowers, knitted shorts, sandows, polo t-shirts, crew neck t-shirts and V-neck t-shirts.



Retail Mapping

Monte Carlo has presence over all the cities across the country through EBOs, MBOs and LFS. It is also available on all leading portals like Flipkart, Jabong, Paytm, Amazon, Myntra and including own portal www.montecarlo.in.

Domestic Retail Expansion Plans

Consolidating its position in all the major markets, the brand in the next 2 to 3 years is expecting a steady growth of 15 to 20 percent over the years.

Brand Associations

Depending upon the brand's requirement and market strategies, it chooses celebrity associations. It partners with them for social media engagements. In the past, it has been associated with a few big movies.

Brand Engagements

Monte Carlo has introduced a loyalty program to engage its 5 lakh customers spread across the country.

KEY INFOGRAPHICS

> Total number of doors

- EBOs: 237
- SISs: 350
- MBOs: 1,000+

> States present in: **Pan India**

> Cities present in: **Pan India**

> Total retail space: **4,00,000 sq.ft.**



/// PEPE JEANS ///

Company: Pepe Jeans India | **Key Category:** T-shirts & Jeans

Founded in 1973, Pepe Jeans is a brainchild of Shah brothers from Kenya - Nitin, Arun and Milan Shah who revolutionised London's fashion scenario by creating stylish and trendy jeans unlike the customary ordinary looking denim available in those days. Pepe Jeans London is in the forefront of international denim-led fashion with every collection. This has been possible because of the brand's commitment to create strong fashion, the hottest multimedia marketing campaigns and the most exciting retail environments while remaining sincere to the Pepe Jeans DNA.

In 1989, Pepe entered India and quickly captured the imagination of fashion starved consumers across the country. The brand is highly accessible in India and is present across 218 EBOs, over 1,350 MBOs and 503 large format stores. It also retails through popular online platforms such as Myntra, Amazon, Jabong, Ajio and Cilory.

Target Consumer

Pepe Jeans is for the young at heart. The brand caters to the fashion forward adults aged 18 to 40 years and children from 4 to 12 years of age; as well as teens between 14 to 16 years of age. It's consumers want stylish and trendy denims that fit well at an affordable price. The quality, fabric, fit, colour, wash, price, feel, etc., together influence the customer's purchase decision.

Product Basket

Pepe Jeans India manufactures a wide array of chic casual wear for men, women and kids. Jeans is its core product and is very popular and sells

extremely well. Jeans come in a variety of fabrics, washes, fits and colours. The brand's product portfolio includes t-shirts, flat knits, sweaters, sweat shirts, jackets as well as woven merchandise. The accessories range consists of bags, wallets, caps, socks footwear.

Latest Collection

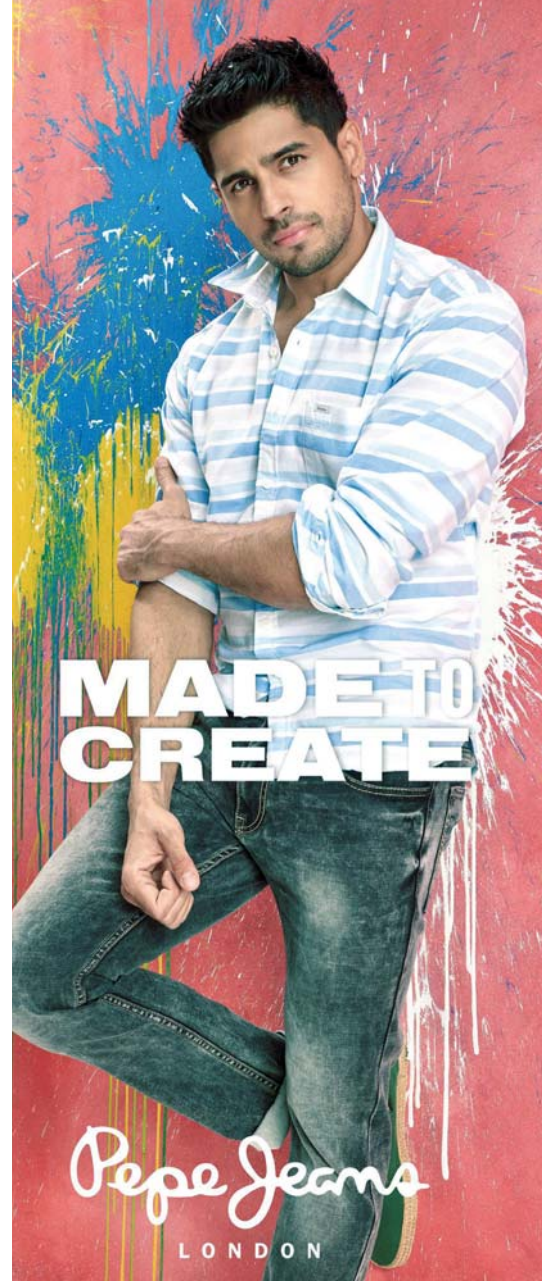
Pepe Jeans Spring Summer 2018 collection for men and women showcases an open-minded and eclectic approach to dressing for the new season. Easy and relaxed denim pieces form the core of this collection and come imbued with a bohemian spirit. This collection is a mix of tropical, vibrant prints and stripes among both the menswear and womenswear offerings; shirts and statement dresses are key highlights. Sleek and fluid silhouettes are explored in bright colours. Playful graphic t-shirts are ideal to mix in with key denim pieces. The collection consist of four distinctive stories which further lend character to items from the collection, W11 (Woman), Portobello (Man), Brit Chic (Woman), Super Ego (Man), Only Play (Man).

Retail Mapping

Pepe Jeans is extensively present in all key metros as well as tier -II and -III cities across 234 EBOs, over 1350 MBOs and 503 large format stores all over India. The brand also retails on popular online platforms such as Myntra, Amazon, Jabong, Ajio and Cilory.

Domestic Retail Expansion Plans

The brand is planning to open about 40 to 50 stores in the next 2 to 3 years across the country.



KEY INFOGRAPHICS

> Total number of doors

● EBOs: 234

● LFS: 503

● MBOs: 1,350

> Number of state present in: 13

> Number of cities present in: 21

> Total retail space: 1,77,886 sq.ft.



Omni-Channel Presence

As consumers have become accustomed to the convenience and empowerment of online shopping, they expect their in-store experiences to be consistent with their e-commerce routines. There is a great opportunity to leverage technology and up the ante to offer consumers a seamless, omni-channel experience. Pepe Jeans has partnered with several online market places and launches its collections season-wise similar to the physical stores. There is an intention to introduce its own e-commerce platform in the near future.

Brand Associations

Pepe Jeans signed Bollywood actor Sidharth Malhotra as its first ever Indian brand ambassador. Malhotra's unique style, confidence and charisma makes him the perfect advocate for Pepe Jeans's newest Spring Summer 18 campaign #MadeToCreate. The campaign is all about acting on your passion to create art and bring to life something remarkable that is driven by creative expression. The collection inspires you to experiment with fashion and create your own individual looks.

Brand Engagements

With a strong focus on the millennial and Gen-Z demographic, we recognise that fashion consumers have an entirely new set of expectations. To meet these shoppers where they live, the brand launches a digital-first strategy - incorporating extensive social media marketing, mobile ads, banner ads (Youtube) and influencer marketing. It's Facebook, Instagram and Twitter feed captures current trends season-on-season. To promote the new Pepe Jeans SS 18 line of the Avengers (Marvel) collection, the brand engages with third-party content providers and stand-up comedians to innovatively create interesting content to highlight the launch of the PepeJeans X Avengers collection.



/// PRETTYSECRETS ///

Company: MTC Ecom Pvt .Ltd. | **Key Category:** Loungewear

PrettySecrets is one of the fastest growing lingerie brands in India. Created by Karan Behal in 2011, the brand started out as a women's sleepwear brand with its presence in major departmental stores such as Shoppers Stop, Pantaloons, Globus, Central, etc., as well as over 300 MBO's. From its advent as a solitary category the brand diversified its range in 2012 through e-tailing on PrettySecrets.com.

Target Consumer

The brand's target audience is between the age of 25 to 35, inclusive of both working women and homemakers. They mostly belong to tier -II and -III cities of India. These are the women who are update with current trends but do not have the budget to invest in luxury pieces but at the same time will not compromise on comfort.

Product Basket

The brand's portfolio consists of 1,200+ products including lingerie, nightwear, active wear and swimwear. It has two seasonal launches (Spring-Summer) and (Autumn -Winter) with 300 styles in each season spread across cross-categories. With 2 season launches and 2 injection rounds per season, the brand puts in a lot of research into product development.

