

BUSINESS OF FASHION

June 2018 | Volume XIX // No. 6 // ₹ 100

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THE SHIRTS & TROUSERS SPECIAL ISSUE



Mr. Pothyraraj, (on right) Managing Director, Otto Clothing Pvt. Ltd. receiving the India's Most Trusted Menswear Brand Award from Mr. Sachin Bhosle, Research Director, The Brand Trust Report



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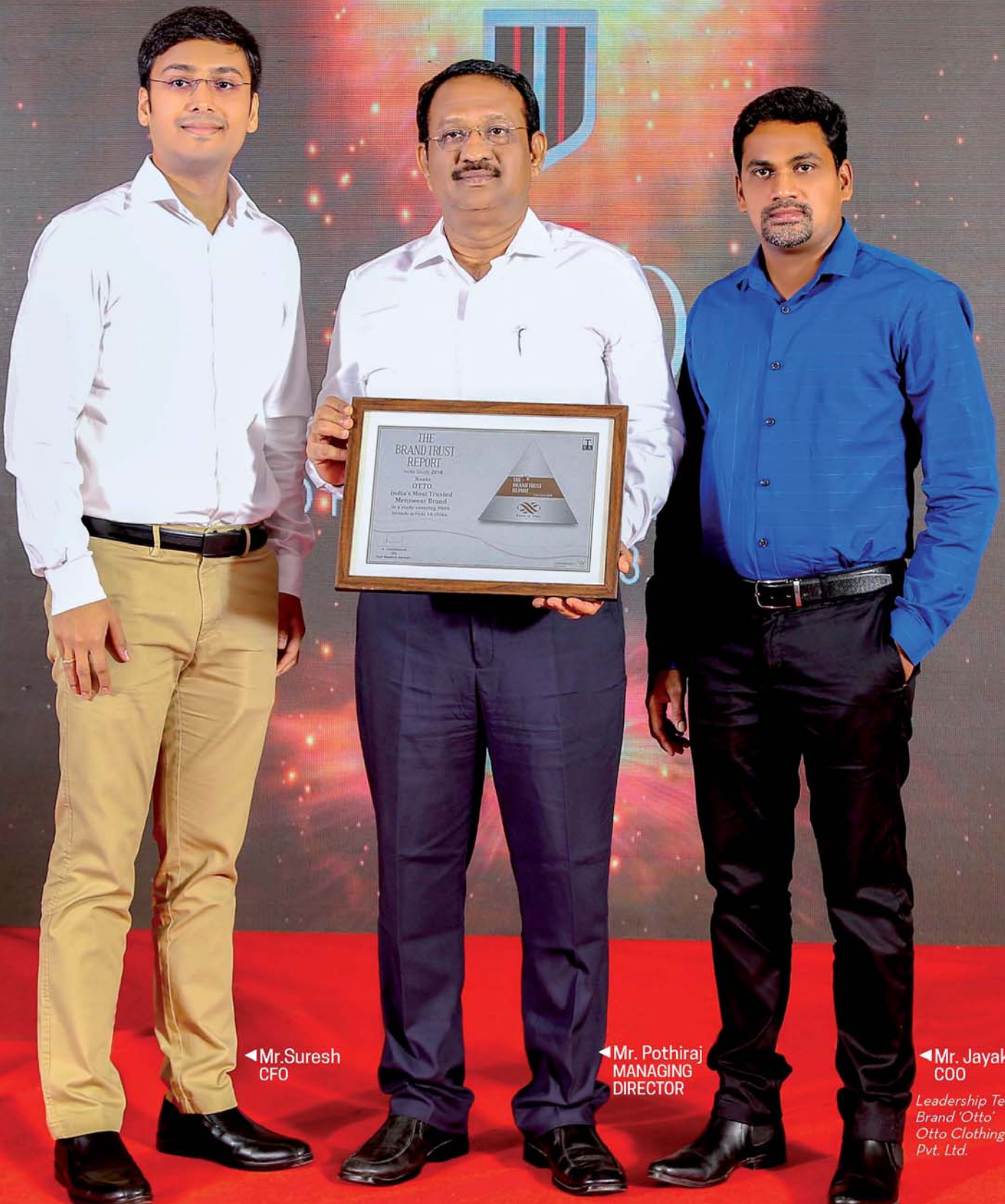


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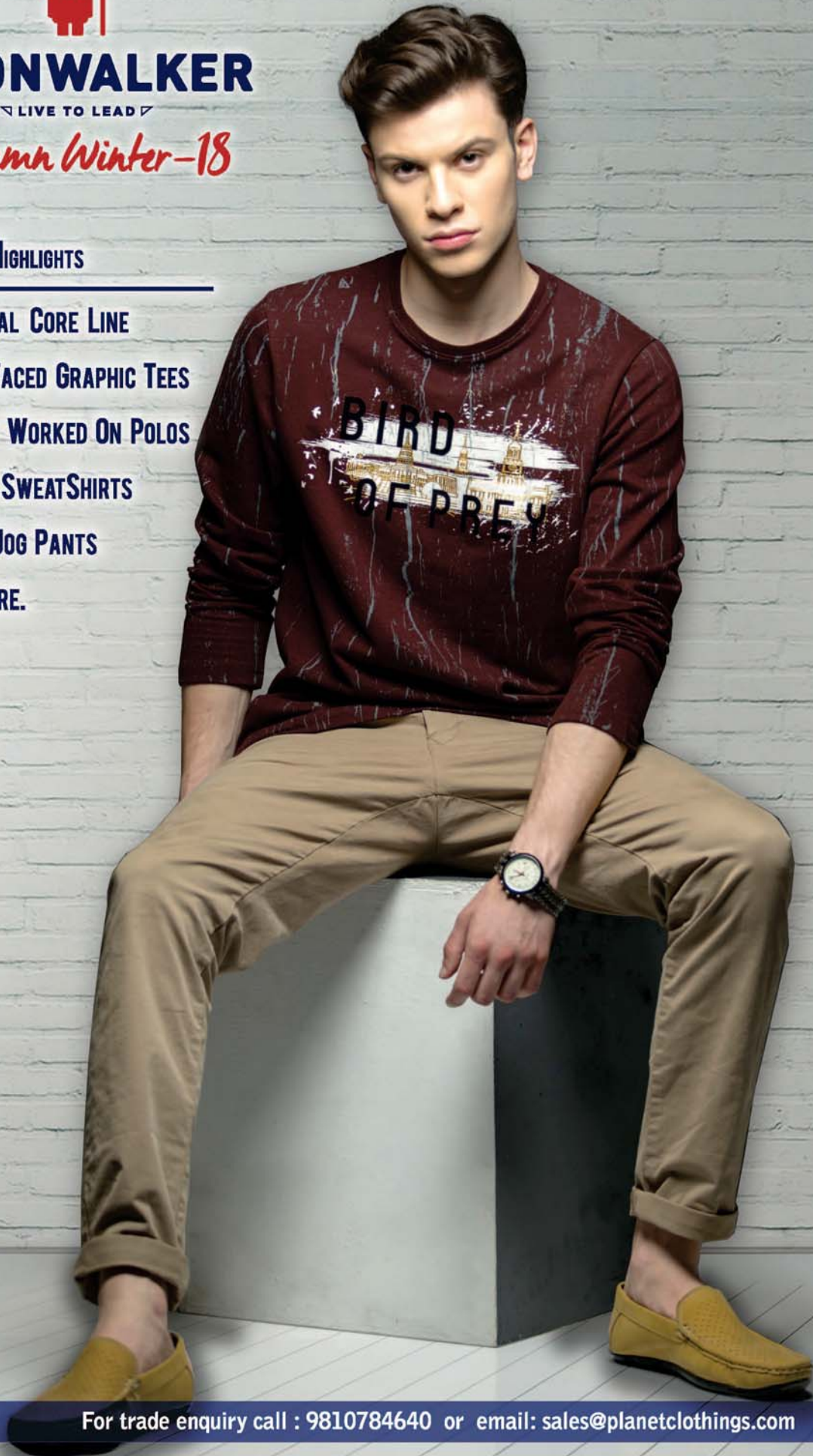
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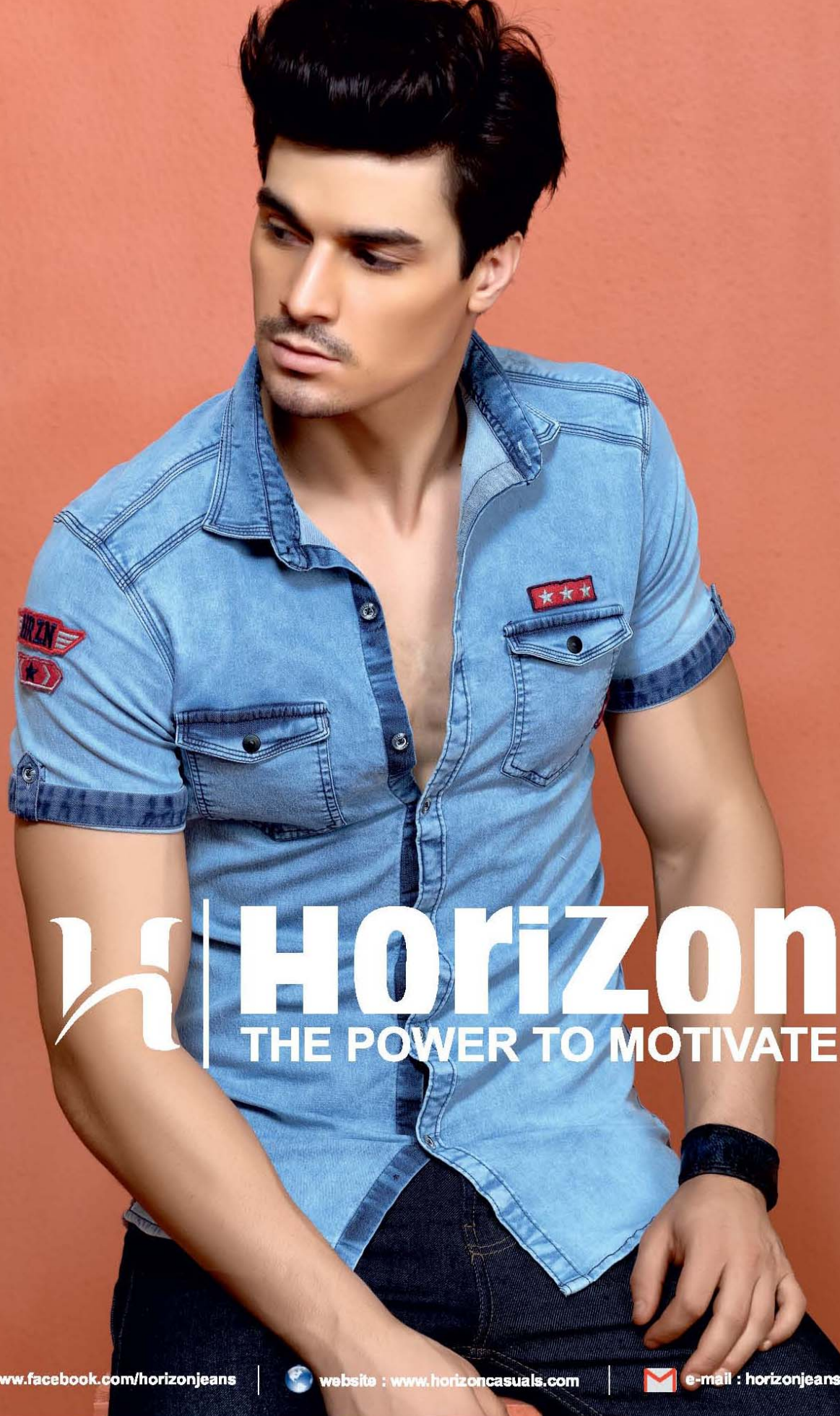
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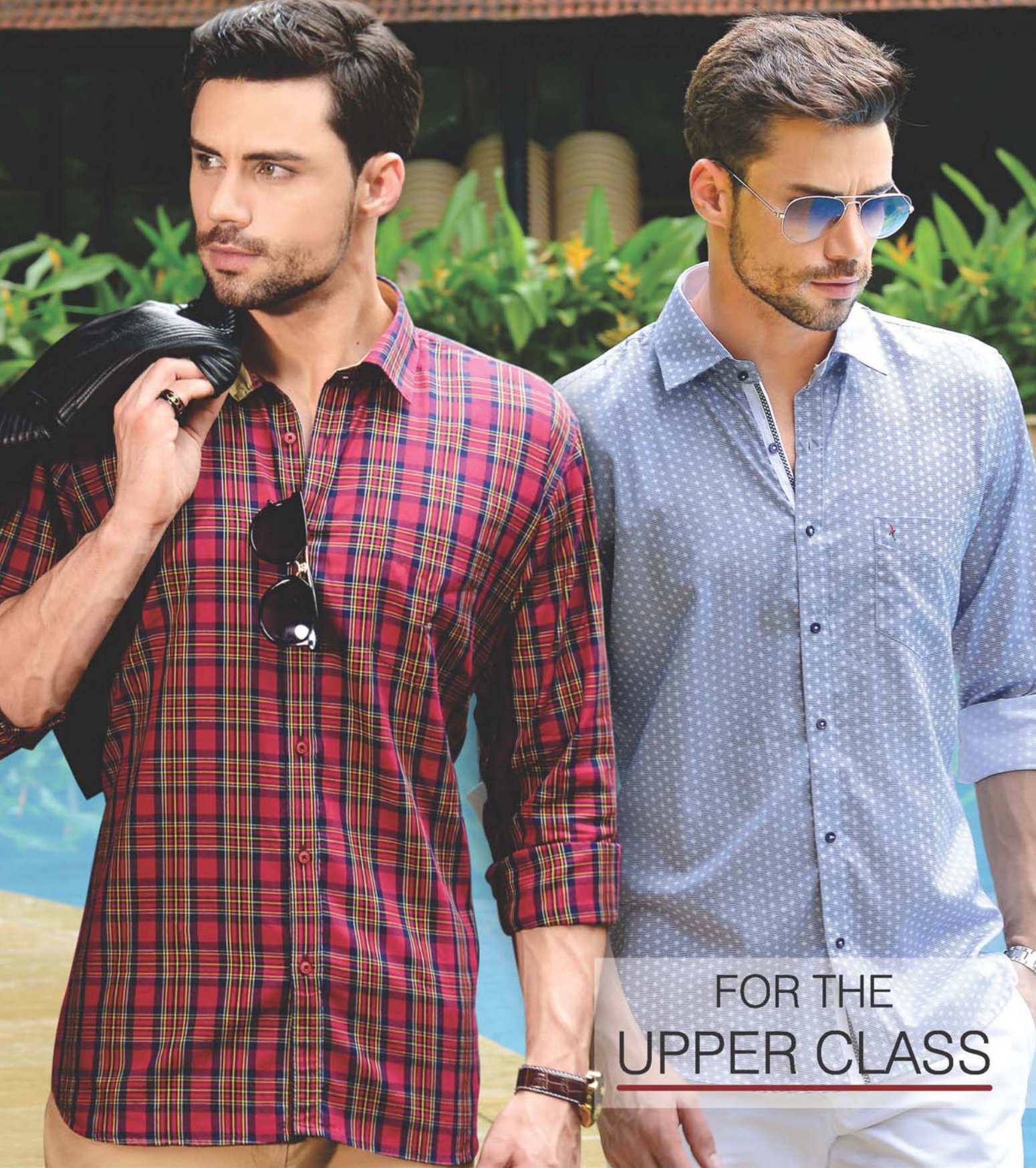
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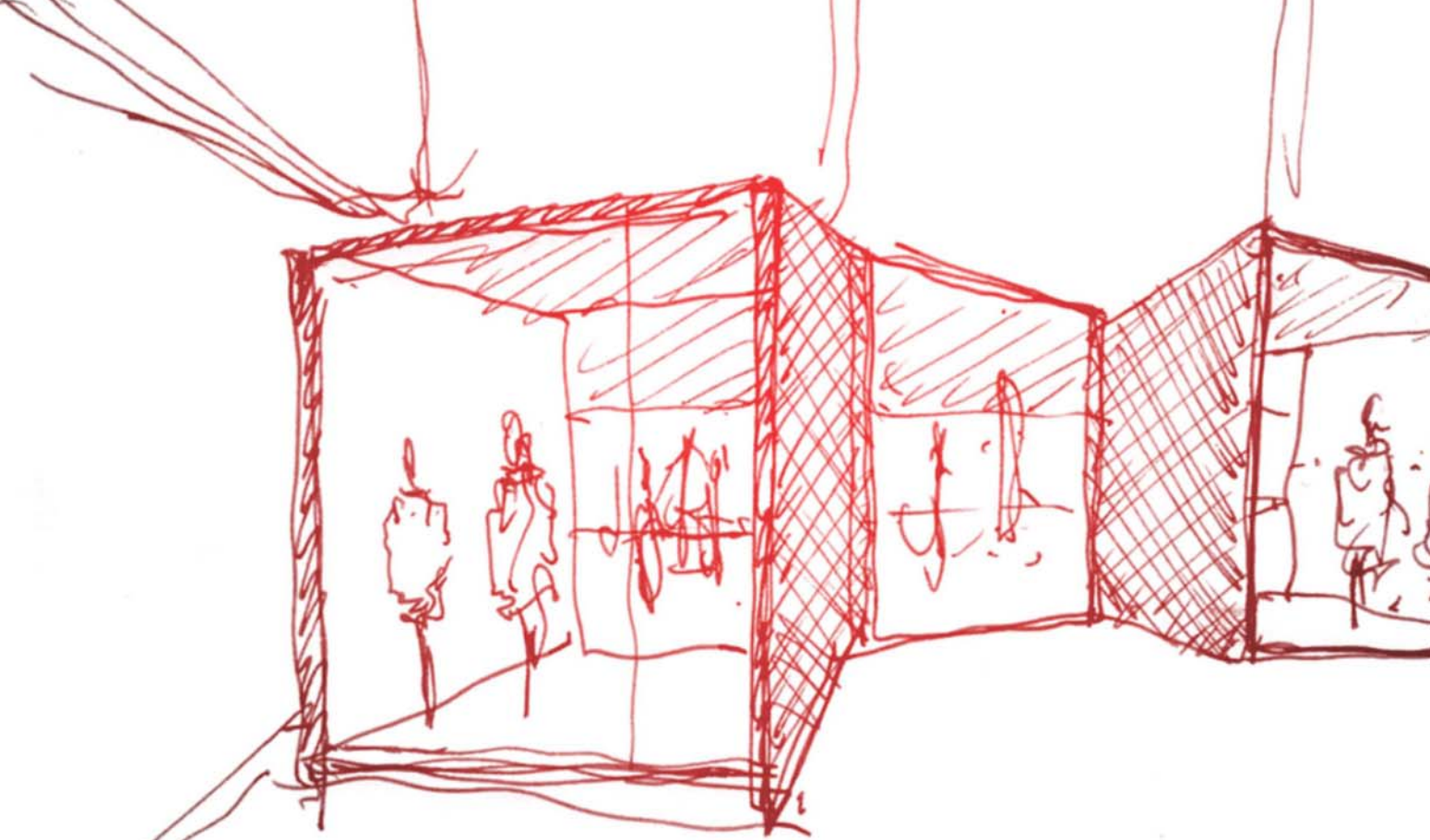


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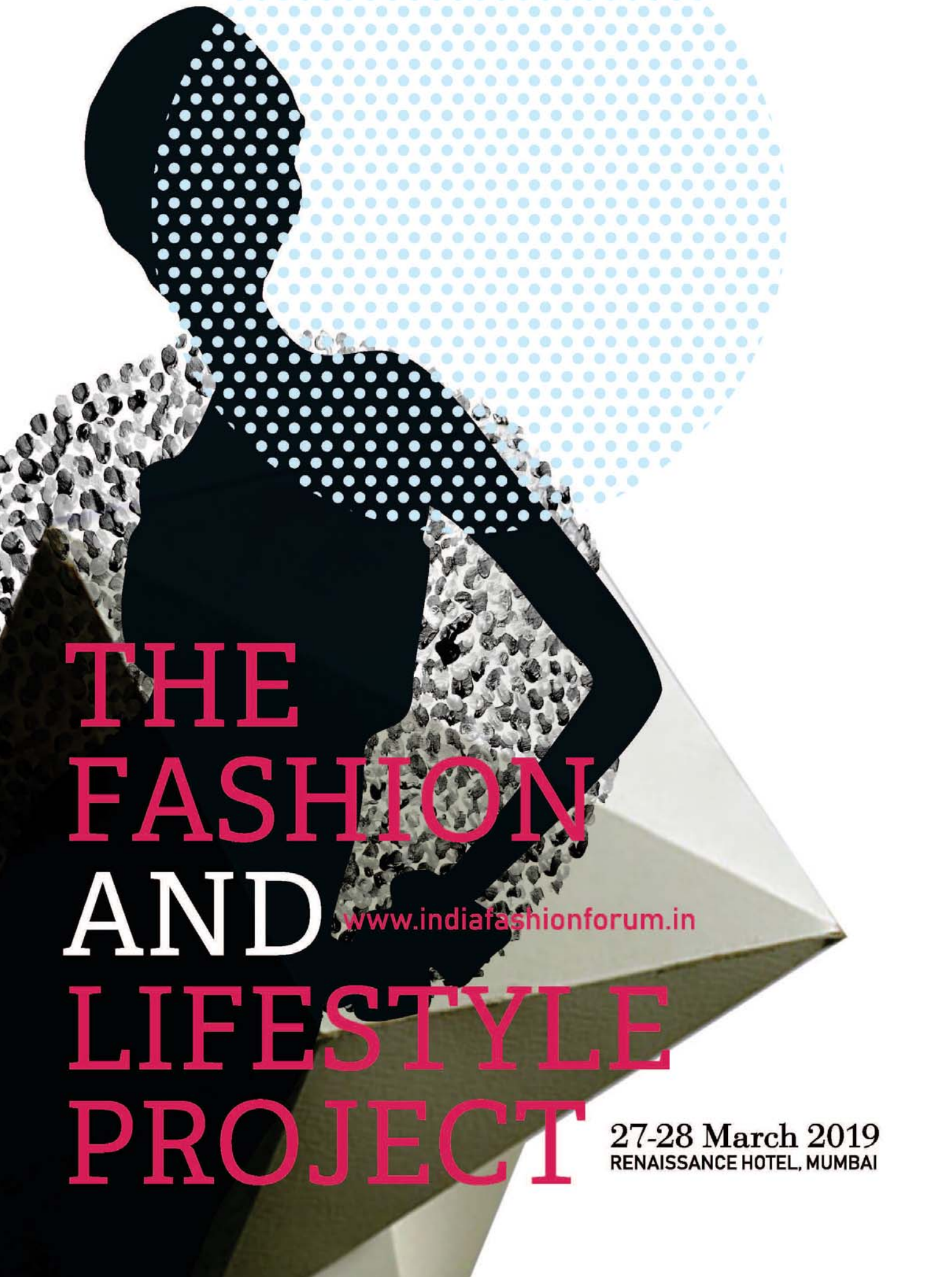
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BRIGADE

Dear friends,

There are two categories that have endured the test of time and still reign as the most popular apparel options, for men and women, around the globe — shirts and trousers. However, with the evolving times the preferences of consumers too have undergone massive changes. Indian consumers today are embracing the idea of fashion as a means of self-expression, and not merely as a functional purchase. The new generation is now at greater liberty from the traditionalist's sartorial template. Over the years both these fashion categories have been subjected to metamorphosis of mammoth proportions, yet the appeal remains the same. In this issue of IMAGES BoF, we look at the ever expanding market of these categories, the innovations that it has been subjected to so as to keep abreast with changing times, and the preferences and latest trends in the Indian market today.

Shirts continue to be the largest men's apparel category in India, and are now also one of the fastest growing categories in women's wear. So, this month apart from elaborately discussing the shirts market in India, we have also made the best of our efforts to cover the pressing subjects that pose a challenge to both these apparel segments. As the lead research reveals, shirts accounts for 12 percent of the total domestic apparel market and were estimated at ₹39,659 crores in 2017. As one of

the fastest growing markets, it is expected to grow at a CAGR of 6 percent to become ₹69,361 crores by 2027.

On the other hand, trousers are still holding ground against the denim invasion these past few years, and are expected to grow at a CAGR of 6.5 percent over the decade and are estimated to reach ₹78,480 crore by 2027.

The feature on the growing trend of bespoke fashion stands as a testimonial to the ever evolving preferences of the Indian consumer, who hesitated to accept readymade garments till the late 80s. We have top designers accentuating on the imperative need of innovation in men's shirts and trousers as well as throwing light on the latest cuts and trends of the season. In addition, the issue also features detailed accounts on the evolving preferences and innovations of both shirting and trouser fabrics that are fast changing the face of the industry.

This edition indeed makes a powerful attempt at analyzing the trends and consumption behaviour of the Indian shirts and trousers market to aid upcoming as well as existing brands establish strong brand equity, and, as part of the Trade Fair Special Series of IMAGES BoF, we are confident of its positive catalysis of the business of fashion in India.



Amitabh Taneja

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LETTERS TO THE EDITOR

I really look forward to Images BoF every month. It is my favourite business magazine. Kudos to the team for compiling content which are apt and to the point. This May issue was outstandingly great and very well put together.

-Damini Merchant, Retailer, Gurgaon

Images BoF is a value addition in the B2B publication. Profiling major knitwear brands in May issue was extremely meticulous and it was enthusing to read how the top players in the industry have overcome material and pricing challenges.

-Dashrath Pratap Chauhan, Retail Analyst, New Delhi

Discovering the editorial brilliance of freshly wrapped issues of Images Business of Fashion every month have influenced me highly. From a subscriber to a regular delegate at India Fashion Forum every year, my business has taken several leaps forward.

-Ganeshan Nambiar, Entrepreneur, Kochi

I have always wanted to write a letter to Images BoF. I have become a more informed and smarter businesswoman by reading and understanding the core of fashion retail business.

-Elena Kapoor, Fashion Designer, New Delhi

Images BoF is such a big part of our trade business meetings. A whole lot of worthy information for our business ideas.

-Harneet Singh, Wholesaler, Jalandhar

I believe that every difficult circumstance is an opportunity to move ahead in life. Images BoF talks to professionals about their journey which I appreciate and admire and as they open up themselves to the reader it gives me reassurance - any situation can be dealt and every problem has a solution.

-Primrose Gulati, Entrepreneur, Noida

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<u>Gate Fold</u>	SWEET DREAMS, MONZA, COOL COLOURS, TNG
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FASHION RESEARCH

- MILLENNIALS
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//EVENTS //DISCUSSIONS //INITIATIVES

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Cover picture courtesy: Blackberrys

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CONSUMER INSIGHTS

ABOVE & BEYOND THE MILLENNIALS

Experts from Kantar IMRB share insights on how the rising urban Indians are the latest fashion consumers pushing the retail market worth at a promising CAGR of 9.7 percent.

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E-COMMERCE

Growth of E-commerce in Indian Fashion

Amit Gugnani, Sr. Vice President, Fashion - Textiles & Apparel, Technopak highlights on how e-tailing can be expected to augment the growth of traditional retail in India along with consolidating wholesale and distribution channels.

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INTELLIGENCE

Intelligent Retail

Samik Roy, Country Head, Microsoft Business Applications, shares that how retail is one of the few industries which witnessed early impact of digital transformation in the form of e-commerce.

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CONSUMER XPERIENCE

CX: Building Customer Centric and ROI Driven Omni-Channel Journeys

Mukul Bafana, CEO, Arvind Internet, anchors a round table panel that talks about a successful omni-channel model where both the customer and brand win.

Pg No.90-93

BUSINESS & INNOVATION



CONFERENCE

MASTERCLASS NIFT & US UNIVERSITIES

A one of a kind master class, on the second day of IFF 2018, featured faculty members from National Institute of Fashion Technology, Iowa State University, University of North Texas and Auburn University, discussing trends affecting small independent retailers in India.

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LAUNCHES

Siyaram Launches Apparel Brands

Mozzo & Inspiro

Siyaram launched its apparel brands - Siyaram's Mozzo and Siyaram's Inspiro at the All India Dealer Conference in Goa.

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INITIATIVE

Usha Silai Bridging Rural Workpool to Urban Fashion Market

Usha International Ltd., in consultation with IMG Reliance, launched the sustainable fashion label Usha Silai at Ogaan, one of India's pioneering multi brand fashion store.

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EVENT

CENTRESTAGE 2018: The Asian Fashion Spotlight

Asia's fashion spotlight event returns with Centrestage, a unique promotion platform dedicated for international, especially Asian, fashion brands and designer labels.

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CELIO

Collection

The new Celio store will offer a complete wardrobe of effortless fashion for today's active and urban men through four fashion lines – essentials, casual, denim and smart – including shoes and accessories.

Store Theme

This one of a kind concept store is inspired by the Parisian design values of the brand.

Store Interiors

The store is aesthetically designed using minimalistic settings using metal and wood for major fittings and fixtures. The store dons an edgy look with a cement floor and open architecture resembling a loft. The store has created a rugged whitewashed brick wall to showcase the latest denim collection. Celio has also added subtle elements such as books, rugs, plants and cushions to create a vibrant yet comforting atmosphere at the store.



BRAND:
Celio

PROMOTER:
Celio Future Fashion Pvt. Ltd.

LOCATION:
Kochi (Lulu Mall)

SIZE OF THE STORE:
800 sq.ft.



Love Moschino LAUNCHES ITS FIRST FLAGSHIP STORE

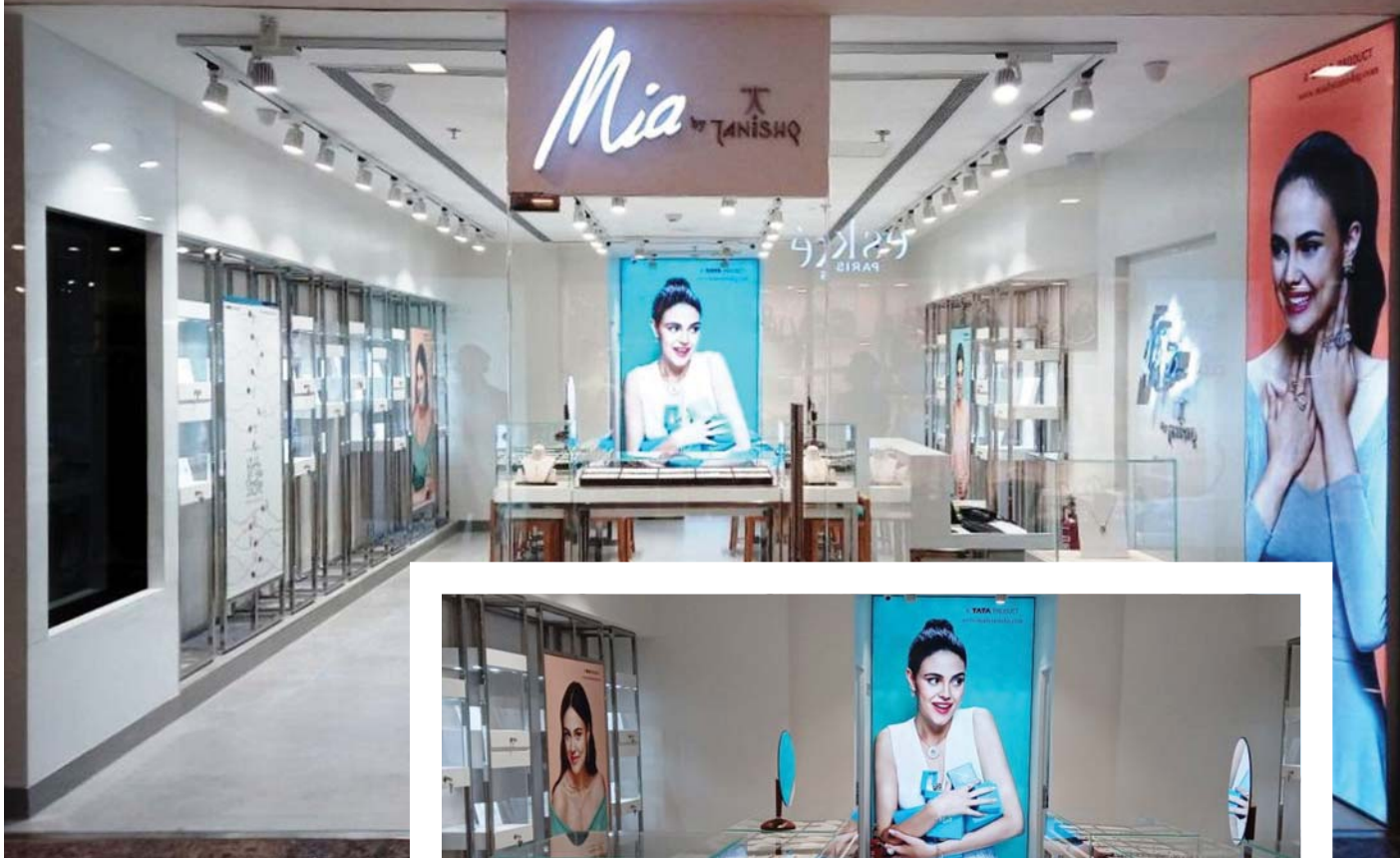
Samar Lifestyle Pvt. Ltd., expands its portfolio in India and forays into luxury retail with the launch of Love Moschino, the iconic Italian luxury fashion brand. Spreading across 1,060 sq.ft., the company unveiled the first flagship store of the brand at Mumbai's premier luxury shopping destination, Palladium Mall. The luxury fashion brand is all set to romance its patrons and win over their hearts with its quintessential eccentricity through a range of merchandise for women.

This newest fashion stop boasts a whole bunch of playful accessories from bags and wallets to clutches and fanny bags as well as key chains amongst others. The store will retail Love Moschino's Autumn Winter 2018 collection along with some of its best selling products like quilted bags and backpacks with iconic Love Moschino prints. Later, the footwear range will also be introduced.

At the launch, Mouli Venkataraman, COO, Samar Lifestyle Pvt. Ltd., said, "We are proud to present Love Moschino at its first ever exclusive store in India. Strategically placed at Palladium Mumbai, it represents the best of fashion from the international market. This Italian luxury label has already set major fashion standards globally and is now all set to woo and garner the same loyalty in India."

Talking on the brand expansion plans Venkataraman said, "We will be adding footwear to our range which will add more glamour to the brand in India. Nevertheless we are soon going to open one more outlet in Ambience Mall, Gurgaon. We will concentrate our strategies in opening exclusive stores to build the brand in India."





MIA BY TANISHQ

Collection

Featuring a wide range, the collections from Mia are designed to accessorize for every moment and every occasion, from desk-to-dinner with effortless ease. Mia by Tanishq presents for the woman of today, jewellery crafted in 14 kt gold. The jewellery brand has over 600 designs including earrings, finger rings, bracelets, pendants and neckwear starting at ₹3,999.

Store Theme

Mia by Tanishq stores are renowned for their trendy fashion offerings and exceptional product portfolio categorised into concepts. The space is done up in soothing shades of white, grey and steel with the excitement of occasional colours.

Store Interiors

Born with the heritage and the legacy of Tanishq, Mia is a brand of bold, modern and chic jewellery. For the young and the stylish, Mia by Tanishq crafts gold jewellery for everyday wear, in designs that are unique, minimal and extremely versatile. Hence, displaying the contemporary and chic taste, the new store has been quintessential done with strategically positioned shelves and merchandise. Mia by Tanishq endeavours to provide world class and unique jewellery shopping experience with an unbeatable retail ambience.

BRAND:
Mia by Tanishq

PROMOTER:
Titan Company Ltd.

LOCATION:
Delhi (Ambience Mall, Vasant Kunj)

SIZE OF THE STORE:
503 sq.ft.





SS HOMME

Collection

At the newly opened SS Homme flagship store, one can choose from an exquisite collection of bespoke suits, sherwanis, bandhgallas and embrace the traditions and spirits of wedding with bright colours, quintessential silhouettes and classic new age tailoring.

Store Theme

The studio has been customised and designed to create the most bespoke and insightful experience for its patrons.

Store Interiors

With the sole aim of progressive fashion, the ensembles at SS Homme are a seamless blend of geometrical and symmetrical illusions that give a perfect twist to modern day menswear, while the interior of the store is a canvas lit with shades of grey combined with pine and gold accents. Hints of grey marble, velvet and silk have also been incorporated to highlight the different monochromatic textures of the store. The soul essence of the design aesthetics of the store lies in the hand drawn elements which depict the various intricacies of menswear and its luxury par excellence, making it one of its kind for today's avant-garde gentlemen. Elegant, decorative yet minimalistic designs and angular silhouettes of the studio interiors bring alive new-age tailoring beaming with radiant vibes.

BRAND:
SS Homme

PROMOTER:
SSentialist Clothing Pvt. Ltd.

LOCATION:
Mumbai (Khar West)

SIZE OF THE STORE:
3,500 sq.ft.





SUPERKICKS

Collection

The store hosts brands that have been in the sneaker business since a long time and whose shoes have attained cult status. These brands are Adidas, Asics Tiger, Nike, Puma, Reebok, New Balance, Vans, Converse and Fila; including accessories like socks, caps and bags.

Store Theme

Superkicks is a one stop store for sneaker lovers who are obsessed about a good pair of kicks.

Store Interiors

The store is designed with a monochrome interior that are forms for creating space. As every element comes together the experience will be unlike any other, one of the important parts of the store concept is fudge and milkshake corner by Oh! Fudge which will serve some exclusive milkshakes with a twist. A vision appealing to the millennials this shoe store cum café is a meeting place for concurring people and sneaker enthusiasts to catch up with the latest releases and trends.

BRAND:

Superkicks

PROMOTER:

Superkicks India Pvt. Ltd.

LOCATION:

Mumbai (Khar)

SIZE OF THE STORE:

720 sq.ft.





SUNAR

BRAND:
Sunar

PROMOTER:
Sunar Jewels Pvt. Ltd.

LOCATION:
Delhi (South Extension, Part-II)

SIZE OF THE STORE:
2,000 sq.ft.

Collection

The jewellery store exhibits an impressive collection of designer bridal ornaments in polki and diamonds.

Store Theme

With a high end stylish ambience, the store promises to catch the fancy of fashion connoisseurs in Delhi with its heritage look and feel.

Store Interiors

The store interiors look right out of a Mughal Palace with the exquisite wall carvings and stunning mother of pearl inlays on the floor.

Store Designer

The architecture and interiors of the showroom have been done by Altus Luxury Living, a Delhi based design firm. Conceived under the aegis of principal designer Adetee Sawhney, the luxury showroom amalgamates art and beauty with a keen eye towards European style architecture, rich colours, exquisite craftsmanship and intricate detailing.





Collection

On display at the new store is a vibrant collection with a comprehensive mix of styles featuring an extensive range of kurtis, fashion bottoms like palazzos, churidars, trousers, dupattas and accessories to match every occasion, mood and personality.

