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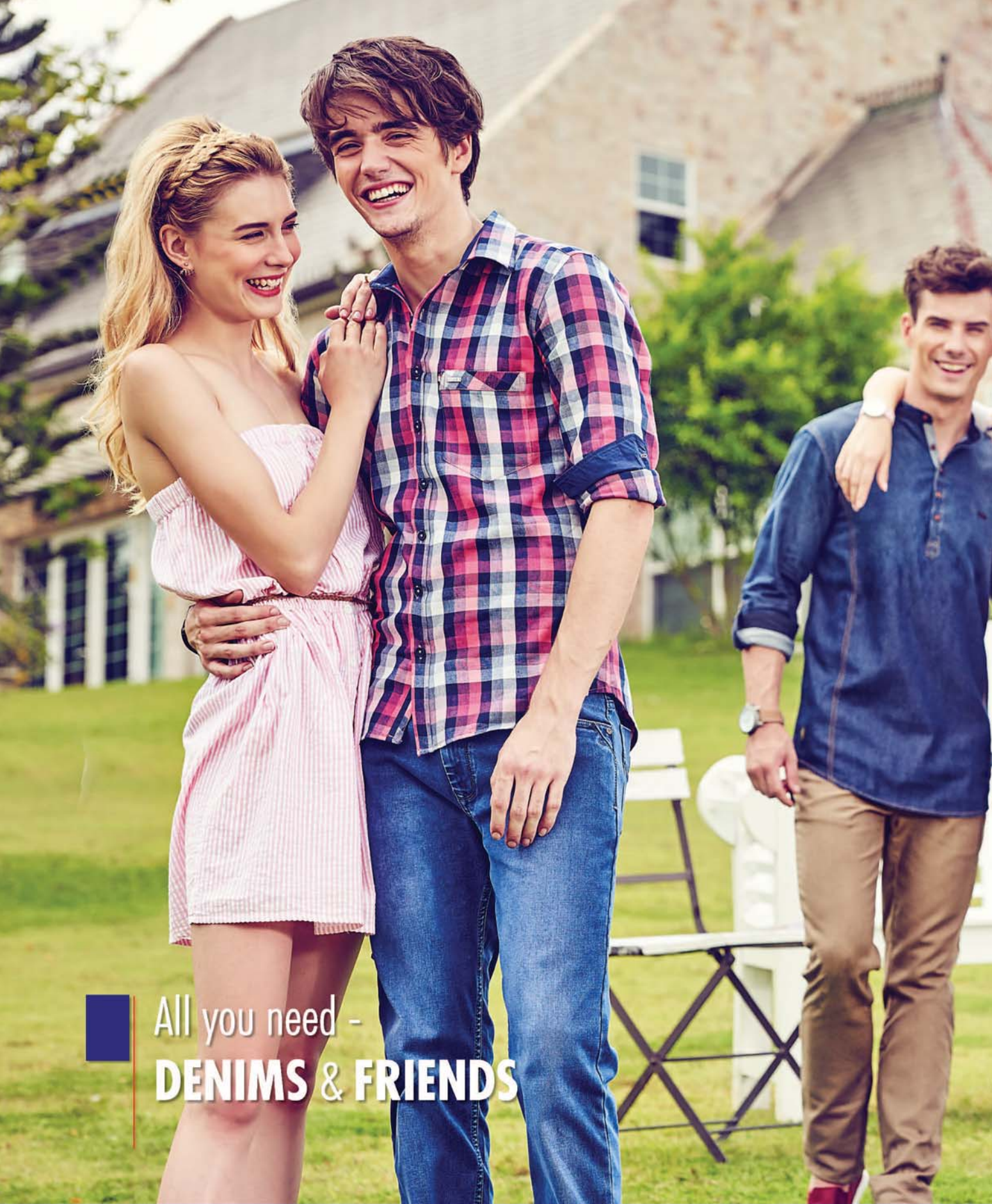


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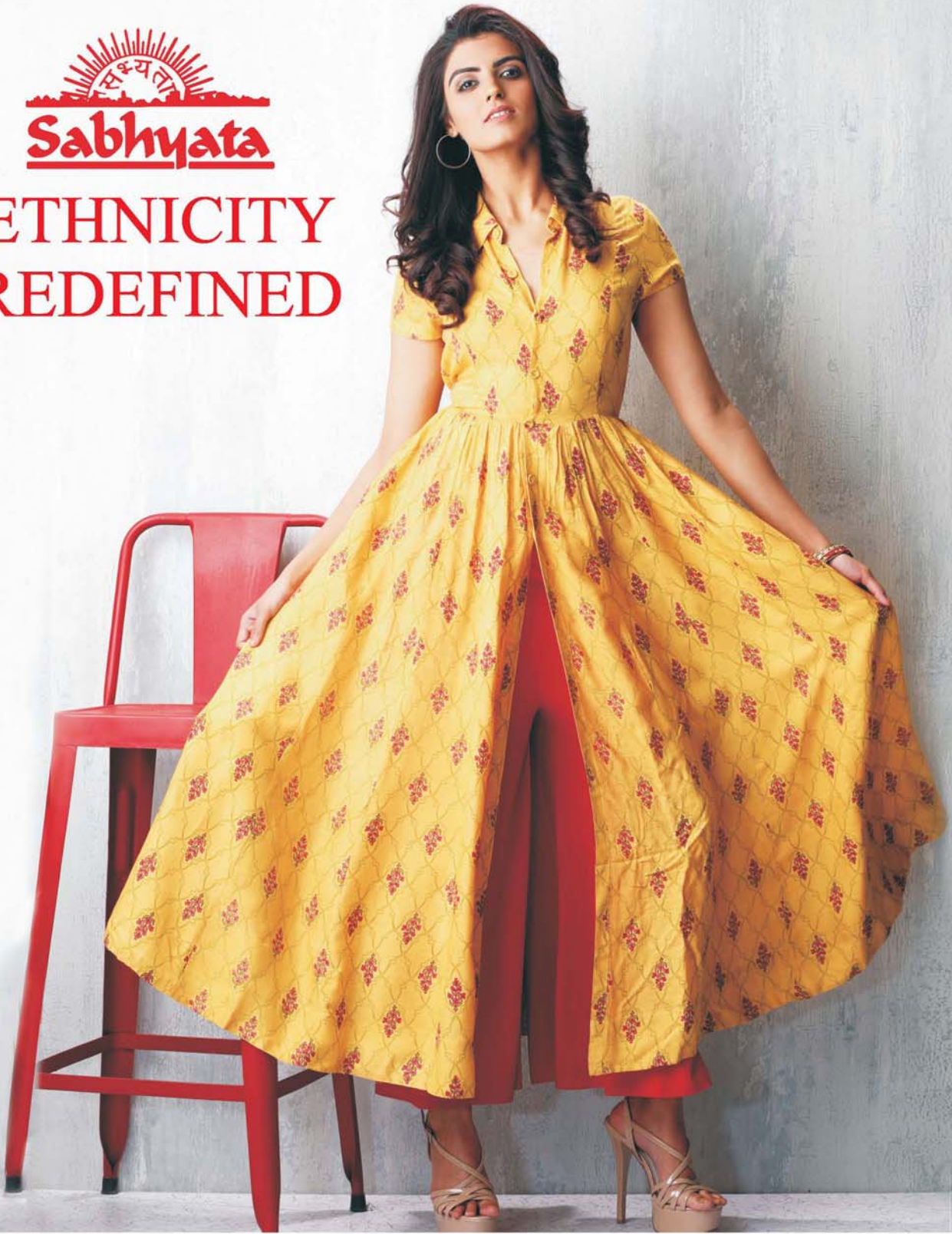