Latest Collection

The Spring-Summer 2018 is all about bright and bold colour palette, including electric fuchsia, sunny yellow, with emphasis on use of texture in not just a visual but also a tactile way. The Basix collection is inspired from everyday 9-to-5 wear, which is inherently easy to look after and also available in plethora

of colours and prints, from seamless bras and sexy silhouettes to padded wired, non- wired and non-padded.

Retail Mapping

The brand opened its first brand exclusive retail outlet in April 2017 and now it has 23 stores across 10 states panning all 4 corners of the country. It has set stage to have 100 stores open by the end of 2018 and 300 stores by the end of 2019. It currently sells through 350 trade stores across the country and aims to get to 1,500 stores by end of 2019. It is also focused at growing its market share on online marketplaces and making PrettySecrets.com the largest culmination of brand loyalists.

International Markets

The brand has been partnering with the international online marketplaces for over 2 years. Its international exposure is currently limited but it is aiming to grow that exponentially this year. It has partnered with some of the biggest e-commerce websites of UAE and South East Asia such as Souq.com and Lazada.com respectively.

Brand Engagements

The brand has just started its loyalty program, which rewards customers on their purchases under certain terms and conditions. In case of digital media, it has its presence across Facebook and Instagram with a following of up to 2,00,000 fans.



KEY INFOGRAPHICS

> Total number of doors

- EBOs: 23
- SISs: 3
- MBOs: 300

> States present in: **Maharashtra, Manipur, Gujarat, Punjab, West Bengal, Chhattisgarh, Jharkhand, Tamil Nadu, Telangana, Arunachal Pradesh & Kerala**

> Cities present in: **Mumbai, Imphal, Surat, Ludhiana, Jalandhar, Baroda, Kolkata, Raipur, Goa, Dhanbad, Chennai, Hyderabad, Naharlagun, Trivandrum & Siliguri**

> Total retail space: **10,724 sq.ft.**

> Average bill/ticket size: **₹2,400**

> Same store sales growth percentage: **15%**

/// STATUS QUO ///

Company: Crave Clothing Company Pvt. Ltd. | **Key Category:** T-shirts

Status Quo is a brand of choice of trendy, self directed youngsters. Offering a complete range of fashion wear, the youth oriented brand appeals to their dynamism, style and outlook. Complimenting their beliefs with modish designs, the brand aims to help them stand apart from the teeming millions with its unique and exciting designs along with consistent quality. The brand's classic styling with continuous innovation gives them an edge over the others.

Target Consumer

Status Quo is a brand for the youth. The brand's core target audience falls under the age bracket of 16 to 35 years. Today, it has emerged as the numero uno choice of people who are young at heart.

Product Basket

The present product portfolio of the brand consists of shirts, waist coats, shrugs, blazers, t-shirts, shorts, joggers, trousers, denims, sweatshirts, sweaters and jackets. T-shirts form the top most selling category followed by others.

Latest Collection

Status Quo follows international forecasts and trends. Creative slogan typography is among the top trends for t-shirts design in 2018. Dark and moody tropical jungle inspired t-shirt prints will feature heavily in 2018, along with digital and DIY collages emerge as a strong t-shirt trend, collating a mismatch of imagery for a surreal playful aesthetic. Multi-colour, big checks are in trend, similarly camouflage and polka dot is also coming up as a new concept. The



KEY INFOGRAPHICS

- > Total number of doors
 - SISs: **65+**
 - MBOs: **1,200+**
 - Others: **Central, Lifestyle, Shoppers Stop, etc.**
- > Number of states present in: **26**
- > Number of cities present in: **290**
- > Average sales per sq. ft. per month: **2,000 (approx.)**
- > Average bill/ticket size: **₹1,300**
- > Same store sales growth percentage: **15-18%**

latest collection displays an array of monochromatic punchy colours including vintage sepia tones.

Collection Expansion Plans

Status Quo launched Game of Thrones as its Spring Summer 2018 collection. The brand has also partnered with Royal Challengers Bangalore (RCB) for its fashion collection. The Status Quo RCB collection is a line of fashionable graphical tees in bold colours, symbolising the true spirit of some of the top RCB players.

Retail Mapping

The brand is available through 1,200-plus multi-brand stores across the country and has a presence across all large format stores like Shoppers Stop, Lifestyle, Lulu and Central with 160 touch points. Status Quo also retails through Amazon, Flipkart, Myntra, Jabong, Snapdeal, Tata Cliq, Paytm and www.statusquo.in.

Domestic Retail Expansion Plans

From 65 shop-in-shops currently, Status Quo is looking at expanding to 115 shop-in-shops by end of this financial year. It will also open EBO's from end of this year. While, its MBOs and LFS businesses are steadily growing and are expected to grow in similar trends in coming years. The new markets which the brand is exploring are Bihar, Jharkhand, Uttrakhand, Himachal Pradesh and Jammu & Kashmir.

International Markets

Status Quo is fairly well placed in the Middle East and African continent. The brand has been consistently exploring opportunities with business partners in different countries.

Brand Associations

In the past, the brand has associated with the movie, Baahubali 2 as its fashion apparel partner. At present, it is the official apparel licensee for Game of Thrones. It also offers a range of fashion collection for Royal Challengers Bangalore (RCB).



/// SPYKAR ///

Company: Spykar Lifestyle Pvt. Ltd. | **Key Category:** T-shirts



Young, stylish and fashion forward, Spykar is India's leading denim wear brand for the youth. Keeping up with the ever-changing dynamics of fashion around the globe has always been at the core of the brand. Backed by a 25-year legacy, Spykar certainly defines the rules of the fashion arena. From what started as a men's denim wear brand sold at multi-brand outlets, it has expanded its portfolio to become a one stop shop for casual wear ensemble for both men and women, available pan India across 210 exclusive outlets, 700+ multi-brand outlets, large format stores, e-commerce (leading fashion portals, marketplace and spykar.com).

KEY INFOGRAPHICS

- > Total number of doors
 - EBOs: 210
 - SISs: 5
 - MBOs: 700+
- > Number of state present in: 27
- > Number of cities present in: 300+
- > Total retail space: 1,29,385 sq.ft.
- > Average bill/ticket size: ₹3,200

Target Consumer

The brand targets youth in the age bracket of 18 to 35 years, who appreciates fashion, likes to be trendy and fashion forward.

Product Basket

The brand product assortment comprises top wear, bottom wear and accessories. The top wear comprises shirts, tees, jackets and vests. The bottom wear has denims, trousers, shorts, joggers, etc. And the accessories include wallets, perfumes, belts, socks and deos.

Latest Collection

Spykar launched the YnR range, a specially curated denim line inspired by global trends. This trendy range is a celebration of individualistic styles with their subtle nuances. The YnR denim comes in smart fits, endearing washes and are accessorised with coloured loop, metal detailing, etc. The collection embodies global inspirations that can match the insatiable search for the best in world class style. Designed for the young and restless generation, the YnR denims recreate the stories of travel, exploration and timeless journeys.

Collection Expansion Plans

The brand is planning to expand its product portfolio by introducing its footwear range.

Retail Mapping

With 210 exclusive brand stores in 110 cities, the brand is quite strong in Mumbai and the rest of Maharashtra, Gujarat, Uttar Pradesh, Bihar, Jharkhand, Madhya Pradesh, Telengana and Jammu & Kashmir. It has been accepted and appreciated well in metros, however its retail expansion in the tier -II and -III cities has also made a good customer base. It is also widely available on Myntra, Jabong, Amazon, Snapdeal, Flipkart and www.spykar.com.

Domestic Retail Expansion Plans

The brand has plans to open more EBOs across India by launching 30

to 40 stores each month. It is also exploring the untapped tier -II and -III markets.

Omni-Channel Presence

Spykar reaches out to a very young audience and hence being present online was a seamless decision. Traditionally India has been offline and Spykar has also had its business come out of offline. Hence the brand engages in such a manner that there is a peaceful course between offline and online route.

Brand Engagements

Being a brand catering a young audience, it is imperative for Spykar to be on key digital platforms. It is quite active on social media such as Facebook, Twitter and Instagram with an engaging content.

Spykar #MoveslikeYnR:

Spykar #MoveslikeYnR is a digital activation to launch its YnR denim range for SS18.

A campaign for today's millennials who are active on the digital platform, it uses a dance mascot and encourages the youth to do the moves on the Instagram platform. The campaign is witnessing a positive response and is taking over social media, encouraging the youth icons of India to share their moves and challenge their friends to do the same.