Store Theme

W by TCNS Clothing is a premium fusion wear brand, which merges Indian and western sensibilities with an emphasis on distinctive design and styling. With this launch, the brand has moved ahead in its expansion, while strengthening its footprint in one of India's major cities. It will provide the latest designs and silhouettes, catering to a class of consumers who prefer buying quality products.

Store Interiors

The highlight of this store is the new retail store design adopted by TCNS to display the new categories of merchandise differently. The most prominent feature is the usage of white as the principal colour that helps better focus on colours of the merchandise. The new format is likely to highlight the brand better within the store. The display of merchandise too has been enhanced and various means have been deployed to showcase the merchandise better through podiums of display fixtures, lighting fixtures, taller display units amongst other elements.



BRAND:

W

PROMOTER:

TCNS Clothing Co. Ltd.

LOCATION:

Delhi (Kamla Nagar)

SIZE OF THE STORE:

800 sq.ft.



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ABOVE & BEYOND THE 'MILLENNIALS'

By Rashmi Nair,
Associate Vice President

Abha Kadav,
Consultant, Kantar IMRB

“Fashion is the armour to survive the reality of everyday life” said Bill Cunningham, the American fashion photographer for The New York Times. This seems to ring true with the Indian consumers today.

Rising affluence, urbanisation, digital revolution has transformed the way Indians think. We live in a visual world today where look and feel is what rules. We derive our gratification from the number of likes on Facebook and Instagram.

More than half (58 percent) of Urban Indians believe that they need to keep up with the latest fashions or that it is important to look good. And this is true across the generations.

It is envisaged that the current fashion retail market worth US \$46 billion will grow at a promising CAGR of 9.7 per cent to reach US \$115 billion by 2026

Source: Technopak article on Fashion - Textile & Apparel, October 2017).

However, to think of it, the Indian fashion industry has always been youth oriented, with most foreign investors making an entry in India attracted largely by the huge young population. While the youth will continue to be the growth engine for the Indian fashion industry as they have been in the past, there is likely to be improved contribution from across the age spectrum.

So, why are the other age cohorts important to the marketer at all?
NEARLY 40 PERCENT OF THE MARKET IN URBAN INDIA IS NON-MILLENNIAL

The relative sizes of different age based marketable segments underscore the need for taking the entire age spectrum seriously.

Proportion to Indian urban population	Millennials (19 to 35 yrs)	Gen X (36 to 50 yrs)	Emerging Silvers (51 to 55 yrs)
	50%	31%	6%

Source: Kantar IMRB's TGI



GROOMING DRIVES THEM TOO

There is hardly any difference in the desire to 'look good' be it a millennial or the 'Emerging Silvers'.

	Millennials (19 to 35 yrs)	Gen X (36 to 50 yrs)	Emerging Silvers (51 to 55 yrs)
I have a very good sense of style	46%	45%	48%
To be beautiful means to be young looking	44%	45%	47%

Source: Kantar IMRB's TGI

Be it sun glasses, perfumes or make up, the older generations are not the ones to be left behind. Rediscovering life in many ways they have both the desire and money power to acquire the finer things in life.

However, the older cousins of the millennials seem to be accepting products and services which may not always be tailored for their requirements.

	Millennials	Gen X	Emerging Silvers
Beauty Parlours/ Saloons Visited	56%	50%	45%
Sun Glasses Owned	78%	77%	78%
Perfumes Owned	15%	13%	11%
Any Make Up (Colours)	39%	32%	25%

Source: Kantar IMRB's TGI





WITH SOCIAL MEDIA COMES THE INHERENT NEED FOR 'VANITY'

Sharing their life online is an area which has picked up across the entire age spectrum. 42 percent of the consumers in urban India mention that they frequently use social media to give/get the opinions of friends. 39 percent of the consumers mention that they share their life with friends on the internet. Given the inherent visual nature of social networking, it is only logical that rewards are reaped by every player in the fashion and allied industries!

	Millennials	Gen X	Emerging Silvers
Usage of IM (WhatsApp, Facebook messenger)	25%	19%	17%

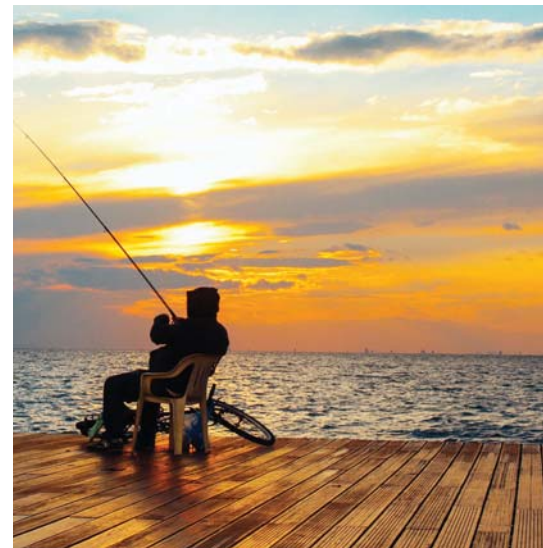
Source: Kantar IMRB's TGI

EMERGING SILVERS ARE LEARNING TO RE-LIVE LIVES YET AGAIN

Gen X and Emerging Silvers seem to be clearly wanting the good things in life! Interesting to note their endorsements on what typical Indian holidays used to be in the decades gone by! On that note, it is not surprising that all leading tour operators in India are now selling holidays off the beaten track and not typical pilgrimage packages.

	Millennials	Gen X	Emerging Silvers
I am willing to spend on a holiday abroad	42%	41%	43%
When I go on a holiday I only want to eat, drink and lie in the sun	37%	38%	39%

Source: Kantar IMRB's TGI



'Living life fullest' is the mantra across generations - in fact the 45+ can boast of a better lifestyle with relatively higher spend on entertainment.

All Figures in INR/ Month	2016	Housewife upto 34 years	Housewife 35-44 Years	Housewife 45+
Personal care	1220	1199	1225	1238
Entertainment & eating out	945	918	953	968

Source: Kantar IMRB's Wallet Monitor

So, what are the behavioural traits that differentiate them from other age groups?

#SUSTENANCE OF BEAUTY IS WHAT THEY SEEK

Middle age brings with it dependence on external solutions to tackle pressures of life. Conservatism in dressing up and beauty regime also seems to drive the middle aged consumers as they “settle in”, in life proverbially.

Indexed Numbers	Millennials	Gen X	Emerging Silvers
It is essential to go for a body / foot massage to be relieved of today's stress / strain	100	105	106
It is important for me to look well dressed	100	102	105
Using well-known brands gives status and prestige to a person	100	104	106

Source: Kantar IMRB's TGI



With old age comes wisdom, that beauty is NOT only skin deep, that clothes and grooming matter and that sustenance of beauty needs the aid of skin care products.

NEED TO RELOOK AT THE SIZE CHARTS

Gen Z are either under-weight or unaware (why care when the body works fine), Millennials move to a more normal range BMI. Weight issues start creeping in the middle age (Gen X) and become more serious in Emerging Silvers. Interesting to see that self-awareness about body improves as one ages.

BMI	Millennials	Gen X	Emerging Silvers
BMI: Normal (18.5 - 24.9)	44%	46%	46%
BMI: Overweight + Obese (25 +)	12%	17%	20%

Source: Kantar IMRB's TGI

Clear shift in BMI from the younger cohorts to the older cohorts evident (the percent of overweight increases from 10 percent amongst Millennials to 17 percent amongst Emerging Silvers).

This change in body contours seems to have an impact on their choice of dressing as well. Middle age onwards, consumers seem to be moving away from pre-stitched apparels such as jeans to apparels that need tailoring. Lack of standard sizing in the readymade garments could be one of the reasons for the same.

APPARELS	Millennials	Gen X	Emerging Silvers
Jeans	28%	21%	17%
Sarees	26%	31%	31%
Material for suits, jackets, blazers, trousers	25%	27%	26%

Source: KantarIMRB's TGI





DON'T JUST SELL THEM PRODUCTS – EDUCATE THEM!

TYPE OF SKIN	Millennials	Gen X	Emerging Silvers
Dry	7%	6%	6%
Oily	9%	9%	9%
Normal	42%	43%	39%
Don't Know/Can't Say	33%	33%	36%

Source: Kantar IMRB's TGI

It is interesting to see that skin related ignorance is really high in urban India, almost one-third of the consumers are unaware of their skin type. More so, ignorance seems to be highest amongst Emerging Silvers.

The same could be explained by the fact that these generations were out of the prime of their youth before the internet revolutionised lives.

LINK IT BACK TO THEIR ROOTS AND CULTURE

CULTURE	Gen X	Emerging Silvers
I am not in favour of the spread of so much western culture and habits	51%	52%
It is important to respect traditional customs and beliefs	46%	46%

Source: Kantar IMRB's TGI

Half the Gen X and Emerging Silvers believe it is important to respect traditions.

Close to half the consumers across ages exhibit a certain scepticism towards western culture and want to be rooted in the traditional belief system. However, they seem to exhibit their pluckiness by mentioning the importance of being attractive to the opposite sex and willingness to stand out in a crowd.

Implications of this dichotomy- the boundaries of fashion ought to move forward gradually, a parallel example can be taken from the Indian television content context. In this industry, content has rightly reflected gradually shifting social mores and hence has been very well accepted.

	Gen X	Emerging Silvers
I like to stand out in a crowd	52%	54%

Source: Kantar IMRB's TGI

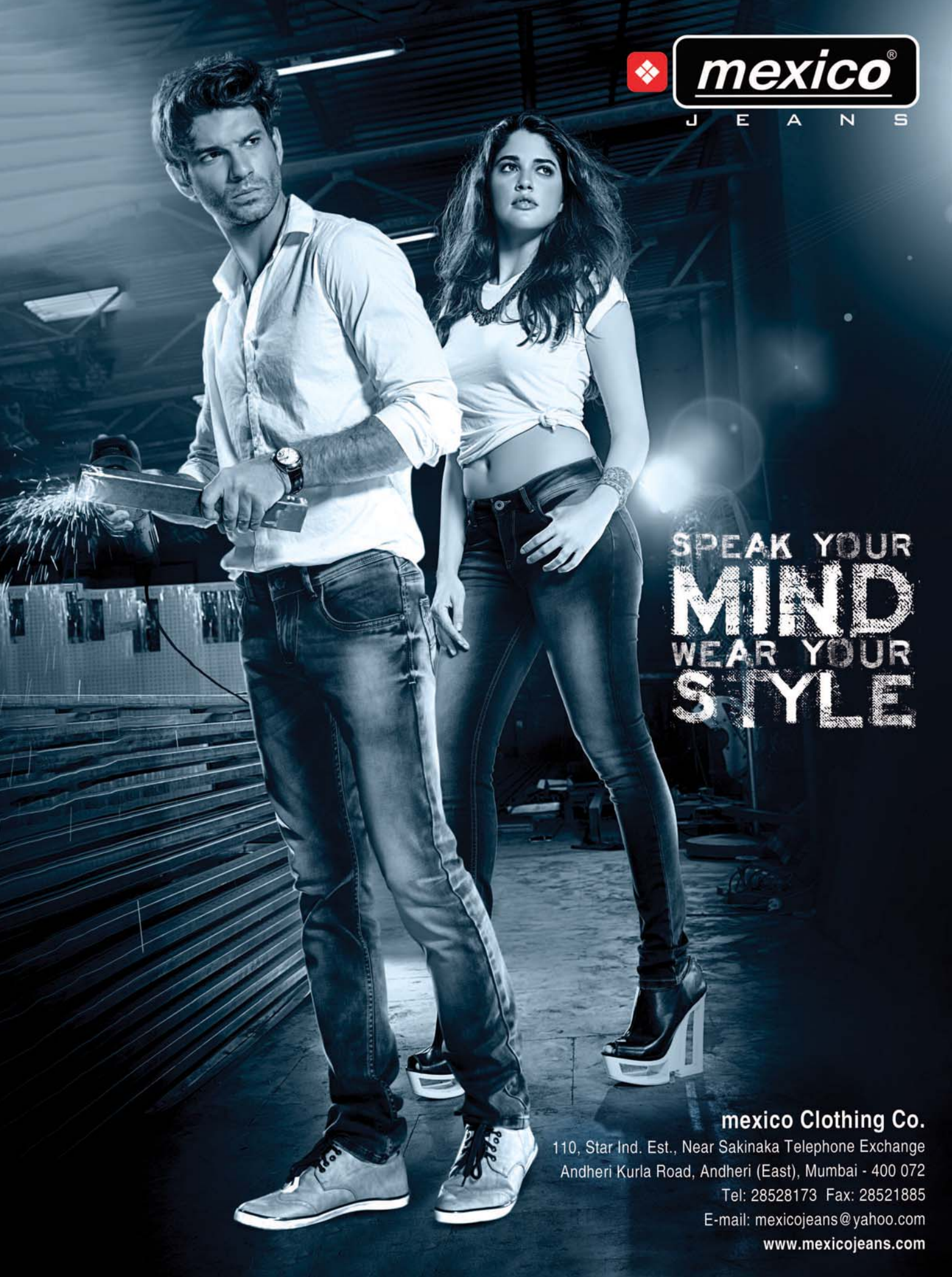


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DIGITAL WOULD BE THE PLACE TO FIND THEM TOO

Technology hasn't really left anyone untouched. While the magnitude of reach might be different across the younger and older consumers, the older consumers do exhibit enthusiasm towards new age media, technology, and benefits/conveniences that technology has to offer.

In fact, they are 33 percent more likely than the younger generation to inquire more about a product before purchasing online.

	Millennials	Gen X	Emerging Silvers
Internet accessed in last 1 week	38%	30%	26%
Online shopping	26%	22%	19%

Source: Kantar IMRB's TGI

This confidence with which they have embraced digital media opens up new avenues for product promotion and sales.

IMPLICATIONS FOR THE FASHION MARKETERS:

1. Look beyond millennials – Senior cousins of Millennials constitute close to 40 percent of the market, they are affluent and willing consumers.
2. Customise offerings – Right sizing and customised solutions is the way to reach them.
3. Offering expectations beyond apparel to beauty products, services, and accessories.
4. Don't just give products and services, educate them. Product knowledge would definitely warm them up to accepting categories more enthusiastically.
5. Push the envelope, but do so gently- Given that, our consumers seem to have a certain cultural baggage, wild trends might not be the right route to target them. Products and services that'll make them feel confident and attractive without testing their social mores are likely to find favour with them.
6. Technology can be a great partner for any activation and will straddle across the age spectrum. Make the information easily available and compiled at one source for easy navigation.



ABOUT THE AUTHORS:

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GROWTH OF E-COMMERCE IN INDIAN FASHION

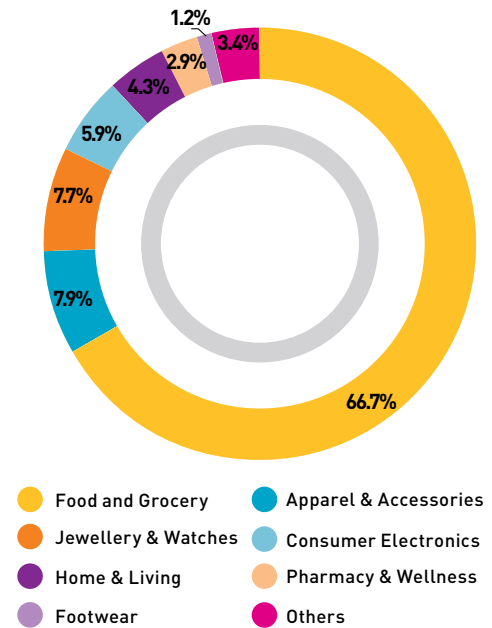
E-commerce is the future of retail, and is taking giant steps as technology is being redefined with each successive year. But, contrary to popular belief, e-tailing can be expected to actually augment the growth of traditional retail in India along with consolidating wholesale and distribution channels.

- By Amit Gugnani, Senior Vice President, Fashion - Textiles & Apparel, Technopak.

The Indian retail market is emerging as one of the most dynamic and fast-paced sector attracting several new domestic and international players. It accounts for over 10 percent of the country's Gross Domestic Product (GDP) and around 8 percent of the employment. India is the world's fifth-largest global destination in retail space. The Indian retail market is estimated at ₹46,15,000 crore (USD 710 billion) in 2017, and is expected to grow at a CAGR of 9 percent to reach ₹1,08,58,000 crore (USD 1672 billion) by 2027. Corporatized retail had only a share of 11 percent in 2017, out of which, E-retail accounted for meagre 2 percent (₹92,300 crore). After the implementation of unified taxation under GST regime, it is expected that the share of corporatized retail will increase at higher rate. With increasing penetration of internet in India, the acceptability of online shopping is expected to grow at a phenomenal pace.



EXHIBIT 1-INDIAN RETAIL MARKET SEGMENTTATION



Source Technopak Analysis

INDIAN RETAIL MARKET

The Indian retail market is primarily dominated by food and grocery (~67 percent) followed by apparel and accessories (~8 percent), jewellery and watches (~8 percent) and others.

India has witnessed a drastic shopping revolution in terms of retail formats, distribution channels and consumer buying behaviour. There has been an increase in purchasing power of consumers owing to the growth of middle class with higher share of disposable income, easy financial options, etc. The consumers today are more educated and well informed thus becoming more experimental and willing to try new products and new modes of purchases.

E-retail is one of the fastest growing formats in Indian retail market owing to the convenient and personalized shopping experience. The Indian

E-retail is estimate at USD 16.3 billion in 2017 and is expected to grow at CAGR of 45 percent to reach USD 49.5 billion by 2020.

E-TAILING IN INDIA

India is expected to become one of the world's fastest growing e-tail markets, driven by robust investment in the sector and rapid increase in the number of internet users. Under government initiatives like 'Digital India', internet has penetrated to 400 million users, 48,000 gram panchayats are connected by optical fibres under Bharatnet program and 120.8 million have access to broadband. The increasing spectrum of internet reach across geographies of India coupled with corporatization of apparel sector is paving way for emergence of e-commerce as a major retail channel in apparel category.

E-tailing evolution took place in India starting with books and media as the key category. Electronics joined the e-tail bandwagon next and apparel, lifestyle were the third product categories. The other categories that

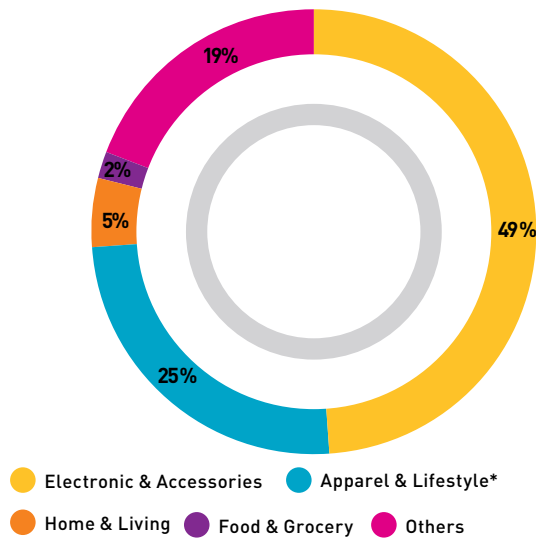
have found traction include baby care, home and living, etc.

At present, the e-commerce market is led by electronics category with a share of ~49 percent followed by Apparel & Lifestyle which is ~25 percent (including footwear, bags, belts, wallets, watches, jewellery, etc.). The adoption of E-tail in apparel and fashion industry is resisted by the consumers' willingness to touch-and-feel the product before making purchase decision. To address this issue, initiatives like cash on delivery, easy return and exchange, discounts and offers are being implemented to encourage consumers to use online channel for shopping.

E-tailing is in early stage but is growing rapidly and it will be further catalysed with the digital India program and structural reforms like GST implementation. Current share of e-retail in 'Apparel and Lifestyle'

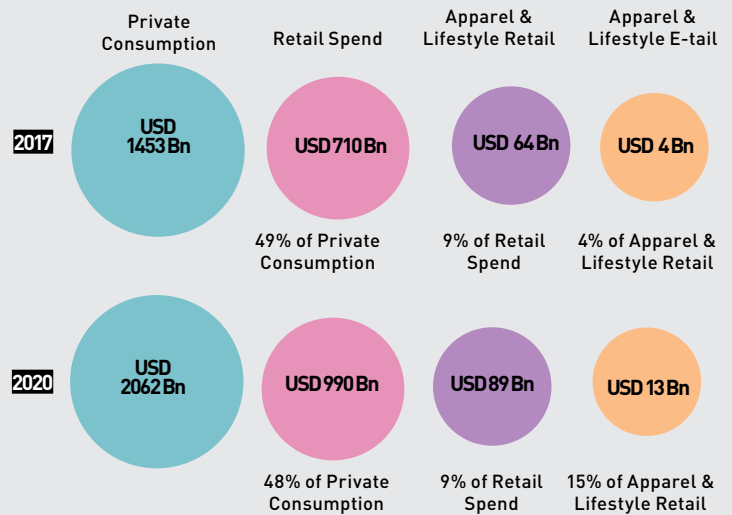
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EXHIBIT 2- CATEGORY SPLIT OF E-COMMERCE IN INDIA



*This will include categories like footwear, bags, wallets, watches, etc.

EXHIBIT 3- SHARE OF APPAREL AND LIFESTYLE SEGMENT IN E-RETAIL



-Lifestyle includes footwear, Bags, Belts and Wallets, etc

Source: Technopak Analysis



E-retail is one of the fastest growing formats in Indian retail market owing to the convenient and personalized shopping experience. The Indian E-retail is estimate at USD 16.3 billion in 2017 and is expected to grow at CAGR of 45 percent to reach USD 49.5 billion by 2020.

segment is estimated at 4 percent in 2017 and is expected to grow four times from USD 4 billion in 2017 to USD 13 billion by 2020.

E-Retailers have rapidly scaled up their product offerings, providing a wide choice to customers. Several players have adopted marketplace models (pure or managed) which has enabled them to offer more categories, more brands and greater market reach for brands. E-Retailers are opting for omni-channel retail model by opening their physical store to capture a bigger

market share. In addition, E-Tailers are also investing into studios to improve uniformity in product catalogue for different suppliers, thereby enhancing customer's shopping experience.

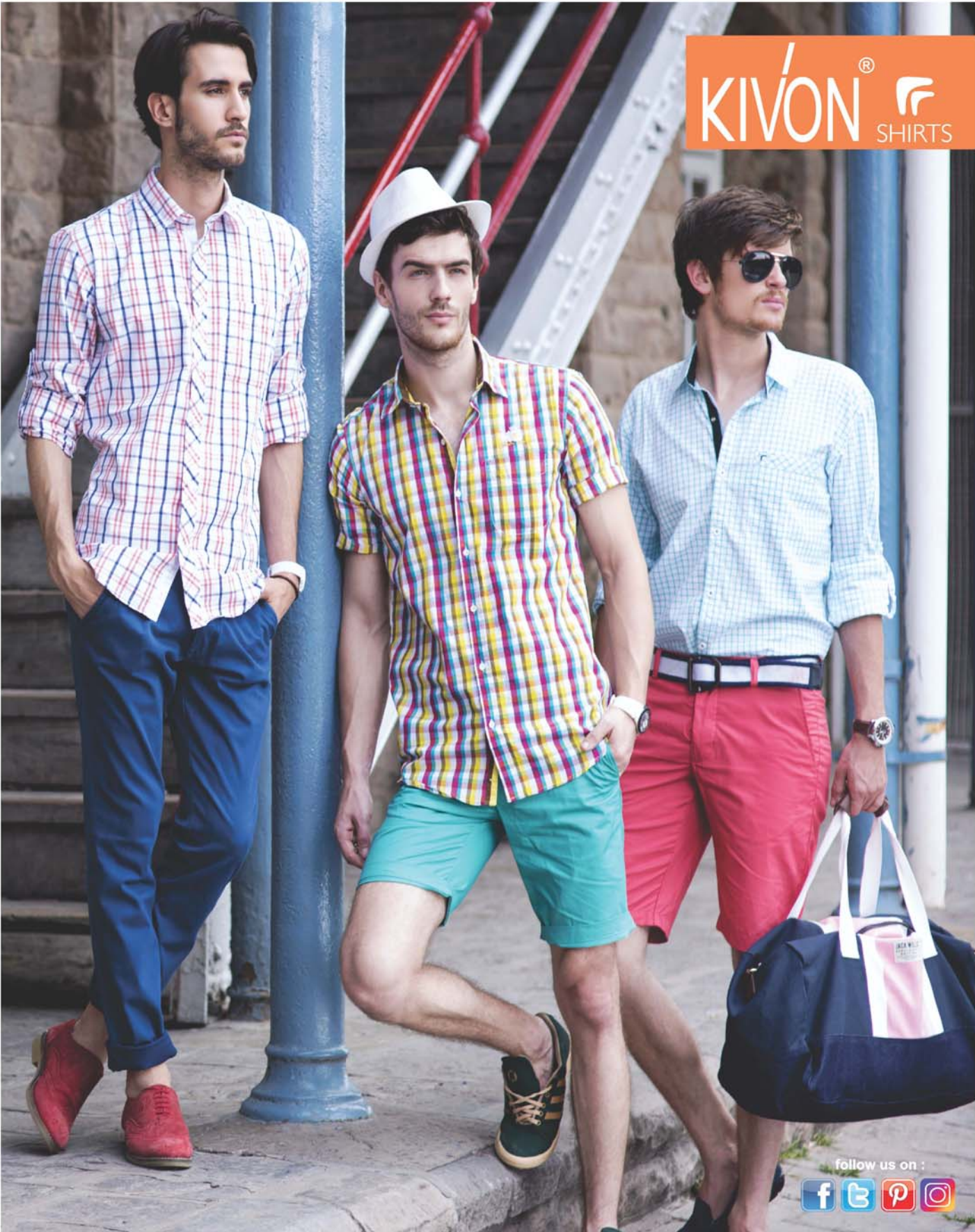
Along with faster and easier navigation, most e-tailers provide detailed specifications of the products to make it easier for consumers to make purchase decisions. For instance, high resolution pictures and zoom in features are provided on the website to showcase the details of the products. Multiple images from different angles enable detailed view of product. Measurement charts assist the customer to make the right fit decision in case of apparel products, etc.

KEY GROWTH DRIVERS OF E-TAIL IN INDIA

Indian online retail has witnessed a surge in recent years and is expected to swell up to ~15 percent of the total retail by 2020 from current contribution of 4 percent (2017) in apparel and lifestyle segment. There are multiple factors which contribute to the growth of e-tail in India.



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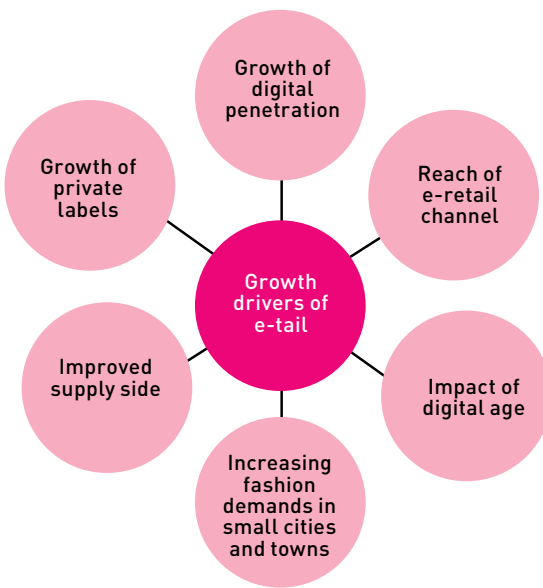
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EXHIBIT 4- KEY GROWTH DRIVERS OF E-TAIL IN INDIA



India is in the midst of a digital revolution. The number of internet users is likely to cross 650 million by 2020. It is expected that half of the population will be online in the next 3 years. Mobiles are the most preferred device to access internet. The availability and affordability of smartphones with access to cheap internet data coupled with the rise in disposable income is fuelling the growth of digital penetration.



Growth of digital penetration

India is in the midst of a digital revolution. The number of internet users is likely to cross 650 million by 2020 and it is expected that half of the Indian population will be online in the next 3 years. Mobiles have become the most preferred device to access internet. The availability and affordability of smartphones with access to cheap internet data coupled with the rise in disposable income is fuelling the growth of digital penetration.

Reach of e-retail channel

In next 3-4 years, more than half of India's incremental internet growth is expected to come from rural India. Additionally, the digital user demographic is expected to expand beyond the traditional stereotype, with a significant growth in female and older internet users by 2020. This will result in a larger market size across different geographies, age and genders and not just a small targeted group. The diversity in the internet users will facilitate an opportunity for online retailers to expand their product portfolio as per the increasing customer base.

Impact of digital age

Though, internet has penetrated to 400 million users today, but they are different in usage behaviour and needs. 60 percent of rural internet users go online using internet enabled phones and not smartphones. The major use of internet in rural consumers is limited to entertainment,





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The online purchase behaviour is best predicted by the 'digital age' (years spent online), and not by demographics. With an increase in digital age, the internet users even from rural areas are expected to use e-retail for making their purchase decisions.

education and social networking. The online purchase behaviour is best predicted by the 'digital age' (years spent online), and not by demographics. With an increase in digital age, the internet users even from rural areas are expected to use e-retail for making their purchase decisions.

Increasing fashion demands in small cities and towns

With the media exposure, rising awareness, growing aspirations and increasing share of disposable income, Indian consumers are looking to get access to global fashion brands. Limited reach of brick and mortar retail outlets of brands in smaller cities provides an opportunity for online retailers. Heavy discounts and promotions, availability of exclusive products, customized experience,

availability of global brands, etc. have made consumers residing in tier-II and -III cities and semi urban areas migrate to these online channels.

Improved supply chain and end-delivery logistics

E-commerce business is completely dependent on effective supply chain management. Successful supply chain management coordinates and integrates activities like manufacturing, operations, transportation and physical distribution of product with last mile connectivity to end users into a seamless process. For customer acquisition from traditional way of brick-and-mortar channel and their retention, it is necessary to provide customized shopping experience to the consumer by giving several convenience options like various payment options, mode of delivery, point of delivery, etc.

Growth of private labels

With increasing acceptability of private labels among Indian consumers, e-retailers are entering into this emerging segment. The access to exhaustive informative data on consumer's buying behaviour and preferences have provided an advantage to online retailers in terms of understanding the consumer's needs. With private labels, online retailers are able to increase their revenues owing to lower distribution overheads, lesser number of intermediaries and negligible marketing cost involved in private labels.

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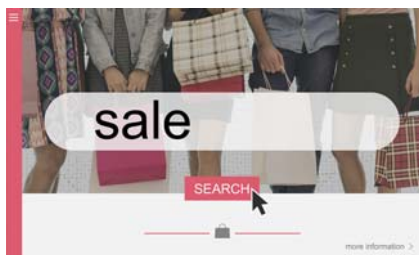
inability of logistics partners to provide service in those areas. Inadequate infrastructure such as poor conditions of roads, highway, etc., is one of the main challenges faced by the e-retailers resulting in a major roadblock in their growth story.

Inability to convert returns into retails

The conventional brick-and-mortar channel is able to convert the return of product into sales. Consumers when go to shop to return the product, they generally shop for other goods due to easy accessibility to other designs and variety in the shop, which is not the same in case of online shopping.

Different Drivers for online purchase

The purchase drivers are very different across different geographies, regions and population centres. Factors such as promotions, discount and offers are the key driving factor for online purchase across all the regions - metros, tier-I and II cities. But there are other region specific factors such as, availability of new products, better product assortments, easy return policy, express delivery options, etc., which drive growth in different cities and regions. Thus e-tailers have to develop different strategies for different regions and geographies.



KEY CHALLENGES

Despite high growth, e-tailers face several challenges in the country. Challenges and concerns related to e-tailing in India are enumerated as under:

Competitive intensity

Changing customer preferences and their competitive demand has made e-tailing a highly competitive business which results in cash-burn with regular promotions/discounts. High discounts by e-retailers to acquire customers have led to unreal customer expectations, low loyalty and losses.

Sub-optimal logistics and infrastructural bottlenecks

Most of the logistics companies do not have pan-India reach. As some regions are not easily accessible, retailers have to cancel such orders due to

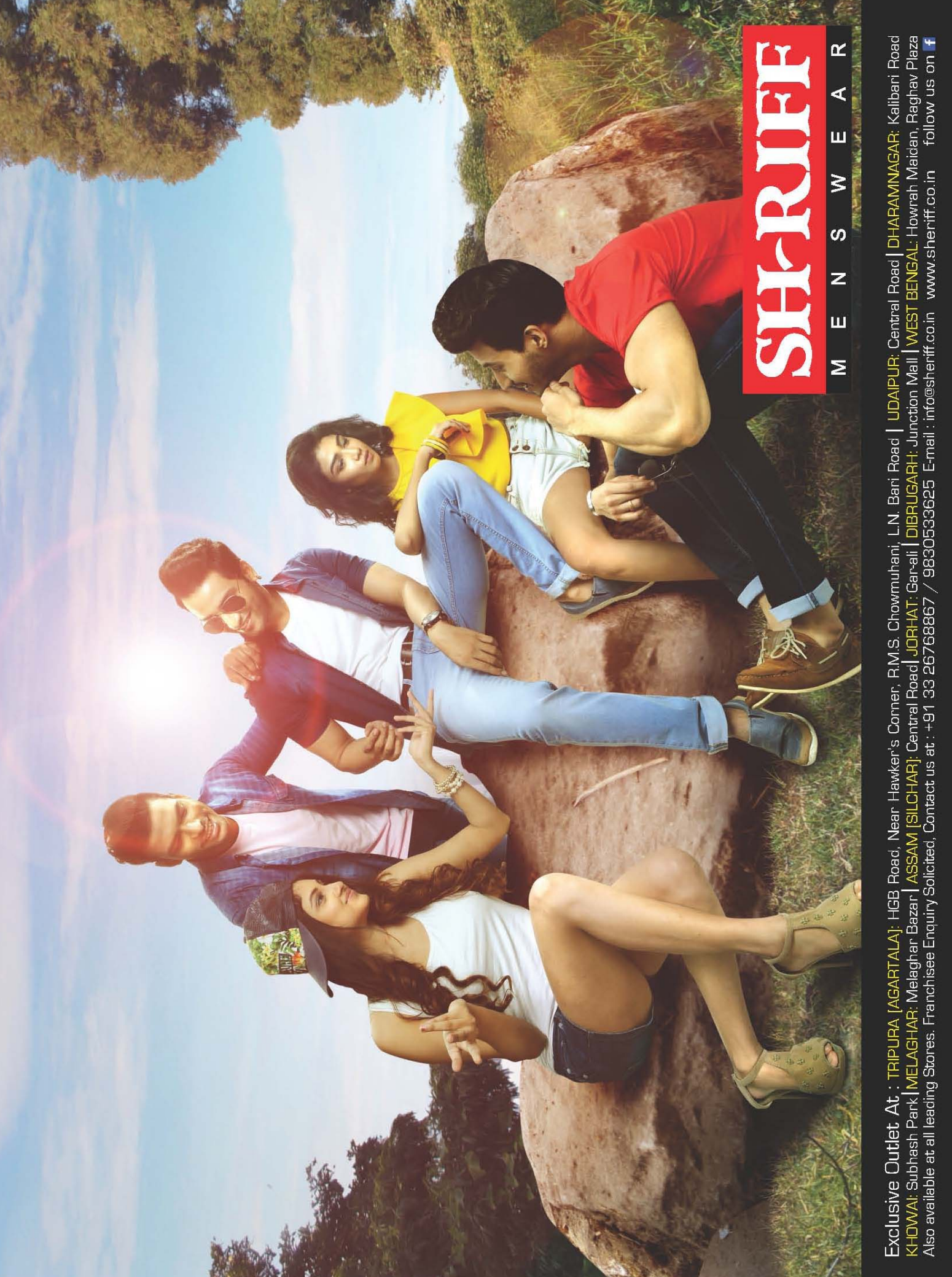


CONCLUSION

In the current shopper-centric era, Indian fashion industry is joining hands with technological advancements. Retailers are progressively accepting innovative ideas and tactics to create a memorable and personalized shopping experience, at the same time ensuring lower logistics and operational cost thus leading to higher revenues. With increasing internet penetration, e-commerce is expected to grow at relatively higher rate in comparison to conventional retail channels. With increasing acceptance of private labels within the Indian consumers, e-retailers are venturing into private labels.

E-tailing can play a crucial role in consolidating wholesale and distribution channels, and in developing India-specific business models. By virtue of the advantages discussed in previous sections, e-tailing can bring down the cost of distribution and can complement the growth of traditional retail. In future, e-retail is expected to take a step ahead in adopting omni-channel retail strategy, capturing higher market share.





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INTELLIGENT RETAIL

By Samik Roy,
Country Head,
Microsoft Business
Applications.

Digital transformation is referred to as the fourth industrial revolution. Each of the previous industrial revolutions (Steam, Electricity, Computers) ushered in positive disruptions that uplifted the world, organizations and people to better levels of efficiency, productivity and convenience. Digital transformation offers an opportunity to rethink your business, differentiate yourself and leap frog ahead vis-a-vis competition. Think of how Uber and OLA have impacted the consumer transportation industry by effectively leveraging digital technology.

Retail is one of the few industries which witnessed early impact of digital transformation in the form of e-commerce. The consumer benefitted in many ways. The phrase "Customer is the King" began to see some light at the end of the day. E-commerce changed customer behavior, who started expecting the experience and services of "Click & Collect" in "Brick & Mortar" stores leading to



the birth of modern retail. Success of modern retail is in going digital and get empowered by intelligence. Customers and retail employees require intuitive, engaging and applicable information that make the shopping experience fun and rewarding and ultimately lead to mindshare, wallet share and eventually market share.

There are three important areas of automation that will enable retailers to embrace digital transformation:

- Customer Centricity:** Putting the consumer at the center of the business by building a customer-centric culture that leverages each interaction to understand, serve and engage with the shopper in a more meaningful manner. Customer Centricity needs to be fueled by advanced analytics that provides deep insights helping modern store owners engage shoppers in a personal and relevant way.
- Modern Store:** The modern, digital retail store provides an environment that allows shoppers to experience the best of physical and digital retail. The modern store is connected, agile and responsive to shoppers in real time. It can provide shoppers with a similar, delightful experience be in “Click & Collect” (commonly known as e-commerce or e-store) or “Brick & Mortar” (commonly known as in-store). We call it a Digital Modern Store, where in the experience is similar irrespective of channel.
- Empowered Workforce:** Customers expect great services at the stores which can only be provided when you have access to a lot of relevant information. Digitally transformed retail organizations provide employees with solutions and technology they need to be effective brand ambassadors.

The options and technologies available for retailers today are wide and broad ranging. Retailers need to make choices that are right for them and will best support the overall objectives of:

- Exceeding end customer expectations** - Delight the customer with personalized, knowledgeable service and experiences, no matter what the method of engagement.
- Empowering all employees** - Creating connections across roles and departments to share and distribute information about the company, products, services and customer.
- Creating actionable insights** - Do what’s right for the company today while continuing to move towards your strategic goals. Enable the

retailer to position the right product to the customer at the right place at the right price.