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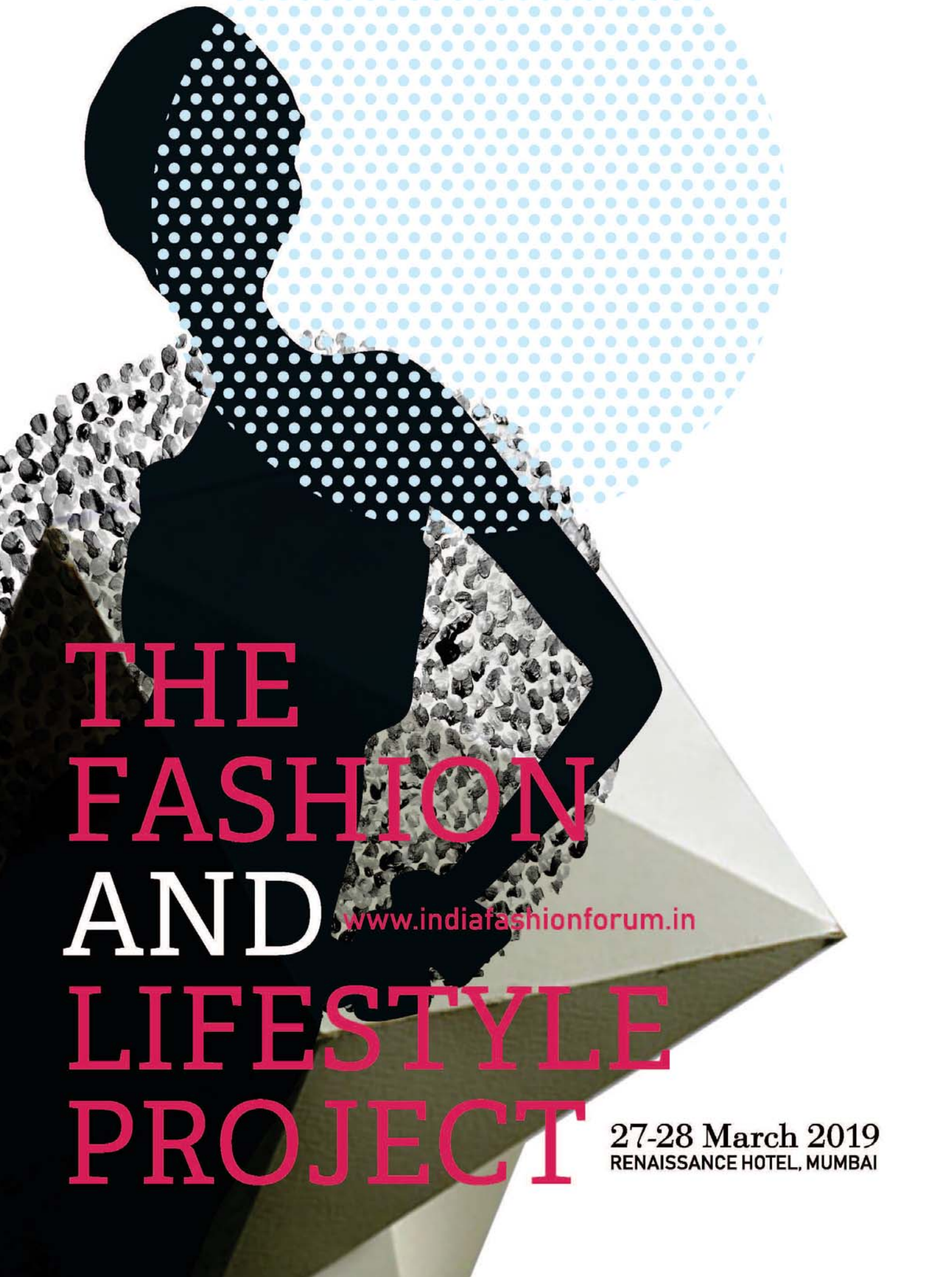
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Suvir Jaggi, +91 9611127470
suvirjaggi@imagesgroup.in

EAST INDIA:

Piyali Oberoi, +91 9831171388
piyalioberoi@imagesgroup.in

FOR DELEGATE ENQUIRIES

Sarika Gautam, +91 9717544226
sarikagautam@imagesgroup.in

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BRIGADE

Dear readers,

A very warm welcome to our favourite issue of the year – The Big Denims Special. Before anything else, I wish to thank all the participants from the industry, the expert contributors, and the entire IMAGES BoF team for bringing out this momentous issue. It was an absolute delight to work with and share the work of the highly committed and deeply thoughtful people that were associated with this month's issue.

Denim is evergreen. It is THE most timeless and global piece of apparel known to mankind. It's been more than a century that this blue hued fabric has dominated the sartorial desires of people around the globe, irrespective of ethnicity, gender or age. There's a pair of jeans for everyone out there. My vote is that the word denim should very well be included in dictionaries as the antonym of ephemeral without further ado.

It's but only natural that the denim industry is growing by the day in India as well. As leading management consulting firm Technopak outlines in the lead research of the issue, the denim apparel market spanned a size of INR 23,076 crores in 2017, and is further expected to grow at a CAGR of 12.7 percent to reach INR 41,947 crores by 2022 and INR 76,258 crores by 2027. Although, it is the men's segment that still dominates the sector with a ~84 percent share, a profusion of aspects have culminated to bolster the growth curve of the women's segment, which industry sentinels hold will exhibit a staggering growth rate of 13.1

percent during the period 2017-27. A special feature in the issue traces the growth drivers, popular cultures, consumption behavior, key trends and the prospects of both these booming denim sectors.

Sustainability is a crucial issue in the denim industry; and in the wake of increasing environmental awareness among consumers, an increasing number of denim brands are committing themselves to both the people and the planet. We look at the positive contributions of brands like Kuyichi, Monkee Genes, G-Star Raw, Patagonia as well as do an exclusive interview with Archroma which highlights their strategic vision and efforts towards catalyzing more sustainable denim manufacturing.

In addition, the issue is laden with numerous features on the current trends, the impact of the rising popularity of athleisure on the denim industry, the impact of leggings on women's jeans, denim for kids, prospects for premium denims in India, denim campaigns and collections, the take of India's top designers on denims, and its application in Indian ethnic wear. The fashion business and innovation section also looks at fashion financing, VM Innovation, start-ups, and features the laucj of American Eagle Outfitters in India, as well as of India's first fair-trade denim brand – Aizome.

I hope you like the issue. Happy reading!!