CRM:

It has been 2 years that Spykar launched a loyalty program for its customers called, ActifClub. The Spykar Actif Club loyalty program is its way of saying thank you for choosing them as the style partner. Now, every time one shops with the brand, the buyer not only takes home something to flaunt, but also reward points that they can redeem later. The program entails -- collection communication, preview sales, special offers and schemes designed only for the customer base.



/// SWEET DREAMS ///

Company: SD Retail Pvt. Ltd. | **Key Category:** Loungewear

Sweet Dreams is a renowned sleepwear brand that caters to the whole family including men, women, young boys and girls. It is among the pioneer fashion brands in sleepwear category in organised retail offering international styles and fabric. With over 29 years in the industry, they have been a key contributor to the Indian casual and lounge wear industry through their specialty of quality night wear. Its strength comes from the fact that as sleepwear experts through the years, most innovations in terms of the fabrics have always been initiated by Sweet Dreams.

Target Consumer

The brand caters to the entire family hence targets men, women, girls and boys alike. It is now also targeting young couples as they are becoming a major consumer force.

Product Basket

The brand primarily focuses on night suits, track suits, work-out wear, etc.

Latest Collection

Sweet Dreams is one of the few brands in the country that produces over 300+ separate bottom wear for travel/leisure/workout range for men and women. According to the brand, bottom wear will be the focus for 2018. Also, in-line with international trend, the brand will focus on athleisure bottom wear, track pants for gym, yoga, jogging, travel and other lifestyle needs of the family.

Collection Expansion Plans

The brand's core focus areas are nighty, night suits and track suits. It is



KEY INFOGRAPHICS

- > Total number of doors
 - SISs: 250
 - MBOs: 5,000
- > Number of states present in: 24
- > Number of cities present in: 60
- > Average sales per sq.ft. per month
₹1,400-1,600
- > Average bill/ticket size ₹2,000
- > Same store sales growth percentage
35%



increasing its work-out range, which is contributing 30 percent to the overall turnover and achieving 100 percent like-for-like growth. The work-out range will take care of lifestyle needs like yoga, gym, zumba, exercising, etc. Also, it is promoting a special occasion lines like the signature bridal collection, fancy nighties, babydolls, etc.

Retail Mapping

The brand has strong foothold in Delhi, Uttar Pradesh and Gujarat. It finds promising markets in the West, South and East regions of the country.

Domestic Retail Expansion Plans

Sweet Dreams is planning to open more EBOs across India. It has plans to open 50 exclusive stores in 2018.

International Markets

The brand has an admirable presence in the UAE and Kuwait.

Brand Associations

Sweet Dreams has partnered with Bollywood actors Katrina Kaif and Zareen Khan to endorse its brand a few years ago. It constantly partners with television actors for various brand associations.

Brand Engagements

The brand has been present and active on its social media platform such as Facebook and Instagram. It, also, tied up with bloggers for gaining the mileage and traction on social media platform.



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/// TAB 91 ///

Company: Garvit Knitwears

Key Category: Woollens

Launched in 2013 by Garvit Knitwear, Tab 91 is a casual wear brand offering extremely trendy, young and colorful collections. The brand has been built and grown on a simple philosophy of the garment industry, that is, fabric, fit and finish. It showcases a wide range of apparels for men and women that adds an extra zing to the person wearing it and making him feel special.

Target Consumer

Tab 91 targets youngsters between 16 to 35 years of age. The brand offers a complete range of fashion wear with modern designs. It caters to people who wanted to look smart and trendy yet wanted an affordable product range.

Product Basket

Tab 91 has a stunning collection to fit the ever changing face of fashion enthusiast. The brand's summer range comprises men's wear such as collar and round neck t-shirts, linen kurtas, fashion joggers, shorts, capris and bermudas. Its winter wear range offers cotton pullovers, full-sleeve t-shirts, light-weight knitwear sweatshirts and fleece sweatshirts. And, the women's winter wear range encompasses fancy yarns cardigans, sweatshirts, knitted coats, trench coats and accessories.

Latest Collection

The brand's latest collection focuses on light-weight theme collection. With a trendy and premium quality offerings, it has become the clothing brand of choice where customers love to buy their

sweatshirts, sweaters, coats, t-shirts, tops, cardigans, pullovers and much more.

Collection Expansion Plans

The brand has plans to add some more ranges in its men's product portfolio under the casual shirts segment.

Retail Mapping

Tab 91 has been receiving tremendous response from tier -I and -II cities compared to metro cities, where the brand has been accepted and appreciated well.

Domestic Retail Expansion Plans

The brand has plans to launch exclusive brand stores across the country. Within the next two years, it aims to open at least 10 EBOs in the North India.

Brand Engagements

Tab 91 is earnestly promoting its brand on all social media platforms including Facebook, Pintrest, Twitter, etc.



KEY INFOGRAPHICS

- > Total number of doors
 - MBOs: 1,350
- > States present in: Punjab, Haryana, Himachal Pradesh, Jammu & Kashmir, Rajasthan, Uttar Pradesh, Gujarat, Maharashtra, Odisha, Jharkhand, Assam, Meghalya, Nagaland & West Bengal
- > Average bill/ticket size: ₹600 in Summers and ₹1,000 in winters
- > Same store sales growth percentage: 20-25%

/// TANTRA ///

Company: Tantra | **Key Category:** T-shirts

Tantra (India-on-a-t-shirt), is a pioneer t-shirt's brand created out of the desire to express creativity via the youth of the subcontinent. The original belief of the label was to convey the life and times of the Indians to the visiting foreign tourists. Quirky, humorous and combined with copy-art, the brand became an instant cult classic and a generic name in the t-shirts category. Today it has a national presence, though initially, it was hard to break established mind-sets.

Target Consumer

Tantra targets the youth of the sub-continent and the world. The brand has created fragmented offerings via a host of labels each catering to a unique audience.

Product Basket

The brand offers unisex t-shirts, women, kids, infants and accessories. It has over 10 t-shirts label under the Tantra umbrella.

Latest Collection

The brand offers a combination of classic t-shirts under its latest collection. It is also planning to launch a new label in June 2018.

Retail Mapping

The brand has been successful in mapping half of the sub-continent and it is consolidating its position with its offline stores. It is focusing at tier -I and -II cities. This is because these cities, in general, are catching up much faster than metro cities, in terms of buying power and embracing a product.

Domestic Retail Expansion Plans

For the coming next 2 to 3 years, Tantra will focus on the unexplored markets of the sub-continent, as well as consolidate its position in the current markets including offline and online domains.

International Markets

Tantra is the only stand-alone, t-shirt startup from India to have an EBO internationally, with the latest being in Seattle (USA). The brand realises that rapid, 10x scaling up needs funding, and thus is working on this aspect to propel future growth.



KEY INFOGRAPHICS

- > Total number of doors
 - EBOs: 30+
 - SISs: 25+
 - MBOs: 200+
- > Number of states present in: 9
- > Number of cities present in: 15



/// TOFFYHOUSE ///

Company: Om Apparels | **Key Category:** Kidswear

Toffyhouse is one of the most successful brands in the baby and infantwear segment and has much higher sales than even the multinational brands present in India. This is mainly due to its deep understanding of what exactly a mother wants for her child. The brand's channel partners are strictly told to inform the brand about the response of each and every style so that Toffyhouse can understand the requirements of the market and stay relevant to its consumers. Strong growth and fast counter sales are considered the best award at Toffyhouse, and it is getting them on a daily basis from mothers across the globe, who continue and will continue to be its greatest support.

Target Consumer

The brand targets newborns and children upto the age of 7 years.

Product Basket

Toffeehouse is a one stop solution for infant and babywear, and houses an exhaustive collection from essentials to luxe

Latest Collection

The brand's latest collection consists of a slew of collections, of which Let's go Travelling, Ambitious Children, Oozing Class, Smart and Peppy, Puppies We Love, I Love Bear Hugs, and Cool Penguins are worth mentioning.

Collection Expansion Plans

The brand is vying to expand its collection to include gift packs, multi packs, essentials, innerwear, etc.



Retail Mapping

Toffyhouse has a strong presence because of a sturdy networking by all its channel partners, which is growing rapidly across all formats.

Domestic Retail Expansion Plans

The brand has plans of rolling out one flagship EBO in each major city in India.

International Markets

Toffyhouse has a strong international presence as well. As of now, the brand is present across international markets of Nigeria, Congo, Mauritius, Seychelles, UAE, Saudi Arabia and Singapore.