This is no trivial decision. It impacts many business units of a retail organization. A true digital transformation spans across the entire process from identifying a prospect (Anonymity) to repeated sales from a happy customer (Advocacy).



STATE OF THE INDUSTRY: RETAIL & CONSUMER GOODS

RETAILERS AS TECH COMPANIES

Born in the cloud, retailers set the bar high for meaningful recommendations, optimized product assortment, fast shipping, easy payments and more

CUSTOMER ENGAGEMENT

Increasingly savvy customers expect no less than exceptional personalized shopping experiences.

UNIFIED COMMERCE

Delivering a consistent experience across digital and physical channels is becoming table stakes.

DIGITAL STORE

Creating compelling in-store experiences and innovating on in-store behavioural data is a greenfield opportunity.

A CONNECTED SUPPLY CHAIN

Retailers must overcome merchandising and inventory inefficiencies to reduce turnaround time and cost.

EXPANDING BUSINESS MODELS

Increasingly, retailers are adopting new subscription models, on demand services, and direct-to-customer selling.

THE CONVERGENCE OF CLOUD AND MOBILE

enables retailers to meet customers where they already are and especially appeal to millennials and Gen Z as customers and potential workers.

APPLYING ADVANCED ANALYTICS

to big data facilitates personalized customer engagement and optimizes supply chain operations.

ARTIFICIAL INTELLIGENCE enhances customer engagement and operations by accelerating what can be done with data in an even more compelling and efficient way.

IOT AND AUGMENTED REALITY are key to transforming the in-store experience and bridging physical and digital shopping.

INTEGRATION ACROSS SILOED SYSTEMS is essential for enabling a unified and frictionless shopping experience.

ENTERPRISE MOBILITY empowers workers to work anytime anywhere and move seamlessly between devices.

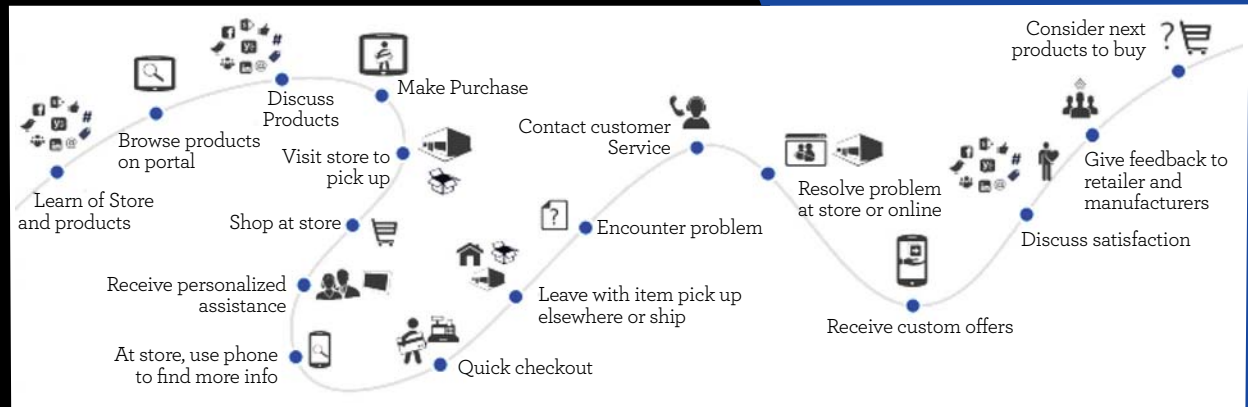


TRENDS AND OPPORTUNITIES



TECHNOLOGY GROWTH AREAS

RETAIL CUSTOMER EXPERIENCE JOURNEY MAP



Digital Hotspots

<p>Attract</p> <ul style="list-style-type: none"> • Learning of products and store • Researching product online • Talking to sales associates at store • Use smartphone while at store to learn more 	<p>Acquire</p> <ul style="list-style-type: none"> • Ordering online • Purchasing product in store • Arranging payment • Tracking shipment 	<p>Grow</p> <ul style="list-style-type: none"> • Receiving customer service • Resolving problems anywhere • Providing ideas to stores and manufacturers • Sharing experience with others
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Retail Customer Experience

Organizations must start mapping their customer's journey across the lifecycle. Starting with social channels and closing the usage experience on these channels is how today's consumer connects with the brand/retailer. It's the journey from anonymity (where a prospect is looking for a product or service) to advocacy (where the same consumer becomes an advocate of the product or service after consuming it). If the experience is disconnected across stages of ATTRACT | ACQUIRE | GROW, then it is difficult to deliver desired outcome for consumer and hence business. The journey from Anonymity to Advocacy traverses across multiple business lines and needs to be truly omni-channel.

Over the past several decades, many retailers have added online shopping as an alternative channel to complement their traditional "brick & mortar" store based retail presence. However, online had mostly been implemented as a "bolt on" to the



CUSTOMERS AND RETAIL EMPLOYEES REQUIRE INTUITIVE, ENGAGING AND APPLICABLE INFORMATION THAT MAKE THE SHOPPING EXPERIENCE FUN AND REWARDING AND ULTIMATELY LEADING TO MINDSHARE, WALLET SHARE AND EVENTUALLY MARKET SHARE.

existing business, leading to noticeable disconnects between the in-store and online shopping experiences. The in-store shopping experience itself has not taken full advantage of many of the benefits of online shopping. Customers essentially have been forced to choose between the data rich experiences available online, or the tactile benefits of a physical store (without the data).



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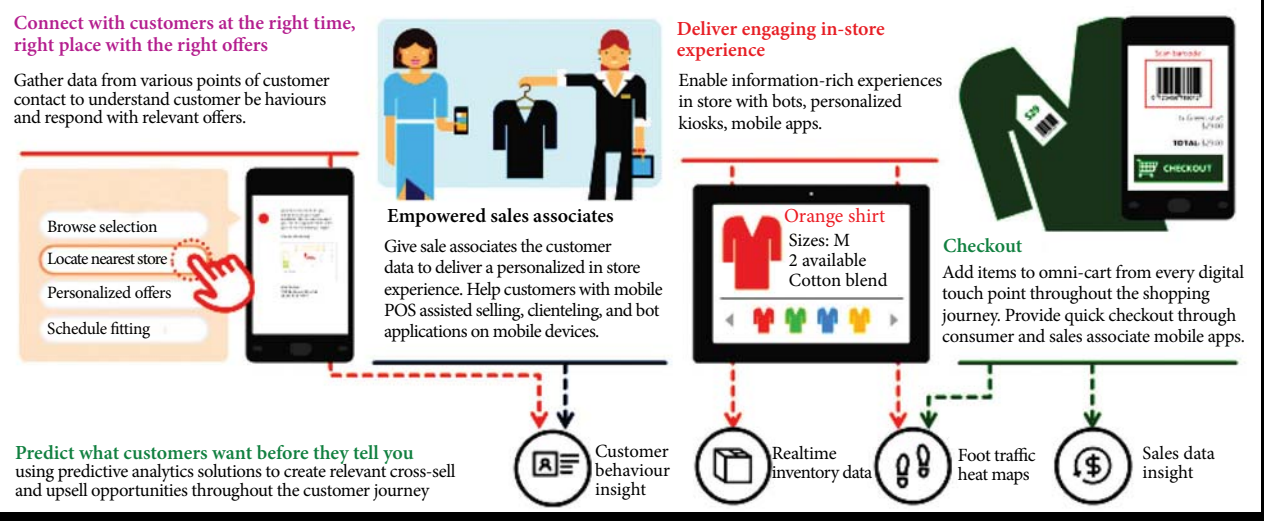
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CREATE A CONNECTED CUSTOMER JOURNEY



BY PROVIDING INTERACTIVE IN-STORE COMPONENTS LIKE DIGITAL SIGNS, KIOSKS, TOUCH SCREENS AND BEACONS, YOU CAN GIVE YOUR CUSTOMERS WHAT THEY WANT.

In fact, the best experience for the consumer is to embrace the coming together of in-store and online into a blended and seamless “digital” shopping experience that combines the best of both worlds – bringing rich information into the physical store environment through experiences such as beacons, mobile shopping in the store, and digital signage.

Connect with customers at the right time, right place with the right offers
The ability to gather data from various points of customer contact

enables retailers to get real-time insights about the customer and make more relevant, timely, personalized and contextual offers. It also drives a more streamlined and effective engagement with customers.

By providing interactive in-store components like digital signs, kiosks, touch screens and beacons, you can give your customers what they want. Endless aisle and custom order solutions allow retailers to extend their inventory range and assisted selling solutions allow sales associates to identify inventory from any location across the enterprise to meet customer demand.

Predict what customers want before they tell you
Predictive analytics can help create cross-sell and upsell opportunities on the shopping floor. It’s possible for a salesperson to view a customer’s recent activity as well as past behavior through a tablet, computer, or mobile device. The salesperson can then make real-time recommendations for additional purchases, either during



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CONSUMERS ARE WELL INFORMED AND EXPECT INTUITIVE, ENGAGING AND INFORMATIVE EXPERIENCES WHEN THEY SHOP. OPTIONS FOR ONLINE, IN-STORE AND MOBILE PURCHASES ARE EXPLODING.

RETAILERS MUST EMBRACE NEW WAYS OF DOING BUSINESS

 Deliver personalization	 Drive omnichannel customer engagement	 Enable collaboration with workplace mobility	 Operate seamlessly with unified commerce
 Be agile with a connected supply chain	 Leverage artificial intelligence across the value chain	 Capitalize on service based revenue streams	 Delight with augmented and virtual reality

Consumers are well informed and expect intuitive, engaging and informative experiences when they shop. Options for online, in-store and mobile purchases are exploding.

Microsoft Dynamics Retail, Azure IoT Suite, Power BI and Cortana Intelligence Suite can help you meet the expectations of today's demanding consumers and transform shopping into a fun and rewarding experience, leading to sustainable competitive advantage for your brand.

shopping floor consumer engagement or during the checkout process. Using data from past interactions across channels coupled with publicly available data, retailers can build predictive models for creating a very personal and relevant engagement with customers. Empower your sales associates with a unified view of each customer's transaction history and preferences across channels along with predictive analytics so that they can deliver personalized experiences that provide customized upsell and cross-sell suggestions.

Furthermore, predictive analytics solutions lets you effectively manage inventory levels (even from mobile devices) across locations. You can be

confident that when customers visit your retail store, you have the right stock and your store associates can access accurate inventory information for an optimum customer experience that lets them try before they buy.

Deliver engaging in-store experiences

By combining the technologies that give customers rich information when they shop online with the in-store experiences of trying out products and engaging with informed sales associates, you can bring together the best of both worlds to enhance the way people shop.

Take advantage of the shopper's smartphone to enable them to get extended information on products using capabilities such as NFC, beacons, and image recognition and push relevant offers based on their interests and location in the store.

Embrace customer centricity in a digital world and deliver personalized, seamless and differentiated shopping experiences by turning data into insights that empower your business. Microsoft offers solutions to collect and understand customer behaviors and respond with offers and experiences that are personal and engaging. With an aggregate understanding of shopping and market insights, combined with external data, retailers can improve forecasting and optimize merchandising and customer engagement better than ever before.



THRIVING IN TODAY'S COMPETITIVE RETAIL ENVIRONMENT

Balaji Balasubramanian, Program Manager, Microsoft Dynamics 365 for Retail, R&D

I am very excited to connect with the retail industry in India through this article. India has been one of the exciting markets for us with many customers adopting our technology to drive their digital transformation journey.

Microsoft Dynamics 365 solutions enable retailers and brands to thrive in today's competitive environment by combining the best of digital and in-store to deliver personal, seamless, and differentiated customer experiences. In essence, it's all about empowered retail.

Retail and commerce technology of today have a completely different set of areas to be addressed. The solution should provide the tools you need to better manage changing demands and deliver truly amazing experiences to customers. Connecting the shopping experience with the things that help consumers move between devices as well as between the online shop and in-store, cross-channel scenarios like buying online with in-store pick-up, all this, if possible, delivered on a modern cloud platform – are all very exciting. Optimized for mobile experiences, which means you can deliver seamless unified commerce across all customer touch points, including store, online, mobile and call centers.

Point of sale is the most important application piece in the store. A modern retail point-of-sale app offering a rich clienteling experience that gives sales associates what they need while on the sales floor: product, inventory, customer and other information that helps them provide exceptional customer service.

Modern point-of-sale, that is cross-platform application, means you can choose the form factor (PC, tablets or phones) and platform (Windows, iOS or Android) will add to the flexibility. This unique architecture will even allow the same POS to be accessible via browser (Cloud POS), which can help you minimize deployment and maintenance costs and react quickly to changing business needs. While taking advantage of omni-channel catalog, pricing, promotions capabilities you can offer modern, immersive experiences to consumers and deliver simple, fast and intuitive checkout experiences supported by integrated, secure payment processing.

Omni-channel order management is another very important solution piece and offers support for scenarios like “buy in one store and pick up in another store” as well as hybrid orders that allow line-level fulfillment flexibility. In addition, you get a complete 360-degree view of customers: addresses, preferences, purchase and order history, wish lists, affiliations and more. Retailers can initiate and offer loyalty programs that cut across various products and categories, while providing personalized recommendations powered by leveraging machine algorithms.

Analytics and insightful intelligence that allows you to provide amazing experiences for your customers and gain clear competitive edge and flourish in this digital age – will add to the seamless operations across the functions.

At Microsoft, we work every day in pursuit of our mission: to empower every person and every organization on the planet to achieve more. On the dynamics 365 for retail team – this means we develop new product features and capabilities to help retailers better manage their businesses and provide better service to their customers. Dynamics 365 for retail has enabled the digital transformation of retailers of varying sizes, verticals, business models, and operating geographies, and in our work, one thing has been clear: no two retailers are the same.

In the end, our story is not about 0s and 1s but rather about how we empower people and organizations to change the world for the better. As our customers write the future of retail from the front line, we're excited to continue supporting their vision however we can.

×



CX: BUILDING CUSTOMER CENTRIC AND ROI DRIVEN OMNI-CHANNEL JOURNEYS

IFF CUSTOMER EXPERIENCE (CX) SESSIONS SEEK TO FOSTER A NEW AND ENHANCED LEVEL OF CUSTOMER EXPERIENCE IN FASHION RETAIL IN INDIA.

Will technology be indispensable for an omni-channel journey, true retail transformation needs enablers above and beyond technology. Success is a summation of incorporating a conducive organizational structure and capabilities, choosing the right technology partners for growth, using analytics and insights to take the right decisions, and defining success through KPIs, Operational Measures and Incentives.

In this exclusive session, Mukul Bafana, CEO, Arvind Internet, anchors a round table panel that talks about a successful model where both the customer and brand win as customer experience goes up and the brand realizes incremental revenue.

Round Table Members:

Anupam Bansal, ED, Liberty Group; Apeksha Patel, CEO, Deal Jeans; Arun Naikar - Head E-commerce, Fabindia; Bhavishya Kelappan, Business Head - Mia (Tanishq); Dinesh Gupta, Div CIO, ITC (LRBD); Dr. Mahendra Singh Bhadouria, Sr VP & Head - Sales & Operations, Biba; Mohit Bhayana, Head Retail & Customer Service, Marks & Spencer; Manohar Chatlani, MD & CEO, Soch; Manish Sapra, Sr.



Retail Director, Adidas Group India; Mridumesh Kumar Rai, President, Sara Group; Sandeep Goenka, COO, Bagzone Lifestyles-Lavie.

Mukul Bafana: The discussion is to see omni-channel from a practitioners point of view. All of us are at different stages of our maturity curve in terms of omni-channel implementation, so I would like to know from all of you, about how you all feel about the omni-channel playbook and where are you all, at the moment, in this journey.

Anupam Bansal: We have about 400 plus stores which are now all connected and also a dedicated online space, all thanks to modern technology. But, speaking from a ROI perspective, I do not see enough returns coming. I feel, we are just building it up for the future, with too much investment going into this process.

Mohit Bhayana: As a predominantly physical format, our first step was introducing a retail mobility app, which is a non trajectory app in the store. Since we have beacon service, every customer is served by our staff, and in case of unavailability of product, we ensure that he is directed to the nearest touch point, tablets in our case, so that the product of his choice is delivered to a preferred address across the country.

Arun Naikar: At Fabindia, the way we look at omni-channel is having a single view of the customer and the stock. So we endeavour to build an ecosystem that will ensure a similar experience across all touch points for the consumer. Today, we have about 35 large stores that ship online orders and about 85 stores which have endless isle, wherein the customer can actually come to the store and place an order for an item which is unavailable at a particular store.

Mridumesh Kumar Rai: In the Sara Group, we see omni-channel as imperative, and we are currently in the process of negotiating and evaluating. We believe you cannot see omni-channel from a ROI perspective, its a business and customer imperative.

Mahendra Singh Bhadouria: Biba is at the first stage of omni-channel. We have started capturing loss of sales at our stores but we are yet to active click and collect and seamless integration of all channels.

Sandeep Goenka: Although a large part of our business is through e-commerce, we are at a very nascent stage in terms of omni-channel presence. At the same time, we believe that omni-channel is the way ahead.

Dinesh Gupta: For both our brands, Wills Lifestyle and John Player, we

are predominantly a strong offline player, although we also have a robust online presence. But we understand the pressing need of integrating these channels to keep up with the expectations of the modern consumer and we are in the process of doing the same.

Bhavishya Kelappan: The online space is a very important platform for jewellery discovery, especially for Mia, that targets a comparatively younger crowd. But, considering the high prices of jewellery, customers exhibit this need of checking out the product physically. In terms of omni-channel implementation, Tanishq has just started off, having understood the need to tap the consumer at every channel of sales possible.

Manish Sapra: At Adidas, we believe that we have to map the consumer's journey through the different channels and touch points. Once that is done, we aim to be consistent in serving the consumer across all the touch points. We are at the initial phase of our omni-channel journey; what we have hitherto succeeded in doing is connect the offline and online stores through the endless isle technology in more than 300+ physical stores. We aim to make this journey across all the different channels consistent.

Manohar Chatlani: Size availability has always been a problem that fuels loss of customers. But with omni-channel, a customer can now choose from about 4,50,000 pieces instead of the 3,000-4,000 pieces that a store normally harbours. This is a huge advantage and omni-channel has, for us, boosted sales upto 6 percent, which we expect will shoot to about 10 percent very soon. We have equipped our stores with tablets, the number depending on the size of the store.

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Apeksha Patel: Deal jeans has a very strong presence in MBOs across the country. We are, as of now, present in about 1,500 MBOs. For us, omni-channel is really fascinating and I want to know how we can integrate the shop-in-shops modules with omni-channel.

Mukul Bafana: I could clearly make it out that, for all of you, customer-centricity is of utmost importance. At the same time, it is also important to ensure that we are making the best in terms of ROI. Basically, pleasing the consumer in a way that it also boils down to the right business matrix for us. Coming to the ROI aspect of it, what do you think about investing on omni-channel? Also, given that you are in different stages of your omni-channel journey, what are your longer term thoughts around investment.

Mahendra Singh Bhadouria: I think, talking about ROI, the first question that arises is how big is the opportunity? According to reports the number of internet users in India is multiplying at a rate of four times than the global count is, and by 2020, the number of internet users in India will almost be equal to that of China. So I think, there is a huge opportunity to invest in.

Mridumesh Kumar Rai: For me, the question is not whether there will be returns or not. Especially in India, whatever data is forecasted it never comes true, so I think we retailers have to make decisions on gut feelings.

Mohit Bhayana: As a retailer, the key matrix for us is conversion. If your customer is going empty handed and you can pump up the conversion by 1 percent, then your LFL goes up by 1 percent, which is massive. What I witnessed in my store is that, by just adding on that retail mobility app, I can



already see the conversion go up by 1.5 percent. The importance of online kicks in here because the customer is everywhere, and the kind of insights we can have by being in all these touch points is massive. For us, it has given insights on expanding to the right places; like Raipur, where we have got stupendous response. I think there are the small facets we can see when we talk about the R of the ROI.

Arun Naikar: At Fabindia, we took baby steps, albeit superbly planned. We first developed a website that outlines our specialty and then worked on a responsive mobile site. About 75 percent of our traffic comes from the mobile site, and we have people who walk into our stores with a specific product that they have saved/selected on the site. If the product is available in the store they have walked to, it is well and good, but if not then they can take help from our endless aisles. For us, this is the first piece of the omni-channel puzzle. I think, you just need to take small but planned steps and ROI will automatically fall into place.

Mukul Bafana: Let's talk about tangible numbers; what percent do you think the returns should be?

Mridumesh Kumar Rai: The trick is not on how much percentage you want the return to be. The question is what is your omni-channel imperative? There are a lot of options available today -- opex vs capex, in-house vs third party,

etc. The point is if you are able to phase out your investments into it, and as long as it is not burning a hole in the pocket, people will be okay with it because we all know it is imperative.

Manish Sapra: It is very important to quantify the R but it is equally important to have a R which is intangible, because it is part of the consumer journey. When it comes to omni-channel, especially, in India, I think we are slightly ahead of the curve -- what we need to do today is built it for the future.

Bhavishya Kelappan: I would like to add that, earlier, the cost of consumer acquisition was huge -- setting up a store, advertising through newspaper, TV, etc. In the omni-channel model, a large part of the customer's mind is purely in the digital space, hence, the cost of getting a product to the consumer is comparatively more feasible and economical. While the actual return could come in two-three years, this return is almost immediate and we have to acknowledge it.

Mukul Bafana: I think the points that we all agree on is the same -- there is R, be it short term or long term but we all are struggling with the I of ROI now. How do you think about the I part in terms of Quantum? And how do you justify the I in terms of where your consumer is?



L-R: Mukul Bafana, CEO, Arvind Internet; **Arun Naikar**- Head E-commerce, Fabindia; **Anupam Bansal**, ED, Liberty Group; **Manohar Chatlani**, MD & CEO, Soch; **Manish Sapra**, Sr. Retail Director, Adidas Group India; **Sandeep Goenka**, COO, Bagzone Lifestyles-Lavie; **Bhavishya Kelappan**, Business Head - Mia (Tanishq); **Apeksha Patel**, CEO, Deal Jeans; **Mahendra Singh Bhadouria**, Sr VP & Head - Sales & Operations, Biba; **Dinesh Gupta**, Div CIO, ITC (LRBD); **Mohit Bhayana**, Head Retail & Customer Service, Marks & Spencer; **Mridumesh Kumar Rai**, President, Sara Group.

all channels, I think a mid to long term exercise would be better to opt for - more investment and ensuring longevity.

Mridumesh Kumar Rai: I agree with Mohit. If you are an established global brand in India and are aware of the benefits of omni-channel, they can afford to go the whole hog for it. Their cost incremental is different, they have the know how and hence, they do not have to take the step by step route.

Apeksha Patel: My main revenue generating models are SIS, and other brick and mortar modules but these people in tier -II and -II cities are utmost unorganised. So, my concern is -- how do we connect there? What about investments beyond technology?

Anupam Bansal: See, the big bang approach doesn't work in India, both brands and consumers are not ready. I mean, go to any brick and mortar store and you will see that the customer wants to be assisted; Indian customers are not independent enough to buy on their own. Change is inevitable and we have to be a part of it, but I think, we are assuming that the consumer will change way too fast than he actually is.

Bhavishya Kelappan: I think the investment and the returns also majorly depend on the kind of industry and where the customer is. Like in jewellery, we are creating the need for the customer, but my investment can be slightly slower than in fashion.

Mridumesh Kumar Rai: Also, I think it's more channel oriented than product. e.g., if you are an EBO centric brand, your ability to leverage omni-channel is very high and in any segment if you are distribution centric, your control over customer experience in the offline space is very limited.



Arun Naikar: It depends on which part of the journey you are in. If you are keen on taking a big bang approach and set a robust omni-channel approach in one go, I would call it unrealistic. In taking smaller steps, you also call for smaller steps in terms of investment, and hence lesser risk. During the journey you learn a lot, so the cost of investment is your learning and at the same time enhances consumer journey. So I guess, investment should not be a big question when you take small steps.

Mukul Bafana: A lot of people cannot afford in-house teams to architect these small steps and they have to rely on third party enterprise type softwares and implementations. This involves money, time and cost. Anybody wants to chip in on the guys that have to do wholesale enterprise transformations in terms of technology because to exercise small steps in these places, you need a robust long term solution.

Mridumesh Kumar Rai: First you need to have believers in the system, like me. I am a complete believer, having seen it in the UK about 7 years back. After that you start building and learn from other's experiences.

Dinesh Gupta: How many organisations have done seamless omni-channel integration? I think it is but natural that I will take smaller steps and

not invest a fortune in the very first year, because there is not a single example of a brand that will encourage me.

Mukul Bafana: Do you think about ROI at the journey level or do you think of it at the end of the journey?

Mridumesh Kumar Rai: You actually define parameters, a little at a time, and once you achieve your primary goals you go to the next step.

Manish Sapra: Actually, it depends upon each organisation and what stage of journey you are in and what are your objectives. Based on that you decide your returns, both tangible and intangible, and on basis of that work out an investment plan, whether its a step by step journey or you want to invest for a bigger picture.

Mukul Bafana: Are we clear about the future of our roadmaps versus what we are doing today? Do you think that the big bang approach to implementing omni-channel is our cake at this point of time? Do we all need to be better architects of building on top of existing journeys and thinking micro?

Mohit Bhayana: It all depends what kind of a company we are. If its a customer product and less marketing and branding then you could take a more step by step approach depending on the size of the store. But if you want to ensure customer experience across

MASTER CLASS BY NIFT & US UNIVERSITIES: UNDERSTANDING THE TRENDS AFFECTING SMALL INDEPENDENT RETAILERS IN INDIA



-Prof. Sibichan Mathew,
Principal Investigator, Fashion Management
Studies & Director, NIFT Kangra



-Asso. Prof. Siewspah Buhroy,
Fashion Management Studies, NIFT Shillong



-Prof. Linda Niehm,
Iowa State University

A unique, one of a kind master class, on the second day of IFF 2018, featured faculty members from National Institute of Fashion Technology, Iowa State University, University of North Texas and Auburn University, discussing trends affecting small independent retailers in India. The academic luminaries deliberated on a vast range of topics including cultural diversity, retail expansion in small/non-urban markets, assortment planning and allocation, triple bottom line retail strategies, omni-channel retailing, promotional strategies and experiential marketing.

Starting the discussion, Prof. Sibichan Mathew, PhD, Principal Investigator, Fashion Management Studies & Director, NIFT Kangra highlighted upon the key challenges that affect the small and medium fashion retailers in the United States and in India. The prime emphasis of the discussion was to create the base for retail entrepreneurship, especially for small and medium retailers. At his discussion, Prof. Sibichan Mathew stated, "Small and medium retail formats are going to make greater impact, as they are fulfilling the major element, which is to be closer to where the consumers are. Even from the sustainability point of view, small and mid level retailers will make more sense, because the future calls for localization of both production and consumption." Talking about retailer entrepreneurship in the US and India, Asso. Prof. Siewspah Buhroy, Fashion Management Studies, NIFT Shillong elaborated that the rural areas in both the US and India have been significantly impacted by the economic and demographic change. To state a better understanding of the characteristics, challenges and opportunities related to retail entrepreneurship, Prof. Siewspah Buhroy presented a detailed module. He says, "India, at present, has more than 48 million small businesses. The micro, small and medium enterprises contribute

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-Asso. Prof. Krishna Kumar,
Fashion Management Studies, NIFT Kannur

nearly 8 percent of the country's GDP, 45 percent of the manufacturing output and 40 percent of the country's total exports. Moreover, the small businesses in India also create around 1.3 million jobs every year and provide the largest share of employment after agriculture." Explaining about the role of small businesses in rural India, he stated that the three prime contributions are employment opportunities, prevention of migration and reduction of inequalities. Explaining more on the module, he says, "We have studied few of the small businesses in an around small towns and rural areas that are competitive and sustainable enough. We have approached them with the marketing mix perspectives. Considering the pricing factor, we have noticed few businesses, such as Mellow Mood Cafe who offer penetration pricing through cost focus strategy and Trendy Affair Boutique who offer skimmed pricing, brilliant customer service and superior product knowledge." He further stated that when it comes to product or service offerings, it has been noticed that offering a broader selection of product differentiation strategy makes greater impact on consumers. He concluded by explaining that the other impacting factors, which small business are implementing are effective use of location variables and superior distribution.

Niehm also explained about operational and competitive strategies for small business success and sustainability in non-urban areas, where she stated that a distinct competitive advantage comes by differentiating the business from the competitors, a combination of offerings that customers want, an attractive outlook, and a strategy that cannot be copied easily. Discussing about the marketing tools that small businesses need to implement, she says, "The small businesses need to use all the marketing tools. From one-on-one networking to traditional marketing to online marketing, they need to explore all verticals."

Asso. Prof. GHS Prasad, Fashion Management Studies, NIFT Hyderabad discusses about assortment planning for small retailers and the challenges that they face. He stated that the prime challenge that small retailers are facing in assortment management is the supply chain administration. With an in-depth market analysis, he notices that the small retailers lack proper supply chain management because of limited professional knowledge. His research states that many small retailers do not have direct access to manufacturers and wholesalers. This also diminishes their ability to choose merchandise from wide choice. He adds, "Small business volume



-Prof. Elena Karpova,
Iowa State University

Speaking of small independent retailers in small and medium communities in the US, Prof. Linda Niehm, Iowa State University explained that the businesses include 500 or fewer employees, they are not dominant in its field of operation and there are many micro businesses with 10 or less employees. Speaking about the business challenges, she says, "The major challenges for rural and small community retailers are declining local market, competition from chains and internet, high operating cost/ lack of economy of scale, availability of qualified employees, narrow profit margins, taxes and regulations and lack of community support." Prof. Linda



-Asso. Prof. GHS Prasad,
Fashion Management Studies, NIFT Hyderabad



-Asso. Prof. Sushil Raturi,
Fashion Management Studies, NIFT Mumbai



-Asso. Prof. Vikas Kumar,
Fashion Management Studies, NIFT Patna



-Prof. Anna Marie Fiore,
Iowa State University



-Asso. Prof. Amandeep Singh Grover,
Fashion Management Studies, NIFT Delhi

significantly reduces their ability to invest in IT solutions. They are unable to compile sales data and analyze their sales status. And their small volume limits their ability to invest in promotions.”

Highlighting upon the concept of sustainability, Asso. Prof. Krishna Kumar, Fashion Management Studies, NIFT Kannur illustrated upon the scenario of retail industry in India where he explained about providing equal opportunities to future generation by bringing forth efficient economic platform or avenue, harmonious or congenial social space and preservation of natural resources and environment. Taking the discussion ahead, Prof. Elena Karpova, Iowa State University states that sustainability is one major factor that no business should overlook. Stating few examples of successful businesses that practices sustainability as their prime module, she states, “Consumers want to know what they are paying for. Businesses need to give them value for their money. It is only when they trust the business or company they will come back to the same and thus, the business will eventually profit. Brands and companies should follow the three strategies that include reuse, repurpose and recycle.” She concluded that sustainability should be the way of life for every business and it is only then a business is sure to flourish.

Asso. Prof. Sushil Raturi, Fashion Management Studies, NIFT Mumbai and Prof. Anna Marie Fiore, Iowa State University discussed about experiential marketing and its impact on different companies. Explaining about experiential marketing Prof. Anna Marie Fiore says, “Experiential Marketing is any form of customer focused marketing where there is an actual connection with the customer. This emphasizes upon making customers feel personally connected to the brand and making them emotionally connect with the brand.” The six key features for successful experiential marketing that she puts forward are multi-sensory (sight, smell, sound) experience, repetition of brand elements, customers physically interact with the brand, meet and learn from customer, personally connect to the customer and emotional enticement. Discussing about the challenges in Experiential Marketing faced by Indian retailers, Prof. Sushil Raturi stated that retailers lack in implementing the 7Es of retail in their business. This includes excitement, environment, engagement, experiment, entertainment, energy and encouragement. He explained that it is very crucial for brands to create a story for the customers to relate to. “Once customers are able to emotionally connect with the brand, the brand is sure to witness amazing footfall,” he concludes.

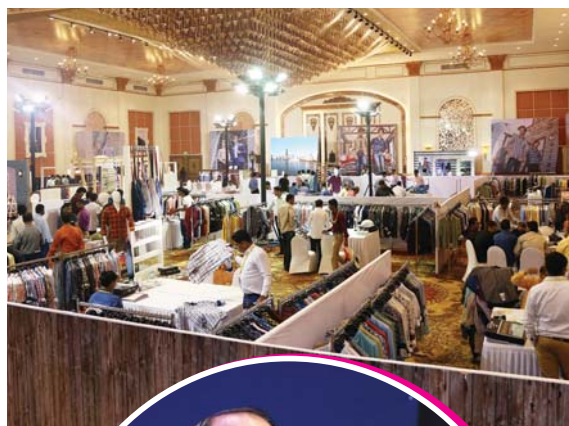
Concluding the discussion, Asso. Prof. Amandeep Singh Grover, Fashion Management Studies, NIFT Delhi and Asso. Prof. Vikas Kumar, Fashion Management Studies, NIFT Patna and Affiliate Asst. Prof. Amrut Sadachar, AESHM, ISU elaborated upon omni-channel and promotion strategies. Prof. Vikas Kumar explained that the consumer behavior is changing all across the worlds. People have all the information right at the tip of their fingers. Thus, a brand cannot claim itself to be the best, without practically being one. Defining omni-channel, Prof. Amrut Sadachar says, “Omni-channel is all about experiential, transactional and informational. The customer today focuses more on the brand than on the retail, and that is very critical.” Highlighting upon omni-channel, Prof. Amandeep Singh Grover further stated that the strategy here lies in merchandising, marketing, store operations and supply chain and product development and sourcing. He therefore, concluded the discussion by stating that stores are now collaborating both digital and physical stores and one of the best examples of this is the collaboration on Amazon and Shoppers stop.



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SIYARAM LAUNCHES APPAREL BRANDS

MOZZO & INSPIRO



“Looking to the ever increasing demand for fashionable garments, we have decided to venture into this segment and launched Siyaram’s Mozzo and Siyaram’s Inspiro. Both these brands are aimed at today’s fashion conscious youth who not only follow international trends, but also dare to incorporate new styles in their wardrobes. We are extremely delighted to see the kind of response we have received for the newly launched products.”

-Ramesh Poddar,
Chairman & Managing Director,
Siyaram Silk Mills Ltd.

A leading textile brand in India, Siyaram launched its apparel brands – Siyaram’s Mozzo and Siyaram’s Inspiro at the All India Dealer Conference held at the hotel Park Hyatt Goa Resort and Spa in Goa. With over four decades in the fashion business, today Siyaram produces over 80 million meters of fabrics per annum and has an unparalleled network of over one lakh retailers across the country. Its belief in providing value for money products to its customers is the reason behind it having the pan India customer trust.

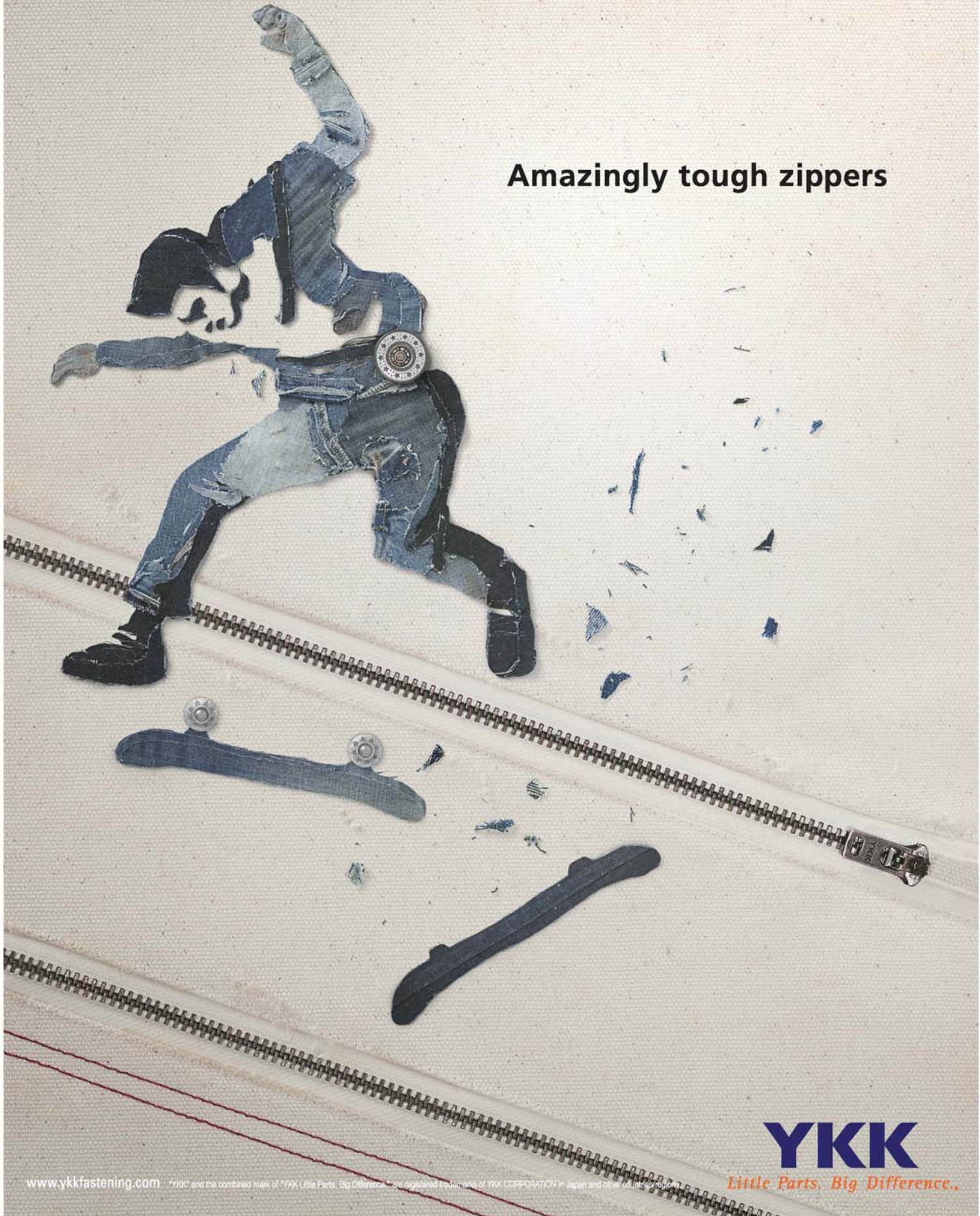
Positioned as a casual menswear brand, Siyaram’s Mozzo offers jeans, chinos and stunning range of casual shirts in the most attractive core items like plains, self, prints, checks, etc. While, Siyaram’s Inspiro is a formalwear brand meant for professionals and lends an aspirational charm to each one of them with its smart yet stylish range of formal shirts and trousers made from the finest cotton yarns.