Amitabh Taneja

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ADVERTISER'S INDEX

293	ACCESSORIES SHOP
121	AEROMEN
44-45	APPLE EYE
18	AWESOME ETHNIC
229	BADA SAAB
275	BANARI AMMAN
48-49	BEINDI
89-95	BLACK PANTHER
227	BLOOD
131	BODY CARE
133	BODY CARE
235	BONJOUR
271	CAA
109	CANDOUR
103	CANTABIL
163	CDF
75	CELIO
191	CHARCHIT (LEGEND)
17	CHASE
255	CHECKPOINT
223	CHOCOLATE BABY
69	CLONE MANNEQUINS
50-51	CMAI
16	CREAM CLASS CASUALS
257	D&J
147	DARE
13	DEAL JEANS
225	DEEP BLUE
185	DESIGN MANDEE
173	DOTTED JEANS
111	DUKE
189	E2O
135	ENDICOTT
107	ERA ETHNICS
205	ETIQUETTE
23	FIFTY DEGREE
311	GARBO
295	GMWA
20	HATSOFF
301	HKTDC
15	HORIZON
294	IBOFR-18
62-63	IFF
309	IMPACT

99	IN LOOK
165	INDIGO NATION
187	INDORAMA
56-57	INFINITI
314	IRIS
22	IRONY
233	JUST SCARVES
303	KHAGA
SS	KK
263	KMF SHOW
179	KRUNCHY
11	LEE COOPER
117	LEEBAS
52-53	LITTLE STREET CREATIONS
251	LIVA
129	LUX
24-25	MANYAVAR
237	MARC SOCKS
12	MASH UP
101	MAX Q
32-33	MAYKA
122	MEXICO
30-31	MILAN ETHNIC
40-41	MOZZO
60-61	MRF
175	NOBLE INDIA OVERSEAS
289	NOVIO
159	NUB
209	NUMERUNO
73	ONLY
207	ORIGIN
66	ORION MALL
115	OTTO
46-47	PAN AMERICA
316	PANAM
38-39	PARIBITO
42-43	PINK AND PURPLE
193	PLATINIA
19	POISON
105	PRETTY WOMAN
119	RAM VIJAY
58-59	REED
249	RELAN

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Front Gate Fold
ROCKSTAR JEANS
Inside Front Cover
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Gate Fold
SWEET DREAMS, A FOX,
COOL COLOURS, PUFF
Inside Back Cover
INDIAN RAYON
Back Gate Fold
TWILLS
Back Cover
FOCUS JEANS

36-37	RIVER BLUE
199	ROOKIES
151	ROYAL TEX
54-55	SABHYATA
70	SAFEEXPRESS
217	SALVE MANNNEQUINS
87	SHASHWAT
221	SHERIFF
231	SHREE
273	SIGA
243	SO DESIGN
195	SPRINGFIELD
28-29	STRANO
201	STRIDE
26-27	SUMMERLINE
125	SUNNEX
65	SUPERSOX
315	TALES & STORIES
307	TANGO
139	TANTRA
153	TEXAS
14	TOYO
149	TRANZ MANNEQUINS
181	TRUFFLE
261	WELCO
215	YELLOW JEANS
241	YKK
34-35	ZILLIAN
21	ZOLA



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QUESTERRA

EVENTS:

>GOTS>PROMOSTYL

VM INNOVATION

Contents

B

71-120

FASHION BUSINESS



Cover picture courtesy: Texas

INITIATIVE

ALLEN SOLLY LAUNCHES 'OPEN WORK CULTURE' CAMPAIGN

The campaign encapsulates the budding work culture that centers around employee friendliness and freedom of self expression.

Pg No.74

GLOBAL BRAND

ABFRL brings American Eagle Outfitters to India

A look inside how the partnership panned out and how ABFRL intends to aggressively expand the reach of the brand in the next 3 years.

Pg No.76-77

FASHION FINANCE

The Business of Fashion for Investors: How Lucrative it is for the Investors to be in?

The panel at IFF 2018 discussed several points on how lucrative it is for the investors to be in the business of fashion.

Pg No.78-88



VM INNOVATION

The French Allure: Being Human @Seawoods Grand Central Mall, Mumbai

Being Human gets a fresh start in Mumbai with a completely reworked 2-storeyed retail space that flaunts an architectural setup reminiscent of 17th century France.

Pg No.96-97



START UP

QUESTERRA: CATALYSING FASHION TALENT

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Pg No.98-99

SEMINAR

GOTS Seminar: Sustainability as Key to Business Efficiency

Reports from the GOTS India Seminar 2018, organised by Global Organic Textile Standard (GOTS) in Tamil Nadu, that was attended by 180 delegates from five countries.

Pg No.102-106



BUSINESS & INNOVATION



EVENT

Promostyl Starts Fashion Networking in India

Promostyl has partnered with Mumbai-based fashion startup Fashionablyin to organize fashion networking events in India.

Pg No.108

COLLECTION

Duke Unveils its Shirts, Trousers & Denims Collection 2018

Inspired by the fashion culture of New Zealand, Duke has launched an impressive collection of shirts, trousers and denims for summer'18.

Pg No.110



PROLOGUE

What is Denim?

From the ranches to evolving into a symbol of youth rebellion, jeans are easily one of the most ubiquitous pieces of clothing and has ruled the word since more than a century.

Pg No.112-114

PIONEER

Decoding India's First 'Fairtrade' Denim Brand: Aizome

India's first-ever 'Fairtrade' denim brand, Aizome encourages responsible fashion consumption, even as it seeks to hold a special allure for patrons by introducing new designs, structures and colours of denim

Pg No.116-120



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ALLEN SOLLY LAUNCHES

'OPEN WORK CULTURE' CAMPAIGN

Allen Solly, India's pioneer brand in semi-formal dressing, which is owned by Aditya Birla Fashion and Retail Ltd., had launched its 'open work culture' campaign. The campaign encapsulated the budding work culture that centers around employee friendliness and freedom of self expression. Allen Solly through this campaign is helping Indian professionals imbibe the new work culture while making an effortless style statement at their workplace.

Over time, the nature of job has evolved along with the way we work and where we work, and the employers have started adapting more employee friendly policies. Open work culture encapsulates this core. The theme of the campaign orbits around 'open work culture' philosophy, and explores the evolution of modern employee friendly work-spaces.

As a part of the campaign, Allen Solly has created a new TVC that highlights the

element of open work culture and showcases quintessential office looks from the 'new age work wear' collection. The campaign has been produced by India's leading creative agency Ogilvy & Mather India. The TVC features a young Allen Solly man walking into the work place with an air of attitude and confidence, sporting a smart chino paired with a maroon blazer from Allen Solly's athleisure collection and holding a stag on the leash. The TVC draws attention to a futuristic office with a pet friendly policy – a perk of an open work culture. The man showcases striking looks from Allen Solly's new age work wear collection, which is as cool as the pet friendly policies at work.