KEY INFOGRAPHICS

- > Total number of doors
 - EBOs: 3
 - MBOs: 1,000+
- > States present in: **All major states**
- > Cities present in: **All major Cities**
- > Same store sales growth percentage: **30-40%**



Company: TT Ltd. | **Key Category:** Innerwear

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

Target Consumer

The brand targets the middle class within the age bracket of 25 to 40 years. As the majority of Indian consumers are rural and semi-urban, for them the basic comfort and the price element is paramount and hence easily falls under the brand's consumer bracket.

Product Basket

The brand's product portfolio encompasses a complete innerwear and casual wear range for the complete family—predominantly in knitwear. It offers a diverse multi-quality, all gender and all age group product portfolio including the basic mass segment innerwear, semi-premium mass segment innerwear, casual wear, sports wear, active wear and accessories such as socks and hankkerchiefs.

Latest Collection

Of late the brand has been focusing aggressively on the fashion oriented casual outerwear segment, in order to service the masses with high fashion products at reasonable prices.

Retail Mapping

With its customers in rural and semi-urban regions, the brand's major thrust markets are the tier-I and -II cities. It is expanding its distribution network systematically to increase its presence in all the districts of the country by appointing rangewise distributors catering to MBOs including the deep interiors. Also, in order to append the brand's publicity, it is expanding its LFS presence and EBOs network.

Domestic Retail Expansion Plans

TT is planning to open more EBOs across the country under its exclusive brand stores, TT Bazaar. It aims to take the EBOs count to 200 in the next 2 years.

International Markets

The brand is focusing at exporting to the third world countries especially Africa through the Middle East window and some Asian countries.

Brand Engagements

The brand has been constantly creating various schemes through its retail partners to connect with its vast consumers. It is in talks with online giants for co-branding to roll-out customised schemes for such retailers.



KEY INFOGRAPHICS

> Total number of doors

- EBOs: 50
- SISs: 15
- MBOs: 50,00

> Number of states present in: 20

> Number of cities present in: 500

/// WOODLAND ///

Company: Aero Group | **Key Category:** T-shirts

Woodland entered India in 1992 when the Indian footwear market was largely unorganised. The brand created a new category of specialised 'outdoor adventure sports' shoes. Its product positioning was different and it was known as a rugged, outdoor leather shoe brand, the kind usually preferred by adventurers. The youth took fancy to the brand's footwear and it gradually developed a product line especially for India. The success in footwear shoes encouraged them to enter into new segments like clothes, handbags and the likes. Last year, the brand clocked ₹1,200 crore in revenues. It has been steadily growing at 20 to 25 percent.

Target Consumer

Woodland products are strong, meant for tough conditions and have a different style. The brand has its USP of being long-lasting and has been synonymous with adventure sports and outdoors for years. Its customers include urban youth (both men and women) looking out for adventure between the age group of 17 to 25 years who are students, college kids and professionals.

Product Basket

The brand's wide product range includes apparels, shoes and accessories for men and women and outdoor equipment like tents, sleeping bags, waterproof outdoor backpacks and products associated with adventure travels and sports.

Latest Collection

Woodland's latest collection for this summer spring includes apparels (shirts, t-shirts, pants, chinos), bags for men and women, shoes, accessories like belts, wallets etc., for men. There are designs

like nautical stripes, solid colour shirts, checks, chino pants. And beautiful eye catchy colours such as bottle green, royal blue, bloody red, shades of blacks and greys. Men's wallets are made of premium leather and are very fashionable. Women's bags come in very pretty and trendy colours such as neons, pretty purple, reds, green, etc.

Retail Mapping

Currently, the brand has a chain of over 600 company owned stores and presence in over 5,000 multi-retail outlets and 500-plus shop-in-shop formats in the country. Globally, the brand is present in more than 40 countries. It is planning to set up 30 to 35 more stores this year majority of which will be in tier -I, -II and -III cities. Recently, it has expanded its business in collaboration with Aokang International to enter China. During the initial stage it will start selling through 150 Aokang outlets. Similarly, it is planning collaborations in some South African countries and Canada. The company's portal and other e-commerce sites equally contribute to the e-commerce sales revenues, thereby adding to its volumes. Moreover, Woodland has a different set of merchandise for the e-commerce companies and this is exclusively available in those sites.

Domestic Retail Expansion Plans

The brand is planning to open more EBOs across India. It is planning to add another 60 stores in this financial year that would be an equivalent combination of small towns and metros. Woodland as a brand is also present in international market for quite some time. It is currently working on entering into more foreign countries in near future.



KEY INFOGRAPHICS

> Total number of doors

- EBOs: 600+
- SISs: 500+
- MBOs: 5,000+

> Total retail space: 9,00,000 sq.ft.

International Markets

The brand is working on strengthening its presence in South-East Asia, West Asia, Europe and the US. It is expecting to generate good revenue by the end of this financial year.

Omni-Channel Presence

Woodland's online sales are growing at a faster rate and the brand expects it to grow to 40 percent in 3 to 4 years. It is planning to concentrate more on a seamless approach through all available shopping channels, i.e., mobile internet devices, computers, bricks-and-mortar, television, radio, direct mail, catalog, in-store experience and so on. Its EMI scheme for online sales has proved very beneficial. Soon after its launch, it generated a tremendous response from the customers, nearly 15 percent of its sales are now through this scheme.

Brand Engagements

The brand keeps running customer loyalty programmes from time to time to provide the existing customers with additional benefits and to reach a wider audience. Loyalty programmes also help the brand to maintain conversation with its clientele.



/// ZERO ///

Company: Cotton Casuals (India) Pvt. Ltd. | **Key Category:** Kidswear

L launched in 1990 by Cotton Casuals (India) Pvt. Ltd., Zero is a kids wear brand that specialises in infant wear. When Zero started, there were limited kidswear brands in the country; there were just one each in Delhi and Mumbai - Baby Care and Meme. Today, it is a leading player in the kidswear section and offers a unique range of products in 100 percent cotton fabric. Soft fabric, soft colours, patterns, cute designs, all together make Zero products comfortable to wear and soothing for a baby. The brand manufactures pure cotton products and offers about down to 40 types of fabrics.

Target Consumer

The brand's target group consists new borns and babies upto 4 months old.

Product Baske

The brand offers anything and everything in garments for babies including 100 percent cotton flat knits, rompers, 3-piece sets, etc.

Latest Collection

The brand's new collection features pink and blue in pastel shades and features a wide range of patterns and styles.

Online Presence

The brand is present in two of the most popular children's e-commerce portals in India - Firstery and Hopscotch.

Domestic Retail Expansion Plans

The brand is vying to launch all over India, and plans to roll out about 20 to 25 stores by the end of next year.

International Markets

As of now, Zero also exports its products to Dubai.

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KEY INFOGRAPHICS

> Total number of doors

- EBOs: 3 (Kolkata)
- MBOs: 4,000+
- Others: Big Bazaar, Pantaloons, etc.

> States present in: Pan India

> Cities present in: Pan India





FASHION *CREATION*

FASHION CREATION

- » WSGN INSIGHTS
- » NEW COLLECTIONS
- » ARVIND: IDEAS FOR DENIM



EVENT

**GOTS INDIA SEMINAR 2018:
BUSINESS EFFICIENCY WITH
SUSTAINABILITY**

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Knitted Fabrics

**SHAKTI: CONSTANTLY
INITIATING, IMPROVISING &
INNOVATING**

Anil Kumar Agarwal, Director, Shakti Knitfab LLP talks to Images BoF about the increasing demand of knitted fabric among women's wear, kidswear and lingerie brands.

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IFF 18 - CX Sessions
**CX SESSION: WGSN
INSIGHTS**

Puneet Dudeja, Sales Director - South Asia and Priya Sachdeva, Business Director - South Asia, WGSN deliberated on retailing in an age of artificial intelligence (AI) and the retail trends/priorities and key drivers that are set to impact retail strategies.

Pg No.172-173



**INNOVATION
ARVIND: INTRODUCING NEW
IDEAS FOR DENIM**

Arvind Limited, India's leading textile to retail and brands conglomerate, along with Invista, one of the world's largest integrated producers of fibres, showcased an exclusive denim collection at its annual event called Arvind Festive 2018.

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Fashion Creation



Launch

**LYRA: THE NEW
INTIMATE WEAR**

Lyra, the pioneers in branded women's legging brand has expanded its portfolio and ventured into the lingerie segment under the same brand name.