Ramesh Poddar, Chairman and Managing Director, Siyaram Silk Mills Ltd., said, “Looking to the ever increasing demand for fashionable garments, we have decided to venture into this segment and launched Siyaram’s Mozzo and Siyaram’s Inspiro. Both these brands are aimed at today’s fashion conscious youth who not only follow international trends, but also dare to incorporate new styles in their wardrobes. We are extremely delighted to see the kind of response we have received for the newly launched products.” The collection of garment offerings encompasses a vast range of designs and colour combinations to complement the style quotient. The salient features of both the brands include attractive colours, luxurious feel and lustrous fabrics, the season’s latest designs, which are in-sync with global trends and attractively priced.



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USHA SILAI

BRIDGING RURAL WORKPOOL TO URBAN FASHION MARKET

Usha International Limited launches sustainable fashion label 'Usha Silai' exclusively at Ogaan

Usha International Ltd., one of India's leading consumer durables company, in consultation with IMG Reliance, launched the sustainable fashion label Usha Silai at Ogaan, one of India's pioneering multi brand fashion store.

The initiative

Usha Silai label is more than just a brand; it is a movement to eliminate gender disparity, and mainstream rural women into the world of high street fashion garment construction, thereby multiplying their earning potential by manifolds. The Usha Silai collection will have tags crediting the rural women and Usha's intent is to fairly share the revenue with the ladies who have stitched these garments. The brand strives to create a skilled workpool comprising rural women who can create clothes and accessories that can feed into the urban fashion market. It not only gives each of them a chance to become a successful entrepreneur, by learning, creating, and teaching others, but also reverses the migration trends in the rural areas by allowing them to work from where they are. Along with financial growth, creating garments for Usha Silai label also positively impacts their socio-cultural standing within their own communities.



“The collaboration will help the skilled rural artisans showcase their exquisite craftsmanship at a global level. We are committed to being the catalyst of change and will continue to nourish local artisans and craftsmanship at the grassroots level.”

-Dr. Priya Somaiya,
Executive Director, Usha Social Services



“The Usha Silai initiative very much resonates with our ethos at Ogaan—we work with designers that use Indian textiles and techniques and marry them with great design and a modern sensibility.”

-Aashti Bhartia,
Director, Ogaan



“Reimagine Fashion is a powerful narrative of empowerment and inclusivity in fashion. It establishes the principle that for Indian fashion to be forward, it needs to think local and leverage human potential at the grassroots level for the development of a sustainable livelihood.”

-Jaspreet Chandok,
Head of Fashion, IMG Reliance

Dr. Priya Somaiya, Executive Director, Usha Social Services said, “We are delighted to launch Label Usha Silai at the Ogaan stores. The collaboration with Ogaan will help the skilled rural artisans showcase their exquisite craftsmanship at a global level. We, at Usha Silai, are committed to being the catalyst of change and will continue to nourish local artisans and craftsmanship at the grassroots level.”

Aashti Bhartia, Director, Ogaan stated, “The Usha Silai initiative very much resonates with our ethos at Ogaan—we work with designers that use Indian textiles and techniques and marry them with great design and a modern sensibility. This is the first time they’ve invited designers to collaborate and it is a great step for the Usha Silai school women. The designers have been well chosen; Soham Dave, Amit and Richard, are names we already work with at Ogaan. It’s an inspiring, ambitious initiative for a company like Usha to take forward, and we’re excited to be the retail partners for it.”

The collection

The first collection under the Usha Silai label (#UshaSilai) has been created by rural women in four clusters under the mentorship of designers who understand the local ethos, and have imbued the collection with their unique take on the sensitivities of the region. Designers Amit and Richard Pandav, Sayantan Sarkar, Soham Dave, and Sreejith Jeevan, worked with local women from Usha Silai Schools in the Rajasthan, Bengal, Gujarat, and Puducherry clusters, respectively. The resulting ensembles – a glimpse of which was showcased at a special show on Sustainable Fashion Day during the Lakmé Fashion Week Summer/Resort in February 2018 – are innovative and contemporary, and uphold the essence of the region.

Jaspreet Chandok, Head of Fashion, IMG Reliance expressed, “Reimagine Fashion is a powerful narrative of empowerment and inclusivity in fashion. It establishes the principle that for Indian fashion to be forward,

it needs to think local and leverage human potential at the grassroots level for the development of a sustainable livelihood. We are honored to partner with Usha International for this initiative. After a fabulous curtain raiser of the Usha Silai Label on Sustainable Fashion Day at Lakme Fashion Week Summer Resort 2018, we are now delighted to partner for its retail launch at Ogaan.”

This launch underscores the commitment Usha International made in 2011 when it incepted Usha Silai Schools with the intent to empower women at the bottom of the pyramid. Today, seven years later, marks a milestone event in the journey of these women who have honed their skills to have their garments find rack-space among toniest high-street fashion brands catapulting them into the limelight.



SOHAM DAVE

THE BLACK MACHINE

The black Usha Machine inspires Soham Dave as much as the Usha Silai initiative. For Dave, the black machine is the central source of his inspiration in conceptualising the collection. Starting from basic colour story to the minute details. The collection is as basic and functional as the machine itself. Usha Silai plays the central role in creating surfaces and textures in the collection. The focus is on creating detailed surfaces on the black lock stitch machine. The black padded machine works on eternal human energy and not “electricity”. That’s the most sustainable way to make garment. Dave explains that we too, like the padded machine, incorporated sustainable design and fabrics to the collection.

IMAGES Business of Fashion



SAYANTAN SARKAR

Designer Sayantan Sarkar’s collection is an experimental amalgamation of the contradiction of the Indian and Western silhouettes representing her chaotic mind and her limited exposure to the West through her books. Her understanding of fashion is completely different and is a make do between accentuating the very basic Indian silhouettes with western influences.

The love struck day dreamer in her own world of romance is portrayed by distorted and disturbed floral motif prints, embroidery and texture created on the fabric base of khadi, jamdani and motif weave.

Her melancholy mood is depicted through the colour palette of dull pastels in shades of ice blue, pale brown, peach, lemon, orange and light olive. The silhouettes in the collection narrate the chaotic mind state of the protagonist and thus it has a blend of Indian silhouettes teamed with western staples, like sarees worn over pants or skirts with summer trenches and shirts or kurtas teamed with skirts and jackets creating a beauty through contradiction.





AMRICH BY AMIT & RICHARD

THE RANI'STHAN

A Queen in their own right. An ode to the Queen in every woman through the study and deconstruction of the royal Rajasthani woman's costume – "The Poshak". Amit Vijaya and Richard Pandav draw inspiration from the traditional poshak and deconstruct the look to present a collection of chic separates – shirts and tunics that evolve from the kurta, blousons and tops that spring from the kanchli, skirts and dresses that evolve from the lehenga, the scarves etc. Playing with the nature of contrasts in the environment of the makers, the collection offer fluidity with rigidity, the rawness with the refinement, the constriction with the flow. The shapes draw reference from the traditional look but are updated with a twist to make them more relevant for the queens of today.



ROUKA BY SREEJITH JEEVAN

WINDOW TO THE WORLD

Every window had a story to tell- about an old French colony, about the people who lived in them, about their favourite tree that enveloped it and about the way they saw me through them. There were so many stories that one simple window had to say and that inspires me to say the story of this collection made by ten different women, each one a window bringing in light to their lives. And Sreejith Jeevan does the same with them, looking to find out what their story is through the window that is their work – silai. And they are also, like the people inside the houses, looking at Jeevan to see what he can add. He finds this narrative very interesting because it connects the technique to the idea, the place and sewing techniques. The idea of the thought process- various aspects of windows in Pondicherry to create garments and details. By using layering to create the idea of viewing through a window, adding the shiny stickers that are reminiscent of how you see the sea through old windows, using box pleats and pintucks as metaphor to the window panes, looking at the shapes of the window grills to make clothes that are quirky, patching of fabrics to get the feel of the multi coloured window glass panels and so on. And metaphorically, Pondicherry was once a window to the world.



CENTRESTAGE 2018: THE ASIAN FASHION SPOTLIGHT

Asia's fashion spotlight event returns with CENTRESTAGE, a unique promotion platform dedicated for international, especially Asian, fashion brands and designer labels. To be held from 5-8th September, 2018 at the Hong Kong Convention and Exhibition Centre, Wanchai, Hong Kong, the second edition of the event will carry the new theme of "TOMORROW LAB – Imagined by today. Inspired for Tomorrow."

Organised annually by the Hong Kong Trade Development Council (HKTDC), CENTRESTAGE presents dazzling fashion shows and a bustling fairground to connect exhibiting brands to an influential network of buyers and media in the region, making lasting connections. Since its inception in 2016, CENTRESTAGE has gained significant recognition from the fashion business world as an unparalleled platform to discover promising Asian talents for worldwide markets. In the 2017 edition, the event attracted over 210 exhibiting labels and brands from 22 countries and regions, engaging about 8,500 buyers from 73 countries and regions around the world.





CENTRESTAGE is also geared to feature a line-up of exciting events, including about 20 runway shows and parades, designers sharing sessions, industry forum, trend forecast seminars and networking events. Highlights include the highly-anticipated opening gala show, where internationally-acclaimed Asian fashion designers will unveil their new collections, the “FASHION HONG KONG” Runway Show on the 5th of September and the Hong Kong Young Fashion Designers’ Contest (YDC) 2018 on the 8th of September. The designer line up of 2018 includes, FACETASM by Hiromichi Ochiai (Japan), IDISM by Cyrus Wong and Julio Ng (Hong Kong), Ms MIN By Min Liu (the Chinese mainland), et al.

On the the closing day, i.e., 8th September, CENTRESTAGE will become “OPENSTAGE” and welcome public visitors aged 12 and above free of charge. The event will allow the public to experience this major international fashion event and to check out the latest designs from leading brands Also, to spread the fashion buzz to the wider community, there will be a month-long citywide campaign “Hong Kong in Fashion” starting from mid-August, featuring a series of public events promoting fashion, trends and creativity at various trendsetting hotspots across the city.



ABOUT CENTERSTAGE

Heading into its third year, CENTRESTAGE has made its mark on the global buying calendar. Some of the most important department stores, boutiques, e-tailers and retailers from around the world return each year to take advantage of this one-stop platform and explore Asian trends. CENTRESTAGE helps industry players to navigate the dynamic fashion world through informative seminars and thought-provoking talks that uncover trends, foster the exchange of ideas and promote the growth of Asian fashion design. (<http://centrestage.com.hk>)

ABOUT HKTDC

The HKTDC promotes Hong Kong as a platform for doing business with China and Asia, with opportunities in Hong Kong and on the mainland, while providing information via trade publications, research reports and online. Each year, the HKTDC organises a broad spectrum of more than 320 trade fairs and promotional activities, 590 networking and outreach events, and receives more than 650 trade missions, helping Hong Kong’s small and medium-sized enterprises (SMEs) connect with business clients and partners around the world. (<http://www.hktdc.com>)




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THE SHIRTS & TROUSERS STUDY

» MARKET SIZING

» KEY CATEGORIES

» MARKET TRENDS

» FASHION TRENDS

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TOP BRANDS

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FASHION RETAIL



LEADER TALK

THE SHIRTS AND TROUSERS STUDY:

Leaders reveal how the market for shirts and trousers has evolved gradually and through it, the wearers today, are inclining towards creating their personal fashion expressions.

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SHIRT MARKET

SHIRTS SPEAK: CHALLENGES, OPPORTUNITIES & TRENDS

Shirts are still one of the most important wardrobe investments for both men and women across India. IMAGES BoF takes a look at the growing segment and the prevailing trends.

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TROUSER MARKET

AN EXPOSITION OF THE TROUSER MARKET IN INDIA

IMAGES BoF speaks to some of the leading brands to understand the current market and key trends in the trouser industry in India.

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The shirts & Trousers study



COVER RESEARCH

THE SHIRTS MARKET IN INDIA

Experts from Technopak map the Indian shirt's market that holds huge scope for brands and retailers, provided they manage to cater to the ever-changing fashion requirements of both formal and semi-formal shirts for men and women.

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COVER RESEARCH

THE TROUSERS MARKET IN INDIA

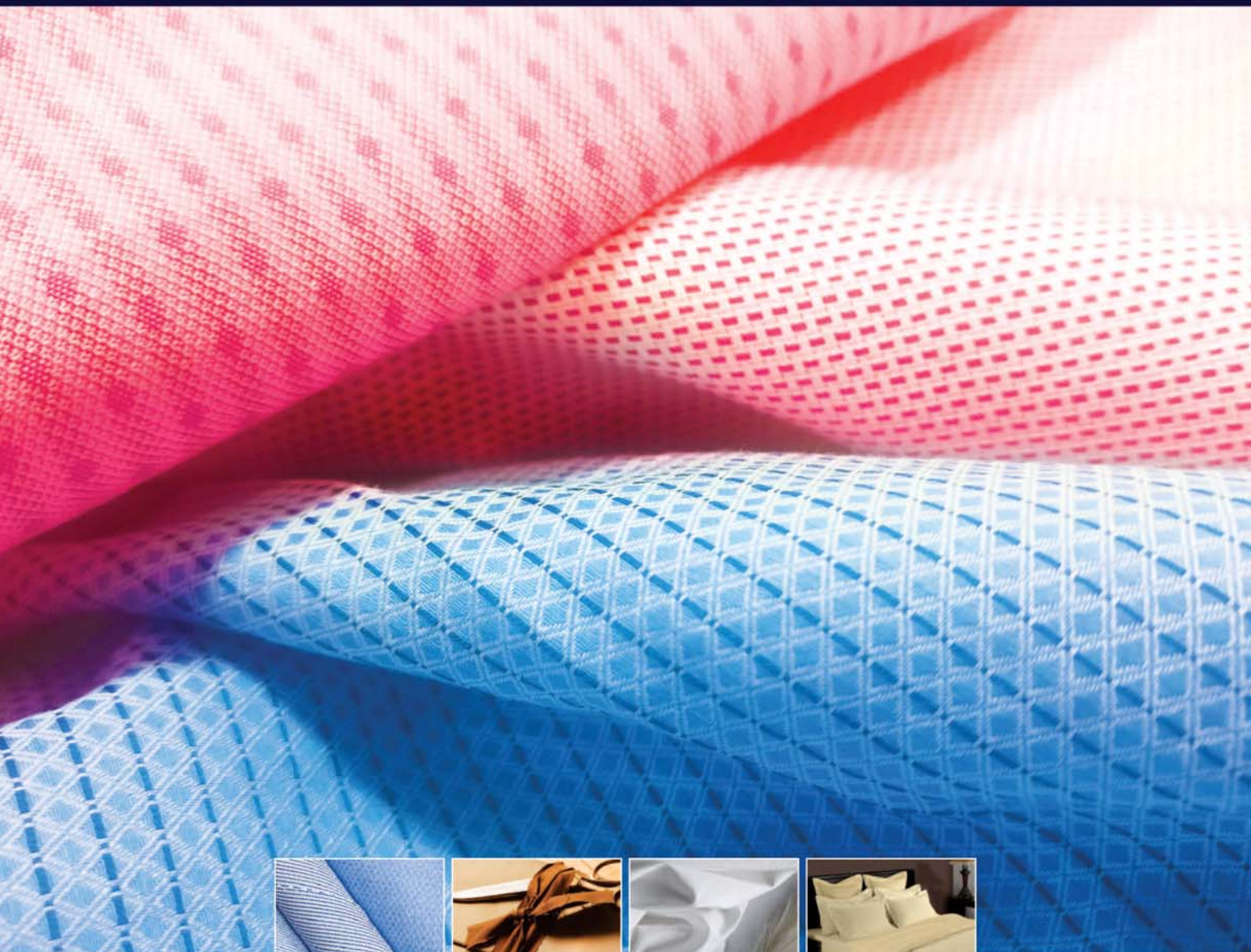
Experts from Technopak outline the market, key segments and the opportunities for brands and retailers.

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THE SHIRTS MARKET IN INDIA

Experts from Technopak map the Indian shirt market that holds huge scope for brands and retailers, provided they manage to cater to the ever-changing fashion requirements of both formal and semi-formal shirts for men and women.

By Amit Gugnani, Sr VP Fashion - Textiles & Apparel and Engineering with support from Goutham Jain, Principal Consultant - Fashion & Textiles, Saima Nigar, Associate Consultant, Technopak Advisors

The rapidly expanding Indian retail market, backed by factors such as strong fiscal and economic measures, rising disposable income, etc., is resulting in increasing consumer spending and increasing workforce. As a result it is witnessing some major shifts and growth in the recent years. Amidst this growing market, fashion retail stands out as one of the largest and one of the most rapidly growing categories.

SHIRTS MARKET SIZE AND GROWTH

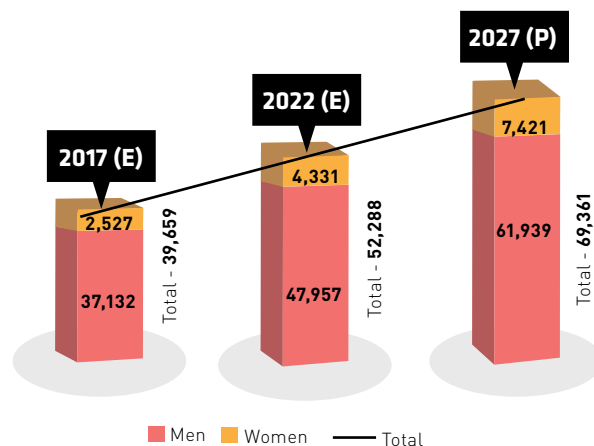
In 2017, the domestic shirt market was estimated at ₹39,659 crores, and it was expected to grow at a CAGR of 6 percent to become ₹69,361 crores by 2027. Shirts accounts for 12 percent of the total apparel market in India. Men's shirts holds 94 percent of the total shirts market with the remaining 6 percent constituted by the women's shirts market, which is growing twice as fast as the men's segment. While the men's shirt market is expected to grow at a CAGR of ~5 percent the women's segment is expected to grow at a CAGR of ~11 percent over the next decade.

MEN'S SHIRT MARKET

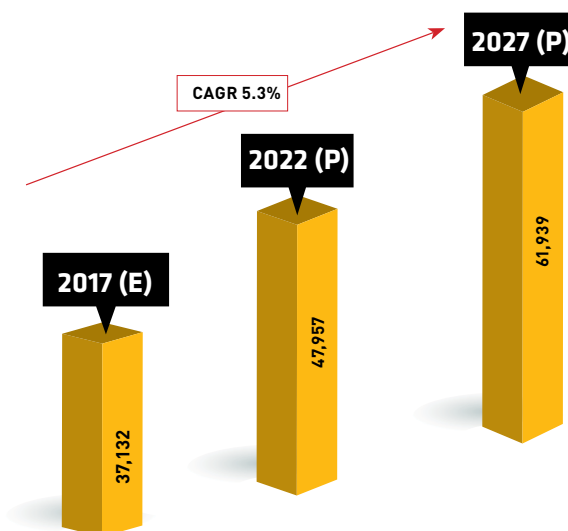
The men's shirts market in India is valued at ₹37,132 crores, and it is the largest category among men's apparel accounting for 28 percent of the total men's wear market. Around 40 percent of the men's shirt market is constituted by formal and semi-formal shirts.

The men's market of shirts is under transition in the last few years from limited colours and designs to distinct categories of formal and stylish shirts. With evolving consumer preference towards semi-formal and casual look, demand for stylish shirts is growing.

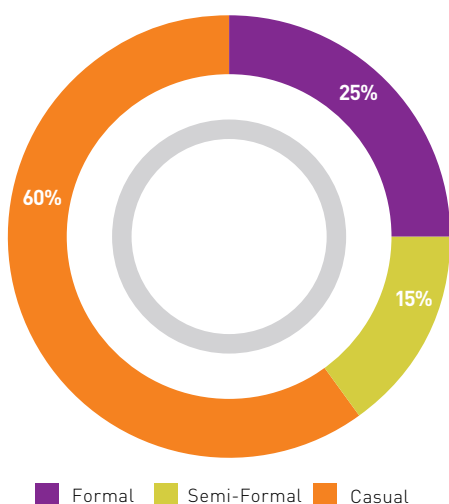
INDIAN SHIRT MARKET 2017, (INR CR)



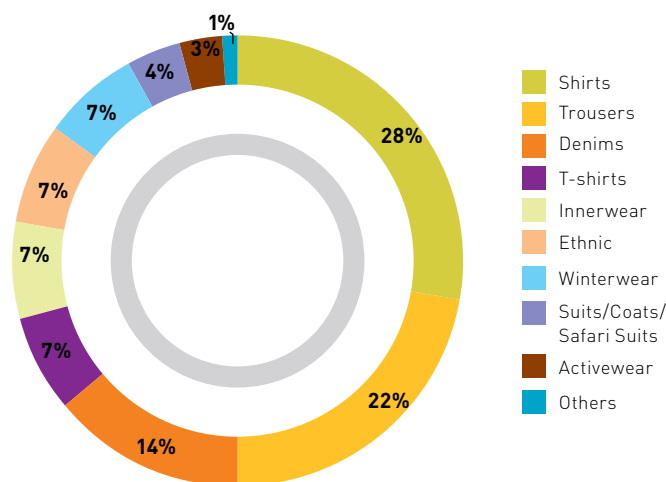
MEN'S SHIRTS MARKET, 2017 (INR CR)



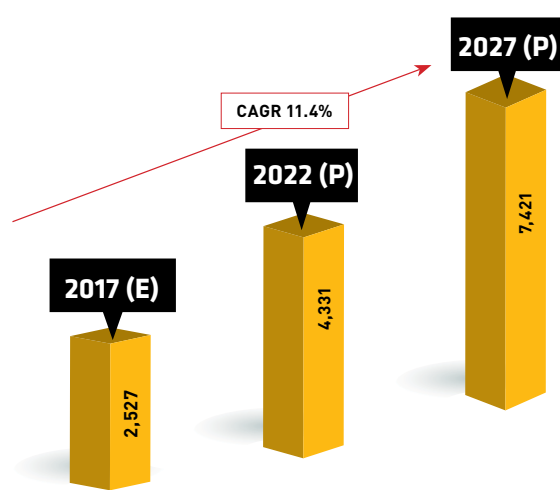
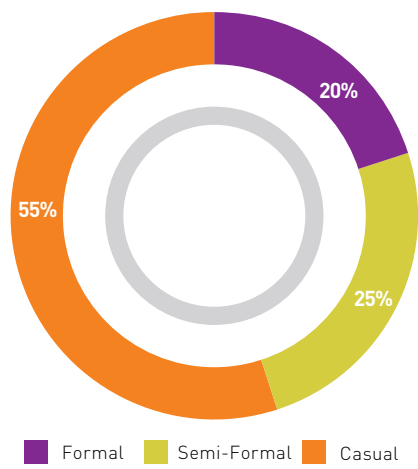
MEN'S SHIRT CATEGORY SPLIT, 2017



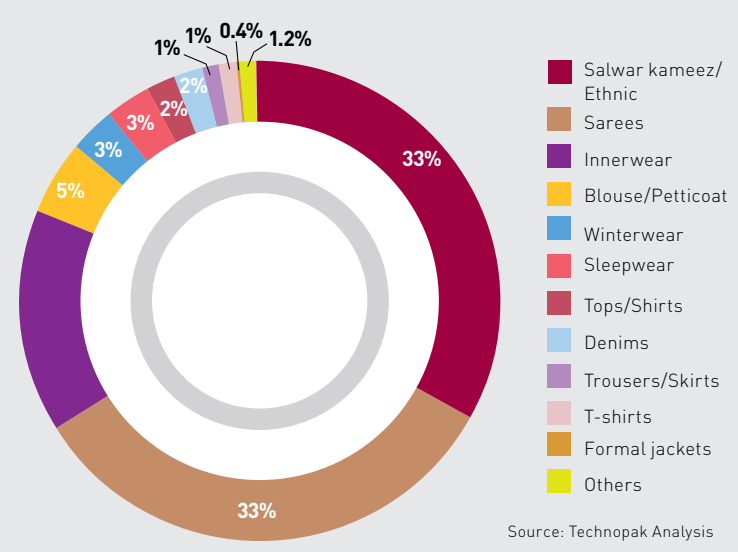
SHARE OF INDIVIDUAL CATEGORIES WITHIN MENSWEAR (2017)



Source: Technopak Analysis

WOMEN'S SHIRTS MARKET, 2017 (INR CR)

WOMEN'S SHIRT CATEGORY SPLIT (2017)


Source: Technopak Analysis

SHARE OF INDIVIDUAL CATEGORIES WITHIN WOMEN'S WEAR (2017)


Source: Technopak Analysis

WOMEN'S SHIRT MARKET

The women's shirt category is a relatively new and small category in women apparel. With a market size of ₹2,527 crores, it contributes only 2 percent to the total women's apparel market, which is dominated by women's ethnic wear. This category is expected to grow at a CAGR of ~11 percent in the near future due to increasing women in workforce, resulting in huge demand of formal shirts and growing demand for western wear among women.

Change in women's tastes and preference has already resulted in creating demand for both formal and casual shirts in metros and tier-I cities which is soon expected to trickle down to the non-metros as well.

TRENDS AND GROWTH DRIVERS

The overall shirt market in India has witnessed several transitions in fabrics, fits, styles and designs in the last few years. With increasing fashion awareness among both men and women and on influx of international brands in the domestic fashion arena, the category is no more restricted to formal wear. Shirts, which were earlier predominantly owned by men can now be seen occupying major chunks of women wardrobes as well. As projected earlier, it is all set to grow at a higher growth rate than men's shirts in the near future.

The shirts market is witnessing demand of personalization of shirts due to increased demand of customized shirts. The retailers have brought in various size segments like slim fits, skinny fits, etc., to cater to various demographics.





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In line with the global trend of casualization of shirts, the Indian shirt market is anticipated to witness huge demand of semi-formal and casual shirts compared to formal shirts, both in men's and women's category. It also has resulted in the emergence of various new designs and patterns in shirts.

Shirting comprises the bigger share of ready-to-wear market currently in comparison to other apparel categories.

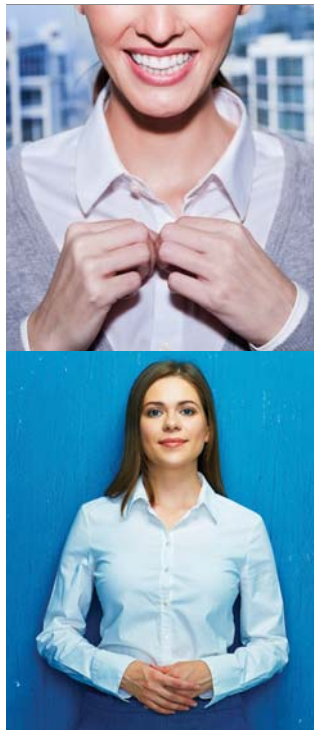
The conventional trend of buying fabric and getting a shirt stitched from tailor has lost its popularity. The Indian populace has now shown a high acceptability of ready-to-wear shirts rather than ready-to-stitch fabric.

The shirt market has witnessed diversification in terms of colour and fabrics too. Retailers today provide the customer with a wide range of choices in colours, styles and patterns. Cotton/cotton blends shirting is expected

to grow faster than overall shirting market due to growing preference of cotton amongst consumers due to higher comfort and quality factors. At the same time, new fabrics such as linen have also witnessed demand in the recent years.

With growing disposable income and rising middle class, the shirt market has experienced the much needed thrust. Further, growing urbanization and corporate culture are the additional growth drivers for shirt's retail market (for both in men's and women's category).

Increasing penetration of e-tailing in apparel has further led to expansion in consumer base for shirts. With increasing brick and mortar brand association with established e-tailers, the domestic market of shirts has been on growth trajectory.



CHALLENGES AND OPPORTUNITIES

Despite the number of rapidly flourishing brands, the penetration of the private labels and international labels are yet on the lower side. It is estimated that branded shirts are only able to drape a small percentage of Indian population. There is still a larger fraction of Indian population who still prefer local garment makers over branded apparel attributable to their cheaper cost.

Private labels and e-tailers have modified their pricing strategy and are offering shirts in low to mid-price range. The major organized players are trying to capture the market with 'efficient sourcing, low overheads' and, above all, higher volumes. Due to the increasing penetration of e-tailers there is easy availability of branded shirts at discounted prices in tier -I and -II cities, thus increasing the share of organised shirts market.

Also, designing proper a fit for women formal shirt as per Indian body type has been a challenge and many private labels and international retailers have failed to overcome this challenge. Fits catering to various body types of Indian women need to be developed in order to target larger consumer base.

In the coming years, the growth of the shirt market will be driven by the young aspiring youth working in corporate sector. At the same time innovative designs, fits and colour combinations in semi-formal shirts will continue to attract the fashion conscious consumers to consider semi-formal shirts and casual shirts as an alternative to formal shirts. Women's shirt market is also expected to witness a surge in demand due to increasing participation of women in workforce. The market will also witness new trends in terms of fabric design, finish application, introduction of wider colour choices and fitting. The shirt market in India therefore has huge scope for the brands and retailers provided they manage to cater to the ever changing fashion requirements of both formal and semi-formal shirt customers.

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THE TROUSERS MARKET IN INDIA

The old school, custom-stitched for fit and price mentality pertaining to trousers is finally witnessing a revolution in India as younger consumers exhibit an increasing inclination towards trendy ready to wear bottom wear. Amit Gugnani, Sr. VP Fashion - Textiles & Apparel and Engineering, with support from Goutham Jain, Principal Consultant - Fashion & Textiles and Saima Nigar, Associate Consultant, Technopak Advisors, outlines the market, key segments and the opportunities for brands and retailers.

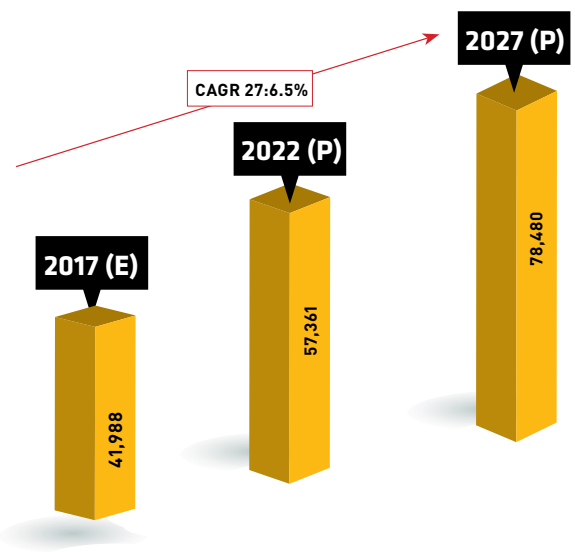
The Indian retail industry has picked up impressive momentum having recently revived from the sluggish growth due to Demonetisation and GST implementation. Buoyed by the increasing aspirations of the Indian fashion consumer, fashion retail continues to be one of the leading segments of modern retail in India. The Indian fashion retail market is likely to reach ₹6,74,037 crores by 2027 from the current level of ₹3,22,209 crores, growing at an impressive CAGR of 7.7 percent.

MARKET SIZE AND GROWTH

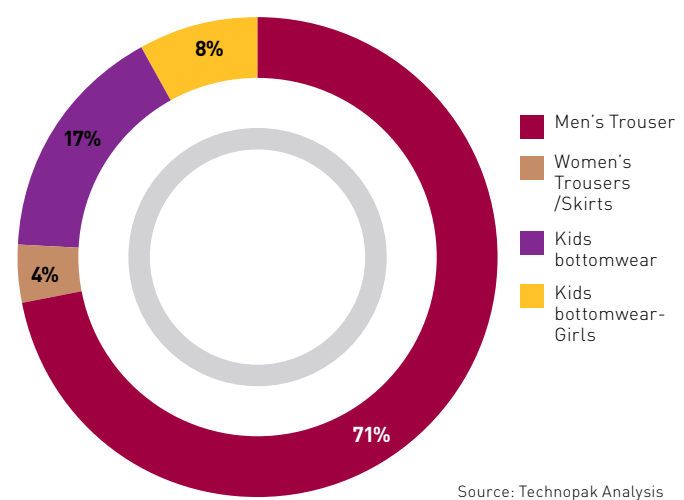
The bottom wear market in India, excluding denims, is estimated to be worth ₹41,988 crores in 2017 for men, women and kids. It is estimated that this market segment will grow at a CAGR of 6.5 percent over the decade and is estimated to reach ₹78,480 crores by 2027.

The trousers market in India is hitherto dominated by the men's segment which comprises ~71 percent, followed by the kids' segment which accounts for ~25 percent and finally there is the women's segment that accounts for ~4 percent of the total share.

INDIAN TROUSERS MARKET 2017 (INR CR)

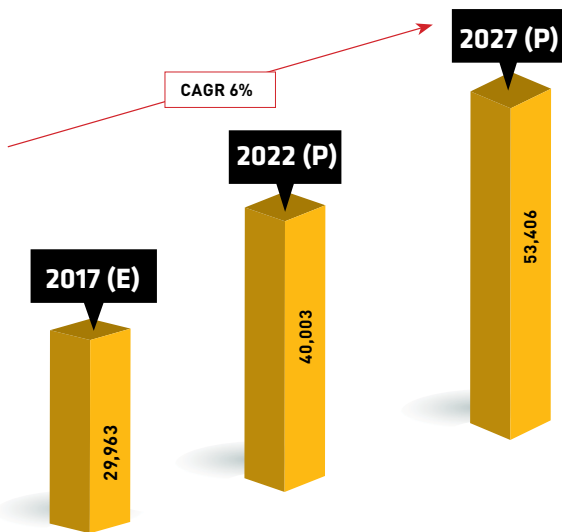


INDIAN BOTTOMWEAR MARKET SPLIT

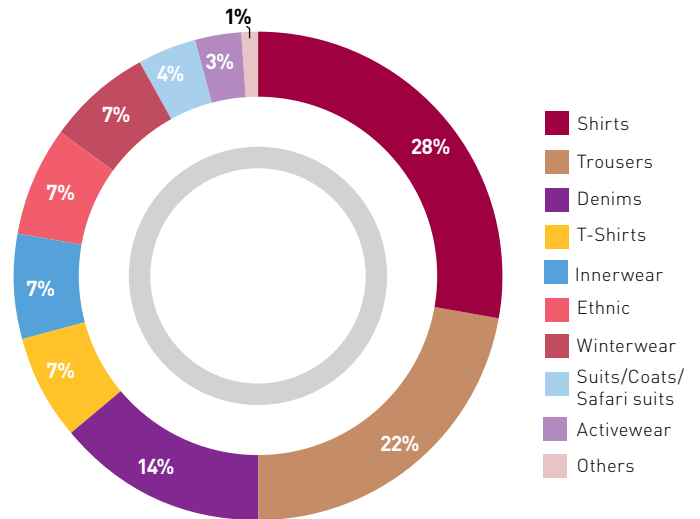


Source: Technopak Analysis

MEN'S TROUSERS MARKET SIZE (INR CR)



SHARE OF INDIVIDUAL CATEGORIES WITHIN MENSWEAR (2017)



Source: Technopak Analysis



The trousers market in India is hitherto dominated by the men's segment which comprises ~71 percent, followed by the kids' segment which accounts for ~25 percent and finally there is the women's segment that accounts for ~4 percent of the total share.

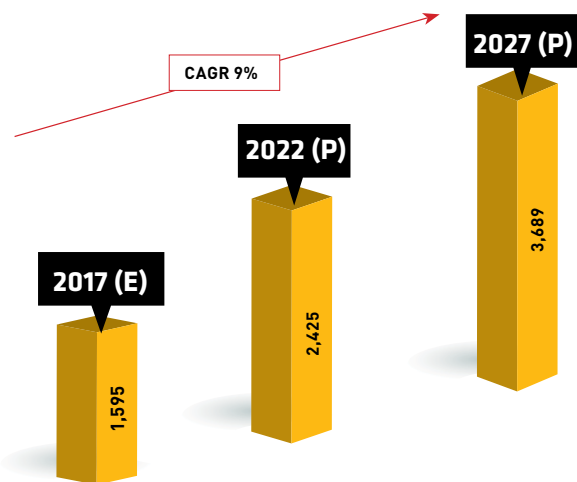
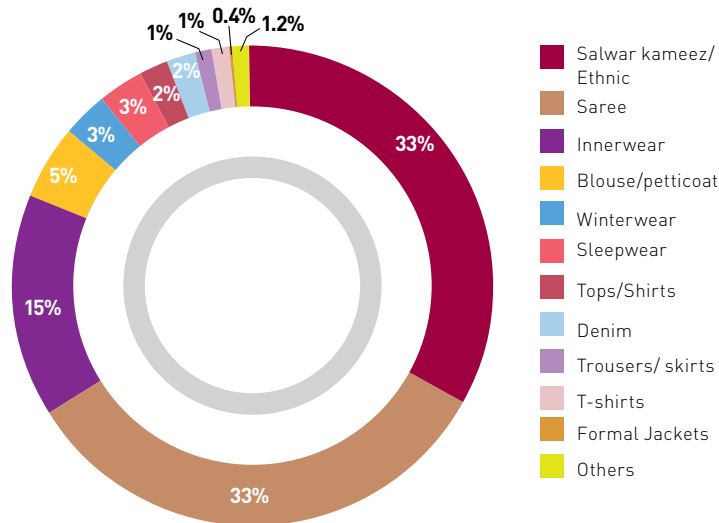
MEN'S TROUSERS MARKET

The single largest category in the Indian bottom wear market is men's trousers. It accounts for ~71 percent of the bottom wear market, with a value of worth ₹29,963 crores and is expected to grow at a CAGR of 6 percent over the next decade to reach a market size of ₹53,406 crores by 2027. It is the second largest category among men's wear and accounts for 23 percent of the total men's apparel market of India.

The men's trousers market has witnessed a remarkable change in the last few years from limited options to a wide range of different colours and designs in both formal and casual wear.

The proliferation of international players coupled with implementation of GST has resulted in growth of the organised market of trousers. Also, the emergence of fast-fashion brands has nipped the share of the ready-to-stitch trousers market, which now has significantly reduced in comparison to the ready-to-wear market.

This dynamic change is not restricted to men's formal trousers only. The men's casual trousers market has also witnessed a significant growth in the recent years. The Indian youth, who now seek trendy look due to increasing fashion awareness, availability of international brands, higher disposable income, etc., has resulted in an increase in demand for trousers in non-traditional colours such as red, green and blue among others.