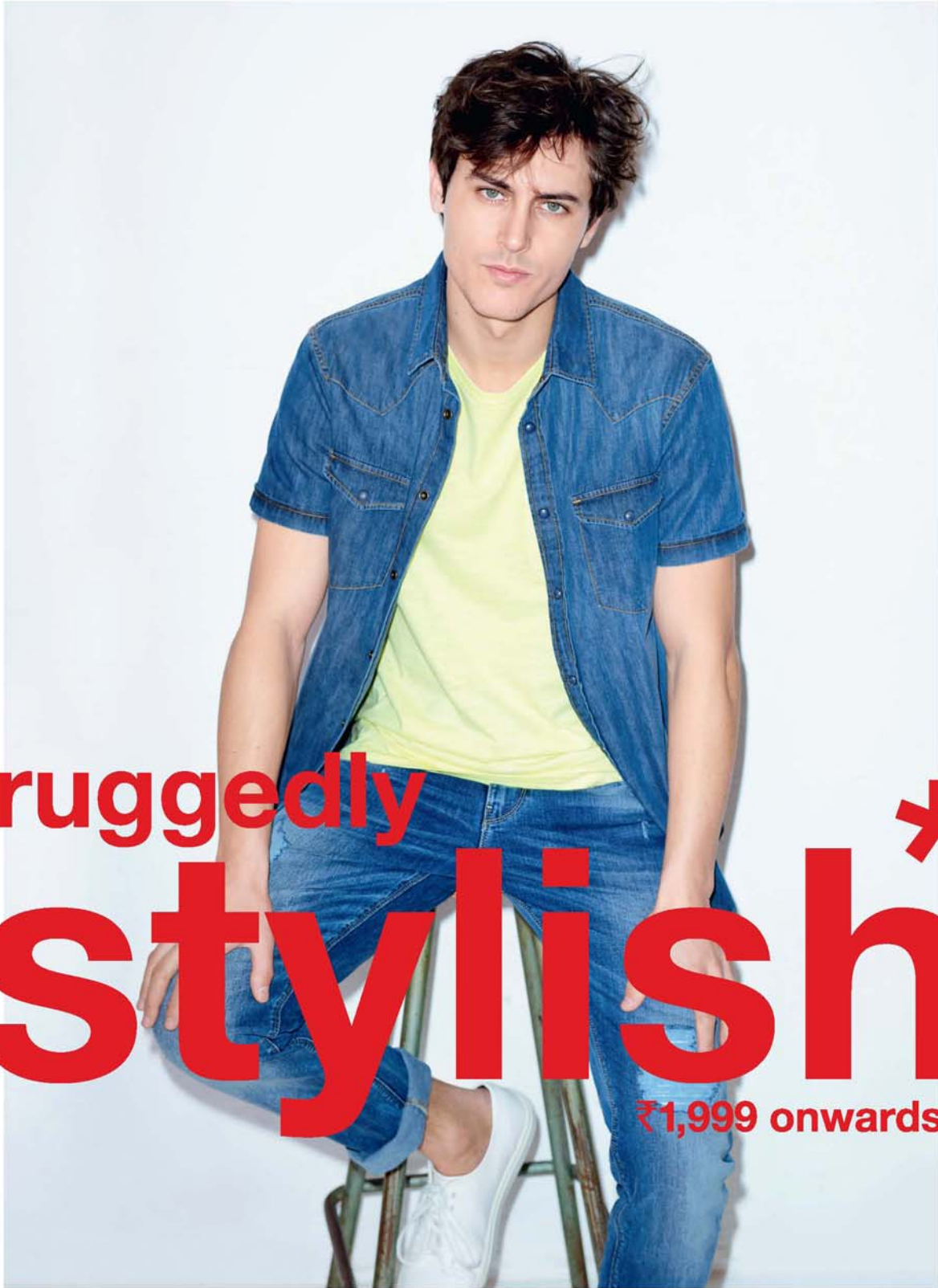
Anil S Kumar, COO, Allen Solly said, "Allen Solly has always been at the forefront of redefining fashion at work through its unconventional work wear offering. The TVC brings alive our brand logo 'The Stag' and through it we celebrate the open work culture in today's workplace." Jayanth Gurumurthy, Creative Director, Allen Solly said, "Allen Solly's open work culture is a fashionable and functional take on the new age work environment and its needs. The collection incorporates blends, which provide comfort, mobility and

enhance a stress free lifestyle. Utilising innovative fabrics, which incorporate cellulosic fibers like modal, viscose and lyocell, the garments are breathable, lightweight and soft. Finishes like anti odour, anti microbial keep the wearer fresh and ready to go through the day. All the Allen Solly trousers are stretchable, which helps movement. The 360 degree flex trouser is a unique property with every component of the garment being stretchable, a truly modern trouser for the rigor and mobility of the modern age."

Over the years, Allen Solly has revolutionized the dressing lifestyle of professionals by netting the imagination of youth and professionals and expressing it explicitly in their 'new age work wear' collection, giving one a chance to mark a fashion statement at work. With its contemporary fitting and revolutionary design, the range provides comfortable fit and expresses a unique sense of fashion. With this most recent campaign, the brand celebrates the ever evolving global phenomena of open work culture, which has helped young professionals maintain a better work life balance by providing comfort and ease of work at workplace.



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ABFRL BRINGS

AMERICAN EAGLE OUTFITTERS TO INDIA



"American Eagle Outfitters is an iconic jeans brand from the US and we are excited to bring it to the fashion enthusiasts in India. The brand will add great value to our international portfolio and strengthen our position in the youth centric lifestyle space, giving our discerning customers a true taste of high-end fashion."

-Sathyajit Radhakrishnan,
President International Business,
Aditya Birla Fashion and Retail Ltd.



Aditya Birla Fashion and Retail Ltd. (ABFRL), India's no. 1 fashion and lifestyle entity has brought American Eagle Outfitters (AEO) to India. A leading global specialty retailer offering high quality, on-trend clothing, accessories and personal care products, American Eagle Outfitters is set to spread its wings and carve a niche in the hearts of the fashion savvy and brand conscious Indian youth. Under this partnership, ABFRL intends to aggressively expand the reach of the brand in the next three years. It also plans to invest in retailing the AEO merchandise through the brands exclusive India website www.aeo.in

Aditya Birla Fashion and Retail hosts India's largest fashion network with over 8,000 points of sale in over 700+ cities and towns, which include more than 2,000 exclusive ABFRL brand outlets. It had also entered into a multi-store retail and e-commerce



license agreement with American Eagle Outfitters Inc. in August 2017.

India has the fastest growing youth market in the world with vast upwardly mobile consumers, who are driving demand for brands having international aesthetics and style. However there seems to be a paucity of choices when it comes to jeans. With the entry of American Eagle, ABFRL aims to fulfill the gap and corner a significant share of the country's premium jeans wear market.

Commenting on the launch Sathyajit Radhakrishnan, President International Business, Aditya Birla Fashion and Retail Ltd., said, "American Eagle Outfitters is an iconic jeans brand from the US and we are excited to bring it to the fashion enthusiasts in India. The brand will add great value to our international portfolio and strengthen our position in the youth centric lifestyle space, giving our discerning customers a true taste of high-end fashion."

"India's rapidly developing economy, anchored by the world's largest youth population, provides an exciting growth opportunity for our brand to expand our global reach," commented Andrew McLean, EVP-Global Commercial Operations, American Eagle Outfitters. He further added, "Aditya Birla Fashion & Retail brings deep market experience and extensive retail capabilities, giving us a strong platform to deliver our leading AE jeans collections and casual American style to the growing market."

Guillermo La Rosa, Vice President-International and Business Development, American Eagle Outfitters said, "As a leader in the Indian retail market, ABFRL's partnership gives us the platform to expand into one of the largest retail sectors in the world. With their retail expertise and aggressive growth plan, ABFRL will become one of our largest partners in our quest to become the global leader among denim brands."

Catering to the fashionable Indian youth, the 2500 sq.ft American Eagle Outfitter store in DLF Mall in Noida promises to be a fashion haven for today's millennials. For the effortlessly chic, fashion savvy young generation, the brand offers superior designs in jeans with an array of washes and fits such as the Super Skinny, Skinny and Slim, and Straight Fit Jeans. Apart from jeans the collection also includes a complete lifestyle assortment of young and quirky clothing options like graphic tees, polo tees with the iconic eagle logo, summer shirts and cargo pants all with accessories to match. The brand also has a range of fashionable casual wear for women.