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Launch

**CROCS: LAUNCHES LITERIDE
COLLECTION**

Crocs, the international footwear brand launches its new store in Connaught Place, Delhi. This expansion augments Crocs India's total number of outlets to 74.

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WENDLER INSIDE



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GOTS INDIA SEMINAR 2018

BUSINESS EFFICIENCY WITH SUSTAINABILITY

Global Organic Textile Standard (GOTS) is organising the 'GOTS India Seminar 2018' in Hotel Le Méridien Coimbatore, Tamil Nadu, on May 29, 2018. The theme for this seminar is 'Sustainability as Key to Business Efficiency'. Stakeholders and actors from organic textile supply chains shall come together and contemplate positive initiatives to achieve business efficiency through sustainable practices.

As consumers become increasingly aware of the environmental cost of fast fashion, 2018 is predicted to be the year that sustainability goes mainstream. Advances in textile process innovations can lead to sustainable development, while at the same time, improving efficiencies and enhancing profits.

Through focused and challenging discussions, this one-day seminar shall address pressing issues relevant to the organic textiles industry. It shall equip delegates with best practices and know-how relating to the biggest opportunities and challenges, help transforming their supply chains to achieve efficiency through sustainability.

The seminar shall look at key issues such as:

- Sustainability in Fashion Industry: What are the current trends in eco-fashion domain? What are the priorities and experiences of conscious buyers? How are Indian and international brands integrating organic textiles in their product offerings?



- Chemical and Environmental Compliance: What are the latest requirements in GOTS? How does it keep pace with technical research and market requirements? What are the current trends in environmental compliances? What needs to be tested? Where should it be tested?
- Future of Compliances and Standards: What are the latest challenges? How are other stakeholders in the market setting their requirements? How can organisations collaborate to reduce double working?

GOTS has been organising international and regional events since 2015. 'GOTS India Seminar 2018' is the third event in India organized by GOTS. Earlier, events in Mumbai and New Delhi were highly appreciated by participants and the industry.

GOTS is the stringent voluntary global standard for the entire

postharvest processing (including spinning, knitting, weaving, dyeing and manufacturing) of apparel and home textiles made with certified organic fibres (such as organic cotton and organic wool), and includes both environmental and social criteria. Key provisions include a ban on the use of genetically modified organisms (GMOs), highly hazardous chemicals (such as azo dyes and formaldehyde), and child labour, while requiring strong social compliance management systems and strict waste water treatment practices. GOTS was developed by leading international standard setters – Organic Trade Association (U.S.), Japan Organic Cotton Association, International Association Natural Textile Industry (Germany), and Soil Association (UK) to define globally-recognised requirements that ensure the organic status of textiles, from field to finished product. GOTS is a non-profit organisation which is self-financed.



• Apparel - Men's, Women's & Kid's Wear • Fashion Accessories • Contract Manufacturing

Exhibitors List

Show Time: 10.00 a.m. to 7.00 p.m.

Company Name	Brands	City	Category	Products
Aagaaz Fashions Pvt. Ltd.	Aagaaz	Jaipur	Women's Wear	Designer Wear
A B Marketing	Tetalee	Jaipur	Women's Wear	Kurtis, Palazzo Pants, Tops & Skirts
Alfaz by R.D.Fashion	Alfaz	New Delhi	Women's Wear	Ethnic Wear
Amazing Olizo Range	Olizo	Delhi	Women's Wear	Leggings, Jeggings, Plazo, Kurti, Blouses
Arena Fashions	Feminista	Surat	Women's Wear	Kurtis, Gowns, Palazzos, Tops
Aditee International	Aditee	Jaipur	Women's Wear	Kurti, Plazo, Pants, Legging, Skirt, Tunics, Dresses, Kafians, Bags, Jewellery, Bed/Cushion Covers, Curtains, Table Sets
AEKA - An Ode To Linen	AEKA	Mumbai	Women's Wear	Kurtis, Shorts, Pants, Dresses & Sarees
Audaz Brands Retail Ind Pvt. Ltd.	De Moza	Bangalore	Women's Wear	Leggings, Fashion Bottoms, Tops & Inner Wear
Black Oak International	Warp & Weft	Bangalore	Men's Wear	Shirts & Kurtas
Bornfree Fashions Pvt. Ltd.	Bornfree	Kolkata	Men's Wear	Bermoda, Shorts, 3/4th, Travelling Payjama
Digsel Cool Cotton	Digsel / Selsia / Rat & Cat	Tirupur	Kid's / Men's / Women's Wear	Gym Vest, Vest, Briefs, Panties, Leggings, Kid's Wear
Dilip Fashions Pvt. Ltd.	Red Chilli / Mummy Papa	Kolkata	Men's/Women's/Kid's Wear/Contract Mfrs	Leggings, Tops, Lower
Dev Enterprise	Devil & Novice	Ahmedabad	Men's Wear	Casual Wear
Draaz Impex	Draaz	New Delhi	Kid's / Women's Wear	Kid's Ethnic Wear, Girl's/Women's - Lehngas, Indo Western Draped Gowns
Elcinco Inc	Dillinger / Storm Born / Difference of Opinion	Tirupur	Men's Wear	T-Shirts, Shorts, Joggers, Track Pants
Eternal Clothing Line	Eternal / Wild Lite / Aashi / Star Light	Surat	Womens' Wear	Kurtis, Tunics, Tops, Gowns
Francis Wacziarg Fashion (P) Ltd.	SlumberJill / Avito	Bangalore	Kid's / Men's / Women's Wear	T-Shirts, Nightwear, Sweat Shirts
Gaurav Garments	Chirag	Delhi	Men's Wear / Fashion & Retail Accessories	Coats, Indo Western Wear, Sherwani Suit
Global Fashions	South Tailors / American Trends	Tirupur	Men's Wear	T-Shirts
Handa Apparels	FCK Gold	Ludhiana	Men's/Kid's Wear	Track Pants, Catris, Shorts
H P Fab Tex Pvt. Ltd.	100 Miles	Surat	Women's Wear	Leggings, Kurtis, Tunics & Treggins
Huerex Apparels	Flybees / Huerex	Tirupur	Infants/Men's/Women's Wear	Body Suit, Ramper, Sleepsuits, Towel, T-Shirt, Shorts, Leggings
International Trading Company	Goat	Tirupur	Men's Wear	Fashion Sweater, Flat Knit Polo, Jersey/Polo T-Shirts
J.V. Overseas Exports	Naatiya / Booba	Tirupur	Women's Wear / Kid's Wear	Leggings, Kid's Wear
Jagadguru Marketing	Pinnacle	Mumbai	Women's Wear	Bridal Nighty, Night Suit, Lingerie, Innerwear
Jeeva Parampara	Jeeva Parampara	Bangalore	Women's Ethnic Wear	Kurtis
Kotak Overseas Private Limited	Kotak	Mumbai	Women's Wear	Intimate Wear & Accessories
Meher Print LLP	Meher & Mansi	Mumbai	Women's Wear	Kaftan, Kurtis, Tops, Plazzo, Pants, Skirts
Mitras	Mitras	Coimbatore	Women's Wear	Kurtis
Mitra Inc.	Nostaljia	Bangalore	Fashion Accessories	Bags & Cushion Covers, Laptop Sleeves
Mukund Apparels	Dhanyawad	Surat	Women's Wear	Kurtis, Gowns, Palazzos
Nandani Creation Limited	Jaipur Kurti / Desi Fusion	Jaipur	Women's Wear	Kurtis, Palazzo's, Duppattas, Ethnic Tops, etc.
Network Clothing Company Pvt. Ltd	Twin Birds	Tirupur	Women's / Kid's Wear	Leggings, Tops, Innerwear
Omnipresent Lifestyle LLP	Banno's Swagger	Surat	Women's Wear	Kurtis and Ethnic Wear
Pinnacle Impex	Doll Up	Erode	Kid's Wear	Dresses
Poshaak Niryat (Exports)	Poshaak	Jaipur	Women's Wear	Shirts, Kurtis, Skirts, Palazzo, Western Tunics
Pranera Services and Solutions Pvt. Ltd.	Laya	Tirupur	Women's Wear	Women's Western Wear, Girls Wear
Rassaa Creations & Innovations Pvt. Ltd.	Rassaa	Jamshedpur	Home Décor	European Pinewood - Home Décor, Gifts & Furniture items
Rajarajeshwari Enterprises	Panache	Bangalore	Women's Wear	Kadhi Fabric Garments
Royal Clothing	Jack Club	Tirupur	Men's Wear	T-Shirts, Shirts, Track Pants
Ruby International	Western Mutiyar	New Delhi	Women's/Kid's Wear	Tunic, Skirts, Tops, Play Suits, Jump Suits
S G Enterprise	Vasanche	Surat	Women's Wear	Women's Garments
Saksh Design Incorporation	Saksh	Jaipur	Women's Wear	Kurtis, Lehngas, Gowns
Shree Bhavya Fabrics Ltd.	Shree Bhavya	Ahmedabad	Home Textiles	Bedsheets
Shree Krishna Fashions	Shree Krishna	Jaipur	Women's Wear	Kurtis, Patiyalas, Leggings
Shree Rukmani Fabtex	Rukmani	Jaipur	Women's Wear	Kurtis
Shree Silk	Shree	Surat	Women's Wear	Fabrics & Fashion Garments
Soochi	Soochirang	Bangalore	Women's Wear	Tops, Lehngas, Maxi, Kurtis, Waist Coats
Stylekraft Embro and Print Designss	Stylekraft	Bangalore	Fashion Accessories	Belts in Canvas, Elasticated, Braided & Leather
Sunshine International	AWAY	Surat	Women's Wear	Customised Uniforms & Garments
Supreme Clothing	Candy Kids / Candy Junior / Candy Teenz	Tirupur	Born Baby to Boy's Wear	Readymades, Undergarments & Outerwear
Sivaraj Spinning Mills (P) Ltd.	Chennis	Dindigul	Men's Wear	Dhoties, Shirts, Under Garments & Outerwear
The Yellow Paisley Store	Svanik	Bangalore	Men's Wear	Ethnic Wear - Kurtas, Pajama Sets, Waist Coats, Sherwani
Varsace Apparels Private Limited	Femigo	Kolkata	Women's Wear	Tops, Kurti, Palazzo, Leggings, Camisole
Vinayak Emporium Pvt. Ltd.	Banjaran	Kolkata	Women's Wear	Kurtis, Crop Tops, Mastanies, Gowns, Palazzo, Leggings, Tops, Sarees,
Vista Lifestyles	VINK	Surat	Women's Wear	Kurtis, Tops, Palazzo Pants, Long Skirts, Tunics
Vivek's Creation	Vivek's	Bangalore	Garment Accessory	Mannequins, Hangers, Stands, Carry Bags etc