WOMEN'S TROUSERS MARKET SIZE (INR CR)

SHARE OF INDIVIDUAL CATEGORIES WITHIN MENSWEAR (2017)


Source: Technopak Analysis



WOMEN'S TROUSERS MARKET

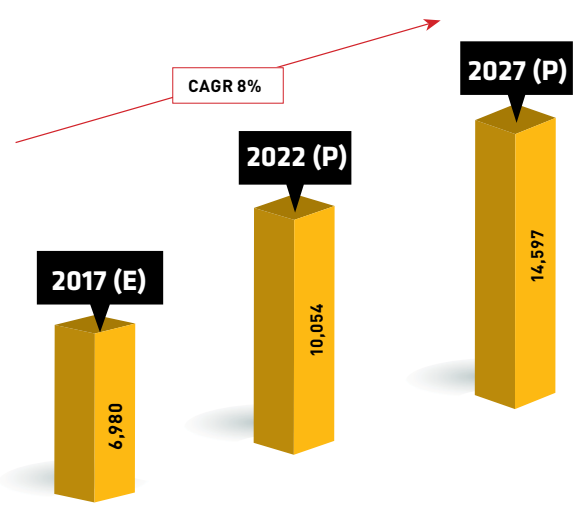
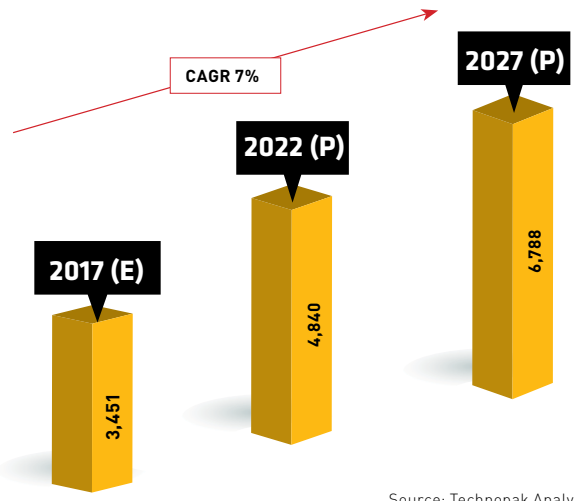
The women's trousers category is a relatively small category in the overall women's fashion segment which is dominated by ethnic wear. The women's trousers market contributes only 1 percent to the overall women's apparel market, but is expected to grow at a CAGR of ~9 percent for the next decade to reach a market size of ₹3,689 crores by 2027 from its current size of ₹1,595 crores owing to its small base. The key drivers behind such high growth rate are increase in number of working women, changing lifestyle and fashion awareness, higher spending patterns, etc.

At present, a major share of women's trousers market is concentrated in the metros and bigger cities. However, the category is expected to penetrate into tier-I and -II cities in the coming years, as it has already started witnessing surging demand.

Women's bottom wear is not restricted only to trousers; a wide range of ethnic bottom wear is popular in India. Women's ethnic wear is continuously evolving and has resulted in a new category, Indo-western which is a blend

of both ethnic and western wear. This fusion category features a wide variety of ensembles like trouser suits—long kurtas with straight pants, palazzos with kurtas, kurtas with leggings, etc. This category has especially gained popularity among the working women of the country.



BOYS BOTTOM WEAR MARKET SIZE (INR CR)

GIRLS BOTTOM WEAR MARKET SIZE (INR CR)


Source: Technopak Analysis


KIDS' TROUSERS MARKET

The kidswear segment is one of the fastest growing segments in the Indian apparel market. The kids' bottomwear market in 2017 was worth ₹8,575 crores and accounted for ~25 percent of the total bottomwear market of the country.

BOYS BOTTOM WEAR

The Indian kidswear market is slightly skewed towards boys' wear which accounts for 51 percent of the total kids wear market.

Within boys wear, uniforms, t-shirts and bottom wear are the dominating categories. Bottom wear is worth ₹6,980 crores (2017) which is expected to reach ₹14,597 crores by 2027 by growing at a CAGR of ~8 percent.

GIRLS' BOTTOM WEAR

The girl's bottom wear market is estimated to be worth ₹3,451 crores which is expected to grow at a CAGR of 7 percent to reach a market size of ₹6,788 crores by 2027. Girls bottom wear comprise for 11 percent of the total girls wear apparel segment.

SELECT TRENDS IN TROUSERS MARKET

The Indian trousers market has witnessed drastic changes in terms of product offering, fashion elements and preferences in recent years. The market has witnessed some of the most innovative changes in colours, prints and designs for both men and women.

Trends in trousers have shifted from cyclically back and forth over time from regular fit to skinny to baggy fit, pleated trousers, chinos, corduroys, flat front trousers with no turn-ups, etc. With increasing casual wear in corporates, the demand for casual trousers is gaining momentum and this segment is expected to grow at a higher rate as compared to formal trousers. Within casual wear, demand for casuals with prints and washed effects, in colours such as red, green and blue has also been increasing.

Finishes such as wrinkle-free treatment, durable press, water resistance, water repellent, etc., have been in the market for a long time. The market recently has witnessed introduction of finishes such as

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The trouser market has demonstrated a gradual increase in size and trousers made from blended and manmade fabrics are more in demand compared to cotton fabrics, as they are easy to wash, dry quickly, resist wrinkles, and are also resistant to moths and mildew.

breathability with superior moisture management characteristics. Trousers with flexible waist-bands have also started gaining traction.

In the women's segment, wide leg trousers are in vogue. The demand of skinny fit jeans and trousers, especially in women's wear segment has also increased in the last few years as a result of which women's trousers with elastane fibre has increased owing to its stretchability and fit. Women in metros and mini metros are experimenting and have shown inclination towards prints and different flairs in trousers. Women can also be seen wearing bright coloured or striped trousers in these cities.

The segment has also registered an increasing demand as an alternate against traditional salwars, churidars. Consequently, palazzos, straight pants and leggings, etc., are giving stiff competition to traditional bottom wear. The increasing number of women at work place has resulted in the origin of these non-traditional bottom wears which provide comfort and convenience to women.



FUTURE OF TROUSERS MARKET

Despite the number of rapidly flourishing national and international brands, the penetration of the readymade segment is still on the lower side and there is potential to grow. It is estimated that readymade trousers are still catering to a limited market and a significant section of men who wear trousers still prefer to get it stitched. The major reason for this is the price and better fitting.

Some private players catering this market have modified their pricing strategy and are offering their trousers in the price range equivalent to the price range of ready-to-stitch trousers. The major organised players are trying to capture the market with efficient sourcing, low overheads and, above all, volumes. The trouser market has demonstrated

a gradual increase in size and trousers made from blended and manmade fabrics are more in demand as compared to cotton fabrics, as they are easy to wash, dry quickly, resist wrinkles, and are also resistant to moths and mildew.

In the rural market, the fashion is shifting partially from traditional wear to western wear. This shift shall contribute towards the volume growth of the trousers market. The emerging tier -I and -II cities with their burgeoning middle class and their aspirations for fashionable products will further push the value growth of the market. Indian consumers, both male and female, will continue to seek better product quality, superior designs and perfect fit in their trousers.

Ultimately, the success of manufacturers and brands will depend largely on their ability to create fast fashion by offering innovative products at right price points and distribution network reaching semi-urban and rural areas across the length and breadth of the country.



IMAGES Business of Fashion

• 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	Products
A B Creation	Tetalee	Jaipur	Kurtis, Palazzo Pants, Tops & Skirts
Aditee International	Aditee	Jaipur	Kurti, Plazo, Pants, Legging, Skirt, Tunics, Dresses, Kaftans, Bags, Jewellery
AEKA - An Ode To Linen	AEKA	Mumbai	Kurtis, Shorts, Pants, Dresses & Sarees
Arena Fashions	Feminista	Surat	Kurtis, Gowns, Palazzos, Tops
Black Oak International	Warp & Weft	Bangalore	Shirts & Kurtas
Bornfree Fashions Pvt. Ltd.	Bornfree	Kolkata	Bermuda, Shorts, 3/4th, Travelling Payjama
Cross Color Apparel	Cross Colors	Chennai	Kalamkari Garments
Digsal Cool Cotton	Digsal / Selsia / Rat & Cat	Tirupur	Gym Vest, Vest, Briefs, Panties, Leggings, Kid's Wear
Draaz Impex	Draaz	New Delhi	Kid's Ethnic Wear, Girl's/Women's - Lehngas, Indo Western Draped Gowns
Elcinco Inc	Dillinger / Storm Born	Tirupur	T-Shirts, Shorts, Joggers, Track Pants
Eternal Clothing Line	Eternal / Wild Litte / Aashi	Surat	Kurtis, Tunics, Tops, Gowns
Five P Venture India Pvt. Ltd.	Nool By Hand	Erode	Shirts, Pants, Kurtas, Dresses, Short Tops
Francis Wacziarg Fashion (P) Ltd.	SlumberJill/FW Collection/Odaka	Bangalore	T-Shirts, Nightwear, Sweat Shirts
Furia Fashions	Furia	Mumbai	Boys T-Shirts
Gaurav Garments	Chirag	Delhi	Coats, Indo Western Wear, Sherwani Suit
Global Fashions	South Tailors / American Trends	Tirupur	T-Shirts
H P Fab Tex Pvt. Ltd.	100 Miles	Surat	Leggings, Kurtis, Tunics & Treggins
Handa Apparels	FKC Gold	Ludhiana	Track Pants, Capris, Shorts
House of Kilti	Kilti	Ahmedabad	Western Wear, Gowns, Short Dresses, Skirts, Jumpsuits, Pants
Huerex Apparels	Flybees / Huerex	Tirupur	Body Suit, Ramper, Sleepsuits, Towel, T-Shirt, Shorts, Leggings
International Trading Company	Goat	Tirupur	Fashion Sweater, Flat Knit Polo, Jersey/Polo T-Shirts
J.V. Overseas Exports	Naatiya / Booba	Tirupur	Leggings, Kid's Wear
Jeeva Parampara	Jeeva Parampara	Bangalore	Kurtis
Junction Fabrics & Apparels Ltd.	Hylex, Monk, Helicon	Tirupur	Polo T-Shirt, Solid T-Shirt, Track Pant, Leggings
Khoday Silk Streams	Khodaywilliams / Spoorthi	Bangalore	Silk Shirts, Linen Polysilk Shirts, Kurtas, Kurtis
Kotak Overseas Private Limited	K2Fashion Accessories	Mumbai	Intimate Wear & Accessories
Libas Fashion	Lakbi, Style Reunion's	Jaipur	Kurtis, Plazzo Pants, Scarfs, Sarees, girls wear
Mack Hosiery (Regd)	Vimal Jonney	Ludhiana	Trum Pants, Capris, Bamodas, Shorts, T-Shirts, Women Tops, Western Wear, Inner Wear, Caps
Mahima Sarees	Shree Guru Kripa	Chanderi	Sarees, Suits, Duppatas, Dress Materials
Meher Print LLP	Meher & Mansi	Mumbai	Kaftan, Kurtis, Tops, Plazzo, Pants, Skirts
Mischief Clothing Pvt. Ltd.	Rick Rogue	Bangalore	Jeans, Shorts, Trousers, Shirts
Mitra Inc.	Nostaljia	Bangalore	Bags & Cushion Covers, Laptop Sleeves
Mitras	Mitras	Coimbatore	Kurtis, Frocks
Nandani Creation Limited	Jaipur Kurti / Desi Fusion	Jaipur	Kurtis, Palazzo's, Duppattas, Ethnic Tops, etc.
Network Clothing Company Pvt. Ltd	Twin Birds	Tirupur	Leggings, Tops, Innerwear
New Aashi Rainwear	AAshi, Aone, Killer, Lawman Pg3	Ahmedabad	Suits, Jackets, Coats, Wind Cheaters
Ocean Knit Fab	Indigual, Lyrica, Incline	Ludhiana	All Types of Garments
Omnipresent Lifestyle LLP	Banno's Swagger	Surat	Kurtis and Ethnic Wear
Pinnacle Impex	Doll Up	Erode	Dresses
Poshaak Niryat (Exports)	Poshaak	Jaipur	Shirts, Kurtis, Skirts, Palazzo, Western Tunics
Pranera Services and Solutions Pvt. Ltd.	Laya	Tirupur	Women's Western Wear, Girls Wear
PVG Overseas Mills	Holla	Tirupur	Leggings
Rajarajeshwari Enterprises	Pranathi Mallaradhya	Bangalore	Kadhi Fabric Garments
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Royal Clothing	Jack Club	Tirupur	T-Shirts, Shirts, Track Pants
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S S Makkar & Co.	Jourman	Ludhiana	Casual Trousers/Chinos
Saksh Design Incorporation	Saksh Design	Jaipur	Kurtis, Lehngas, Gowns
Salona Cotspin Limited	Newrie London	Coimbatore	Palazzo, Leggings, Capri, Casual Pant, Tops
Sarkas Garments Company	Rollear	Tirupur	Men's Polo Shirts, T-Shirts, Track Pants, Ladies Pyjama Set
Selfwear	Selfwear	New Delhi	Scarves, Stoles, Shawls & Western Wear
Shree Bhavya Fabrics Ltd.	Shree Bhavya	Ahmedabad	Bedsheets
Shree Krishna Fashions	Shree Krishna	Jaipur	Kurtis, Patiyalas, Leggings
Shree Rukmani Fabtex	Rukmani	Jaipur	Kurtis
Shree Sadashiv Garments	Deesign	Vijayapur	Formal Shirts, Uniforms
Shree Silk	Shree	Surat	Fabrics & Fashion Garments
Simran Garments	Blackpool	Delhi	Modi Koti, Nehru Jackets, Waist Coats, Blazzers, T-Shirts, Kurta, Baloon Pajama
SNRDC Fashion Market	SNRDC	Surat	Readymades Wholesale Outlets
SO Design Factory Pvt. Ltd.	SO Design	Bangalore	Casual & Designer Shirts
Soochi	Soochirang	Bangalore	Tops, Lehngas, Maxi, Kurtis, Waist Coats
Sunshine International	AWAY	Surat	Customised Uniforms & Garments
The Yellow Paisley Store	Svanik	Bangalore	Ethnic Wear - Kurtas, Pyjama Sets, Waist Coats, Sherwani
Value Added Group	Dhanyawad	Surat	Kurtis, Gowns, Palazzos
Varsace Apparels Private Limited	Femigo	Kolkata	Tops, Kurti, Palazzo, Leggings, Camisole
Ventra G Fashions	Ventra	Tirupur	Night Wear, Night Suits, Pyjama Sets, Frocks, Sweat Shirts
Vista Lifestyles	VINK	Surat	Kurtis, Tops, Palazzo Pants, Long Skirts, Tunics
V Star Creations Pvt. Ltd.	V Star	Kochi	Innerwear / Outerwear
Vivek's Creation	Vivek's	Bangalore	Mannequins, Hangers, Stands, Carry Bags etc

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THE SHIRTS AND TROUSERS STUDY: MARKET DYNAMICS & TRENDS

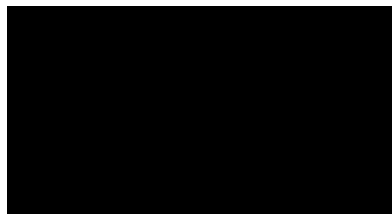
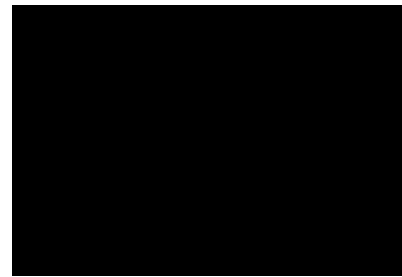
Shirts and trousers are the garments that can be found in every individual's wardrobe! In India, shirts and trousers are the highest selling assortment. The market for these has evolved gradually and through it, the wearers today, are inclining towards creating their personal fashion expressions.

By Niyorkona Saikia with inputs from Gurbir Gulati and Rosy N Sharma

Elaborating upon the growth story of India's shirt and trouser industry, few of the big players have presented their views on the fostering elements that has acted as prime catalysts for the ever-evolving market. Team IMAGES BoF tries to know from them, about the impending future of the industry.

Describing the current status of the shirt and trouser industry, Abhishek Shetty, Head - Marketing, PR & Loyalty, Celio said that they are the highest selling apparels at present. Highlighting on the same, Prem Dewan, Retail Head, Corneliani says, "The market has evolved along with the rest of the global apparel market. Consumers are also embracing the idea of fashion for its own sake, as means of self expression and not just a functional purchase."

Trousers are considered the most versatile garment for men with multiple applications like



Parx

casual wear, work wear, and everyday use. They have gone through a fashion journey, evolving from formal attire into a key element of casual fashion. "Trouser Industry as a whole is flourishing. Consumers are getting lot many options in trousers such as printed, checkered as well as plains. There are different segments for casuals, formals, semi-formals, as well as evening wear," says Rajnish Sethia, Director, Success.

Today, the consumers have a plethora of options for both shirts and trousers. There are different segments for casuals, formals, semi-formals and evening wear. Though evolved over a period of time, the industry still holds tremendous growth potential in the country, owing to the ever changing fashion requirements across the ever changing gamut of consumer base.

Focusing on the per capita consumption growth and the chief reasons for this change, Rajnish Sethia mentions that the per capita consumption has grown by leaps and bounds. The main reason behind this is the high disposable income of the consumers. Since, our country is a young country as far as average age is concerned, the young stars want to dress well to present themselves in a better way, and this has further increased the sales up to many levels.

Challenges

Like any other industry, the shirt and trouser industry too faces certain challenges. Discussing upon the various challenges, Abhishek Shetty, Head - Marketing, PR & Loyalty, Celio, says, "Managing multichannel and offline today has become a key challenge for all the players, as the cost of operations is going up. Also effective utilization of stock becomes increasingly difficult in an environment where the consumer wants increased product choices."

According to Prem Dewan, Retail Head, Corneliani, the biggest challenge facing the Indian organized retail sector is the lack of retail space. With real estate prices escalating due to increase in demand from the Indian organized retail sector, it is posing a challenge to its growth. Other challenges include infrastructure and logistics, supply-chain bottlenecks and complex taxation.

Highlighting more upon the industry complications, Rajnish Sethia, "The biggest challenge this industry is facing is the non-availability of skilled labors. Since the consumer has become more educated regarding the fit, and designing part being exposed to international brands. We require very skilled labors to compete with the international brands."

Moreover, e-commerce and discounting leads to price competition amongst the brands and is making it difficult to sustain margins and product quality for the domestic retail brands. Consumers can find wide options

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"The market has evolved along with the rest of the global apparel market. Consumers are also embracing the idea of fashion for its own sake, as means of self expression."

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



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Celio



“The market has evolved along with the rest of the global apparel market. Consumers are also embracing the idea of fashion for its own sake, as means of self expression and not just a functional purchase.”

-Prem Dewan,
Retail Head, Corneliani

from both unorganized and organized sector, which is not only impacting the brand stickiness, but also the pricing strategy across channels.

Growth

In spite of all the challenges faced by the industry, yet the big players believe that there are still a lot of scope and opportunities in this industry. E-commerce helps one to reach the hinterlands of the country and that makes it possible for brands to reach a wider audience, thereby fuelling further growth.

“India’s retail sector is witnessing accelerated growth as the purchasing power of Indian consumer is growing. Significant growth in discretionary income and changing lifestyles are among the major growth drivers of Indian retail industry. Also, due to the large scope of business and high growth potential, India is attracting investors across the globe,” says Prem Dewan.

Even in such a volatile market, consumers are accepting innovations, which might have been shunned upon previously. For shirts, this includes printed shirts, blends like modal/tencel, etc., which were predominantly for womenswear market before. With skilled labors, state-of-the-art machines, manufacturers can produce huge quantities of good quality shirts.

When being asked about the potential of tier -II and -III cities in shirts and trousers for both men’s and women’s categories, Sandeep Khapra, Design Head, Men’s Wear, Max, says, “Tier -II and -III cities hold a huge potential as currently these markets are dominated by the unorganized sector. Penetration of branded segment will not only help the retailers to grow, but will also help the consumers to evolve.”

According to market analysis, the growth in the next few years for the retail category as a whole will come



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“The trouser industry is flourishing. Consumers are getting many options in trousers such as printed, checkered as well as plains. There are different segments for casuals, formals, semi-formals, as well as evening wear.”

Rajnish Sethia,
Director, Success



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from tier -II and -III cities. There is a strong demand for trousers, as categories such as denims are still making inroads as people's fashion statement. The rising disposable incomes and growing infrastructure availability is further fueling the growth. In fact, the demand for shirts in these cities tends to be even higher than metro cities. During the festive seasons, many brands usually clock a very strong growth in their shirts category.

“Now that the brand culture is picking up in tier -II and -III cities, consumers are becoming more brand conscious. This opportunity can be leveraged by a category like shirts and trousers” says Pragati Srivastava, GM & Brand Head, Parx.

Understanding the Indian consumer viewpoint and their will to pay for quality products by domestic brands, Abhishek Shetty explains, “Consumers are willing

to pay a higher amount as long as the brand perception, consumer value equation and their needs being satiated all align. Even for an international brand such as ours, where products are designed and sourced on a global scale, we are constantly striving towards increasing domestic production. With increased manufacturing capability in India, we are seeing considerable progress in Indian production in the last few years.”

Competition

Domestic brands are competing with international brands like Zegna, Brioni and Canali to name a few with better offerings in terms of collection, after-sale service, and also made-to-measure service. They are focusing more upon providing experience over product. The new-age consumers are willing to pay a price for brands, which are high on awareness quotient and appreciate the quality and innovations offered by them. Being espouse to international brands, the consumers now have immense knowledge about the quality





Highlighting upon the ratio between men's and woman's shirts, Rajnish Sethia mentions that in India the sale of women's shirts is still negligible compared to men. The reasons behind the slow growth of women's shirts are preference for traditional ethnic wear and growing share of contemporary ethnic wear in women's wardrobes.

Trends

When it comes to trend; the market sees different types of shirts and trousers. In the men's category, there is an increased play in fabrics and prints. Linen has been the top selling style in shirts. The colored denim and printed shirts are also gaining fashion momentum on the global scale. Talking of trends, Abhishek Shetty says, "Celio will bring the global trends to India in the Autumn Winter season. In addition to the aforementioned products, Celio will also be launching a range of reversible shirts. This will be a good play of colors and fabrics." He also states that slim and regular fit linen trousers and cargos have been making quite a comeback in recent times. While the categories are old, people are looking for more contemporary fits in these categories. Jack & Jones emphasizes, "Side-seam detailed trousers continue to be a key statement. Tapered leg pants are also fast developing into a trend. Their longer rise and shape slims towards the ankle, add volume at the hip while pleat detailing and further amplifies the look. Also, athleisure trend continues to be strong this season, with sweatpants being a must have."



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GM & Brand Head, Parx

of a product. So, manufacturers believe that the consumers are ready to pay higher for better quality product.

International brands like Jack & Jones and UCB have penetrated well into the Indian markets and have good recall amongst consumers for shirts. Illustrating upon the competition from foreign brands, Rajnish Sethia says, "With the advent of international brands in India, the competition has become tougher. Indian brands now have to compete with these brands in fit, design, quality and at the same time keeping the price under control."

On the other hand, emphasizing on competition from foreign brands, Pragati Srivastava says, "Trousers as a category has lesser competition from foreign brands because of lesser presence and different target customer."

What started purely as a functional item has now been transformed into a style defining garment. The recent evolution of menswear reflects not only advances in production techniques, but also caters to the growing needs and demands of the Indian market. Vertical striped shirts in varied fabrics, ranging



Considering color preferences, Abhishek Shetty comments that white, blue, navy, solids and check shirts are available across seasons and the demand for them exists despite the prevalent trend and people prefer natural, navy, olive linen and cotton trousers, as they are the styles that go for every season.

from casual to formal coupled with bold colored trousers are something that all fashion enthusiasts love to sport.

Explaining a little bit about the top selling fabrics in shirts, Jack & Jones states that cotton and cotton blends continue to be the top selling fabrics for t-shirts, followed by viscose. Special effects like burn out, single dye, acid wash and cold pigment dye allow interesting innovations. Linen too has its importance felt, especially in the tropical areas. Sandeep Khapra shares, "Cotton is always a staple choice for men's shirts, but lately linen has become a very close second in terms of fabric choice, especially in summer season. Recently, ecologically friendly fibres, such as modal, lyocell, bamboo, etc. are being offered by retailers. Women's shirts are more accepting of synthetic and man-made fibres.

For trousers, cotton Lycra is one of the top selling fabrics followed by various cellulosic based blends and linen. In the coming future, regenerated fabrics have the potential to be popular. On the contrary, polyester-viscose has become a standard substitute for the classic wool or wool blend trousers in the economy and value market.



According to Jack & Jones, "White is a key staple in every man's wardrobe, a clean plain white crisp shirt is easy to team with any outfit and suitable for most occasions. Micro printed shirts are emerging as another classic staple, as they work well for all occasions. Semi-solids such as the chambray, fil-a-fil, etc. are the main stay for shirts and are the evergreen fabrics." They believe that evergreen colors like black, olive night, desert sand and navy work for every occasion when it comes to trousers. For Spring/Summer, lighter shades such as salmon pink, camel, sky blue and white are great choices as they provide a playful break from the classics.

COTTON AND COTTON BLENDS CONTINUE TO BE THE TOP SELLING FABRICS FOR T-SHIRTS, FOLLOWED BY VISCOSE. SPECIAL EFFECTS LIKE BURN OUT, SINGLE DYE, ACID WASH AND COLD PIGMENT DYE ALLOW INTERESTING INNOVATIONS.

Interpreting on the most popular and upcoming styles in shirts in terms of cuts, stitches, embellishments, etc., for both men and women, Jack & Jones mentions, "Classic regular fits are the most popular choices, season on season. Clean cuts, detailed finishing and pointed collars rule the rooster. Since Jack & Jones offers the most extensive denim offerings, our upcoming styles revolve around experimenting with the denim fabric through new and interesting embroideries, embellishments and cuts."

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“Full sleeve slim fit shirts are standard style for shirts. Dinner shirts with new collar styles, band collar and wing-tip collars and bib yokes are a choice for special evening occasions,” says Sandeep Khapra.

The upcoming trends in Indian trouser market, according to Pragati Srivastava are cropped chinos, fashion trousers with a contrast waistband, looser cuts, relaxed shapes. Pleated trousers, side stripes and patch pockets, pleat-less slim trousers are few others.

Impact of Global Exposure

Describing about preferences of Indian consumers for international trends, Abhishek Shetty states, “Indians do follow global trends with both shirts and trousers, but our requirements for shirts tend to be much higher than many other parts of the world. Hence this fosters a lot of local innovation in the shirts category.”

According to Jack & Jones, the influx of high-street fashion in the country is necessary for brands to offer wardrobe options that are at par with global trends. Consumers in metros are seen



Corneliani



Max

to be more open to experimenting with new trends and patterns. However, while choosing shirts especially during formal occasions, Indian consumers at large are seen opting for trends that are popular, and tried and tested within the market. Patterns like classic checks, fennel, micro prints and monotone colors continue to be all time favorites.

“Yes, India follows international trends, only it is little slow to pick up these trends and for the trends to reach the masses. Success of two big

international retailers in the recent past is clear sign of international trends being picked by Indian men. The size of the fashion forward customer base is small and the masses take long to adopt these trends,” says Sandeep Khapra.

In India the requirement and preference for shirts and trousers tends to differ as per different regions and their respective weather conditions. South India, which has a more tropical climate, witnesses an increased demand for pure linen products, whereas winter markets might prefer double fabric products. Moreover, different regions have different levels of readiness to adopt new trends.

Talking on global trends and its influence, Rajnish Sethia says, “We try to follow global trends at a fast pace, as we have to compete with other domestic brands and at the same time keep pace with international brands too.” Neeraj Srinivas, on the other hand, states that most of the inspiration for new design comes from international markets. “I try to adapt it to the Indian market. Sometimes local trends emerge and I keep an eye on it to stay relevant in the market,” he adds.

Thus, the industry is on its path to greater excellence and the market is expected to grow at a steady pace. Indian manufacturers are looking into global forecasters for trend references and directions. Even though they are influenced and inspired from the global trends, yet they have toned it to suit the Indian domestic retail expectations. With such measures, the major players are expecting to create a niche of their own in the global market in the near future.





t-shirts, shirts, trousers, denims, lowers, bermudas, value packs, footwear

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SHIRTS SPEAK

CHALLENGES, OPPORTUNITIES & TRENDS

Shirts are still one of the most important wardrobe investments for both men and women across India. The length of the collar point and the width of the cuffs might have varied with the vagaries of men's fashion but the basic shirt still prevails. We take a look at the growing segment and the prevailing trends.

By Zainab S Kazi, Gurbir Singh Gulati & Rosy Sharma

A walk through any men's wear section in an MBO will bring us face to face with a plethora of shirt brands available in the country today. From private labels, national brands to international names, there is space for all. Adding to the market for readymade shirts is the growing prominence of bespoke shirts. The very fact that we have companies like Arvind Limited and Raymond offering made-to-measure in shirts and independent brands luring customers with a choice in fabrics, accessories, cuts, styles and fits is a testimony of the healthy demand for shirts in the country. At the same time, the industry also unanimously agrees that with t-shirts gaining popularity, the market for shirts has taken a hit. Elaborating on this, Saurabh Singh, Head - Men's Wear Designer, Being Human shares, "In the men's wear market, overall, the shirt is still the biggest category but for certain sections within the market like youth fashion, shirts are facing a stiff competition from t-shirts due to multiple reasons like change in trends towards more casual/sports direction, price points, opening up of casual wear for work, etc."

Where we do see t-shirts taking over some of the preference for shirts, it must also be noted that this change in demand has led brands to expand their casual shirts category. The market for casual shirts has witnessed a phenomenal growth where men today do not mind being spotted in bright colored floral print shirts for an evening out or for other semi-formal/casual occasions. Hetal Kotak, CEO, Lee Cooper (India) shares, "The shirt market holds huge scope for brands and retailers. With the work culture being more receptive to casual dressing, requirement for casual shirts is booming. And we see this trend growing stronger in the coming years." >

Harshil Dilkhush, Proprietor, Sigo adds, "I see a growing demand for printed shirts. Customers today are giving a skip to ordinary shirts and opting for shirts that look different." Echoing his thoughts, Praveen Mutha, MD, Cool Colors expresses, "In recent years, the shirt industry has shown an increase in demand for designer men's wear with shirts having prints and unique patterns." Mutha attributes this change to ever changing lifestyles and trends. Apart from the fact that shirts today need to offer something exciting in terms of print and color, according to Prashant Bhatia, MD, Cambridge, only those with sensible pricing are surviving.

The Growth Chart

Citing reasons for growth in demand for shirts, Saurabh Singh shares, "I think the main reason for this is economical. With an increase in disposable income and also due to rapid urbanization, people want to indulge in fashion. Ease of online shopping too has added to the demand." Where there is an increase in the number of customers opting to buy shirts, according to Prashant Bhatia, the growth buying quantity of a customer has not increased. Explaining this further, he shares, "We have realized that the customer is not buying more number of units. Instead of buying 2 at lesser prices he/she would prefer to buy 1 of a better quality at a higher price."

Casual dressing is the in-thing and this applies across categories. Casual shirts are growing in their popularity and brands have been catering to this rise in demand. Saurabh Singh points out, "The casual shirt segment, I feel, has a lot of potential, as it was majorly catered by the unorganized sector and formal shirt segment has always been the most organized sector."



"The casual shirt segment, I feel, has a lot of potential, as it was majorly catered by the unorganized sector and formal shirt segment has always been the most organized sector."

-Saurabh Singh,

Head - Men's Wear Designer, Being Human



Being Human



Lee Cooper



“The shirt market holds a huge scope for brands and retailers. With the work culture being more receptive to casual dressing, requirement for casual shirts is booming. And we see this trend growing stronger in the coming years.”

Hetal Kotak,
CEO, Lee Cooper (India)

Combating the Challenges

Apart from facing a competition from t-shirts, shirts as a category have to deal with other challenges like competition from unorganized players, remaining abreast with international trends, dealing with seasonal and cultural variations within the country, etc. Sharing more on the host of challenges faced, Hetal Kotak says, “The shirt market in India faces its own set of challenges. For instance, a huge chunk of the shirt market is unorganized and highly fragmented. This high level of industry fragmentation has resulted in an extremely competitive market wherein product price has become the core basis for competition. However, the brands which are offering differentiated propositions continue to gain consumer acceptance.”

Saurabh Singh shares, “Fashion retail in India is fast moving towards maturity and an over abundance of choices for the consumer leading to a tougher competition. Only the players who are able to adapt, keep pace with the competition or who are able to create a niche for themselves are likely to

do better.” According to Prashant Bhatia, low entry barriers within this category can be seen as another big challenge the industry is facing today. He elaborates, “The premium names have reduced prices and are entering the value segment. Hence, the increase in competition leads to price cuts as well.”

Reiterating on the threat posed by the unorganized market, Neha Shah, Head - Marketing, Pepe Jeans India shares, “Part of the market is unorganized and highly fragmented. This high level of industry fragmentation has resulted in an extremely competitive market wherein product price has become the core basis for competition.” Highlighting on another important factor that causes unrest into any category, Harshil Dilkhush talks about ‘discounting’. He shares, “We see ‘discounting’ has been generously used today. But what needs to be understood is that at the manufacturing level, the price cannot be brought down as this would directly affect the final quality of the product.”



“Discounting is been generously used today. But it has to be understood that at the manufacturing level, the price cannot be brought down as this would directly affect the final quality of the product.”

Harshil Dilkhush,
Proprietor, Sigo



“Part of the market is unorganized and fragmented. This industry fragmentation has resulted in an extremely competitive market wherein product price has become the core basis for competition..”

Neha Shah,
Head - Marketing, Pepe Jeans India

Emphasizing on the prevalent trend of discounts and offers, Jayakumar K, COO, Otto says, “Discounts and offers are a big threat. This threat especially comes from the online players as they can afford to shell out products at very discounted prices and the offers keep coming throughout the year. The other two most complicated challenges are rising customer expectation and finding the right service staff.”

Exploring Tier -II and -III Markets

With mobile data being freely available and online shopping portals offering delivery to the remotest of pincodes in India, brands and manufacturers have, before them, the option to reach out to their patrons living in smaller towns and cities across India. Accentuating on this, Neha Shah explains, “As retail continues to grow, one cannot treat the tier -II and -III markets simply as an extension of the tier-I markets. With growing purchasing power, style consciousness, international brand launching and e-commerce expansion, the purchasing power of these towns is almost at par with metro areas in both the ladies and men’s wear segment.” Majority of the players agree that these markets offer a huge scope for expansion. Saurabh Singh throws in a word of advice, “These cities have potential for both men’s and women’s shirts but certain local/ regional factors need to be kept in mind to be able to succeed here.” Prashant Bhatia shares similar views, “There is a great potential



Otto Store



Cambridge Store



Otto



Sigo

in these classes of towns provided you have understood the needs of the customer and you are willing to accommodate his preference in your product.” Harshil Dilkhush shares an interesting observation stating that customers in these places are more inclined towards bespoke tailoring as compared to metro cities.

Pricing it Right

Indians love to bargain and anything that is available at a discounted price or on an offer is up for grabs! But does this apply to the category for shirts as well? According to Saurabh Singh, not all consumers are same. He feels that where at some point they may be tempted by a bargain/ discount to make a purchase, during other times they may really love a product or need a product and that drives their buying decision. He adds, “I still feel that the shock of poor quality is bigger than the shock of high prices.” Hetal Kotak is of the opinion that with the shopper being increasingly aware of the product, they now understand the value of innovations, customization, add-ons and hence the brands who are doing it effectively enjoy their patronage.

From Across the Shores

International brands have always received a warm welcome in India. There is an undeniable fetish for anything that comes from abroad. Names like Zara and H&M have turned around the fashion market in India and for good. Brands are now seen working towards being at par with these established names not only in terms of product quality and style but also their customer service initiatives. Elaborating on the influence of international brands, Saurabh Singh minces no words when he shares, “Some foreign brands are a bane and a boon at the same time. On one hand, they bring in the latest trends and help develop fashion awareness and on the other hand some big retailers deliberately adapt



“Discounts and offers are a big threat. The other two most complicated challenges are rising customer expectation and finding the right service staff.”

Jayakumar K,
COO, Otto

predatory pricing strategy to capture the market, which not all local brands will be able to compete with.”

Jayakumar K, COO, Otto feels that Indian corporates support international brands but miss out on opportunities to partner with upcoming Indian brands.

On whether or not, brands in India follow international trends, Praveen Mutha is quick to say, “India’s fashion industry does follow the trends of the world. We incorporate a lot of styles, design and stitching patterns that are predominant globally to make our market a place for global fashion.”

Catering to Women

Blouses and tunics for women have a considerable larger market share as compared to shirts if we talk about western top-wear category. Though, a lot many brands have a healthy offering of shirts for women and most of them are doing well. Hetal Kotak talks about the response being received at Lee Cooper, “In my opinion, shirts in women’s wear is an exciting space in today’s time. We have achieved this growth by studying latest trends and successfully implementing newer silhouettes and concepts in our women’s wear line.”

Neha Shah echoes similar thoughts, “Women’s shirts are going to be huge next season. Shirts as a segment are very versatile, formal or informal they can be styled in any way whether formal, informal, semi-formal or casual. Although there are several categories like dresses, tops, blouses jumpsuits that dominate the women’s wear segment, shirts remain one of the top selling segments.”

Styles Speak

If we take a look at the design dynamics, the category for men’s shirt is dominated by bold colors and print, especially tropical prints. Reiterating

on this, Saurabh Singh shares, “For men, it is the tropical printed resort shirts. Apart from that, there is a good movement seen in knitted shirts and linen too. Sportswear too is the standout trend of season with colour block and hybrid woven and knit mix shirts.” According to Prashant Bhatia, business casual/ smart casual shirts are in demand besides pure formals.

Hetal Kotak points out that the market is witnessing a good response towards checkered, solids, stripes and prints and that these “are something which never go out of fashion.” Sharing an in-depth view into colors and prints that do well in shirts for men, she shares, “Solid colors in different bases, red, blue and white checks, different shades of Indigo will remain forever in any men’s wardrobe. But concept/ story based prints, nautical stripes, ombre, single color and gingham checks are some styles that are picking up and will trend in future with various adaptations. With regards to evergreen colors; shades of blue, black, red, yellow, grey and white will continue to dominate the shirt industry for men. These days a lot of structures, dobby, melange, grindle, indigo checks, different wash treatments, etc. are ruling the game. Smaller details in plackets, collars and cuffs are also the new highlights.”

A quick look into the recent collection of shirts brought out by Pepe Jeans London shows us how ethnic prints have made inroads for men’s shirts.

Neha Shah shares, “The SS’18 Pepe Jeans collection for men and women showcases an open-minded and eclectic approach to dressing for the new season. For men, iikat and batik prints, bleached denim shirts, tropical and vibrant prints, bright and sold colours are key highlights. For women, floral prints, embroidery, cold shoulder shirts in sleek and fluid silhouettes are popular this season.”

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Pepe Jeans
LONDON



“We have realized that the customer is not buying more number of units. Instead of buying 2 at lesser prices he/she would prefer to buy 1 of a better quality at a higher price.”

Prashant Bhatia,
MD, Cambridge



“India is an aspirational market and global influence plays a part in shaping trends. However, it is a market filled with creators as well, and using art and innovative designs from Indian designers are creating quite some styles here as well.”

