

IMAGES

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THE KNIITWEAR SPECIAL

ALSO IN THE ISSUE

- // Fashion Business
- // Fashion Innovation
- // Fashion Creation

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

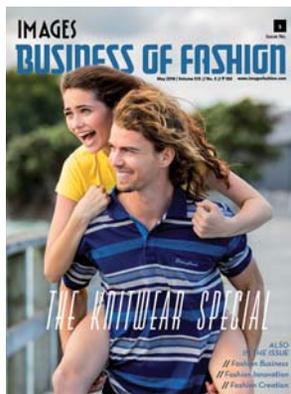
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Cover Picture Courtesy: Duke

Stores



Wrangler

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Vajor

Pg No.44



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.

Pg No.58-59

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.

Pg No.60-61

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.

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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 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.

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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.

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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.

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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?

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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.

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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.

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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.

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DISTRUBUTOR

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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- 153 Status Quo
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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



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



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.

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**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.

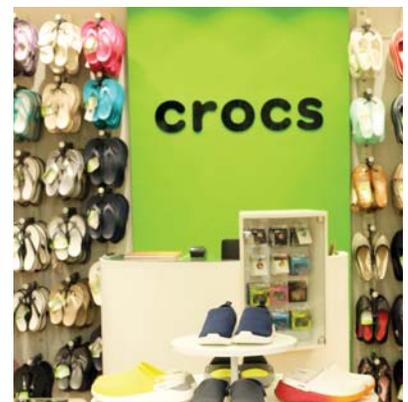
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Launch

**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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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.





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



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