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SHAKTI:

CONSTANTLY INITIATING, IMPROVISING & INNOVATING

Anil Kumar Agarwal, Director, Shakti Knitfab LLP talks to Images BoF about the increasing demand of knitted fabric among women's wear, kidswear and lingerie brands and how they are offering newer blends in knit fabrics to these brands and manufacturers.

Started as a yarn agency firm in 1970s, Shakti is a renowned fabric manufacturer from Kolkata (West Bengal). In 1993, the brothers, Naveen Kumar and Anil Kumar Agarwal saw a dearth of high quality fabrics in the knitwear industry and immediately started exploring the opportunity. They started with delivering knit fabrics to women's wear brand and later also supplied fabrics to kidswear brands. The demand for knit fabrics was much more in kidswear compared to adult wear because of its various key properties.

Since the beginning, Shakti has been passionate about promoting cotton based products. Thus, they have been travelling and gathering products which can further be developed in to cotton based fabrics. Working diligently on the companies motto to initiate, improvise and innovate, Shakti has been able to create a big basket of high quality knitted fabrics.

Product range & the market

Shakti manufactures a wide range of knit fabrics such as single jersey, single jersey lycra, interlock, polo knit, loop knit, viscose, modal and indigo in a variety of blends. Every year, they have been adding two to three fabrics in a wide range of colours, to their portfolio depending upon the fashion trends existing in the market.

"There is a huge acceptance of spandex products amongst the consumers now. So, we are developing fabrics keeping that in mind," shares Anil Kumar Agarwal on their upcoming fabric collections.

Future plans

Shakti supplies to many export houses making women's wear, kidswear and lingerie. They have been exploring different international markets based on fabric consumption, but at present they are focusing on the Indian market as there is a huge opportunity for superior quality fabrics and the supply gap is huge. "Given our diversified portfolio and expansion plans, we aim at growing 40 percent YOY every year till 2020," concludes Agarwal.

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"There is a huge acceptance of spandex products amongst the consumers now. So, we are developing fabrics keeping that in mind."

-Anil Kumar Agarwal,
Director, Shakti Knitfab LLP





WBGMDA



**46TH
GARMENT
BUYERS AND
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MEET
2018**

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Organised By :



West Bengal Garment Manufacturers & Dealers Association

(Affiliated to Bharat Chamber of Commerce)

39, Tara Chand Dutta Street, 4th Floor, Kolkata - 700 073, Ph. : (033) 4069 9009/2268 0336

E-mail : wbgmda@gmail.com

CX SESSION 3

WGSN INSIGHTS

"AI is the new mantra of the retail industry, given the innovations and benefits it offers to retailers, brands, consumers and everyone in the chain. For a brand and retailer, AI acts as an enabler and allows them to interact with the consumer on a personal basis and anticipate their needs, while on the other hand the consumer is served better with a unique shopping experience."

-Puneet Dudeja,
Sales Director - South Asia, WGSN



In this session, Puneet Dudeja, Sales Director - South Asia and Priya Sachdeva, Business Director - South Asia, WGSN deliberated on retailing in an age of artificial intelligence (AI) and the retail trends/priorities and key drivers that are set to impact retail strategies.

WGSN



AI is the new mantra of the retail industry. And would not be, given the innovations and benefits it offers to retailers, brands, consumers and everyone in the chain. For a brand and retailer, AI acts as an enabler and allows them to interact with the consumer on a personal basis and anticipate their needs, while on the other hand the consumer is served better with a unique shopping experience. Yet, the industry is just at cusp of what is anticipated to completely overhaul the template of shopping in the coming years.

A narrowing of the field of vision

Inspite of all the benefits, AI also brings to us a big challenge – it is ushering us into a new age of virtual assistance, and as an increasing number of us shift to rely on them, these assistances will become the gateway through which brands reach customers, they will be constantly refining and controlling the choice and may be re-routing sales and footfalls. As a result the customer's field of vision is narrowing. Leaders in the domain of assistance are Amazon Alexa, available in devices like

RETAILING IN AN AGE OF ARTIFICIAL INTELLIGENCE



“The modern consumer is very much concerned about social responsibilities and is keen on knowing the story behind each respective product that he owns.”

- Priya Sachdeva,
Business Director - South Asia, WGSN

Amazon Echo and the Amazon Echo Dot Smart. A whole slew of global leaders are now banking on artificial assistance. “Ford has partnered with Alexa for its mobility services; General Motors has partnered with IBM’s AI platform Watson to deliver a flight of assisted in car services, and the list goes on,” adds Puneet Dudeja.

Retailing in an era of AI

In this era of personal assistance, constantly improving algorithms have created new pathways for customers and processes at the back end. In the near future, knowing AI data, it influences and how to act accordingly will become a standard KPI for all retailers. “As more of us opt to press the remote control on choice, it will proliferatingly become challenging for brands and retailers to break into our lifestyle. Hence, beyond understanding the data we need to rethink and recalibrate, what we do to amplify a brand in other ways so as to keep them relevant in this particular age,” said Puneet Dudeja.

The human impact and the way forward for brands

Retail in India is registering a massive shift in terms of consumer preference – how they like to look at brands and retailers, how they like to acquire products, etc. Priya Sachdeva elucidated on two main shifts in consumer behaviour, new product relationships and operating with purpose (Retailer’s POV).

New product relationships

Social responsibility is high on millennials’ list. “One of the things that they really care about is resources; they want to preserve resources. This has given rise to what we call the re-commerce market or sharing economy,” said Priya Sachdeva.

Citing Saks Fifth Avenue’s collaborating with Vitamins on a recycle programme called Rewearable that utilised old apparel collected from donations and Myntra’s collaboration with Goonj, Priya Sachdeva illustrated the second and third life of a apparel product that an increasing number of retailers and consumers are realising that they can tap into.

Citing the example of Depop, an app where the world’s creatives come to buy, sell, discover, and explore unique things, she illustrated how the consumer’s mindset is rapidly changing as compared to the previous generations. The modern consumer is very much concerned about social responsibilities and is keen on knowing the story behind each respective product that he owns. “What I am trying to tell you is that there is a rapid growth of a market where products gets a second and third life and retailers are not a part of this market. This is going to pose as a stiff competition in the future and hence retailers need to be aware and be a part of it,” she said.