Praveen Mutha,
MD, Cool Colors

In fabric, cotton rules the game though linen too has its fair share of patronage. Talking about the most popular fabrics in demand at Being Human, Saurabh Singh says, prints on all kind of bases like poplin, denim, linen are always popular. For the coming Autumn/Winter season we are experimenting with a lot of light weight flannels.” According to Hetal Kotak, apart from 100 percent cotton, Indigo checks, yarn dyed and knitted are the top selling fabrics. Yarn dyed linen and blends continue to excite customers. In the jeans wear segment, the end appeal of product gets amplified and transformed due to the use of innovative washes that we subject our products to.” As for fabrics preferred by women, according to Neha Shah it is viscose and denim. Harshil Dilkhush heavily bets on the prevalence of Pinpoint shirt fabric as the next ‘in-thing’ followed by giza cotton print.

Where currently, pastel shades and flower prints are in high demand during summers, according to Saurabh Singh, in the next season, classic plaids in bright red and bright yellow colors ways will be trending in the youth

segment. He points out that in terms of color, “Mint green is coming up really fast and might just become the replacement of millennial pink.”

Neha Shah points out that whites, coral and pastel colors are always in the forefront of the spring summer collection but light pinks, blush reds, lavender, peaches and lush greens are going to be some of the colors to look out for in the future. In terms of style, according to Saurabh Singh, for young men, bright colored flannel checks with grunge styling of badges, prints, distress will be trending and we shall also witness bold stripes making a comeback. Moving over to cuts, based on the demand witnessed at Lee Cooper, Kotak shares, “Slimmer cuts (slim fit) and silhouettes are favorite among men as it makes them appear leaner, other than that hooded shirt, drop shoulders are also picking up. In women’s, knotted shirts, drop shoulder, layered, shirt dresses with pocket, extra loose/over size shirt etc. are getting popular.”

To Conclude...

Unlike other categories, shirts do not offer much in terms of creativity except for a play in colors and prints. Global influence plays a major role for brands in India to work with their design team and offer fresh collection to their patrons. Praveen Mutha concludes stating, “India is an aspirational market and global influence plays a part in shaping trends. However, it is a market filled with creators as well, and using art and innovative designs, Indian designers are creating quite some styles here as well. As India is a large market, it has the ability to accommodate a wide variety of trends.”

As Jayakumar K, COO, Otto puts it, “Apparel industry will grow further in India, so will the competition. The future will be for brands who can evolve as per the customer needs and change fashions with continuous improvement.”

Being Human



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ANALYSIS

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AN EXPOSITION OF THE

TROUSER MARKET IN INDIA

Trousers have been worn since ancient times and were regarded as a masculine garment for hundreds of years. Various styles of trousers have come and gone in past decades and the garment has been changing its appearance countless times. Team Images BoF spoke to some of the leading brands to understand the current market trends of the trouser industry in India.

By Bharti Sood, Gurbir Singh Gulati & Rosy N Sharma

Courtyard

According to the latest industry report, the trouser market in India today is dominated by the men's segment which comprises ~71 percent, followed by the kids' segment, which accounts for ~25 percent and women's segment ~4 percent. The cumulative bottom wear market of men, women and kids, excluding denims, is estimated to be worth of ₹41,988 crores in 2017. It is estimated that this market segment will grow at a CAGR of 6.5 percent over the decade and is estimated to reach ₹78,480 crores by 2027.

The Industry

The trouser market has evolved significantly over the past few years, due to the change in consumers' dressing preferences. There has been a tremendous increase in the per capita consumption. Says Suvarna Kale, DGM - Design, Blackberrys, "The change is in sync with the per capita growth consumption of the country".



“Competitive prices with quality products and value added garments are the biggest challenges we face in the industry.”

-Amit Dhelia,
Proprietor, Courtyard

According to Suvarna Kale, the men's trouser market size (including Khakis) is estimated to be worth ₹7,900 crores approximately. Modita Tripathi, Chief Brand Manager, John Miller, feels that the core formal trouser is currently moving towards the fashion formal trouser with the introduction of checks and striped patterns and with inclusion of various other styling elements like crop length and reverse turn ups at the hem. Whereas, Amit Dhelia, Proprietor, Courtyard feels that the trouser industry is the same as before and much changes have not been seen.

Elaborating on the potential of the tier -II and -III cities in trousers segment in both men's and women's categories, Amit Dhelia, felt that tier -II and -III cities have a huge potential as major buying comes from there. According to him that market is huge and consumption is very high. Kale is of the opinion that as much as 35

percent of the sales of luxury brands in India are coming from non-metro cities. “There are a lot of luxury/brand loyal buyers in the interiors of India, a section that is still largely unexplored by brands. The smaller cities have huge spending capacities and we end up underestimating them,” said he.

The trousers market has witnessed a remarkable change in the last few years. The Indian youth seeks trendy look and there is increasing fashion awareness, which leads to increase in demand of trousers. Earlier the options used to be limited in trousers as such, but now they are available in a vast range of colours and styles, fabrics and finishes in formal as well as casual wear. “There is great potential for the trouser segment as people now prefer the branded to the unbranded in this segment. The spread of mobile media and the internet has also helped in making people more brand conscious,” says Modita Tripathi.

Challenges

Consumers today hold the buying power and retailers are hyper sensitive to the consumers' needs, as they want a vast variety of styles of high quality. Due to globalization also the trouser brands have to face various challenges in the industry. Brand owners at times find it difficult to thrive against intense market competition. They have a pressure of controlling production and

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Blackberrys Store



sourcing costs, managing excessive inventory and discounts, and balancing sustainability and business growth. Says Amit Dhelia. “Competitive prices with quality products and value added garments are the biggest challenges we face in the industry”.

Nowadays, consumers are not only accessing products from brick and mortar stores but even from online retailers. The trouser industry is overflowing with multiple brands and abundant style options to cater to the increasing demand of the consumers. “Multiple brands be it domestic or international are going for extensive expansion plans to provide the consumers with a lot of choices. Every two months, the



“Quality and fitness are the two rising trends. Young consumers are looking at easy fashion and matured consumers definitely look at quality driven products especially in men’s wear.”

—Suvarna Kale,
DGM-Design, Blackberrys

cotton trousers that they can wear at work or casual events”. According to Modita, shirt to trouser ratio with every customer is 3:1, which can be made to 2:1 or 1:1.

Consumer Behaviour and Spending Patterns

Increase in incomes, greater awareness, new developments and twists and turns are affecting consumer attitudes and buying preferences. Is the Indian consumer willing to pay higher for quality products manufactured by the domestic brands or are they willing to pay for value added products done by the domestic brands. “Yes, consumers pay for quality, and value additions are always a welcome. Any domestic brand with exclusive products is always preferred,” says Amit Dhelia. Agrees Suvarna Kale “Quality and fitness are the two rising trends. Young consumers are looking at easy fashion and matured consumers definitely look at quality driven products especially in

brands keep introducing some promotion or a sale, which itself is a challenge to sell products at full value,” shares Kale. According to Modita, inventory management , and discount management are the biggest challenges for the industry.

Opportunities

Today, social media has become an influencer and the smart phone has become a tool of purchase. The consumers have more choices than before. There is a vast opportunity for the manufacturers/brands to understand how to tap this new retail terrain. They need to continue to evolve quickly and be more innovative to meet the changing marketplace.

Affirms Amit Dhelia, “There are immense opportunities in this industry, as the market is huge. People require a variety of clothing, and trousers add to their wardrobe. Also, quality goods at competitive prices add to the opportunities”. As per Suvarna Kale, “The bottoms have become diverse, with their fits as well as style options. The market is trying each option, be it the typical dress line trousers, or the



John Miller



Blackberrys

men's wear." Consumers in big cities, on an average, buy more premium products, which leads to higher spending. Affirms Modita, "Yes, the consumer is willing to pay higher for quality products, as long as he is able to find value in his purchase. Also to a large extent customer service and in-store experience, play a key factor too."

Trousers for Women

The women's trousers category in India is relatively a small category in the overall women's market segment, which is highly dominated by ethnic wear. Amit Dhelia opines, "The ratio between men's and women's trousers is 80:20. This is so because women in the working industry are comparatively few as compared to men and also jeans have taken up the formal form of clothing". Similarly, Modita shares, "The slow growth in women's trousers is because primarily, Indian women still prefer ethnic wear. In ethnic, there are various Indo-western options like work-wear kurtas, etc. A lot of companies including large IT firms have moved away from the formal dress code compulsion and are open to casual dressing at work. Thus a large number of women prefer wearing denims, which are easier to maintain and easy to pair up with a suitable top wear." Overall the market for women's trousers still remains untapped to a large extent. It is mostly concentrated in the metros and larger cities. However, in the years to come, the category is expected to register deeper penetration into tier-I and -II cities as well.

Competition From Foreign Brands

Various international brands have made deep inroads into the Indian trouser market. Indian consumers increasingly prefer these brands for their perceived quality, fit and style. Shares Suvarna Kale, "It's a tough scenario competing with fast fashion

brands like Zara and H&M, due to competitive price points. But things are different in the formal segment. E.g. a formal shirt from Canali would cost nothing less than ₹9,000, whereas Indian brands would be able to give amazing qualitative products at half the cost."

Modita feels that the availability of foreign brands at various price ranges has made the customer open to various possibilities of flaunting his style in so called 'Foreign labeled brands'; and thus the competition is steep. On the contrary, Amit Dhelia is of the opinion that there is no competition from the foreign brands, as the Indian consumer tastes completely vary.

Trousering Trends

Today, trousers can be broadly categorised as formals, sport, leisure and chinos. Trousers are the more traditional alternative to jeans when it comes to semi-casual and formal wear. The style of trousers one chooses depends partly upon personal preference and partly on body type.

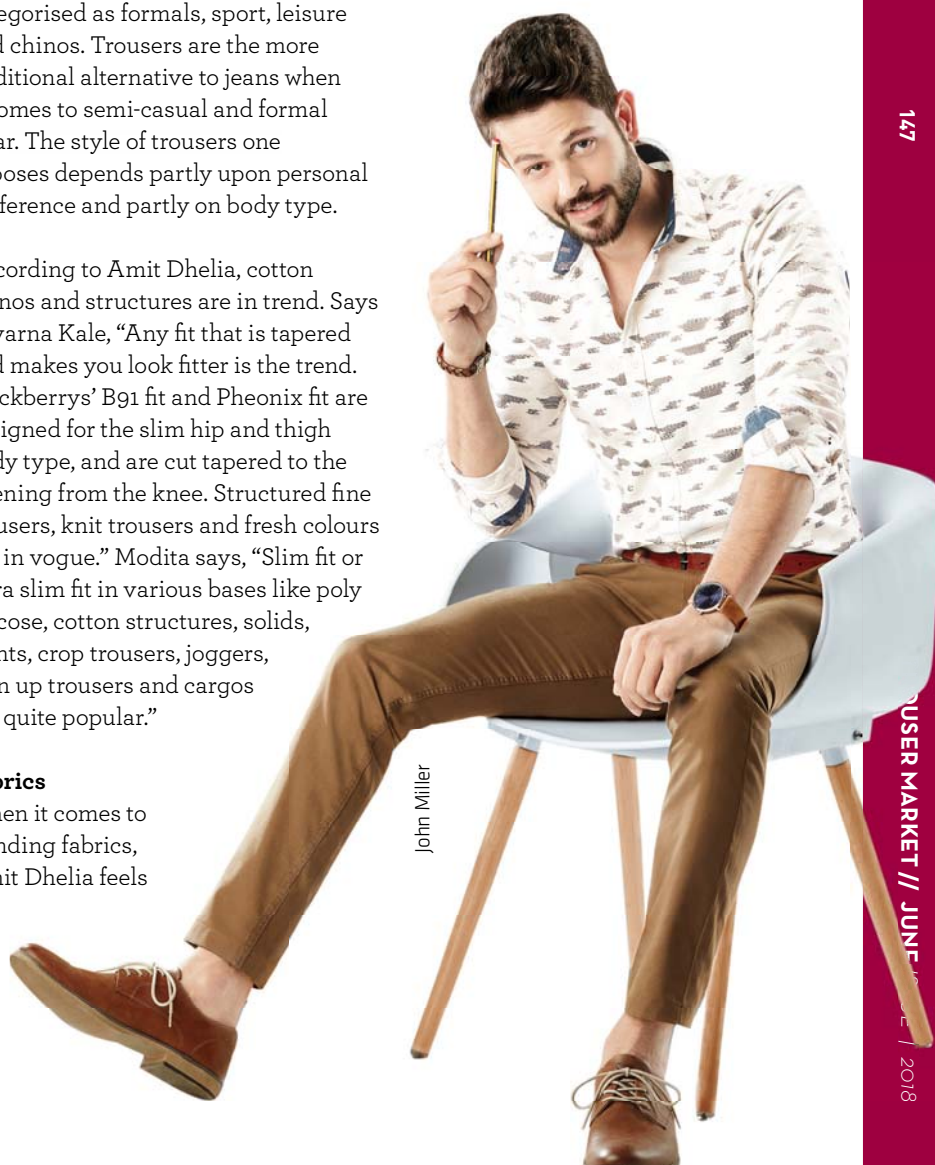
According to Amit Dhelia, cotton chinos and structures are in trend. Says Suvarna Kale, "Any fit that is tapered and makes you look fitter is the trend. Blackberrys' B91 fit and Pheonix fit are designed for the slim hip and thigh body type, and are cut tapered to the opening from the knee. Structured fine trousers, knit trousers and fresh colours are in vogue." Modita says, "Slim fit or ultra slim fit in various bases like poly viscose, cotton structures, solids, prints, crop trousers, joggers, turn up trousers and cargos are quite popular."

Fabrics

When it comes to trending fabrics, Amit Dhelia feels

"Slim fit or ultra slim fit in various bases like poly viscose, cotton structures, solids, prints, crop trousers, joggers, turn up trousers and cargos are quite popular."

-Modita Tripathi,
Chief Brand Manager,
John Miller



John Miller

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Blackberrys

THE WOMEN'S TROUSERS CATEGORY IN INDIA IS RELATIVELY A SMALL CATEGORY IN THE OVERALL WOMEN'S MARKET SEGMENT, WHICH IS HIGHLY DOMINATED BY ETHNIC WEAR.

chinos are the top selling. According to Suvarna Kale, structured dobbies, knits and window pane checks are slated to trend in the coming seasons. "Currently poly viscose stretch fabric is in high demand across various bases like twills, structures, checks, stripes and prints. Also recycled poly trousers have gained huge popularity due to increasing awareness of environmental sustainability," shares Modita.

Colours

Talking about colours, Amit Dhelia, Proprietor, Courtyard feels, "Earth colors along with regular fit are evergreen. Navy and black are add-ons. Pastels colors may take up the trend in future." At Blackberrys, navy and shades of blues are their top sellers. "Checkered trousers and self dobbies are evergreen patterns," says Suvarna Kale. According to Modita, shades of khaki, beige, brown, black, navy, deep olive, grey have been faring well in the market. Deep maroon, mustard and mist are the emerging colours of the season.

Fits and Cuts

Styles and fits in vogue include sleeker looks like narrow cuts and slim fit. "In women's wear, narrow fits, slide slits are more popular, while trends for men include regular or narrow fits," shares Amit Dhelia. According to Suvarna Kale, turn-up hem in trousers is a big hit in men's fashion. He says, "Turn up trousers and cut and sew details for evening trousers are in trend." Similarly Modita also

lays focus on slim fits, ultra slim fits, cropped trousers, turn up trousers, darts at the bottom, back yoke, side seam taping, neon embellishments, contrast cut'n'sew at waist band, pocket detailing, pleating, chain stitches, zig-zag stitches, blind stitch, raffu, etc.

Modita and Suvarna Kale are of the view that trends do vary from region to region in India to a certain extent. "The North, West, North-East are highly fashionable and are open to try new trends and styles. While the southern states are conservative and more inclined towards the classics and are not too keen on experimenting with the trends," says Modita. On the other hand, Amit feels that the trends are same all over India, though north India may differ a bit.

Influence of International Trends

When it comes to following international trends in trousers, Amit Dhelia feels Indians have their own section of fits. They may just copy international washing patterns. He says, "Global trends have no influence on the Indian markets. Domestic markets compete among themselves." At the same time, Blackberrys follows the international trends as their customers are global. Adds Suvarna Kale, "South India is more classic".

Even John Miller follows the trending international styles, fits, embellishments, cut and sew panels, washes, etc. Modita shares, "Global trends are on the extreme. Either the trousers are way too narrow in their fits or recently they are getting more balloon shaped. In India, we need to find a balance as it is not necessary that these trends would be accepted here; and also the Indian body type may not be suitable for their styles. But we as a brand are now focusing more on the slimmer fits".



>> AEROMEN/ AEDON /CENTOVENTI <<

Company: M K Enterprises | **Key Category:** Shirts

A prominent and highly-specialised menswear manufacturer, M K Enterprises offers three brands under the names of Aeromen, Aedon and Centoventi. Under Aeromen, the brand is offering 100 percent semi-casual cotton shirts. Aedon comprises designer shirts made from linen and other innovative fabrics. The third brand, Centoventi offers a range of exclusive club shirts with Italian silhouettes and fits.

Target consumer

All the three brands cater to the similar target group. However, Aeromen targets men between 18 to 40 years group and Aedon focuses on men aged between 25 to 60 years.

Current product categories in shirts

Aedon offers party wear designer shirts in linen and flex cotton. Aeromen offers a semi-casual range in 100 percent cotton. And, Centoventi offers a collection of white shirts for formal and party wear. All the three brands are made from cotton and branded fabrics such as Monza and Carolyn. The brands are available in checks, prints, plains and stripes, dobby, twills, structures, etc.

Top new innovations in shirts

They are planning to launch a new category in sportswear under Aeromen Sports by July 2018. They are also planning to launch a range of formalwear shirts in Aeromen.

Theme & core elements of the latest Spring-Summer '18 shirts collection

In the latest Spring Summer '18 collection, they have launched many solid colours and dubbies in the shirts



KEY INFOGRAPHICS

- > Retail presence:
 - MBOs: **600**
- > No. of cities present in: **152**
- > No. of states present in: **7**

collection. They have also made a collection with bright checks. They have introduced Chinese collar and button down collar with cufflink cuffs in their latest range.

Manufacturing infrastructure

They have two manufacturing units in Mumbai (Maharashtra).

Major future plans in product/range expansion

The company has been evaluating the market to launch a trousers brand.

Retail expansion plans

The company is looking forward to expand its brands in Madhya Pradesh and Uttar Pradesh.



>> BEING HUMAN <<

Company: The Mandhana Retail Ventures Ltd. | **Key Category:** 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 support 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 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

Being a casual and jeans brand, the brand's primary target consumers are youth. The term 'youth' for Being Human is not just an age group rather it is a mind-set.

Current product categories in shirts

The brand's casual line of shirts consists of a wide range of prints, checks, denims and for the summer season it offers a range of linen shirts. It's core top selling shirt is the smart poplin stretch shirt which is available in five colours this season.

Top new innovations in shirts

This season, the brand has introduced a lot of sportswear inspired hybrid shirts with a mix of woven and knits. The brand's best selling shirt recently has been the black bomber shirt with contrast taped styling. The other highlight of the season is its big floral print and polka dot printed 100 percent linen shirts.



stores in 45 cities in India including Ahmedabad, Ajmer, Aligarh, Allahabad, Ambala, Amritsar, Aurangabad, Bengaluru, Bhatinda, Bhilwara, Bhopal, Bilaspur, Chandigarh, Chennai, Delhi, Gurugram, Gwalior, Hyderabad, Indore, Jabalpur, Jaipur, Jalandhar, Jodhpur, Kanpur, Kochi, Kolhapur, Kolkata, Kota, Lucknow, Ludhiana, Mohali, Mumbai, Nagpur, Nasik, Navi Mumbai, Noida, Pune, Rajkot, Ranchi, Surat, Thane, Udaipur, Vadodara, Varanasi and Vijayawada. The brand is also retailed across multiple channels such as exclusive stores, shop-in-shops, distributor networks and e-commerce websites internationally and in India. They are now planning to open more EBOs across India with more focus on tier -II and -III markets.



Theme & core elements of the latest Spring-Summer '18 shirts collection

The main themes for this season's collection are tropical, modern indigo, sports and pastel. The core elements in collection include indigo shirts in solid, printed and checks, etc. Then, for higher fashion quotient, it has introduced a sportswear inspired hybrid shirts.

Major future plans in product/range expansion

In future, the brand has plans to increase the share of its experimental range of shirts. Till date, the market response to its sportswear inspired hybrid shirts has been very good and the brand has plans to develop it further.

Retail expansion plans

The brand has launched its exclusive





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>> CAMBRIDGE <<

Company: Cambridge Clothing Co. LLP | **Key Category:** Shirts

The casual menswear brand, Cambridge has been dressing people for over three generations. The brand boasts of a glorious heritage of over five decades. They began operations in 1960 with focus on shirts and trousers, 20 years later they started manufacturing other menswear garments and accessories. The years 1989 and 1990 were definitive years for the brand as they introduced 'white collar shirts' in the market for the first time and launched blazers and suits at an affordable price range for their customers. They have been awarded the best formal wear brand thrice between 2000 to 2010 and also have been voted the most trusted brand.

Target consumer

The brand targets consumers from tier -I and -II cities, who want to feel comfortable and look stylish at an affordable cost for any occasion or event, irrespective of their age.

Current product categories in shirts

The brand boasts of product categories ranging from business formal to party casual and everything in between. At the moment, their complete product range comprises shirts, trousers, t-shirts, blazers, suits, jeans, denims and accessories. Their collection of formal shirts is the best selling and the most sought after by their customers, followed by formal trousers and casual shirts and suits.

Top new innovations in shirts

The focus of the latest collection in shirts this season is on business casual range both in 100 percent cottons and cotton blends.



Manufacturing infrastructure

The brand outsources their manufacturing from units across Mumbai city. These factories have been working with them for long.

Marketing strategy to promote the brand

Cambridge has enjoyed the goodwill of customers for over five decades, hence, their promotion has been primarily through word-of-mouth. They participate in print media from time to time by giving advertisements in magazines and newspapers. Their print advertisement campaigns throughout the 90's were quite noteworthy and helped the brand establish itself as stylish and affordable clothing to the



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 200
- EBOs: 80

> Total space occupied by EBOs:
50,000 sq.ft. (approx.)

> No. of cities present in: 50+

> No. of states present in: 5

masses during that period. They also indulge in below-the-line promotions, brand activation drives and trade shows.

Major future plans in product/range expansion

The brand aims to focus on its business and smart casual shirts and trousers range. They also plan to introduce premium 100 percent cotton formal shirts at very attractive and reasonable prices.

Retail expansion plans

Maharashtra continues to be their focus market. The brand aims to scale up their operations process in West Bengal, Jharkhand, Chattisgarh, Bihar and Karnataka. They will primarily be focusing on standalone outlets so that they can deliver a complete brand experience to their esteemed customers.



>> BLACKBERRYS <<

Company: Mohan Clothing Company Pvt. Ltd. | **Key Category:** Shirts & Trousers

Founded in the bylanes of Chandni Chowk (Delhi) by Mohan Brothers—Nikhil Mohan and Nitin Mohan, Blackberrys is a leading menswear brand, providing wardrobe solutions with diverse style options to the progressive men. Not just capturing but rejuvenating the comfort scale with premium quality fabrics, they are the definitive fashion partner offering wardrobe essentials for work, party, casual and streetwear. Blackberrys pioneered the impeccable fit with suits in 1991. They emerged with introducing wrinkle-free khakis in 1996. In 2000, they launched the dress line trousers for the first time in India. They were the first Indian brand to source fabric globally. In 2014, they launched their certified 'whitest shirt in India'.

Target consumer

The brand targets aspiring professional who falls in the age group of 25 to 40 years. The customer base also focuses on youth between 18 to 25 years with their youthwear brand Urban Blackberrys.

Current product categories in shirts

The brand's shirts range comprises the renowned Blackberrys' super white shirts, Giza cotton shirts by the name of Lord of Giza and comfortable 2-ply ultra shirts. Speaking of the patterns, dobby shirts and structured pattern shirts are their top selling range.

Current product categories in trousers

Blackberrys trousers offer utmost comfort with rich fabrics with technology inspired techno waist and flexi hook trousers. Knitted and checkered trousers have held the favourite spot, while their signature Phoenix Fit trousers offer the cleanest tapered look.

Top new innovations in shirts

Super white shirts and P100 with stretch are some of the innovations they have introduced. Blackberrys super white shirts come with the highest whiteness index of 160+. The P100 with stretch offer wrinkle free shirt with stretch properties for comfort and flexibility. Blackberrys is a fashion formal brand which speaks through their products including the best quality fabrics, colour palettes and latest styling.

Top new innovations in trousers

The brand's Pheonix Fit Signature range is the most tapered fit trouser in the market. Available in formal colours, their trousers offer the latest fashion.

Theme & core elements of the latest Spring-Summer '18 shirts collection

Move, Stretch, Soar—is the mood of the Spring Summer '18 collection. The range carries shirts in supreme cottons found around the world such as Giza cotton, 2-ply stretchable shirts and F3 shirts.

Theme & core elements of the latest Spring-Summer '18 trousers collection

The trousers' theme—Move, Stretch, Soar—highlights knit options for the aspiring men who need comfort as





much as style. The fashion elements like trims and turn-up hem is the additional USP in this collection.

Manufacturing infrastructure

Blackberrys runs four manufacturing facilities that produce shirts, formal trousers, suits and casual bottoms (khakis & shorts). The manufacturing capacity are - shirts (8.5 lakh pieces a year), suits (4 lakh pieces a year), formal trousers (6 lakh pieces a year), and casual bottoms (6 lakh pieces a year).

Marketing strategy to promote the brand

Blackberrys re-positioned its brand identity, the firebird; and the motto, keep rising. The brand was launched in a new avatar. The new logo re-staged the brand with values that complement the modern man of today.

In terms of marketing strategy, they use all media vehicles with huge presence in digital space. A 360-degree marketing approach leading to the best of the class consumer experience is the route for new opportunities. Recently, they also celebrated 'India Khaki Week'. They ran a campaign for their collaboration with the movie Race 3. The brand is the official style partner for the movie starcast.

Major future plans in product/range expansion in shirts

The brand's future plan is to have collections that are dynamic and versatile. The design and category should continuously works towards innovating the most comfortable collection that serves the best in class, styles and experience.

Major future plans in product/range expansion in trousers

The brand aims to explore on structures, fits and create unique trendy dress line trousers.

Retail expansion plans

Blackberrys plan to expand horizontally and vertically alike, with both exclusive stores and dealer networks. They are targeting more than 100 new doors this year.



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 450
- EBOs: 181 (COCO), 58 (FOFO)
- SIS: 350 (MBO), 211 (LFR)

> Total space occupied by EBOs & SIS: **approx. 0.6 million sq.ft.**

> No. of cities present in: **350**

> No. of states present in: **29 states, 6 union territories**

> Top 5 retailers: **Kapsons, RS Brothers, Bachoomal, Pothys & Shree Shivam**



>> COOL COLORS <<

Company: Bafna Clothing Company Pvt. Ltd. | **Key Category:** Shirts

A part of Bafna Clothing Company, Cool Colors is one of India's fastest growing garment brand. With over 35 years in the business, the brand is ISO 9001 certified and enjoys a respectable position in its domain today. Based in Bengaluru, it has directed the business to greater heights and invests every valuable effort in gaining maximum exposure in the market whether domestic or international. This has enabled them to achieve good growth across India, Singapore and UAE.

Target consumer

Cool Colors has positioned itself as an alternative men's wear brand that has broken free from the routine of just being another brand and provides unique collections in shirts and trousers.

Current product categories in shirts

Each season gives the brand new ideas and thoughts to come up with new fashion trends that sets them apart from the rest. However, there are always a range of classic designs like stripes, checks and plains that still hold the larger share in the market.

Top new innovations in shirts

The brand has introduced a range of printed shirts in patterns and designs.

Manufacturing infrastructure

Armed with 750 workforce, who work on 500 machines, the brand boasts of 3 units in 3 different locations.

Marketing strategy to promote the brand

The brand is currently promoting Cool Colors through a mix of traditional



media and digital promotions through social media. They have received a lot of interest and orders for the latest collection.

Retail expansion plans

The brand's ongoing retail expansion plan consists of increasing its presence in SIS and MBOs and through distribution network. They have targeted a few cities for EBOs expansion. They have recently entered the East India and are focusing on understanding the opportunities and challenges to create a sustainable business in that part of the country.



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 1,500
- EBOs: 6
- SIS: 75

>> CORNELIANI <<

Company: OSL Luxury Collections | **Key Category:** Shirts & Trousers

Italian men's wear brand, Corneliani is renowned for its suits. An international player, Corneliani stands out for its values of tradition and quality that make it an essential in every man's wardrobe. The brand's main factory is at Mantua (Italy) from where the products are supplied worldwide including India. The brand is retailed in India through OSL Luxury Collections.

Target consumer

A Corneliani wearer is one who understands style and luxury in terms of material and construction. A person who appreciates a refined quality of life. He is both refined, sophisticated and cultured, and knows what's going on. He has a sensitivity for beauty and authenticity, he's connected and he's spending money to live an experience, not just to own a product.

Top new innovations in shirts

The Corneliani idea is to have a clean silhouette on the outside. It is a sportswear/casual collection with hidden surprises that are useful for the customer in 2018. It can either be the fabric with stretch and shape that allows one extra comfort or it can be a hidden pocket to place the wearer's technology.

Top new innovations in trousers

Weightlessness is the dominant characteristic in the brand's latest trousers collection. The garments are airy and constructed in impalpable nylons.

Theme & core elements of the latest Spring-Summer '18 shirts collection

This dominant characteristic of our times seems to dictate the best of the new styles in Corneliani's latest shirt's



KEY INFOGRAPHICS

> Retail presence

● EBOs: 2

> No. of cities present in: 2

collection. The idea of fluidity and movement has been the inspiration, which offers a fully coordinated wardrobe that flows from a metropolitan look to one of leisure. The story the brand has dreamt up is of a voyage, through city and desert, written with the language of colours.

Theme & core elements of the latest Spring-Summer '18 trousers collection

The trousers collection displays a full-blown summer style dominated by soft silhouettes and natural fabrics, which contribute to the overriding sense of extreme sophistication and relaxation.

Manufacturing infrastructure

Corneliani is an Italian menswear brand, manufactured and made in Mantua (Italy).

Marketing strategy to promote the brand

Corneliani focuses on building the brand by using the right mix of marketing strategies. At store level, it ensures that the brand builds relations with the client and provides a unique shopping experience. It maintains regular communication with its clients through e-mailers, newsletters, media and via social platforms. Customer relationship programmes play a critical role in the luxury segment. The brand keeps organising special collection previews for its top clientele and follows systematic PR strategy events like made-to-measure and trunk shows. It recently launched SS 2018 collection with a stylist-blogger meet at its store.

Retail expansion plans

The brand is open to all the opportunities for expansion. It is always looking for new and innovative proposals that help the brand to strengthen its presence even better. The brand is evaluating something in the form of good retail space or any other worthy plan that comes across.



>> COURTYARD <<

Company: Artex Creation | **Key Category:** Trousers

Launched in 2015 by Artex Creation, Courtyard aims to provide fast, affordable and fashionable garments. The company has been a veteran in the denim market since the last two-decades. Under Courtyard, the company specialises in manufacturing blazers, suits, jackets, jeans, trousers, chinos and cotton pants for men, and a denim range for women.

Target consumer

Targeting men, women and teens between the age of 16 to 30 years, the brand caters to upper and middle class consumers. Their consumers have their own style statement and always seek to try out new fashion.

Current product categories in trousers

The brand's primary range comprises denim wear. Their trousers range consists of cottons pants, chinos and corduroy pants. Under trousers, jeans is their top selling product segment.

Theme & core elements of the latest Spring-Summer '18 trouser collection

The brand's latest Spring Summer '18 collection focuses on pastel colours.

Marketing strategy to promote the brand

The brand organises periodic sales at its brand store and with retail partners at their multi-brand stores. They have also partnered with prominent online market places like Flipkart, Amazon and Snapdeal to sell their products. Their online and offline retail channels maintain parity across rates, product quality and collection design. Apart from this, the brand regularly advertises

through SMS, Whatsapp, e-mailers, print advertisements including magazine and newspapers, and outdoor promotions. They are also very active on social media.

Retail expansion plans

Courtyard opened its first store recently at Raghav Plaza, Howrah (West Bengal). They have plans to open more exclusive brand stores. They are also planning to take the franchise route to scale up their expansion.

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KEY INFOGRAPHICS

> Retail presence:

- MBOs: 500+
- EBOs: 1
- SIS: 1

> States present in: **Uttar Pradesh, Andhra Pradesh, West Bengal, Assam & Odisha**

> Top 5 retailers: **Shree Shoppers Ltd. (Kolkata), Citi Choice (Sreerampur), Take Chand and Grandsons (Balurghat), Rinco Behala (Kolkata) & Bazaar Style Pvt. Ltd. (Kolkata)**



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ALSO AVAILABLE ACROSS THE MIDDLE EAST AND SINGAPORE



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>> CREAM CLASS <<

Company: K.P. Arts Fashion Pvt. Ltd. | **Key Category:** Shirts

Established in 1992 by K. P. Art Fashion, Cream Class was launched with an aim to bring more styles and innovation in men's formal shirts. Today, the brand offers both cotton-polyester and 100 percent cotton formal shirts. Apart from this, it also makes semi-casual shirts. Cream Class shirts come in both regular and urban fits at affordable price range.

Target consumer

The brand's target consumers are office goers, executives and the youth.

Current product categories in shirts

Cream Class current collection includes formal and semi-casual shirts in checks, stripes, plains and dobby; and linen shirts.

Top new innovations in shirts

Cream Class accentuates formal shirts for executives that offer sensuality and fashion forward style. The brand takes pride in designing for today's youth who are looking for international fashion but have re-worked according to Indian taste.

Marketing strategy to promote the brand

Besides consolidating their position in India, the brand also has plans to strengthen their position in the international market through their product portfolio.

Major future plans in product/range expansion

The brand plans to launch a new fashionable set of shirts targeting the youth.

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KEY INFOGRAPHICS

> Retail presence.

● MBOs: 1,000

> States present in: **Maharashtra, Madhya Pradesh, Rajasthan, Punjab, Haryana, Himachal Pradesh, Tamil Nadu, Karnataka & the North-East**



>> ENDICOTT & SKYKING <<

Company: Stitch Apparels | **Key Category:** Trousers

Conforming to the demands of high-end fashion in men's trousers, Stitch Apparels launched Endicott and Skyking. Skyking, launched in 1988, specialises in formal trousers. Endicott was introduced later and offers a wide variety of casual trousers that are high in quality and style. The company has become a one stop shop for all needs pertaining to trousers for the fashion conscious men of today. The brand aims to be one of the best solution providers for men's trousers in India. The mission is to be the first to give the latest fashion in trousers to its discerning consumers who want nothing but the best.

Target consumer

Both the brands target upper class young men who are 20 years and above.

Current product categories

Skyking, the formal trouser brand offers formal and semi-formal trouser collections displaying clean cuts and dark colours. While, Endicott has in store, trousers in a lot of prints and checks in corduroy fabric for casual wear.

Top new innovations

The company understands the changing dynamics of the men's trouser market and provides products that are in line with the latest standards in terms of cuts, colours and patterns. The brand is also known for its unique styles and regular innovations.



Major future plans in product/range expansion

Along with maintaining its existing product portfolio, the company aims to periodically introduce new and innovative designs that adhere to the latest trends.

Retail expansion plans

The brand is about to initiate its digital presence and is in talks with the most reputed e-tailers.



KEY INFOGRAPHICS

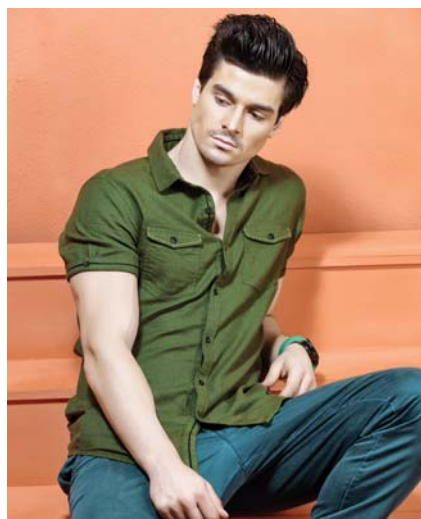
> Retail presence:

● MBOs: 300+

> No. of cities present in: All top tier - 10 - 11 cities

>> HORIZON <<

Company: Shankheshwar Designer Pvt. Ltd. | **Key Category:** Shirts



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 550
- EBOs: 2

> No. of states present in: 10



One of the best casual wear brands for men in the mid-segment, Horizon is riding high on a strong legacy of craftsmanship, unmatched quality and exemplary style. With a humble beginning in 2007, the brand today holds an inimitable position in the sphere of trend inspired fashion for the cosmopolitan man. Horizon has always



catered to the fashion quotient and consistently innovates to maintain its leadership position.

Target consumer

Horizon targets the middle class Indian men who are always in the look out for something new. The audience falls within the age group of 18 to 60 years and aspires to wear quality clothing.

Current product categories in shirts

The brand proudly offers a stylish range of casual shirts for men. Their clients always look for something new and creative in casual shirts, hence they keep developing new collections in checks, prints, plains, linen, etc.

Theme & core elements of the latest Spring-Summer '18 shirts collection

The brand's latest collection focuses on solid shirts and check shirts collection. With a trendy and premium quality offerings, it has become the apparel brand of choice where customers love to buy their shirts, t-shirts and much more.

Manufacturing infrastructure

Spread across 4,500 sq.ft., the brand's manufacturing unit is located in Mumbai (Maharashtra). It produces close to two lakh pieces per annum and is further expanding their capacity.

Marketing strategy to promote the brand

They promote the brand through a marketing mix of retail branding, outdoor publicity and a strong presence in media through newspapers and radio. They also participate in fairs and exhibitions which help them in creating a lot of buzz in the industry.

Retail expansion plans

Consolidating its position in all the major markets, Horizon in the next 2 to 3 years is aiming at a steady growth of 15 to 20 percent.



>> JACK & JONES <<

Company: Bestseller India | **Key Category:** Shirts & Trousers

Started in 1990, Jack & Jones is a democratic jeans brand that helps fashion conscious men to create their own personal style. Today, Jack & Jones is one of Europe's leading producers of menswear with more than 1,000 stores in 38 countries with menswear clothing being sold by thousands of wholesale partners all over the world. In India, Jack & Jones was introduced in the year 2008. From a single store in 2008, to around 67 EBOs and 329 SIS in a decade, Jack & Jones has become one of the most preferred menswear brands in the country.

Target consumer

The Jack & Jones target audience are millennials in the age group of 18 to 24 years who are true representatives of the persona of the brand, i.e., ultra-modern, edgy, rebellious, unique and don't ever hold back. They are confident individuals who are expressive, sporty, trendy and fashion conscious.