Being a global fashion giant catering to the young style setting devotees, American Eagle Outfitters upholds the jeans heritage, which has changed the fashion outlook since 1977. The brand has always believed in celebrating individuality, freedom, and self expression. Each AE jeans is a blank canvas for self-expression, the foundation for any look. Representing American youth culture and casual American style, the brand will target young people who are looking to express themselves and their individuality through fashion. These youth don't just follow trends, they create them.

American Eagle Outfitters, Inc. (NYSE: AEO) company operates more than 1,000 stores in the United States, Canada, Mexico, China and Hong Kong, and ships to 82 countries worldwide through its websites. American Eagle Outfitters and Aerie merchandise is also available at more than 190 international locations operated by licensees in 24 countries.





THE BUSINESS OF FASHION FOR INVESTORS

HOW LUCRATIVE IT IS FOR INVESTORS TO BE IN?

MODERATOR

Baqar Iftikhar Naqvi,
Business Director, Wazir Advisors.

PANELISTS

Manu Indrayan,
Co-Founder & CEO, 612 League

Sneha Jain Paul,
General Manager-HR, Manyavar

Sanjay Vakharia,
Director and COO, Spykar

Nikhil Mohta,
Director - PE, ICICI Ventures.

The panel at IFF 2018 discussed several points on how lucrative it is for the investors to be in the business of fashion. They spoke on how investors look at investing in the apparel space and what the companies seek from the investors. How do they make the matrix right so that the investors are more positive about approaching those industries? How do they grow their businesses together? What is the collaboration between the investor and the companies that they have invested in?

Excerpts from the panel discussion:

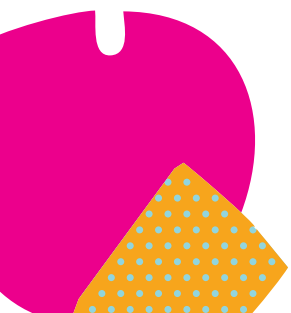
Moderator Baqar Iftikhar Naqvi: We wish to know ICICI's view on investments in the apparel space. What view do the investors have for the apparel sector and are they really looking forward to invest more and more in the physical space?

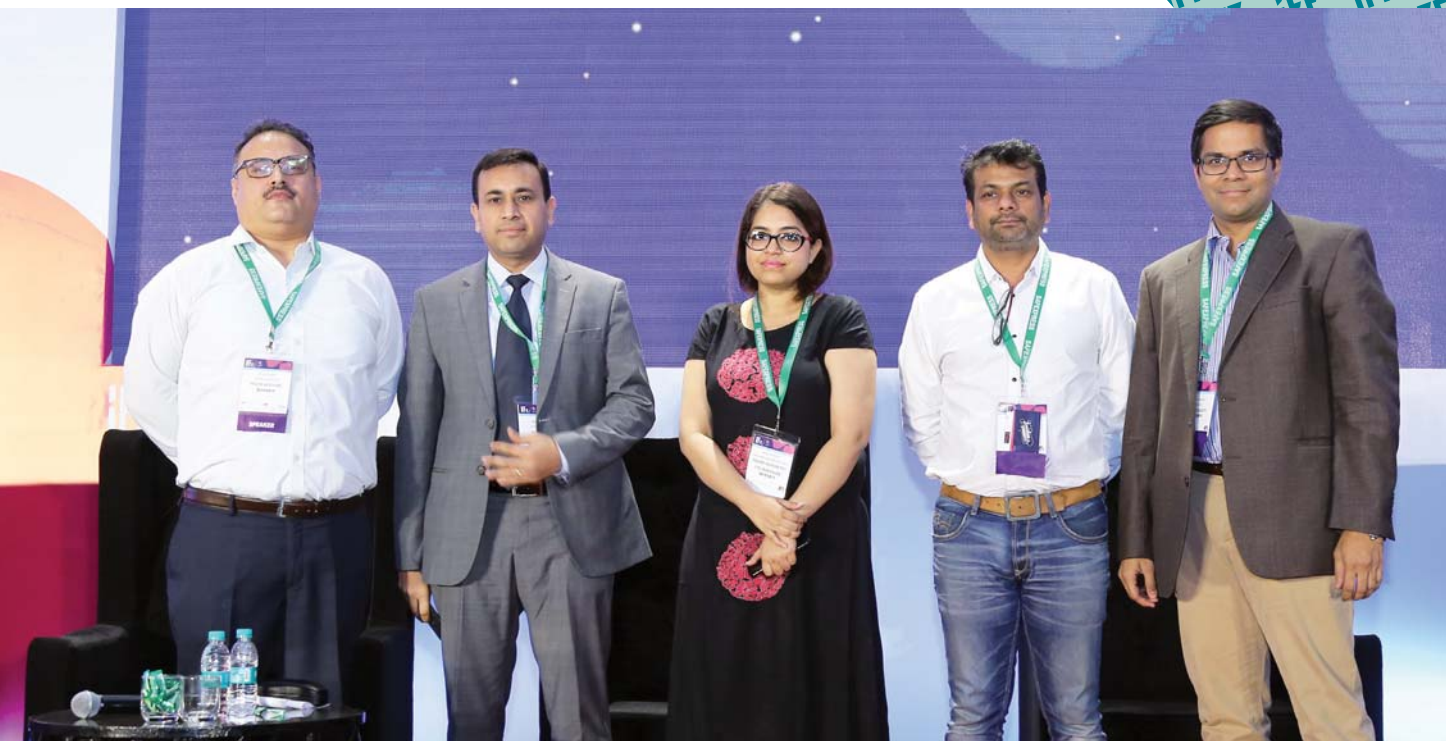
Nikhil Mohta: ICICI Ventures has always liked and interacted with the apparel space. As an investor, we have always been very positive about apparel and fashion segment. We have recently invested in Go Colors. From a macro perspective, there are a lot of strong underlying trend spaces, be it the overall growth story in terms of income levels going up or per capita going up, or brand differentiation coming up on its own. We also believe that from an Indian point of view there are very few brands of size and scale and that is what we need to change in the next few years. As an investor we are more than happy to play our part in providing capital to the right entrepreneur who is playing that change. From an investor perspective what we want to see is businesses with a long-term sustainable story and long-term franchise value. We are an old world private equity house. We do not believe that business can double or triple overnight. We are rather happy about the steady growth trajectories. We are happy to see businesses building from a long-term perspective and that is what makes it exciting for us.

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(L-R) Baqar Iftikhar Naqvi, Business Director, Wazir Advisors; Manu Indrayan, Co-Founder & CEO, 612 League; Sneha Jain Paul, GM-HR, Manyavar; Sanjay Vakharia, Director & COO, Spykar; Nikhil Mohta, Director - PE, ICICI Ventures

Moderator: Is the business more top line driven or a bottom line driven?

Nikhil Mohta: I think it is either. It has to be both. It is pure top line. We like to see businesses, which are sustainable and for sustainability growth is a must. Status quo is not an option in the country as we stand today. But growth without bottom line or healthy growth is not something that we are too excited about.

Moderator: Manyavar raised capital most recently. What was the matrix that Kedara was looking at when they were investing in Manyavar? What was the hypothesis, the key elements of investments from Kedara into Manyavar?