ARVIND

INTRODUCING NEW IDEAS FOR DENIM

Arvind presents the future of denims at Arvind Festive 2018

Arvind Limited, India's leading textile to retail and brands conglomerate, along with Invista, one of the world's largest integrated producers of fibres, showcased an exclusive denim collection at its annual event called Arvind Festive 2018.

Taking inspiration from the most powerful force on our planet, Arvind launched its latest collection called 'Gravity', a range of new denims that embody power, stability, and comfort. The collection was introduced through engaging displays and an enthralling runway show that highlighted the most desired features of modern day expression of energy.

Commenting on the Festive 2018 event, Aamir Akhtar, CEO - Denims, Arvind Limited said, "Arvind Limited is taking steps for leveraging innovative technologies to create the best fabrics across performance, fashion and functionality. We are constantly pushing our limits to redefine denims every season. It is our endeavour to bring customers the best products that are aesthetically elevated, technologically innovative, and most importantly sustainable. We will continue to work towards creating disproportionate value for our customers by providing them with end-to-end solutions from design to delivery."

During the event, Arvind and Invista hosted an expert panel to brainstorm for new ideas, in a thought provoking session titled "Looking beyond woven knit



Arvind Limited is taking steps for leveraging innovative technologies to create best fabrics across performance, fashion and functionality. They aim to bring customers the best products that are aesthetically elevated, technologically innovative and sustainable.

denim". The event also included a unique experiential concept titled 'The ADL Experience: Art and Science of Denim wash' was curated and developed by on board international laundry experts, Giovanni Petrin and Andrea, who have been previously instrumental in the success story of the famed Italian laundry, Martelli. This installation showcased the most sought after trends, aspirational, yet sustainable denim wash directions. With sustainability lying at the core of Arvind's belief, this wash trend collection has been developed at Arvind Denim Lab (ADL) using eco-friendly technologies and processes. Also, Arvind created a visually stimulating Indigo Art Centre, that gave visitors a sneak peek into their vision of 'Indigo inspired lifestyle'. This section of the event focused on creating endless possibilities with Indigo, beyond just jeanswear.

A key innovation at the show was Arvind's new product range christened as E-Indigo. This range

uses a path breaking new Indigo dyeing technology, which is not only substantially more sustainable compared with traditional dyeing techniques; it also imparts a completely new and aspirational aesthetic appeal to the finished product. The technology creates unique and controlled patterns on the fabric that resemble traditional textile art form of ikat.

The Show was curated in collaboration with Invista, which has been a long-standing technology partner to Arvind and has collaborated to jointly undertake path breaking research and development in the field of textiles. Transforming daily life through its innovations, Invista also showcased the path-breaking technology of Coolmax® Eco Made that has been brought to India exclusively in partnership with Arvind.



LYRA:

THE NEW INTIMATE WEAR

Lyra is set to become a complete women's wear brand as it forays into innerwear

Lyra, the pioneers in branded women's legging brand has expanded its portfolio and ventured into the lingerie segment under the same brand name. The company, Ebell Fashion Pvt. Ltd. (a Lux Group Company) has positioned Lyra Lingerie in the market as an affordable fashion range. With a collection of 8 style ranges of bras and 4 designs of panties, Lyra targets the independent women who are fashion conscious and prefer to own the right priced products.

Elaborating on the upcoming new collection, Udit Todi, Senior Vice President, Lux Industries Ltd., said, "Lyra today enjoys very high level of consumer awareness and consumer loyalty. In a short span of time, Lyra has successfully established itself as the largest legging brand in the women's wear segment. With topmost quality and comfort features, Lyra has emerged as the market leader in the legging category with the highest brand recall in the organised retail and online space." He further said, "We have extended our brand portfolio to intimate wear to emerge as the most sought-after women's wear brand in the country. With our battalion of strong retailers and distributors across India we plan to reach out to our discerning customers. In the online space, in addition to our own website, we have tie-ups with leading e-commerce sites to sell our new products. We have competitively priced our products keeping in mind the price sensitivity of the Indian consumers."

The collection

Lyra bras are made of super stretch combed cotton fabric and seamless wrinkle free cups for the right comfort and support. Innovative cross over designs and soft adjustable straps with perfect stretch ensure natural shaping and mark free skin. Made of breathable Modal blended cotton fabric, Lyra panties comprise of both hipster and bikini styles. Its modern fit, sits just below the waist and adds complete front and back coverage. Soft signature waistband leaves no marks on your skin and ensures all day comfort. With the launch of Lyra Lingerie the brand is all set to delight the consumers ensuring stupendous brand success.



"Lyra today enjoys very high level of consumer awareness and consumer loyalty. In a short span of time, Lyra has successfully established itself as the largest legging brand in the women's wear segment. With topmost quality and comfort features, Lyra has emerged as the market leader in the legging category with the highest brand recall in the organised retail and online space."

-Udit Todi,

Senior Vice President, Lux Industries Ltd.





CROCS LAUNCHES LITERIDE COLLECTION

Crocs, the international footwear brand launches its new store in Connaught Place, Delhi. This expansion augments Crocs India's total number of outlets to 74.

With the new store launch, the brand also introduced their latest collection, LiteRide™. The collection, which has just made a worldwide debut, is the most innovative comfort technology to-date by the brand. Created from “equal parts science and magic” LiteRide™, a revolutionary closed-cell material, reinforces Crocs' dedication to comfort, delivering consumers a delightful mix of support and sink-in softness.

LiteRide™ foam, the key ingredient in a collection of the same name, comes to life by merging sporty, on-trend styles and silhouettes with the legendary Crocs comfort that consumers expect. In fact, LiteRide™ foam is 40 percent softer and 25 percent lighter than Classic Croslite™ foam, the original Crocs comfort material that consumers already know and love.

“We're witnessing a shift from comfort being a ‘nice-to-have’ to a consumer ‘must-have,’ and we think LiteRide answers that call,” said Michelle Poole, Crocs, Senior Vice President - Global Product and Marketing. “In fact, our LiteRide comfort technology is a perfect fit for consumers who want to feel comfortable all day, every day or who simply want a stylish complement to their athleisure wear.”

For SS18, the LiteRide™ collection offers a variety of product choices designed for women and men that align with the increasing popularity of the athleisure categories. The LiteRide™ collection includes the following styles: the Clog, the Slide, the Sandal, the Flip, the Slip-On, the Lace, the Pacer and the Mule. The collection ranges between ₹3,495 and goes up till ₹5,995 only.

“LiteRide is lighter, softer and more flexible than anything we've created before. While Croslite remains at the heart of our comfort story and our classic footwear, we continue to up the ante by delivering innovative comfort to our consumers,” Poole continued. “Not only does the LiteRide technology offer an elevated level of comfort, but the new streamlined designs deliver modern Crocs styling at its best. We believe in continuous innovation in order to make our consumers feel comfortable in their own shoes.”



BRAND:
Crocs

PROMOTER:
Crocs Inc.

LOCATION:
Delhi (Connaught Place)





SHIRTS & TROUSERS MEGA ISSUE

Shirts and *Trousers* are probably the most basic wardrobe staple across the world. The shirt-pant combo struck a surprising connect in India, a country that seldom absorbed anything apart from handed-down traditions. The connect was so deep-seated that the nation took years to open its doors and embrace newer trends in fashion. Even today, it is deeply embedded in the Indian mentality that a shirt and pant combo elicits a powerful effect on cognition, however today a vast variety of looks cater to a complete set of lifestyle requirements.

Shirts, the largest men's apparel category, are now sprinting ahead as one of the fastest growing categories in women's wear too. Understanding the emerging consumer base and staying ahead therefore has become a big challenge for almost all brands in India. Similarly, *Trousers* have undergone such massive metamorphosis and the market in India is registering a healthy buzz and is picking up momentum rapidly.

In the June issue of IMAGES BoF, we study these mammoth categories that have over the years been the chief drivers of fashion retail across the globe.

We will deliberate on the following in each of these two categories in India:

- >> Market Size
- >> Key Segments
- >> Growth Drivers
- >> Top Players
- >> Evolving Preferences & Consumption Behaviour
- >> Contemporary Innovations
- >> Designer Offerings
- >> Fashion Trends & Innovations in Fabrics

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**IFF PRIVILEGE
 MEMBERSHIP OFFER**
 ★★★★★★

MEMBERSHIP FORM

The Indian fashion industry is today a very fast-moving, challenging category. Technology and consumer behaviour are forcing fashion retailers to constantly evolve and adapt to these changes.