Current product categories in shirts

The product line comprises four broad categories – Jack & Jones Vintage Clothing, Premium by Jack & Jones, Originals by Jack & Jones, Core by Jack & Jones. Denim is the backbone of their business. Denim shirts along with prints, checks, solids and stretch bases are the top selling items across seasons.

Current product categories in trousers

Jeans are the top selling items across seasons. Jack & Jones Premium along with Core, Originals and Vintage which include jeans, cotton pants and chinos continue to be a favourite season on season. While cleaner silhouettes in formal wear is the popular choice. Their top selling items in trousers category

comprises casual and laid back chinos and comfortable cotton pants.

Top new innovations in shirts

The brand continues to have a high level of expertise when it comes to craftsmanship, quality and design of shirts. The brand constantly strives to make each product special for the customers and offers a value addition rather than just producing the same designs over and over. To add a tactile element to the shirt, they have worked on dobby, textured, bases and prints for the customer. They also use more compact bases for printed shirts which increase the durability of the fabrics, giving the customers a crisp yet comfortable garment to wear.

Top new innovations in trousers

Comfort and fit is crucial for the success of this category. In addition to



this, durability of the product is also extremely important. Jack & Jones continues to work with newer fabrics to ensure that their products are trendy. Their trousers and jeans are all about fashion, fit and interesting quirky details.

Theme & core elements of the latest Spring-Summer '18 shirts collection

The brand has experimented with various themes for Spring Summer such as The Tokyo story, The modern dandy, 90's nostalgia, Wild life and more while developing the existing sub brands of Originals, Vintage, Core, Premium and Tech.

Theme & core elements of the latest Spring-Summer '18 trousers collection

The core element for trousers was playing with colours. Casual chinos



KEY INFOGRAPHICS

> Retail presence:

- EBOs: 67
- SIS: 329

> Total space occupied by EBOs & SIS:
2,16,406 sq.ft.

in various pastel shades, joggers with camo prints and retro styled trousers are some of the various elements of the Spring Summer collection.

Marketing strategy to promote the brand

The brand's marketing strategy is honest and straightforward, much like its target audience. To reach out to their desired demographic, Jack & Jones works continuously to successfully connect men belonging to its TG through its brand campaigns. They look at connecting men across music, sports and popular culture.

With music, it created its very own property, All Star Jamm, offering their customers access to musicians they generally wouldn't be able to see, at the Jack & Jones flagship stores. The #DontHoldBack campaign also brought music to the fore, by working first with

Ranveer Singh and then launching 4 new-comers to rap versions of the song, titled #DontHoldBack. Jack & Jones 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 sport and IPL in the country but have also not left behind the followers of basketball. Last year, they called world's greatest rebounder Kenneth Faried at one of the flagship stores in Delhi and launched an exclusive NBA collection.

Major future plans in product/range expansion in shirts

Fashion at Jack & Jones is created by some of the most talented designers. While the brand continues to offer newer options across all sub brands, they will foray into experimenting with stretch fabrics. There has been a significant shift towards using stretch materials in their garments. The design teams constantly think of new innovations and work towards bringing this fabric to some of their core product categories. Everyday wear checkered shirts, cotton and linen blends with stretch fabrics are expected to be big.

Major future plans in product/range expansion in trousers

They continue to grow this category by adding more options in chinos and cotton pants. Also, Jack & Jones Premium will contribute to the growth of this category by adding formal options with quirky details.

Retail expansion plans

Jack & Jones has always been looking at the right opportunities in market. By 2020, they plan to become one of the biggest fashion brands in India. Their key strategies would be bigger brick-and-mortar stores as it gives better customer experience. Better technological integration of inventory across all their platforms. And to enter in new cities and increasing the number of stores.



>> JOHN MILLER <<

Company: Future Lifestyle Fashions | **Key Category:** Shirts & Trousers

In today's corporate parlance, success is about having an extra edge that makes one stand out and stride ahead. This new breed believes in looking the part, to be taken seriously, to establish a presence and they do this by dressing for success. John Miller is a brand that blends a clever mix of conformity and distinctiveness to create edgy fashion for the workplace that makes success look easy and inevitable.

Target consumer

The brand targets young executives aged between 21 to 28 years. Their focus consumers have seen plenty of 'young achievers' around and are confident of their own stride. They are inspired and believe even they 'can' do it.

Current product categories in shirts

The flexi shirts by John Miller are currently selling well. The flexi shirts are stretch shirts delivering motion and impeccable comfort in sharp and sophisticated tailoring.

Current product categories in trousers

The brand's feather light trousers are being received well. The trouser collection is available in lightweight PV with stretch in checks.

Top new innovations in shirts

The signature shirt by John Miller is made from 2-ply finer count yarn. It has been treated with liquid ammonia for softer hand feel, and silk protein finish for silky hand feel and enhanced breathability. It is also pre-cured to have a neat and crisp look all day.

Top new innovations in trousers

The brand offers athleisure trouser with knitted poly viscose and cataonic viscose stretch. The stretch comfort trouser gives maximum mobility.

Theme & core elements of the latest Spring-Summer'18 shirts collection

The Spring Summer '18 collection will focus on flexi shirts and high summer shirts. Flexi shirts are a full range of motion and impeccable comfort shirts with sharp and sophisticated tailoring. They are available in slim and ultra slim fit. While, the high summer shirts offer cotton lyocell blend shirts allowing maximum air permeability. The collection is available in bright pastel shades.

Theme & core elements of the latest Spring-Summer '18 trousers collection

Athleisure trousers inspired by the global ATH trend for work places is the theme of the Spring Summer '18 collection. Made from knitted poly viscose and cataonic viscose stretch, these trousers offer comfort with maximum mobility.

Marketing strategy to promote the brand

Digital play defines the brand's marketing strategy. They have an interesting campaign on trousers (#Move Smart) which re-defines how product communication is perceived.

Major future plans in product/range expansion in shirts

In shirts, the brand has launched the Signature collection which is a premium shirt under John Miller. They are also launching the Good Looking shirts at price point starting from ₹899 onwards. The shirts are made from 100 percent



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 11
- EBOs: 43

> No. of cities present in: 44

> No. of states present in: 20

> Top retailers: Central, Pantaloons, Trends, etc.

cotton, wrinkle free, fil-a-fil with liquid ammonia for soft hand feel. Tailored fit to suit any body type, the shirts are available in 12 colours.

Major future plans in product/range expansion in trousers

In trousers, the brand is launching dress pants for the customer who doesn't like the traditional poly viscose trouser. Made from 2-ply 100 percent cotton, the smart dress pants are casually looking trousers for formal occasions.



>> LEE COOPER <<

Company: Future Lifestyle Fashions | **Key Category:** Shirts

Founded in 1908 by Morris Cooper, Lee Cooper is an authentic British denim brand. Established itself as a leading maker of workwear, the brand provided uniforms for the British troops in WWI and WWII. Soon it emerged as the preferred denim brand in the UK wherein 8 out of every 10 denims sold was a Lee Cooper. Over the years, Lee Cooper has emerged as a brand catering to the youth and their celebrity icons. Creating specialist cuts and innovative new styles has always been at the core of the brand thereby creating a great fan base across the globe. In India, Lee Cooper is a ₹500 crores strong brand. The brand is growing at an average of 25 percent year-on-year.

Target consumer

The brand's target consumers are youth and people with a youthful mindset mainly in the age group of 18 to 30 years. They want relaxed, easy going look. They are the ones who aspire to consume in-trend clothing which not just looks appealing but fits right too. They want to look cool but don't want to try too hard at the same time.

Current product categories in shirts

Lee Cooper offers its customers a variety of shirts to choose from. Some of them are yarn dyed, indigo washed, knitted, printed and solids. Among these categories, yarn dyed and indigo washed shirts are their top selling lines.

Top new innovations in shirts

At Lee Cooper, they have a dedicated team who studies latest trends, fabrics and technology. Their aim is to provide something new and trendy to the customers every season. This time also,

they have infused grindle into yarn dyed and solid. They are also doing a lot of indigo melange, injected yarns and tencel blends. The best seller for the brand this season is the laser printed indigo shirts.

Theme & core elements of the latest Spring-Summer '18 shirts collection

Being an authentic British denim brand, the brand's inspirations are mainly derived from London and life in London. The macro theme for Spring Summer '18 collection for shirts was 'Dreamland Margate', an amusement park located in the east coast of London. The core elements were beach side floral printed linens, laser printed denim shirts and summery yarn dyed check shirts.

Manufacturing infrastructure

Since quality and finish is non-negotiable for Lee Cooper, they



KEY INFOGRAPHICS

> Retail presence:

- EBOs: 9
- SIS: 675

> No. of cities present in: 200+

> No. of states present in: 20+

> Top 5 retailers: Central, Lifestyle, Shoppers Stop, fbb & Reliance Trends

are working with some of the best manufacturers in the country. The brand's manufacturing base is in Mumbai and Bengaluru with a capacity to manufacture more than two lakh shirts per month.

Retail expansion plans

The brand has plans to open 10 flagship Lee Cooper stores, 5 each in Hyderabad and Delhi in the next 6 to 8 months. Also, they have 8 to 10 exclusive brand outlets lined up in Andhra Pradesh and Telangana. Their long term plan is to open 100 exclusive brand outlets in the next 2 years.



>> MAX FASHION <<

Company: Max Fashion | **Key Category:** Shirts & Trousers

A leading fashion brand of the Landmark Group, Max offers a one stop shop for the entire family. They pioneered the concept of 'Latest fashion at great prices', thereby offering the discerning shopper a vast choice with international fashion and quality. The brand offers apparel, footwear and accessories. The store ambience offers an international shopping experience making shopping for the entire family an absolute delight. Globally Max has over 400 stores across 16 countries and in India, Max has more than 200 stores across 80 cities.

Target consumer

The brand's primary target group falls within the age bracket of 24 to 34 years. And their secondary consumers are between the age group of 18 to 24 years. Consumers under 35 years contribute over 70 percent of the total business, the 24 to 35 age group—the young family—account for the lions share.

Current product categories in shirts

The shirts category in Max falls under segments like casual, smart casual (semi formal), formal, fashion formal and fusion.

Current product categories in trousers

The brand's trouser segment is classified under categories such as casual, smart casual (semi formal), formal and fashion formal.

Top new innovations in shirts

Easy to iron shirts in cotton as well as linen blends is one of the main innovation launched by Max in shirts.



KEY INFOGRAPHICS

> Retail presence:

● EBOs: 200+

> Total space occupied by EBOs:

1.7 million sq.ft.

> No. of cities present in: 72

Top new innovations in trousers

Adjustable waistband is a very customer focussed innovation launched by Max in trousers. The trousers adjust to the expanding waist size throughout the day.

Theme & core elements of the latest Spring-Summer '18 shirts collection

A fashionable office collection in micro prints and jacquard imitation prints for

evening wear shirts are two of the main collections of their Spring Summer '18 range.

Theme & core elements of the latest Spring-Summer '18 trousers collection

The brand focuses on slim fit pants. New summery shades are main flavour of the Spring Summer range.

Major future plans in product/range expansion in shirts

Expansion will come through range innovation such as light weight travel shirts, etc.

Major future plans in product/range expansion in trousers

Expansion through range innovation such as light weight travel chinos, etc.

Retail expansion plans

The brand has major expansion plans. They aim to gain larger presence in tier -II and -III cities specifically in South India since it is a wovens' driven market.

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>> OTTO <<

Company: Otto Clothing Pvt. Ltd. | **Key Category:** Shirts

A popular men's wear brand, Otto offers formals, smart casuals, t-shirts, denims, innerwear and accessories such as belts, wallets, perfumes, etc. The brand reaches its discerning customers through an extensive network comprising more than 1,800 multi-brand outlets across South India, predominantly present in Tamil Nadu. With over 22 years in existence, the brand believes that with excellent manufacturing infrastructure, focus on logistics and supply chain management and sizeable investments in IT, Otto can compete with any international brand in terms of quality at an affordable price.

Target consumer

The core segment, Otto is targeting are the professionals and self employed owners of small, medium and large corporates, who have a definite need to dress in high quality clothing, offering elegant appearance at a reasonable price.

Current product categories in shirts

The brand offers an exclusive shirts collection in linen. They use fabrics such as linen, cotton and blends that offer a wide range and variety some of which are exclusive to Otto. They have also launched Otto Elite for their premium customers.

Manufacturing infrastructure

Spread across 2,00,000 sq.ft., Otto owns and operates an integrated state-of-art production facility with an average production capacity of 20,000 garments a day.



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 1,800+
- EBOs: 30

> Total space occupied by EBOs:

70,000 sq.ft.

> States present in: **Tamil Nadu, Kerala & Andhra Pradesh**

Marketing strategy to promote the brand

The brand imparts and participates in all kinds of direct marketing and loyalty programs.

Major future plans in product/range expansion

The brand aims to be a complete men's lifestyle brand. They also have plans to introduce more categories in Otto Elite such as suits and blazers.

Retail expansion plans

Otto has plans to increase their presence through large format stores and multi-brand outlets across the country. The brand plans to touch 100 EBOs by 2020-21.



*Otto's brand ambassador, Actor Dulquer Salmaan in the brand's collection

>> PARX <<

Company: Raymond Ltd. | **Key Category:** Shirts & Trousers

A casual men's wear brand, Parx addresses the complete fashion and lifestyle needs of millennial men. From its inception in 1999, Parx has been the preferred casual wear brand offering continuous innovations infused with international trends and styling. It is positioned to meet the consumer needs for all day wardrobe solution through categories like casual, denim, blackstagg and play.

Target consumer

Parx is directed towards the tech-savvy globally connected youth who have a trendy sense of style. The brand reflects the persona of the energetic 22 to 26 years old male who is outgoing, trendy and dynamic.

Current product categories in shirts

The categories in shirts are sport casual, denim and blackstagg (an evening line). Sport casual range contributes to more than 70 percent of the range and remains the strength of the brand.

Current product categories in trousers

At present the brand is offering sport casual trousers which include solids, dobby, prints and functional trousers.

Top new innovations in shirts

Aroma shirts and digital printed shirts stand out as the top new innovations in the shirts range. Apart from new blends like tencel and coolmax, techniques like embroidery have been brought in.

Top new innovations in trousers

Yoga chinos with 4-way stretch, printed and garment dyed chinos and accessorised trousers are the few innovations in trousers collection.

Theme & core elements of the latest Spring-Summer '18 shirts collection

The Spring Summer '18 collection revolved around the theme, Vacation Download and portrayed a wide range of digital printed shirts inspired by Morocco. The season also saw introduction of blends like tencel and coolmax.





Ankit Agarwal



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KEY INFOGRAPHICS

> Retail presence:

- MBOs: **650**
- EBOs: **19**
- SIS: **177**

> Total space occupied by EBO's & SIS: **17,000 sq.ft**

> No. of cities present in: **650**

> Top 5 retailers: **Central, Reliance Trends, Shoppers Stop, Brand Factory & Mega Mart**

Theme & core elements of the latest Spring-Summer '18 trousers collection

Revolving around the theme, Vocation Download, the brand Spring Summer '18 collection portrayed a wide range of geometric prints in its trousers collection. The season also saw introduction of blends like tencel and finishes like teflon (stainfree).

Manufacturing infrastructure

The brand works with all major mills in India and China for fabrics for both the categories. Their production facilities are based at domestic as well as international locations (Bangladesh).

Marketing strategy to promote the brand

To connect with their 'youth' target group they have shunned the traditional way of marketing and embraced digital platforms. New properties such as 'Parx Hunt' was created as the new high-decibel touch point to talk to tech-savvy millennials. Parx Hunt contest, 'India's Best College Bands 2017', directly engaged with the brand's new target customer – the millennial – through music. The nationwide program, was hosted across 60-plus colleges, spanning 25 cities, targeting over 2,00,000 college students, trending on Twitter India 5 times, in all the regional finale's as well as the grand finale, with #ParxHunt generating a potential reach of 28.07 million.

Major future plans in product/range expansion in shirts

Shirts being a major category for the brand, apart from expanding their core causal range they are looking forward at tapping the denim shirts market more extensively.

Major future plans in product/range expansion in trousers

The brand is looking at adding more functionality to the category by introducing newer blends and finishes. Also, they are going more aggressive with the fits to make it more contemporary.

Retail expansion plans

Parx is planning to open 25 to 30 EBOs in FY 2018-19 under FOFO model which will help increase the brand's reach to the market in tier -II and -III cities. This will also help boosting the other channels especially MBOs which has been the pillar of success for the brand in last 2 to 3 seasons. The brand aims to expand to around 100 exclusive stores by FY 2020.



>> PEPE JEANS <<

Company: Pepe Jeans India | **Key Category:** Shirts

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 that were unlike the customary ordinary looking denim available in those days. In 1989, Pepe entered India and quickly captured the imagination of fashion starved consumers across the country. Pepe Jeans India manufactures a wide array of chic casual wear for men, women and kids. Jeans is their core product and is very popular and sells extremely well.

Target consumer

Pepe Jeans is for the young at heart. The brand caters to the fashion forward. The consumer wants 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.

Theme & core elements of the latest Spring-Summer '18 shirts collection

The Spring Summer 2018 collection for men showcases an open-minded and eclectic approach to dressing for the new season. Inspired by the easy going Bohemian spirit, the collection is indicative of nature, the ocean and travel as key elements. The collection is anchored in true blue authenticity and continues to build on the adventures of the contemporary man's wardrobe. Representative of summer; a mix of tropical, vibrant prints and stripes in bright colours sets the scene for pieces that are urban in aesthetic approach, easy to wear and comfortable. The shirt is a key piece in the collection such as bleached denims, ikkat prints, printed

chambray, jacquard plaid and stripes in soft cottons and linen.

Marketing strategy to promote the brand

With a strong focus on the millennial and Gen-Z demographic, Pepe Jeans recognize that fashion consumers have an entirely new set of expectations. To meet these shoppers where they live, the brand moved towards a digital-first strategy - incorporating extensive social media marketing, mobile ads, banner ads (Youtube) and influencer marketing. Pepe Jeans' Facebook, Instagram and Twitter feed/timeline captures current trends season-on-season and different ways in which their current collection can be styled.

Pepe Jeans signed Bollywood heartthrob Sidharth Malhotra as its first ever Indian brand ambassador to 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 media event took place on 7th March post in which the campaign starring Sidharth Malhotra went live on Pepe Jeans' social media - Facebook, Twitter and Instagram. This alone garnered a cumulative social media reach of 7.5 million across Twitter, Facebook and Instagram. To further amplify the campaign, Pepe Jeans partnered with India's finest fashion bloggers to create conversations about the new campaign #MadeToCreate which received an astounding reach of 5.3M across all social media platforms (Facebook+Twitter+Instagram). The brand also heavily advertised in cinemas across South India as the affinity for cinema amongst the target



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 1350
- EBOs: 234
- SIS: 637

> No. of cities present in: 21

> No. of states present in: 13

consumers in that region is very high. In the west, the brand targeted urban youth centric movies like Avengers and Deadpool to reach out to its target audience. Lastly, Delhi was branded with images from the SS18 collection which further helped in taking the campaign to the next level.

Retail expansion plans

Pepe Jeans is planning to open about 40 to 50 additional stores in the next 2 to 3 years across the country.

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>> SIGO <<

Company: Adore Creation | **Key Category:** Shirts

Launched six years ago by Adore Creation, Sigo is a designer shirts brand for men. The brand offers a range of carefully crafted and selected collection having global appeal and style. The shirts are manufactured using high quality raw materials, ranging from Indian cotton to Turkish wool by skilled craftsmen.

Adore Creation has been dealing in designing and manufacturing of trendy shirts and has years of experience in the textile business. The company supplies designer shirts to South Africa, New Zealand, Mali, Ghana and Peru. They manufacture shirts as per the design and needs of a brand, and also customise shirts' design and style as per requirement.

Current product categories in shirts

Sigo's product portfolio comprises designer shirts for men including casual and partywear shirts.

Top new innovations in shirts

The brand's latest innovation in shirts involves linen shirt with a zip which can be worn as a casual jacket. They have also introduced a designer shirt in kurta style which looks trendy and makes up as a partywear.

Theme & core elements of the latest Spring-Summer '18 shirts collection

Floral print shirts and pastel plain pinpoint fabric colour shirts are the brand's latest Spring Summer '18 collection.

Manufacturing infrastructure

Sigo has two manufacturing units.



Their state-of-art unit in Mumbai (Maharashtra) manufactures shirts, while their unit in Surat (Gujarat) carries out customized tailoring business.

Marketing strategy to promote the brand

The brand aims to bring both readymade and customized shirts under a single platform that is in one single store for their discerning customers.

Major future plans in product/range expansion

Sigo plans to expand its product portfolio by adding t-shirts and pants. They also want to expand their customized tailoring business pan India.

Retail expansion plans

The brand's retail expansion plan is to open Sigo unique showroom where readymade and customized tailoring will be available under one platform.



KEY INFOGRAPHICS

> Cities present in: **Mumbai & Surat**

> States present in:
Maharashtra & Gujarat



>> SUCCESS <<

Company: Agwani Fashions Pvt. Ltd. | **Key Category:** Shirts & Trousers

Established in 1996 by Agwani Fashions, Success is a contemporary men's wear brand. Headquartered in Kolkata, the brand started out as a trouser manufacturer. Today it offers a complete wardrobe for men consisting primarily of suits, blazers, jackets, waist coats, shirts, trousers, denims and accessories broadly classified under formal, casual and party-wear segments.

Target consumer

The brand offers trendy merchandise for men from age 20 and onwards; as well as garments of a classic taste keeping in mind their loyal customers and at the same time attracting new ones. Their unique selling point lies in their speedy conversion of latest trends into fast-moving merchandise goods.

Current product categories

Success is evolving to be a complete men's wear lifestyle brand rather than just selling men's apparel. The customer will find the choicest of merchandise by just walking into their stores. At present, the core product range the brand is offering includes suits, blazers, waistcoats and trousers. Their product basket also showcases casual jackets, denims, shirts, t-shirts and accessories.

Top new innovations in shirts

A few innovations that the brand has undertaken include a hooded shirt in kurta style, shirts with in-built pocket square and reversible shirts.

Top new innovations in trousers

The brand has introduced skiny cotton trousers with checks and prints. They have also launched ankle length chinos in the bottom wear range.



KEY INFOGRAPHICS

> Retail presence:

- MBOs: 375+
- EBOs: 25+
- SIS: 10+

> No. of cities present in: 40+

> No. of states present in: 10+

Theme & core elements of the latest Spring-Summer '18 shirts collection

The core elements of Success latest Spring Summer '18 shirt collection boasts of checkered shirts, knitted shirts and indigo shirts.

Theme & core elements of the latest Spring-Summer '18 trousers collection

Skiny fit checkered cotton trouser in ankle length is the latest collection of the brand's Spring Summer '18 trouser range.

Manufacturing infrastructure

Success has separate manufacturing units for shirts, trousers and suit-blazers. Armed with skilled manpower, they

make use of state-of-art machines in their units.

Major future plans in product/range expansion in shirts

The brand is emphasizing on the use of digital prints and knitted shirts.

Major future plans in product/range expansion in trousers

The brand has plans to introduce knitted trousers in near future. They also want to make skiny ankle length trousers in printed fabric.

Retail expansion plans

As of now, the brand's retail reach in terms of their exclusive brand stores is limited to the East India only, though they are also present in a few prominent large format stores across the country. They want to expand their presence pan India with more focus in tier -II and -III cities.

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>> SUMMERLINE <<

Company: Rachit Creations | **Key Category:** Shirts

Incepted in the 1980s, Summerline is a men's wear brand with over 3 decades of existence in the shirts market. The fact that the brand has sustained over such a long time proves of its quality and customer satisfaction. The ability to constantly innovate with the changing trends has been their USP. They are the only brand in India that manufactures small size to 10 XL sizes in shirts.

Target consumer

Summerline targets the young adults in the age group of 25 to 45 years who are basically looking at value for money products.

Current product categories in shirts

The brand offers men's shirts using all kinds of fabrics suited for casual wear like indigo, twills, filafil, chambray, etc.

Theme & core elements of the latest Autumn-Winter '18 shirts collection

The brand is offering a variety of shirts in checks, indigo and twills under their latest Autumn Winter '18 collection.

Major future plans in product/range expansion

Summerline is diversifying their product range wherein they are planning to introduce bottomwear.

Retail expansion plans

The brand is looking at expansion in Kerala, Jharkhand and West Bengal.



KEY INFOGRAPHICS

- > Retail presence:
 - MBOs: **1,200**
- > No. of cities present in: **500**
- > No. of states present in: **12**
- > Top retailers: **J C Retail, Chunmun e-Monalisa**

>> TURTLE <<

Company: Turtle Ltd. | **Key Category:** Shirts & Trousers

Established in 1993, Turtle is a renowned men's wear brand offering international fashion. The journey of Turtle began with a production capacity of just 20 shirts a day. Today the brand is one of the fastest growing apparel brands in the country with a nationwide presence in over 300 cities through 1,000+ MBOs, 100+ EBOs and 300+ LFSs. Its USP lies in its trend setting fashion and superior quality products that are all offered at value pricing.

Target consumer

The brand targets men in the age group of 25 to 35 years in SEC A+, A and B in tier -I, -II, and -III cities.

Current product categories in shirts

The brand's line of pure formal shirt forms 12 percent of the total shirts range. They also have fashion formal shirts and semi casual shirts range. They introduced a special edition such as khadi shirts recently. Their core top selling shirts include filafils and satin blend shirts for occasion wear.

Current product categories in trousers

The brand covers both formal and casual bottoms including jeans. In formal, they have the core range comprising of filafils and twills. Similarly, in casuals the bottoms range is dominated by khaki. For fashion formals, they play with polyester viscose having stretch and flexi waist. In casuals, they offer printed chinos and knit back bottoms that gives a good hand feel and the comfort of stretch to the wearer. All of their casual bottoms have the common factor of stretch.

Top new innovations in shirts

The brand introduced engineered range of shirts in prints, stripes, checks, solids, structures, etc., under following categories such as casuals, fashion formals and occasion wear. With every season, they take their collections to the next level. Khadi as a base, is another collection range in shirts that sets them apart.





KEY INFOGRAPHICS

> Retail presence:

- MBOs: 1,000+
- EBOs: 100+
- SIS: 300+

> No. of cities present in: 300+

Top new innovations in trousers

Knit back range of cotton bottoms is the latest innovation the brand has introduced. The stretch waistband that moves along with the fabric is another addition they have made in their bottom wear range. While, in fashion formals the auto flex waist band ensures proper movement to the wearer.

Theme & core elements of the latest Spring-Summer '18 shirts collection

The themes for the Spring Summer '18 shirts collection are Something Classic Something Blue offering exclusive printed shirts on yarn dyed blue and white base. Take It Easy, inspired by the summer pastels shades. Men in Pink based on the colour pink in a range of smart checks, subtle prints and structures. Fuse, a collection of bright checks and prints in vivid colours and patterns inspired by the fusion of variegated cultures across the globe.

Theme & core elements of the latest Spring-Summer '18 trousers collection

The brand offers light and medium tones and tints in bottoms to go with the pinks and pastel range in formal and casual shirts range. The collection



includes lots of micro structures and printed chinos. They also offer white denim to go with the special pink washed shirts.

Major future plans in product/range expansion in shirts

Turtle is revamping its khadi range by restructuring its design patterns and colour schemes. They are also adding qualities in their core range in formals, especially for the occasion wear range comprising blazers and suits.

Major future plans in product/range expansion in trousers

The brand is planning to introduce a range in trousers with smart finishes. It will be a performance enhancer, which adds to the longevity of the garment and gives wearer a comfort factor.

Retail expansion plans

With plans to open 30 stores in the East India in the next 12 to 15 months, the brand has plans to increase their footprint of 110+ stores to 150 stores.



NEXT ISSUE

THE ULTIMATE DENIM

SPECIAL ISSUE

WILL GRACE THE BIGGEST TRADE FAIRS OF 2018 IN INDIA.

IMAGES JULY 2018
BUSINESS OF FASHION



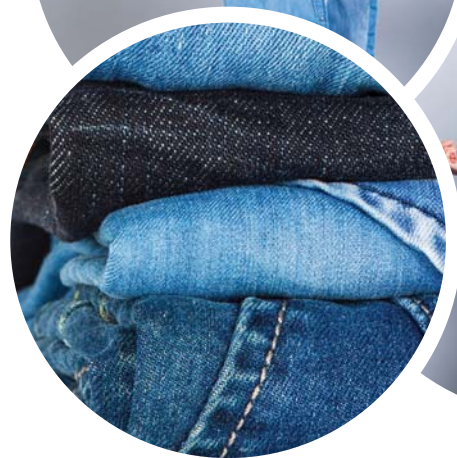
JEANS ARE TODAY UBIQUITOUS. THEY ARE THE FOREMOST GLOBALLY PERVASIVE FASHION CATEGORY. But why exactly are jeans so big? Why are they the obvious No.1 choice of the world?

Jeans grow more comfortable with wear and have also adapted wonderfully to becoming much more softer and more intimately individual to a wearer with fit variants, fiber and finish innovations, distressing, customization, etc. With such great virtues, they have also become the default mode for people uncertain as to what clothes to wear.

The modern consumer is essentially looking for ways to feel and look better about themselves and about the world, and, if jeans continue to help them do so — jeans will survive. On the other side, jeans manufacturing processes today stand accused of resource wastage, damage to the environment and exploitation of labour. **The greatest challenge before the denim industry today is whether it will continue to stand for a better world. We explore this critical subject and many more in the July 2018, Denim Special issue.**

Some highlights of this blockbuster issue...

- Lead Research on the Indian Denim Market. Size, Segments & Key Market Trends of Key Categories including Men's, Women's and Kids' Denim
- Impact of Sportswear & Athleisure
- Physical versus Online Sales
- Penetration in Tier-III, Tier-IV cities and rural India
- Denims Fashion Forecasts 2017-18
- Emerging Vistas in Perfecting the Fit
- Latest Innovations in Denim Fabrics
- Prospects in Blended Denims—Silk, Khadi and Wool Denims
- Latest Trends in Effects, Finishes, Trims, Accessories and Embellishments
- Sustainable Denim Production
- New Technologies
- Advent of Stretch Denim
- Customization in Jeans
- Great Denim Stores - Case Studies
- Industry Talk — India's top Denim Brands
- New International Denim Brands in India
- Top Denim Fabric Companies.



A Not To Be Missed Advertising Opportunity

Also in the issue:-

- Editor's Picks
 - >> Most Valuable Fashion Startup
 - >> Most Exciting VM Design Concept
 - >> Most Effective Tech Implementation
- Fashion Business
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FASHION *CREATION*



SHIRTS &
TROUSERS

THE CUTTING EDGE

- BESPOKE
- DESIGNER

//TEXTILE WATCH

Contents



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FASHION CREATION

Bespoke Fashion **BESPOKE SHIRTS AND TROUSERS**

Over the past few years, there has been a steady rise both in the number of clients and brands in the bespoke apparel segment. Shirts and trousers act as the gateway for the nouveau bespoke enthusiast, chiefly due to the relatively lower prices. A ground report from the industry.

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Design Icons

DESIGNER SHIRTS AND TROUSERS

Designer fashion is a segment that has been steadily climbing up the ranks when it comes to the modern consumer's affinity for a perfect look. IMAGES BoF takes a look at the finer nuances of the shirts and trousers segment as it gets more and more organised with the increase in the modern consumer who wants the best fit for him.

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Bespoke Brands

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Fashion Creation



Textile Leaders

BIRLA CENTURY: RISING DEMAND FOR BLENDED FABRIC & FUNCTIONALITY

R C Panwar, Joint President - Marketing, Birla Century reflects on the shirts and trousers market and sheds light on the evolving fabric market and how the market has transformed in the past few years.

Pg No. 205-207



Textile Leaders

MAYKA: EMPHASIS ON FABRIC INNOVATIONS & FINISHES

Jayanti Gangar, Partner, Mayka shares his experience about the shirts fabric industry with IMAGES Business of Fashion. He shares insights on the emerging trends and market demands for the shirts fabric.

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Reynu Tandon



Raghavendra Rathore



Rajesh Pratap Singh

DESIGNER SHIRTS & TROUSERS

Designer fashion is a segment that has been stealthily climbing up the ranks when it comes to the modern consumer's affinity for a perfect look. IMAGES Business of Fashion takes a look at the finer nuances of the shirts and trousers segment as it gets more and more organised with the increase in the modern consumer who wants the best fit for him.

By Shivam Gautam & Bharti Sood

Designer fashion, once a prerogative of style connoisseurs with deep pockets, is fast becoming a growing trend among professional men around the world, as prices fall and awareness grows. The once underground market, propelled by the gaining penchant for exclusive details and individualised fashion preferences, has today been impelled to the street level making it accessible to everyone, with a fondness for a personal style statement.

Although it's hard to handpick names of the pioneers, a walk through the legacy of designer shirts and trousers in India takes us back to the memorable (read nostalgic) commercials of Charagh Din, Ravi Bajaj, et al. "I think in 70's and 80's designer shirts were basically done by Charagh Din. They were one of the first ones who's shirts were very popular. Then came in Raymond with legwear collection in early 80's. Designers were never like just making designer shirts or designer trousers. It has always been part of the entire collection. It is not a category specific designer product," says designer Rajesh Pratap Singh.

In contemporary times, the demand for designer shirts and trousers have undubiously snowballed. But designers like Raghavendra Rathore believe that there had been a constant demand in the yesteryears



Image courtesy: Rajesh Pratap Singh



Image courtesy: Rajesh Pratap Singh



Image courtesy: Rajesh Pratap Singh

too. "There is a consistent demand for detailed designer shirts in India. Be it evening wear party, dress shirts or just day wear cotton ones. It is the most staple piece of clothing for semi formal or formal occasions for men and women and therefore the demand has always been on the higher side for a product like that," he adds.

The Clientele

The popularity of designer clothing is generally attributed to the publicity and hype attached to them. Initially the craze for such dresses was restricted only to the patrician faces with elevated sartorial taste, who used to flaunt them in social gatherings but now the awareness and demand for them has also permeated to the other classes. "The brand has serviced a coterie of clients over the years, from various walks of life and they have been a mixed bag of people aspiring or specifically looking to dress for various occasions," says Raghavendra Rathore about his brand.

A typical designer fashion enthusiast is an evolved gentleman who harbours

a zeal to stand apart from the rest. And above all, he is aware of the product he is sporting. "Both overseas and in the domestic market, what I have noticed of my clients is their awareness of the product. It's more about how and where the product is made. Simpler, cleaner, more modern products. That's our client actually," reveals Rajesh Pratap Singh.

For long, fashion, or rather apparel, shopping in India has predominantly been occasion specific. Traditionally, families indulged in apparel consumption mainly during festivals, and occasions like weddings, birthdays, etc. That definitely has changed over the years - and at the same time there also has been a surge of nouveau occasions that acts as a stimulant for consumers to experiment and look their best. "The inquiries come in based on the following - weddings, wardrobe make overs, special events, travel and lifestyle influenced," says Raghavendra Rathore. Today, from Mother's Day, Father's Day, cocktail parties, alumni meets, through office celebrations, dining out, to baby showers, kids' school functions, graduation day, the opportunities are endless.

Over all, with the change in the urban consumer's way of living, the occasions and reasons prompting apparel consumption have also increased. Today, urban consumers are buying apparel which serves a specific occasion/usage. "Its not only people who are going to office who wear our shirts. But they even wear our beautifully embroidered shirts for afternoon lunches, for social commitments or for generally roaming around," says Renyu Tandon. "I have all time clientele from masses to classes. The American store and Anthropology in USA buy quite a lot of shirts from us," she shares.





Image courtesy: David Abraham AW '18



Image courtesy: David Abraham AW '18



Image courtesy: David Abraham SS '17



Image courtesy: David Abraham AW '18



Image courtesy: David Abraham SS '17



Image courtesy: David Abraham AW '18

Consumer Demands

So, what categories in shirts and pants enjoy the most demand in designer wear? “Men prefer more of party shirts, waistcoats/ jackets while women go for both smart day dressing and work shirts. Also interesting bottoms consisting of palazzo pants, dhoti pants, zouaves- plain, embroidered and printed draw attention of our clients,” says David Abraham.

According to Raghavendra Rathore, surface treated designer shirts, printed shirts, evening wear shirts consisting of semi formal and formal shirts have the maximum demand. Most designers also unanimously agree that designer shirts and trousers enjoy more demand as evening wear. “There is more demand for evening wear with a touch of either sequins, embroidery, Swarovski or something or the other. Casual shirts are picked from mass stores. But when they come to designers they want a touch of exclusivity. So we make with exclusivity. For evening they could be with sequins, Swarovski, or maybe with a bow,” says Reynu Tandon.

Delivering a Look

Conjuring an idea and working on it to deliver a fashion masterpiece is no child’s play. While some designers create new designs by researching current fashion and making predictions of future trends, others create collections from inspirations they get from their regular surroundings, from the cultures they have experienced and places they have visited, or from various art media that inspire them. “We work very hard to create that look. We have a certain look and an idea in mind and then the entire collection is designed around that. Jackets make the foundation and shirts and trousers are more like compliments to the jackets. For the domestic market just the shirt itself can be engineered





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Image courtesy: Raghavendra Rathore



Image courtesy: Raghavendra Rathore

fabrics, textures, etc. “Our last few collections have also re-looked at how men dress and we have introduced an Indian alternative to corporate dressing,” he says.

Reynu Tandon shares, “I make shirts based on the theme of my shows. If the theme of my show is Bohemian, I make shirts in crepe with frills, embroideries and pintuck... if the theme is Victorian, I use Victorian pattern.”

Preferred Fabrics

The creation of a designer garment begins with a piece of cloth and the most important element in designing apparel is choosing the perfect fabric. The choice of fabric varies from designer to designer and every designer has a unique definition about the role of textiles in designing apparels. “Cotton and silk-based fabrics work well for shirts. For trousers we use cotton, linen and silk jacquards. They are chosen accordingly in keeping with purpose and occasion,” expresses Raghavendra Rathore.

Like David Abraham says, “We like to work with handloom cottons, khadi, silks and linens.”

Expressing her fondness for linen, Renyu Tandon states, “I mainly like to use either linens or crepes and sometimes georgettes also. For trousers I mainly work with linen only.”

Label Rajesh Pratap Singh works with a lot of natural fibres, most of which it uses not only for shirts and trousers but for its entire collections. “We like to make our fabrics ourselves in natural fabrics. At times we like to twist it with metallic yarns, like stainless steel, copper or silver. It’s not only for shirts and trousers, but for the entire collection,” he adds.

Value Additions and Price

Structural details and accessories affect the pricing of a product to a certain extent and add value to the



Image courtesy: Raghavendra Rathore



Image courtesy: Raghavendra Rathore

to fit into this language, which we are trying to speak,” says Rajesh Pratap Singh.