Sneha Jain Paul: If the business has a vision of where it intends to go and where do the stake holders want to take the business to, it is the most important thing. What is more important is what

are the things that are already set in place. Focus on systems and processes is also very important so that you know how your merchandise is moving, how well do you know your customers - their tastes and preferences. If you get these basics right, customers' focus and your customers centricity right you are in a place where investors can look at you to come on board and work with you. I think with Kedara, what is very important for them is that how is their work unique, how do they look at investments in a business - what are the things that they should change in a business. They have a listing system of what are the unique USP's of the brand and what are the things that should not change, so that it goes from point A to point D. With Manyavar it was definitely the value system that we brought with us. We were very rooted to our Indian values. Bhartiyyata is the ethos of our brand, which they did not want to change.

Moderator: Post the investment, how have the two of you worked together with Kedara on one side and Manyavar on the other?

Sneha Jain Paul: It has been really exciting. Ever since last one year when they have come on board, there has been a lot of learning for us. We were and we still are a small company based out of Kolkata with a ₹1,000 crores turnover. They come and they tell us how to do things better and it is an exciting experience for us because there are so many new things that can be done. For instance, we had an in-house analytics team who did a lot of analytics but all in the merchandise field. They came and suggested that why don't we put customer analytics into play. We worked hard on it and realized that so much was happening in that space in the country and it was so exciting. There are various other examples of this sort where they have just been showing us new things and great things that are happening in the world, which we can implement and that's what is exciting for us.

Moderator: One of the things that we tell the clients is that investors just

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don't typically bring funds; they bring in a whole new eco-system, lot of best practices, which are essential for the overall growth of the company. What are the things that investors bring in beyond money?

Manu Indrayan: Our story is more of start-up from a scratch so the partnership at that level with the investors is from a different perspective. It is essentially growth capital to just help let the business grow. This whole concept of investors and apparel business coming together is basically to create value and help businesses to achieve their potential. And in India branded apparel business is at a very high growth rate and there is a lot of potential for many brands and many spaces to create something very big here. I think the investors primarily aim to create a value within a certain specified period of time, which is permitted by the mandate of their funds, etc.

So we need to understand at what stage is the business and what is the specific requirement of the business for that stage. To do that, we could classify the journey of apparel branded business into three stages. The first stage is a threshold below ₹100 crores, where the business actually establishes itself, by establishing the product line, consumer segment and the primary selling channel, which are essential to help build up the whole brand and apparel business. The second stage is a ₹200 crores stage, the third stage is ₹300 to ₹1,000 crores and then the ₹1,000 crores stage. Many have already reached that stage and they are looking at it from a different perspective.

Initially when a business starts, you are in a 0-100 stage and you raise capital.



-Baqar Iftikhar Naqvi,
Business Director, Wazir Advisors

The main thing that the investor brings in is a structure to the business to help you remain organized to create a brand. They bring in a SKU based management, etc., make sure you have your MIS system in place, strategise for you the right channels to reach out to your end consumers. And see how you are defining your role. So those are very formative years and it is only in the second stage when the challenges become different, the investors bring in something different. Once you have established yourself as a semi, reasonably known apparel brand then comes growth and how do you manage growth. I think there are different stages that we need to understand.

Sanjay Vakharia: From Spykar's perspective it is the second investor we are working with and I think it all goes back to very basic tenets. The primary diligence that one needs to do is on people vs. anything else. I feel if you don't have the right set of people aligning then however good processes or however great is the market, they are not going to work for you. Whether you are on the investor side or on the brand's side, I think the primary alignment has to be on whether we are fine with each other or not. For an investor it is very important to know with whom he is working with because the kind of business that we are in is not binary for sure. A lot of things are on gut, whatever level of analytics you may employ. There are people who are trying

to do forecasting. But I am a very strong believer in using analytics to get into forecasting or you will be just creating clothes and this whole essence of fashion, creativity and uniqueness will not survive. It will not give any brand an edge in the market. So, I genuinely feel that a set of people finally is very critical in this kind of space. Both the parties need to understand what the goal is. In fact it is more important for the brand owner to understand the goal because he is in the business for good. Whereas the investor is into it for a definite period, only till he wants to be in the business. So if you do not align your goals and the speed, it can create issues between the two. The investor may want to move at a speed, which may allow him to move out after five years. For instance in the last 3 to 4 years nothing has been constant - it has been really disruptive. So from that perspective the period at which both are going to be aligned needs to be very certain.

Also, any brand owner needs to look at people who are going to be there for long term in advising. I think those days are gone when a foray of people were required to make tons and tons of evaluations. So it is hard work out there and if you do it well, there is money to be made. But the money to be made is not in that quantum which people used to look at a few years ago. Tempering of expectations, tempering of how do you want to move ahead, all these things are very critical for either parties because as a brand you need to take private equity money only when you are doing well. It's a relationship of equals.

I feel it is the timing, which matters a lot. Also the overall goals of both the parties matter and even the connect that

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you have with the people is important. For me people are paramount, rest everything else can be set up. Citing the example of Spykar, we still have the same set of people with two investors. Today we are among the top three in profitability. The previous investor could not manage anything but nothing has changed at our end as far as people and operations are concerned. It is probably the alignment of goals and ambitions of the investors, which were not right.

Moderator: Please throw some light on the alignment between the investor and the management of the company, because that is very critical to create wealth for both the stakeholders.

Nikhil Mohta: Fundamentally, some dis-alignment will always be there due to some extent because as an entrepreneur you are here for 20 to 30 years or in the Indian context for a few generations but as an investor you are coming in for only a 4 to 5 years period. It is very important to be clear what is doable and what is not. As an investor it is very important for me to know with whom am I partnering. It is not a business but it is the person I am partnering with and will I as an investor be able to work with this person for the next 4-5-6 years or not.

When you are trying to grow 15 to 20 percent a year there will be certain things that will go as per your plan and some not as per plans. Are you both able to understand and acknowledge that, have you both built in that margin of error, are you able to believe and trust each other that both of you are doing the right things for the business? Full respect towards each other, working

styles that match well and compliment each other as well as trust in each other is very important. As an investor I won't tell you what kind of products to put in the store, where to source your products from, what the designs palette should look like, but at the same time in issues around financing, governance, strategy, etc. I possibly can add more value.

It is important for both management and the investor to know what their roles genuinely are. As an investor I am not interested in being a CEO of the company. When you go down the path of raising capital it is always better to do it when the business is looking good and things are looking up because then you are in a positive frame of reference and you do a deal of equals. But at the same time you have to also recognise that the investor is also there for making money out of this whole process and invariably it is not the investor's own money. He too has raised capital from a variety of institutions across the world or from within India. He also has



"An investor brings in a structure to the business to help you remain organized to create a brand. They bring in SKU based management, to ensure that your MIS system in place, strategise for you the right channels to reach out to your end consumers."

-Manu Indrayan,
Co-Founder & CEO, 612 League

a fiduciary responsibility to set up the whole business plan. When you set up the entire investment conversation as management, you also need to have the same perspective what is real and what is unreal.

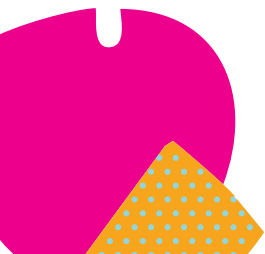
If I will put a higher valuation today on the basis of an unreal business plan that can lead to a breakdown. The moment you realise that the things are not going as per the plan, despite things going 15 percent a year, if I underwrote a 25 percent growth story in valuation and if it is a 20 percent growth story there will be a miss match.