And that is where India Fashion Forum (IFF) comes in. It is India's largest fashion market intelligence hub, and its members have unparalleled access to every connection, information and research that they need to ensure informed and profitable growth of their businesses.

Membership of India Fashion Forum Privilege Club – India's largest fashion retail network – offers:

- Pan-India networking and business development openings for top leaders and industry influencers.
- Multiple routes to optimise brand visibility and marketing reach.
- Instant access to IFF's multiple knowledge platforms and a broad network of top-level decision makers and business owners.
- Connecting them to the entire value chain (designing, buying & sourcing to manufacturing, merchandising, branding, marketing & retailing) round the year.
- Privilege access to **India Fashion Forum** annual fashion retail intelligence event, including an exciting blend of Conference sessions, CEOs Roundtables, workshops and masterclasses, zoned exhibitions and industry awards.

HOW TO ENROLL?

Choose your Membership category/ies from below:

- Prelim
- Bronze
- Silver
- Gold
- Platinum

A group operating in more than one category may enroll its different companies in their respective categories. To know the applicable fee and entitlements please refer to the table IFF Annual Membership Fee & deliverables. GST will be levied as applicable which at present is 18%. A proforma invoice can be mailed on request.

IFF Annual Membership Fee may be paid by draft/ cheque payable to Images Multimedia Pvt. Ltd. or bank transfer (details below).

Current Account No: 02482000004779 | **Account Title:** Images Multimedia Pvt. Ltd. | **Bank:** HDFC Bank Ltd.

Branch: S-355, Panchsheel Park, New Delhi 110 017 | **RTGS Code:** HDFC0000248 | **MICR:** 110240029

MEMBER INFORMATION

Company Name	
Category	
Address for communication	
Name of the person responsible for IFF communication and coordination	
Designation:	
Ph:	
Cell:	
Email Id:	

OTHER REQUIREMENTS:

- Please send brand / organization logo along with high resolution pictures of key people, products & services. The pictures can be sent through yousendit or wetransfer. All visuals should be of 300 dpi.
- Please send a separate Company Backgrounder of about 350 words. This should be in PDF or MS word format.
- Please send a separate note on outstanding achievements. This should be in PDF or MS word format. All visuals should be of 300 dpi.

IFF CONTACTS FOR MEMBERSHIP:

- **Anil Nagar**, +91 9811333099
E: anilnagar@imagesgroup.in
- **Priti Kapil**, +91 9868801869
E: pritikapil@imagesgroup.in
- **Sarika Gautam**, +91 9717544226
E: sarikagautam@imagesgroup.in

IFF SECRETARIAT

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 New Delhi 110020.
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F: +91 11 40525001
W: www.indiafashionforum.co.in

NAME/S OF AUTHORISED REPRESENTATIVE/S TO AVAIL IFF PACKAGES

Name:	Designation:	Phone:	Mobile:	E-Mail:

.....
 Signed by CEO / Director / Owner
 Name:
 Designation:

.....
 Company stamp/ seal



IFF ANNUAL MEMBERSHIP & DELIVERABLES*

**YOUR
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TO THE
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MEMBERSHIP ELIGIBILITY	PRELIM MEMBERSHIP	BRONZE MEMBERSHIP	SILVER MEMBERSHIP	GOLD MEMBERSHIP	PLATINUM MEMBERSHIP
RETAILERS	A. Fashion Retailers	A. Fashion MBOs/ Independent Retailers	A. Regional Chains - 3 or more stores/ Brands with Owned Brand Outlets/Shop-in-shops	A. National Department Stores/Large Format Fashion stores B. Online Retailers	A. Groups with Multiple Retail Formats + Franchise/ Distributor/ Licensing/Own Brand Operations
NON RETAILERS	B. Fashion Startups in manufacturing/ processing C. Fashion Startups Support & Enablers	B. Exporters, Manufacturers & Buying Houses of Fashion Lifestyle Products C. Trims & Embellishments D. Fashion Franchisees & Distributors E. Fashion Startups Support & Enablers	B. Fashion & Lifestyle Brands (without own stores/SIS) C. Fibres Fabrics & Finishes		
All Inclusive Annual Fee (GST extra)	₹10,000	₹30,000	₹50,000	₹1,00,000	₹1,50,000
Advertorial in Member's special issue	NA	NA	NA	1 Page, PR value worth ₹75,000	2 Pages, PR value worth ₹1,50,000
Feature/s, editorial coverage subject to Editorial guidelines in relevant Images Publication/ Research Books/ coffee table books print/online (Data & information to be provided by members)	Subject to editorial approval	1 Page, PR value worth ₹75,000	2 Pages, PR value worth ₹1,50,000	5 Pages, PR value worth ₹3,75,000	8 Pages, PR value worth ₹6,00,000
Promo Banners in Indiaretailing.com portal /EDM (applicable as per category)	NA	Up to ₹30,000	Up to ₹50,000	Up to ₹1,00,000	Up to ₹1,50,000
Entry Pass for India Fashion Forum Conference, Master Classes, Workshops, Exhibitions, Trend Arenas & India Brand Show	1 Pass free worth ₹15,000	1 Pass free worth ₹20,000	2 Passes free worth ₹40,000	4 Passes free worth ₹80,000	6 Passes free worth ₹1,20,000
Special Invite for Power Breakfasts & Networking Lunches	NA	1 Pass	2 Passes	4 Passes	6 Passes
Awards & Gala Dinners	NA	1 Pass	2 Passes	4 Passes	6 Passes
a. Research Reports & Publications-Print & eReport b. Publications Subscription - Print & eMagazine (Business of Fashion & Images Retail)	E-Subscription : ₹3,000	a. Research Reports worth ₹5,000 b. Subscription : ₹1,800	a. Research Reports worth ₹10,000 b. Subscription : ₹1,800	a. Research Reports worth ₹20,000 b. Subscription : ₹1,800	a. Research Reports worth ₹35,000 b. Subscription : ₹1,800
Business connects	NA	10 connects, worth ₹5,000 per connect	15 connects, worth ₹5,000 per connect	30 connects, worth ₹5,000 per connect	50 connects, worth ₹5,000 per connect
CEO's picture & profile in 'Who's Who' page on indiaretailing.com website	NA	Yes, PR value worth ₹1,00,000	Yes, PR value worth ₹1,00,000	Yes, PR value worth ₹1,00,000	Yes, PR value worth ₹1,00,000
Speaker / Panel discussion opportunities (Subject to availability of slots)	Subject to board approval	Yes	Yes	Yes	Yes
Presence at India Fashion Forum website	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000	Member's logo with URL Link PR value worth ₹1,00,000
Images Fashion Awards processing fee	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)	2/3rd waiver on awards processing fee (in applicable categories)
Lounge Access at India Fashion Forum	Space for business meetings	Space for business meetings	Space for business meetings	Space for business meetings	Space for business meetings
Catalogue wall at India Fashion Forum	Display & distribution of catalogues/ company brochures (Quantity 50 worth ₹5,000)	Display & distribution of catalogues/ company brochures (Quantity 100 worth ₹10,000)	Display & distribution of catalogues/ company brochures (Quantity 150 worth ₹15,000)	Display & distribution of catalogues/ company brochures (Quantity 200 worth ₹20,000)	Display & distribution of catalogues/ company brochures (Quantity 250 worth ₹25,000)
Deliverables worth	₹1,23,000	₹3,91,800	₹5,41,800	₹10,21,800	₹15,31,800

*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
▶ Priority in processing of your application for 'Trusted Mark' Certification.

For Privilege membership: Anil Nagar: +91-9811333099, anilnagar@imagesgroup.in | **Priti Kapil:** +91-9868801869, pritikapil@imagesgroup.in

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TRADE FAIR MEGA ISSUES

IMAGES

BUSINESS OF FASHION

June, July & August 2018

The industry will soon be buzzing with Trade Fairs and Brand Buyer Meets. Let your brand travel to the Fall-Winter Shelves of all the top retailers in India with IMAGES Business of Fashion magazine.

The **June, July & August 2018 issues of IMAGES BoF are TRADE FAIR MEGA SPECIALS** that will be prominently visible at all major fairs across Maharashtra, Gujarat, Punjab, Chandigarh, Delhi, Uttar Pradesh, West Bengal, Assam, Odisha, Andhra Pradesh, Karnataka, Tamil Nadu and Kerala. The issues will empower fashion retailers with insights and options to facilitate their Fall Winter planning.

REGULARS:

- FASHION INNOVATION ● FASHION BUSINESS
- FASHION RETAIL ● FASHION CREATION
- FASHION E-COMMERCE & OMNICHANNEL

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