Raghavendra Rathore believes that designing a shirt is subject to the relevance and purpose to the wearer. “Mainly, evening shirts with detailing of some hand work or formal surface treated shirts and custom printed shirts require special attention to details. Also combining the shirt with the right button and cufflink is crucial to further accentuate the look,” he adds.

David Abraham uses traditional shapes in kurtas, bundhis, bandhgalas for men and then tweaks them using interesting



Image courtesy: Reynu Tandon



Image courtesy: Reynu Tandon



Image courtesy: Reynu Tandon



Image courtesy: Reynu Tandon

suggested products. Specialised custom printed trim up the grade of design and detailing thereby increase the perception value of design. The pattern and fit also play an integral part through the design process of executing these products. “Our value addition starts at the fibre stage. The kind of fabric we make, the yarns we choose, the kind of weaving we do, for us that is value addition. Not just some superficial printing or embroideries. Everything we do, it would affect the price. Price would be an accumulation of whatever we do,” says Rajesh Pratap Singh.

Reynu Tandon adds, “I use lot of frills, pintuchs, embroideries, sequins and Swarovski in my designs. Of course pricing does effect. If you are making georgette, it will be a different price. If you are making linen, it is already so expensive. If you are adding thread work, or Swarovski the price is different. It varies everytime.”

Latest Trends

Talking about the latest designs that are gaining popularity in men’s shirts and trousers, David Abraham notes, “For men’s shirts the trend is easier fits, more patterned designs. The women’s shirts are much more experimental now, especially when teamed up with a sari, interesting silhouettes like kediyi shapes or anti fit, boxy styles.”

Throwing light on his minimalist approach towards designing shirts, Raghavendra Rathore expressed that as a classic piece of clothing, a shirt lasts longer as a style in ones wardrobe if the level of detailing is minimal. “Colours could range from bright, pastels to neutral tones in keeping with the day or evening-wear choice of dressing and what the colours compliment with. Surface embellishments are more predominant for women and for men there could be pintuck or some form of thread work. Even a rich silk printed shirt could work well for both men and women,” he adds.



BESPOKE SHIRTS AND TROUSERS

India, as a nation, has long nurtured a rich bespoke heritage. Especially, when it comes to shirts and trousers, bespoke was traditionally the norm and the only option back in the day. Owing to lack of size standardisation, there were few ready-to-wear options for consumers of yesteryears, who preferred to buy ready-to-stitch (RTS) fabric and then have a tailor craft it according to their respective sizes. It was only in the late nineties that the RTW segment frog-leaped to popularity, especially in urban centres, and ever since, the segment has grown rapidly and outpaced the RTS segment of the apparel market. But a shift away from ready-to-wear back to bespoke has been registered in the last few years mostly among the young, style-conscious, and financially stable men of today.

Over a period of time, the demand for customised fashion has rapidly increased. “The changing phase of fashion in India has definitely ascended the demand for the made-to-measure shirts and trousers, especially in the past few years. The customers are now more inclined towards their own choice of clothing. The bespoke service gives them a freedom to personalize their own wardrobe,” says Saggur Mehra, Creative Director, House of Sunil Mehra. The concept works very well for shirts and trousers as most users,

Over the past few years, there has been a steady rise both in the number of clients and brands in the bespoke apparel segment. Shirts and trousers act as the gateway for the nouveau bespoke enthusiast, chiefly due to the relatively lower prices. A ground report from the industry.

By Shivam Gautam

The growth of this segment within the Indian subcontinent is also attributed to the emergence of the nouveau riche and the High Net-worth Individuals (HNIs). This section of society possesses an increased disposable income along with a keen desire for exclusivity. Apart from celebrating their personal and professional achievements, the owners of bespoke clothing often also see the exclusivity offered by a bespoke suit as an extension of their own personality.

Over the past few years, there has been a steady rise in the number of manufactures and retailers of made-to-measure garments. With the evolution of online shopping, the made-to-measure segment has become more popular and is leading to the growth of this industry. "When we started out, the concept of bespoke was relatively new in India and people were slightly more apprehensive about buying custom garments. But over the past few years we've seen a major change in this approach. Consumers are more informed, ready to experiment and open to new styles. In today's time we are known more for our bespoke options than RTW," says Vito Notaristefano, Design Head, Tailorman.

The Bespoke Enthusiast

Bespoke fashion, especially shirts and trousers, are much more affordable now as compared to a decade back when the trend was still teething. Before it became affordable in true sense, the growth was driven by a small set of affluent customers who did not mind paying a premium over ready to wear shirts. The premium paid is viewed by these customers as an investment rather than cost. "The target customers are usually the affluent families and the corporate gentlemen. They usually opt for these services as they are ready to pay the price for the exquisite service to get the desired fit. The lifestyle they have is one of the biggest reasons as to why it is a leading option for this audience," says Sandeep Gonsalves.

who are usually first timers can afford to experiment with shirts or trousers mostly because of the relatively lower prices as compared to jackets or suits.

Growth Drivers

The simplest reason why bespoke fashion is gaining ground is the FIT! Shirts and trousers, being the most dominant apparel categories in the men's fashion sphere, are worn for extended hours and bespoke products are completely customized with utmost attention given to even the tiniest of detail. It gives the consumer the best fit for his body type without compromising on the comfort factor, unlike ready-to-wear. Also, a bespoke suit is more personal than a readymade suit anyway. Each curve and each nuance is taken care of in a bespoke item.

The increasing number of Indians travelling abroad who are getting acquainted with the idea of bespoke were the pioneering growth drivers of this market. "With time people realised that product expectations were undelivered by most from the RTW segment, which led to the rise of bespoke. It began with an audience who fell in the category of globetrotters for leisure or business," says Sandeep Gonsalves, Co-founder, SS Homme.



"The changing phase of fashion in India has definitely ascended the demand for the made-to-measure shirts and trousers, especially in the past few years. The customers are now more inclined towards their own choice of clothing. The bespoke service gives them a freedom to personalize their own wardrobe."

-Saggar Mehra
Creative Director,
House of Sunil Mehra





Tailorman

SS Homme

But times are a changing and a new consumer section for bespoke has risen the ranks. In the recent times, along with the affluent customer, a new legion of young and dynamic consumers has surfaced that harbours a penchant for style and comfort and also has the financial stability to acquire it. “Our concept of offering premium men’s wear does shift the focus on the higher income strata of the society. However, also maintaining its agenda of introducing the mass customization lifestyle in India, the brand always ensures to optimize the price point, to make the products affordable for the largest audience base. Besides that, Creyate looks forward to the group of modern gents who have a certain individualistic taste in fashion, eye for detail and prefer to make a personal statement,” states Tejinder Singh, COO, Arvind Internet that launched Creyate, an omni-channel men’s wear custom clothing brand in 2014. Equipped with tech-driven stores across India and Japan, a 3D customization engine, a luxury concierge service and an



House of Sunil Mehra

automated backend, Creyate aims to provide an unprecedented experience in men’s wear customization.

Today, the bespoke brands in India serve a potpourri of age groups, genders and socio economic classifications. “There is no specific TG for bespoke service. It can be a young lad, an adult or a complete old man. It all comes down to one thing – ‘the style and the comfort’ that people seek to have in their garments. Besides this, the young generation is so inspired with the fashionistas of the industry that they like to see themselves as a star of their own life. They want to wear same clothes that their favorite fashion icon is making an appearance in. Hence, relying on the bespoke services to meet their sartorial needs,” says Sagar Mehra.



House of Sunil Mehra



“Maintaining our agenda of introducing the mass customization lifestyle in India, the brand always ensures to optimize the price point, to make the products affordable for the largest audience base.”

-Tejinder Singh,
COO, Arvind Internet

Is Bespoke Expensive

A bespoke product generally tends to be on the higher side of the price spectrum. But considering the time and attention to detail invested in the creation of a bespoke suit, its cost can very well be justified. “In comparison to RTW options, bespoke is slightly more expensive as it is more personalized, offers better fit and construction. These



Tailorman



“Currently, pencil trousers and impeccable fit are what the buyers are mostly looking for. As for the shirts- stretchable cotton and melange fabrics are a huge hit because of the comfort and style they provide to the consumer.”

-Vito Notaristefano,
Design Head, Tailorman

garments offer a unique take on the individuals style and last longer in terms of quality as compared to a RTW outfit,” says Vito Notaristefano.

But most bespoke consumers, as stated earlier, see this more as an investment rather cost and are always ready to pay for the best fit and comfort that bespoke shirts and trousers offer. “I would not say it is expensive. When it comes to quality and fit, the customer is ready to pay a little more. When it comes to creating custom, it solely depends on the quality of fabric

which you use and the design which you prefer. Depending on the same, the prices will vary,” says Sandeep Gonsalves. While there are several elements that aid in crafting an apparel piece, there’s no doubt that the fabric is the soul of it and most bespoke players have the choicest of fabrics to offer to their consumer. “For shirtings, we have some of the finest Egyptian and 100 percent cottons by Soktas, Vaugh & Pickett, Grandi & Rubinelli and Dormeuil. We also have pure linens by Solbiati amongst others. Clients are also presented with a vast selection of prints, textures and shades of lining options,” says Sandeep Gonsalves. SS Homme is supported by international fabric majors such as Huddersfield, Scabal, Dormeuil.

“Our customers have the option to choose from over 4,000 fabrics from international mills such as Zegna, Scabal, Loro Piana, Holland and Sherry. “We’ll soon be launched our latest range of shirt fabrics from Luthai this coming season,” says Vito Notaristefano.

Apart from the fabric, a slew of value additions also play a major role in determining the price of a bespoke product. “We do offer classic shirts and trousers as well as designed ones. However, when you add to the design with terms of monogramming and other detailing, the cost goes up by a small amount and not a relatively large amount. The focus we have is for minimalism along with well structured fits,” reveals Sandeep Gonsalves.

Value additions at Tailorman ranges from options in buttons, piping, collars, pockets, linings, cuff, and sizing options. “The up-charge is completely based on the individual choice of the customer. Few styling options we offer as default such as the collar and size but if you’re looking for a custom monogram or a detailed piping the charges vary,” states Vito Notaristefano.



SS Homme





“With time people realised that product expectations were undelivered by most from the RTW segment, which led to the rise of bespoke. It began with an audience who fell in the category of globetrotters for leisure or business.”

-Sandeep Gonsalve,
Co-founder, SS Homme.

What’s Trending

Sandeep Gonsalves opines that although trends come and go with season, in the shirts segment trends are created to stay. “For example, the major trend is to mix simplicity with a touch of detail. We try to incorporate our brand aesthetic of minimalism with whatever we design in all our collections. Geometric prints and symmetrical illusions is what really distinguishes us from the rest of the market. Another focus is on tailored classic shirts with a touch of detail at a prominent part in the shirt,” he adds.

According to Saggur Mehta, The plaids and stripes are one of the most popular patterns that have made their way to every corner of men’s wardrobe. The floral patterns too have garnered a demand rise among the men’s wear, infusing a bit of pop in their casual styling. “Of all the tenets of dressing for men, ‘black and white’ seems to be like fading away with the emergence of pastels,” he adds.

Even Tailorman has witnessed a major surge in the love for stripes and tonals among men. “Checks of all sizes are also in. One of our favourite colors of this season is undeniably the Royal Purple. We’ve incorporated a lot of it in our new collection as well. If you see the trend in menswear this year, pencil trousers and impeccable fit are what the buyers are mostly looking for. As for the shirts- stretchable cotton and melange fabrics are a huge hit because of the comfort and style they provide to the consumer,” adds Vito Notaristefano.

The Potential in Smaller Cities

With a rapidly growing middle class consumer base propelled by rising income, the Indian luxury market is experiencing strong evolutionary even in the smaller cities. Today, to the growing awareness amongst the



Tailorman

youth with digital facilities has lifted the demand of bespoke suit services in the smaller cities as well. “The primary market for bespoke fashion undoubtedly lies in the tier -I cities. However, India has always been an evergreen market for occasion wear, and the tier -II cities show immense potential for these services during occasions. Today, we have already reached out to prospective tier -II cities including Amritsar, Pune and Kochi,” says Tajinder Singh.

The Future

The bespoke industry is steadily growing in India and a slew of new brands, including a surprising number of regional and online players, have emerged in the last few years in the bespoke domain, which reinforces the demand and potential of these once niche services in India. “We strongly believe that bespoke is the current big thing and shall remain so in the near future. Men are always on the look out for better fit and style. When we started out, our aim was to create products that stood out from the cookie-cutter, ill-fitting garments available in the market. As exclusivity and quality became more and more important to the consumer, bespoke surely stands at the forefront of retail in terms of price, finish and fit,” expresses Vito Notaristefano.



>> CREYATE <<

Arvind Internet is the digital arm of Arvind Limited which was founded by Kulin Lalbhai, Executive Director of Arvind Ltd. Arvind Internet's first venture, Creyate is an omni-channel men's wear custom clothing brand. Equipped with tech-driven stores across India and Japan, a 3D customization engine, a luxury concierge service and an automated backend, Creyate aims to provide an unprecedented experience in men's wear customization.

Target Group

The Creyate man is an evolved gentleman with an elevated taste and believes in excellence in everything he does. Creyate's concept of offering premium men's wear does shift the focus on the higher income strata of the society. However, also maintaining its agenda of introducing mass customization lifestyle in India, the brand always ensures to optimize the price point, to make the products affordable for the largest audience base. Besides that, the brand looks forward to the group of modern gents who have a certain individualistic taste in fashion, eye for detail and prefer to make a personal statement.

Services Offered

Creyate offers customisation options in shirts, suits, denims and chinos for men. The brand basically brings the factory to the customer's fingertips in terms of fit and style.

In addition, there is the Linea D'oro collection (line of gold) which is super luxury and the ingredients are flown in to the factory on individual request. As the brand's signature of luxury and style, Linea D'oro opens up a new world of self-indulgence for customization of premium suits.



Infrastructure

Creyate operates with a lean yet specialized team across all functions. As an MTM brand, its DNA lies in sourcing of best garment inputs, efficient customer handling and rendering the product in immaculate fit. The entire process is powered by a strong technology of automated backend and 3D customization engine at all stores in India and Japan. Creyate is equipped with Japanese-trained MTM specialists who guide the consumers regarding their choices of customization. From fabrics, types of construction to lapels, trims and buttons, every detail is decided after a detailed body observation of the customer. Thereafter, at the hit of "add to cart", the entire factory comes together to produce a unique garment for the customer.



Creyate has also launched a new feature in its app whereby an existing customer can repeat his purchase without having to go through the measurement process again. We look forward to incorporating more such futuristic ideas to cater to the digital-friendly customer base.

Retail Presence

As of now Creyate has presence in 12 EBOs and 30 MBOs across the major cities of the country.



>> SS HOMME <<

SS Homme is an amalgamation of the aesthetic philosophy of Sarah and Sandeep Gonsalves, launched to commemorate the art of reconstructing classic men's wear. It was started in 2012, inspired by a mix of Savile Row London and European silhouettes. The creations form a symphony of minimalistic sensibilities, crafted with traditional tailoring and detailing. While Sarah is a graduate in Fashion Design and Construction from the London College of Fashion and Wigan & Leigh, Sandeep Gonsalves has a formal training in business management.

Target Consumer

The wedding wear market is one of the core markets that the brand serves along with corporates. The brand's core target group are well to do people who have penchant for garments that fit well.

The Modus Operandi

The process in SS Homme begins with the client selecting fabric swatches after which measurements are precisely taken by the team to make sure the suit is well-fit. Thereafter, customized patterns, which are drafted from scratch, are carefully cut and painstakingly hand stitched to construct the rudimentary silhouette of the garment. It is at the 'Best fit' that the customer can discern how his suit will feel and fall. By the second fitting, the adept craftsmen sew the fabric into perfect contours, giving it shape and ascribing it a structured identity. At the last trial, the suit in its immaculate form is paired with accessories to complete a perfect ensemble. If a shorter timeframe is given by the client, the brand's experienced consultants guide the client through their recently introduced M2M process. It is where the client goes through an extensive process of



selecting from a wide array of garments and achieving the best fit as per the measurements by using a quintessential procedure.

New Collections - Shirts

Creating a different cut, focusing on contemporary geometric prints and mixing it with classics is what SS Homme has planned for the forthcoming season. The goal is to keep the design of the shirts in accordance with the geometric design and minimal aesthetics that the brand has been able to retain over the years.

New Collection - Trousers

Each trouser crafted at SS Homme is crafted with detailed attention. The forthcoming season's collection will feature structured trousers with minimal detailing and refreshing shades.

Marketing Strategy

SS Homme also engages in experiential marketing to assure retention

and engagement. It uses various collaborative opportunities with partners to host events which are fruitful for both the brands. Recently, the brand has launched a bespoke collection with Porsche Centre Mumbai, where a fashion show was hosted with the entire collection being inspired by the meticulous framework of the vehicles.

Expansion Plans - Product

Currently, SS Homme has explored an entirely new range of bespoke Italian shoes which are exquisitely handcrafted in-house. In the years to come, the brand also aims to create signature accessories.

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>> TAILORMAN <<

Tailorman started out in the year 2013 with the sole aim of changing the way men perceived fashion in India. The brand is backed by a state-of-the-art infrastructure that helps it to bring together traditional Indian craftsmanship and cutting-edge technology to create fashion that guarantees unparalleled fit and quality.

Target Consumer

Tailorman targets the well-established, self aware individual with a refined taste in fashion and personal style. His taste is defined by his years of travel and exquisite lifestyle.

Services Offered

Tailorman lets its customers personalize their complete ensemble. The brand sources some of the finest fabrics from around the world and offers over 4,000 variations along side premium trims and linings. Tailorman's expert stylists help customers vamp up their personal style quotient from the comfort of their home.

New Collections - Shirts

The brand is about to launch a luxury collection in a range of wrinkle resistant checks, stripes, solids, and prints. With over 50 fabric variants in varied color options, this range encompasses a handpicked selection of 100 percent cotton and linen fabrics with wrinkle free and flame retardant finishes.

Manufacturing Capacity

Backed by 22 years of experience in manufacturing for global customers such as Ralph Lauren, Calvin Klein, DKNY, and many Savile Row London boutiques that specialize in bespoke clothing, Tailorman offers unmatched sartorial services to its customers. The brand is one of the first in the industry to use computerized CAD



KEY INFOGRAPHICS

- > Company Name: **Camden Apparel Pvt. Ltd.**
- > Retail presence. **Total no. of POS: 8 Stores**
- > No. of cities present in: **3**

tailoring system which ensures perfect consistency on orders with the most advanced tailoring technology available in the world today.

Marketing Strategy

Through extensive social media and e-mail marketing, the brand consistently creates engaging content for its subscribers. One of our biggest marketing strategy for the year is undeniably the "Young Bangalore Gentlemen" event that Tailorman holds quarterly. The event is a personalized shopping experience with a one-on-one, by appointment only, session with its Made-to-Measure specialists. The brand offers this for its most eminent customers.

Product Expansion

Tailorman is about to launch its newest Indian wear collection this coming fall. The design head previously headed men's wear at Sabyasachi, Shantanu Nikhil, and Anita Dongre and brings in his years of experience and expertise into every minutest detail of the collection.

Retail Expansion Plans

Currently spread out in 3 cities, the brand is vying to launch new stores in Delhi and Mumbai in the coming year. With re-branding efforts under way at Tailorman, it is excited to see how the new stores will look and feel.





>> HOUSE OF SUNIL MEHRA <<

House of Sunil Mehra, a bespoke luxury men's wear design house with a legacy of over 30 years, envisages to provide unmatched sartorial experience for men. Hand craftsmanship and creativity being a core belief entwined with spirituality, the brand offers tailor-made and bespoke experience ranging from Indian couture, western wear and luxury accessories for men.

Target Group

The brand targets discerning men who display an exceptional concern about flaunting an individual style statement. These men are highly particular about the fit and aesthetics of their garments and settle for nothing but the best.

Services Offered

House of Sunil Mehra offers customized Indian-ethnic wear, Indo-western, western, contemporary and bespoke accessories.

New Collections - Shirts and Trousers

House of Sunil Mehra has crafted a wide variety of shirts for the upcoming season. Among these are the hand made bespoke white shirts, shirts with quirky customized motifs, limited edition T-shirts, and limited edition pocket squares. The new trousers collection features intricate hand-stitched details in premium fabrics like silk, linen and tropical wool.

Marketing Strategy

House of Sunil Mehra exercises an old school approach when it comes to marketing strategies. The brand still largely relies on word of mouth publicity, a testimony to the exquisite craftsmanship that the brand proudly endorses. Additionally, it also conducts events like the Bespoke Shirts Week



from time to time to raise awareness pertaining to made-to-measure fashion.

Expansion Plans - Product

The brand has plans of pushing the boundaries of its product basket and offer a wider range to its customers. As of now, the brand plans to launch a collection of fragrances very soon.

Retail Expansion Plans

House of Sunil Mehra harbours a modern outlook towards progress and will be expanding with suitable growth opportunities. The brand vies to start their expansion drive with Mumbai, the fashion capital of India.



KEY INFOGRAPHICS

- > Company Name: **Sunil Mehra**
- > Total no. of POS: **2**
- > Cities present in: **Gurgaon and Delhi**

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BIRLA CENTURY:

RISING DEMAND FOR BLENDED FABRIC & FUNCTIONALITY

IMAGES Business of Fashion talks to R C Panwar, Joint President - Marketing, Birla Century to understand the shirts and trousers market. Panwar shed light on the evolving fabric market and how has the market transformed in the past few years.

Renowned fabric manufacturer, Birla Century is a division of Century Textiles and Industries Ltd. Incorporated in 1897, the state-of-the-art vertically integrated plant was set up in Bharuch (Gujarat). Spread over an area of 100 acres, Birla Century uses the best modern machinery to produce a wide range of premium textiles – from suiting and shirting to fine fabrics and household linen. Birla Century focuses on manufacturing products of excellent and consistent quality; adding value by offering a variety of weaves, designs and finishes; innovating continuously to create new products; and satisfying customers with their excellent service and timely delivery.

Fabric range & innovations

Birla Century manufactures one of the finest shirt fabrics range in the country. It manufactures 20 million meters of shirt fabric, out of which 7 million meters is yarn dyed shirt fabric and 8 million meters is bottom weight fabric per annum. It offers premium Giza cotton mix, 100 percent cotton yarn dyed fabric, 70x70 Giza mix dyed fabric, cotton linen blend fabric, 100 percent linen fabric, Lawn in 100's singles to 140's singles and super fine shirting fabrics in 2/100's to 2/200's count. The shirt fabric comes with innovative finishes such as yarn dyed cotton stretch, cotton modal yarn dyed with stretch, linen cotton yarn dyed stretch, bleach-proof with modal viscose blend, linen cotton intimate blends, linen/lyocell intimate blend. In trousers, it offers stretch varieties in 30's and 40's satin, twill and dobby bottom weight fabric, 50x40 high density double face dobby stretch bottom weight fabric, 2-ply and 3-ply stretch fabric and tencel cotton stretch fabric. It has developed linen blend stretch fabric, yarn dyed stretch fabric, lyocell blend bottom fabric, cotton viscose blend bottom fabric and dual-core stretch fabric.

National & international clients

Birla Century caters to all the prominent national brands and garment manufacturers such as Arvind Brands (Arrow, US Polo), Blackberrys, Being Human, Cobb, Cotton King, fbb, Madura Brands (Allen Solly, Van Heusen, Louis Philippe, Peter England), Killer, Raymonds, Sin, Siyaram, Turtle, Twills, etc., and international brands like Uniqlo, M&S, Debenhams, to name a few.

Future plans

Birla Century plans to introduce 100 percent cotton yarn dyed stretch fabric, linen/cotton yarn dyed stretch fabric, lyocell/linen stretch fabric, cotton shirt fabric with different slub, fancy yarn application in yarn dyed fabric, cotton/coolmax fabric with high inherent moisture management feature fabric for shirts. In trouser fabric, it plans to develop dualfx stretch fabric, lyocell blend stretch bottom fabric, linen blend stretch bottom fabric, linen blend yarn dyed stretch bottom fabric, cotton/coolmax fabric, various cotton and cotton blend fabrics with speciality finishes.

IBoF: How do you define the fabric industry and what are its main segments? What share do each occupy and which categories will do the best in the future?

R C Panwar (RCP): The shirts fabric industry currently structures around the shirt brands, where they consume 90 percent of the fabric sold and the remaining fabric are marketed through OTC (retail), which accounts to 10 percent or even lesser. Likewise, the suiting fabric industry is majorly divided into synthetic suiting fabrics (PV/PC) and cotton base trousers, where denims/jeans form the major part and the small part comprises basic cotton trousers such as chinos, cargos and formal cotton pants.

The fabric industry has seen a lot of transformation in the last 3 years. For



“The shirts fabric industry currently structures around the shirt brands, where they consume 90 percent of the fabric sold and the remaining fabric are marketed through OTC (retail), which accounts to 10 percent or even lesser.”

-R C Panwar,
Joint President - Marketing, Birla Century

example, the cotton suiting segment saw the demand shifting from non stretch fabric to nearly 100 percent stretch bottom fabric. At present, the most preferred bottom fabric are piece dyed fabric, yarn dyed fabric and printed fabric. While, the synthetic suiting fabric comprises PW, TR, superior PV in high-end and mid-level range, and other segment is of work wear and economy range fabric with PC and PV blends. Similarly, the post favoured shirts' fabrics are premium cotton yarn dyed fabrics, printed fabrics, linen fabrics and economy range of PV/PC fabrics sold in OTC.

IBoF: At what rate is the fabric industry growing? How has the demand varied over the last 2-3 years?

RCP: The fabric industry is getting strong in India with value brands like Max, Reliance Trends, Fashion at Big Bazar, etc., posting good growth and high-end brands giving good sales with discounts. Moreover, the online garments sale is also increasing. The overall shirt fabric industry is growing at around 10 percent but the OTC (retail) business is rapidly shrinking.

The suiting fabric industry is growing at 10 percent as the next generation is buying more cotton trousers than PV/PC formal trousers due to comfort of cotton. The cotton bottom fabric has given more comfort to consumers by using stretch features.

IBoF: What are the top challenges the fabric industry faces today?

RCP: Firstly, the cotton and yarn rates are quite uncertain. The impact of GST to the market. And, the discounts offered by garment brands, where many mass brands want to limit their MRP to less than ₹1,000, which is putting pressure on fabric prices.





R&D Unit



Spinning Unit



Weaving Unit

FABRICS SUCH AS COTTON, COTTON STRETCH, LINEN AND BLENDS, LYOCELL (TENDEL AND EXCEL), ETC., ARE MOST IN DEMAND. FABRIC TRENDS LIKE PRINTS, CHECKS, DOBBIES, AND COTTON AND BLENDED FABRICS WITH SLUB EFFECT ARE IN TREND.

IBoF: What are the latest trends in shirts and trousers fabric for the season? Do these trends vary from region to region in India?

RCP: Fine and medium count cotton fabric with checks, prints, dobby designs are in demand. Linen and linen cotton intimate and union blends with checks and dobbies, lyocell (tencel and excel) fabric, cotton stretch, cotton and blended fabric with slub effect are the favoured fabric for trousers.

North India prefers synthetic wear in winter (between October to January) and for the remaining period the cotton consumption remains high. Whereas, the Central and South India is a cotton consumer market throughout the year.

IBoF: Tell us about the top fabric trends that you have seen emerging in the past 5 years? What are the top trends that you think will emerge in the future?

RCP: Fabrics such as cotton, cotton stretch, linen and blends, Lyocell (Tencel and Excel), etc., are most in demand. Fabric trends like prints, checks, dobbies, and cotton and blended fabrics with slub effect are in trend. Meanwhile, peach finish, wrinkle defense fabric, anti-microbial finish, fancy yarn fabric, organic cotton, green finishes, etc., are some of the features that are in demand for the shirts and trousers fabric.

IBoF: Which fabric enjoys the most demand in the men's shirts and trousers market in India? Also tell us about the most consumed fabrics in women's shirts.

RCP: Cotton fabric and PC blended fabric (economy segment) are the preferred fabrics for men's shirts. Women's shirts' fabrics embrace 100 percent polyester fabric in prints and embroidery. Also, cotton blended with modal, polyester, etc., form high consumption segment. While 100 percent cotton in yarn dyed and stretch are the latest trend. We have observed

a high consumption for PV/PC suiting fabric in men's suiting fabric market. The demand is followed by denims and then cotton trousers. In women's wear bottom weights, synthetic high stretch material is used and currently high stretch cotton fabric are in demand.

IBoF: Name a few man made fibres that are hugely popular now. Do you believe the future of shirts and trousers fabric market will be owned by man made fibers?

RCP: The popular man-made fibers available in the market today are lyocell (tencel and excel), modal, coolmax (polyester), bamboo, nylon and blends, polyester and blends and recycle polyester.

IBoF: Tell us about the ratio/share of sales in OTC fabric retail versus RMG manufacturers?

RCP: Our current share encompasses OTC, which is 15 percent of the total business. The readymade garments and export comprises 50 percent of our business and fabric sale to brands make up for 35 percent of our total business.





MAYKA

EMPHASIS ON FABRIC INNOVATIONS & FINISHES

Mayka is a renowned name in the fabric trade business. It trades approximately 8 lakh meters monthly. Jayanti Gangar, Partner, Mayka shares his experience with Images Business of Fashion on the shirts fabric industry. He shares insights on the emerging trends and market demands for the shirts fabric.

Initiated in 1975, Mayka has been supplying fabrics to the textile industry ever since. It initially sold bottom weight fabrics and later moved on to shirts fabric. It won the most admired readymade garment fabric supplier at the Infashion Awards in 2013.

IBoF: Tell us about the fabric categories and blends that you offer. Which are your best sellers?

Jayanti Gangar (JG): We mainly sell 100 percent cotton shirts fabric for men. We also sell cotton linen blends, modal and Tencel blends for both men and women. At present, our best selling fabric include a variety of base fabrics in prints in both indigo and non-indigo.

IBoF: What are the latest innovations in fabrics?

JG: Some new functional finishes in fabrics have been introduced lately. Also the new natural and man-made fibre blends are much in demand.

IBoF: Name some of your renowned clients in the domestic and international market.

JG: We cater to almost all of the top domestic brands in India, who have their presence in renowned multi-brand outlets or have exclusive stores. We also supply to Zara, FCUK, Mango, Celio to name a few.

IBoF: How do you define the shirts fabric industry and what are its main segments? What share do each occupy and which categories will do the best in the future?

JG: The shirts market is mainly divided into 3 segments - casuals, clubwear and smart casual/formal wear. The shirts fabric industry is divided into plains (30 percent), prints (50 percent) and checks/stripes (20 percent). The print fabric have been selling well and are expected to continue doing so until the next year. Meanwhile, the checks fabric range would increase its share to 10 percent by the next year.

IBoF: At what rate is the shirts fabric industry growing? How has the demand varied over the last 2 to 3 years?

JG: The shirts fabric industry is expected to grow steadily in the next few years as the domestic consumption has been increasing. In the past 2 to 3 years, the demand has been hampered owing to various factors such as demonetisation, GST, etc.

IBoF: What are the top challenges the fabric industry faces today?

JG: Post GST, the 12 percent tax on garments over ₹1,000 has adversely affected the sale of mid-segment brands whose price points hovered between ₹1,000 to ₹1,600. As a result, the primary challenge the fabric industry is facing is that that the manufacturers are lowering their MRPs and want to keep their



price targets low so that they can compete with many national brands offering garments between ₹700 to ₹800.

IBoF: What are the latest trends in terms of shirt fabrics for the season? Do these trends vary from region to region in India?

JG: The trends for the Spring Summer '18 season has been floral prints and prints on structures. The trend does vary from region to region. Generally, the North India stands first when it comes to experimenting and leading the fashion trends. It has been observed that the North, Central and East region prefer brighter shades and lighter colours, whereas the South region prefers medium and dark colours.

IBoF: Tell us about the top shirt fabric trends that have seen emerging in the past 5 years? What are the top trends that you think will emerge in the future?

JG: Prints have emerged as the top trend in the past 5 years. From almost being non-existent to now being worn even in tier-III cities, it has come a long way. Another trend that has been emerging is the knit fabric for shirts. I think stripes will be reintroduced in a year from now. Also, there will be more experimentation of different blends

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from brands. The organic cotton and various nano finishes will also be used more widely in the future.

IBoF: Which fabrics enjoy the most demand in the men's shirts market in India? Also tell us about the most consumed fabrics in women's shirts.

JG: Printed fabric have the most demand in men's shirt market currently in India. With regards to women's shirt market, there is a good demand for both printed and solid fabric.

IBoF: Name man-made fibres that are hugely popular in shirts now. Do you believe the future of shirts will be owned by man made fibers?

JG: Man made with natural fibres are popular right now like viscose/tencel, cotton/modal, cotton/viscose, etc. The future will not be owned by man-made fibres but a blend of cotton and man-made fibres.

IBoF: Tell us about the ratio/share of sales in OTC fabric retail versus RMG manufacturers?

JG: The sale of fabric through OTC retail in comparison to readymade garments is very less. It will be about 20 percent of the readymade garments business.



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May'18

THE KNITWEAR ISSUE

June'18

THE SHIRTS & TROUSERS ISSUE

July'18

THE BIG DENIM ISSUE

August'18

THE INNERWEAR SPECIAL

September'18

**OCCASION, DESIGNER, WEDDING &
WINTER WEAR**

October'18

THE WOMENSWEAR ISSUE

*Thermals * Study on Fashion Accessories

TRADE FAIR
SPECIAL ISSUES

New Sections for 2018-19

- ▶ National Retailer in Focus
- ▶ Regional Retailer in Focus
- ▶ Fashion Startup in Focus
- ▶ Fashion Technology in Focus
- ▶ Fashion Designer in Focus

November'18

THE ATHLEISURE, ACTIVE & SPORTSWEAR ISSUE

December'18

THE INNOVATION ISSUE:

Top 10 innovations in a) Fashion Retail Tech, b) Store Design & VM, c) Great Product Ideas, d) Fabric & Ingredient Innovation, e) Promotions

January'19

THE BRANDS IN INDIA MEGA ISSUE

February'19

THE KIDSWEAR SPECIAL

March'19

THE IFF 2019 CURTAIN RAISER

*Women's Day Focus on Women Fashion Leaders

UPCOMING BOOKS

▶ **THE SHIRTOPAEDIA: 1ST EDITION**

-The Giant Encyclopedia of Shirts
(Sept '18 at the *India Retail Forum 2018*)

▶ **INDIA BUSINESS OF FASHION REPORT 2019**

(March '19 at the *India Fashion Forum*)

Focus also on:

- ▶ Consumer Experience (CX) Innovation
- ▶ Design Innovation Showcase
- ▶ Textiles, Trims & Accessories Innovation

THE IFF INNOVATION CRUCIBLE: As a part of the India Fashion Forum's vision 2018-19, we shall showcase the finest, most path-breaking and consumer friendly **INNOVATIONS IN THE FASHION BUSINESS**. A key cornerstone of this mission will be to foster and support **OPEN INNOVATION**. Open innovation (a concept developed by Henry Chesbrough) encourages companies to acquire outside sources of innovation to improve product lines, shorten time lines, and to market or release internally developed innovation. Indeed, it is time to foster far reaching collaboration between enablers and innovators to catalyse Indian fashion business.

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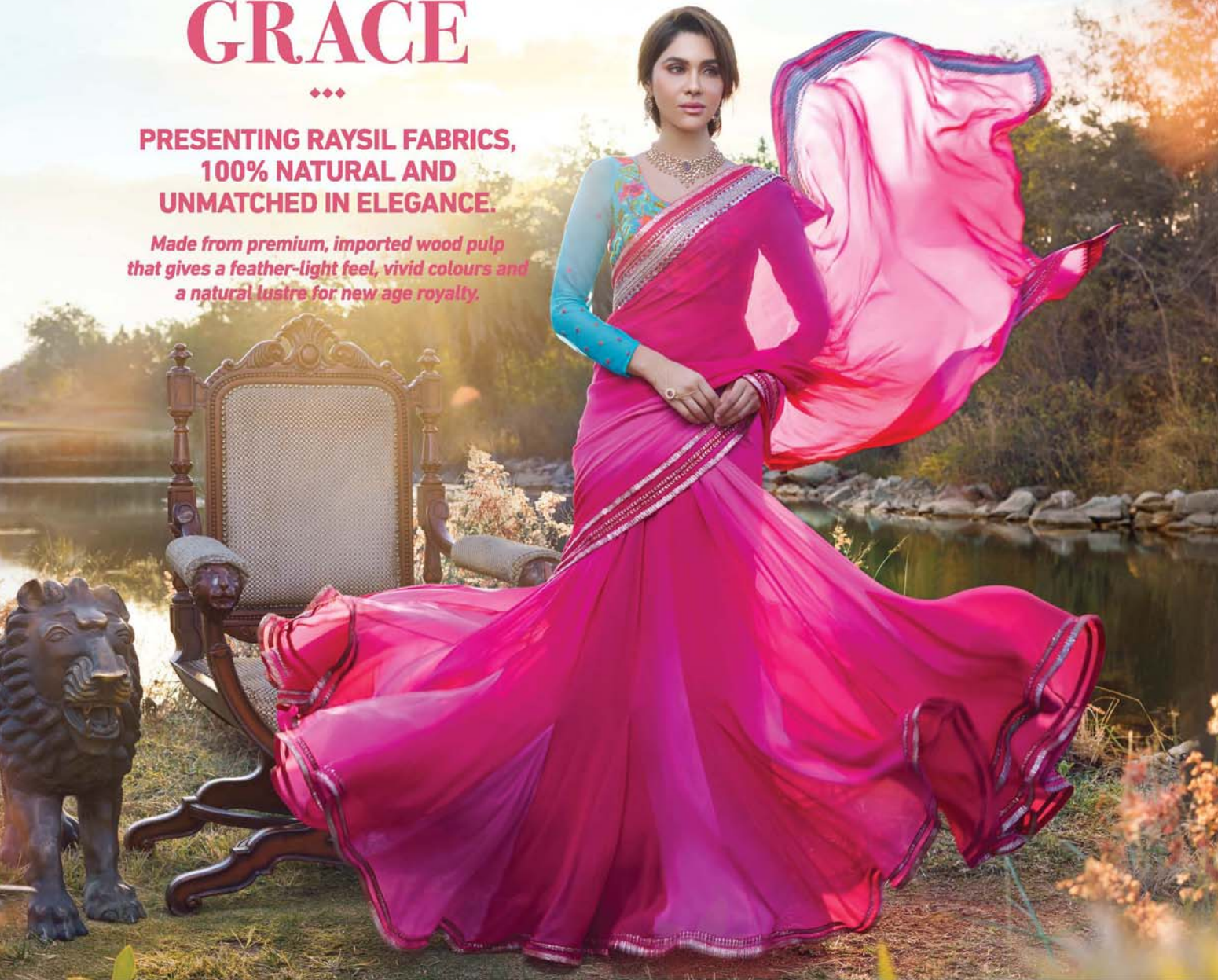
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