I think the onus is on both the sides. As an investor I take a management business and believe this is fine and underwrite it then that's my folly but even as management if you agree that you push a business plan for the sake of today's valuation there is a challenge.

As management we need to take the perspective of value creation from a longer term and therefore build a business plan in a manner, which adds to the business from a 10 to 15 years perspective.

Most important is the chemistry between the people on both the sides. They should have the right chemistry, the right understanding and the right manner of working with each other and trust and respect for each other.

If I am a minority investor in a company and I believe that my majority partner is not doing things in the right interest of the company, there will always be a dispute. If I believe that he is taking decisions in the right interest of the company, then though some decisions may go wrong but as long as both have understanding and comfort, it works fine. The moment as an investor or as a management I start believing that my 80 percent has a different value, that's when the things break down.



Manu Indrayan: I think it should be looked at some kind of a marriage and you need to live together and be broadly in sync with how you want to lead your life. Otherwise it does not work. If you want to go on different tangents, then that can be laid out in the beginning while drawing up the business plan, at the pre-investment stage. It is not an overnight decision that an investor or a company takes. It has to be a mutual decision.

If someone shows interest to invest in a company, it is equally important for the company to access whether there could be a mutual fruitful partnership or not. Though money is primary, but you also need to work together and have common goals, at least during the tenure of the fund and later it should also align to your long-term vision. Maybe at that point of time, the founders or the company owners should be flexible in hearing out and listening to ideas or strategies. Most of the time investors with their kind of experience and interactions with other people in the industry can give you a lot of perspectives. It is about taking joint decisions as far as key strategy decisions are concerned. At that extent you need to be very open and flexible and make yourself comfortable.

One of the investors we were interacting with for the first round said if you feel comfortable picking the phone at 10 o'clock at night and telling me something which has gone wrong or right, we can be together. One should have that kind of relationship with the investors where you do not treat them as outsiders, but as part of your system. They are not there for your day-to-day management or operations. Nor are they telling you to



“When businesses know their key strengths and they marry into an investment firm, which comes with another set of key strengths, they can just complement each other.”

-Sneha Jain Paul,
General Manager - HR, Manyavar

buy from X or Z. But then as a business eventually you are both in it to create a certain value for the shareholder and to some extent there has to be a certain comfort with each other.

Moderator: A lot of funds that we meet also specify that they want to invest only in a certain size of the industry. Not very many companies are beyond ₹500 crores and very few beyond a ₹1,000 crores. Is that something very critical? How do you look at it?

Nikhil Mohta: At ICICI Venture, we are very happy to work with companies which have a business of ₹500 crores. There are different investors and different stages of a business evolution. When you are a startup and are growing from a ₹100, ₹300 to ₹500 crores, you look for a different kind of investor and support and beyond that it becomes a very different ball game. I think the bigger challenge is the fact that a lot of capital which came into the market, at least in the last few years is the capital, which wants to see very rapid returns. Thanks to the e-commerce story, people have got used to the 100

percent y-o-y growth, but unfortunately that does not happen in the real world, and certainly not in a sustainable manner. As investors and an investment house we look at businesses, which are sustainable in the long run. We are not investors who like to bag businesses, which need 5 rounds of capital raise to survive. We are happy to write a larger cheque today and put more money in the business but only if you want to build a business plan in a manner that sustains.

At the end of the day in India, most of us are back promoters and management teams. Most investments in this space and otherwise are still minority deals. You want the promoter or the management teams to have enough skins in the game for a longer term period for him/her to be excited about doing that business. You do not want him/her to be on the road every year trying to raise capital. You want them to focus on building the business on a sustainable manner. Then whether you are a ₹100, ₹300 or ₹500 crores business, there are different investors who look at different ticket sizes. At ICICI Ventures we look at ticket sizes of 20 million dollar and more. If someone is smaller in size and scale they look for investors who do the ₹50 to ₹60 crore kind of deal and for businesses which are much larger, there are obviously much larger investors as well. You should be clear as a company why you should be raising money and why are you getting an investor. If it is only for the money then you should probably take a bank debt from someone who is sitting 10,000 miles away and comes twice a year and will not ask you too many questions but hopefully as an investor we are able to bring some value to the business by being collaborative and by being partners.

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“If you don’t have the right set of people aligning then however good processes or however great is the market, they are not going to work for you. Whether you are on the investor side or on the brand’s side, I think the primary alignment has to be on whether we are fine with each other or not.”

-Sanjay Vakharia,
Director & COO, Spykar

Take a view and ask who is the right investor for you both as an institution and as an individual and then with that institution and individual you negotiate hard and get the best of the terms you can. Challenge should happen in the current framework how deals get run. You should invite a bunch of bids and see whom you are most comfortable with, who you can pick up a phone and call in the night to give the bad news. Accordingly deal and negotiate as hard as you can.

Moderator: What is your suggestion to the delegates here and to the larger industries who are trying to raise funds. What should be the top two things one should look at and what should they expect?



“Investors and an investment houses look at businesses, which are sustainable in the long run. No investor like to bags businesses, which need 5 rounds of capital raise to survive.

-Nikhil Mohta,
Director - PE, ICICI Ventures

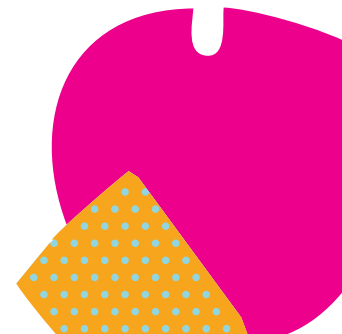
Manu Indrayan: Set out a very realistic business plan and set the level of expectations very clearly on the table. We normally tend to create unreasonable expectations from the businesses when they start boomeranging back on you. A very honest assessment of the business plan, backed by real research and understanding at your end is necessary. Eventually the investors buy into that business plan and make their own assessment. Be very sure and honest of what you are setting out to do.

Sneha Jain Paul: Businesses need to focus on what they want to continue doing themselves and what the investors advise on. If they can create that divide I think they can best collaborate. When they know their key strengths and they marry into an investment firm, which comes with another set of key strengths, they can just complement each other. If that analysis is made, it can be the best collaboration.

Sanjay Vakharia: I feel that the promoters and the founders know the business much better than the investors and that is the belief one should always have. If that belief is shaken then everybody’s money will go down the drain. So if you want to get any money investor in the company, one has to have a sense of who is partnering with you. Who is going to the board with you? Whether he has enough experience on ground because the business on excel and on ground is very different. Also it is very important to have enough money in the business or it will crumble. So only a brilliant idea, a brilliant opportunity and not enough money at the right time, are the issues that probably will take the whole fun out of the business.

Panel Discussion Summary

The whole concept of investors and apparel business coming together creates value to the business. Both the parties need to understand what the goal is. An investor needs to know with whom he is partnering with. It is not the business but the person he partners with and needs to see that will he be able to work with that person for the next 4 to 6 years or not. Both should have the right chemistry, the right understanding and the right manner of working with each other and trust and respect for each other. Investors look at businesses, which are sustainable in the long run and try to bring in some value to the business by being collaborative.





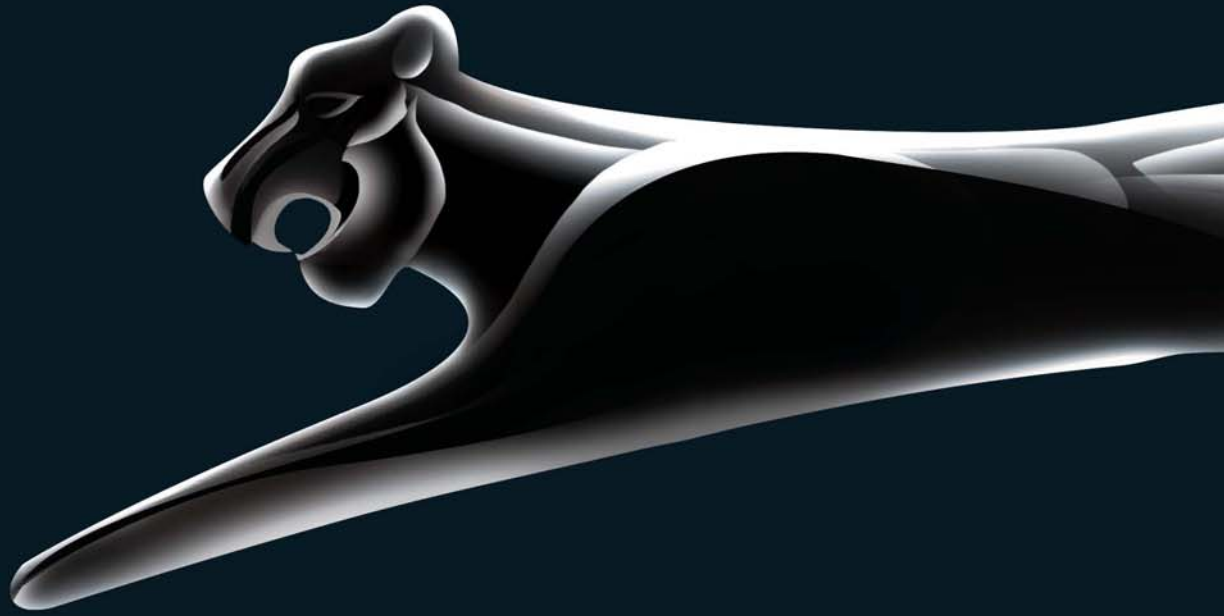
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Flex < verb > stretch, bend, curve, angle, kink /
in physical endeavour > outstretch the body to
prime tendons and muscles.



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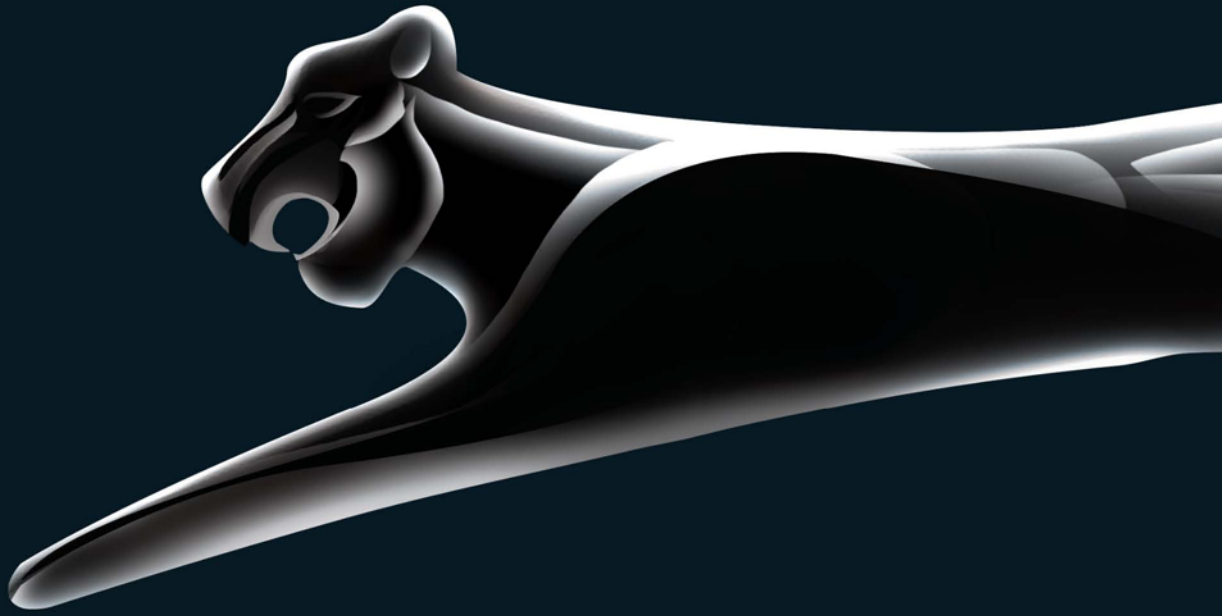
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Train < verb > instruct, coach, tutor, prime, drill /
in fitness > to develop and condition the body through
sustained practice and instruction.

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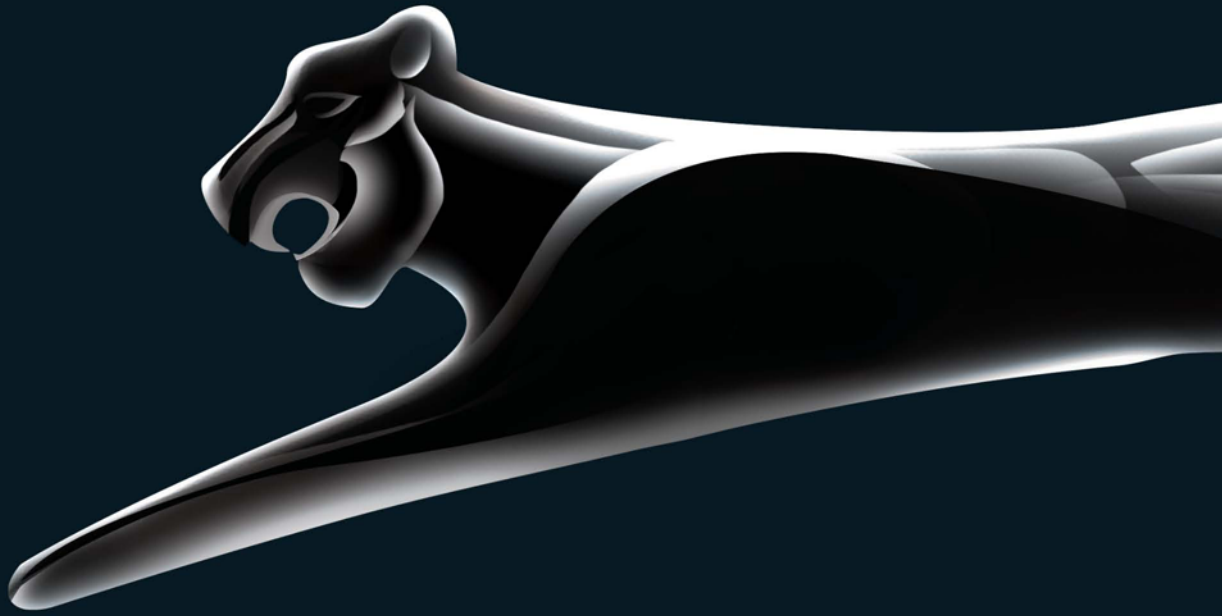
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GET THERE





Distance < noun > interval, space, span, gap, separation / *in athletics* > the full length of a race or objective of activity.



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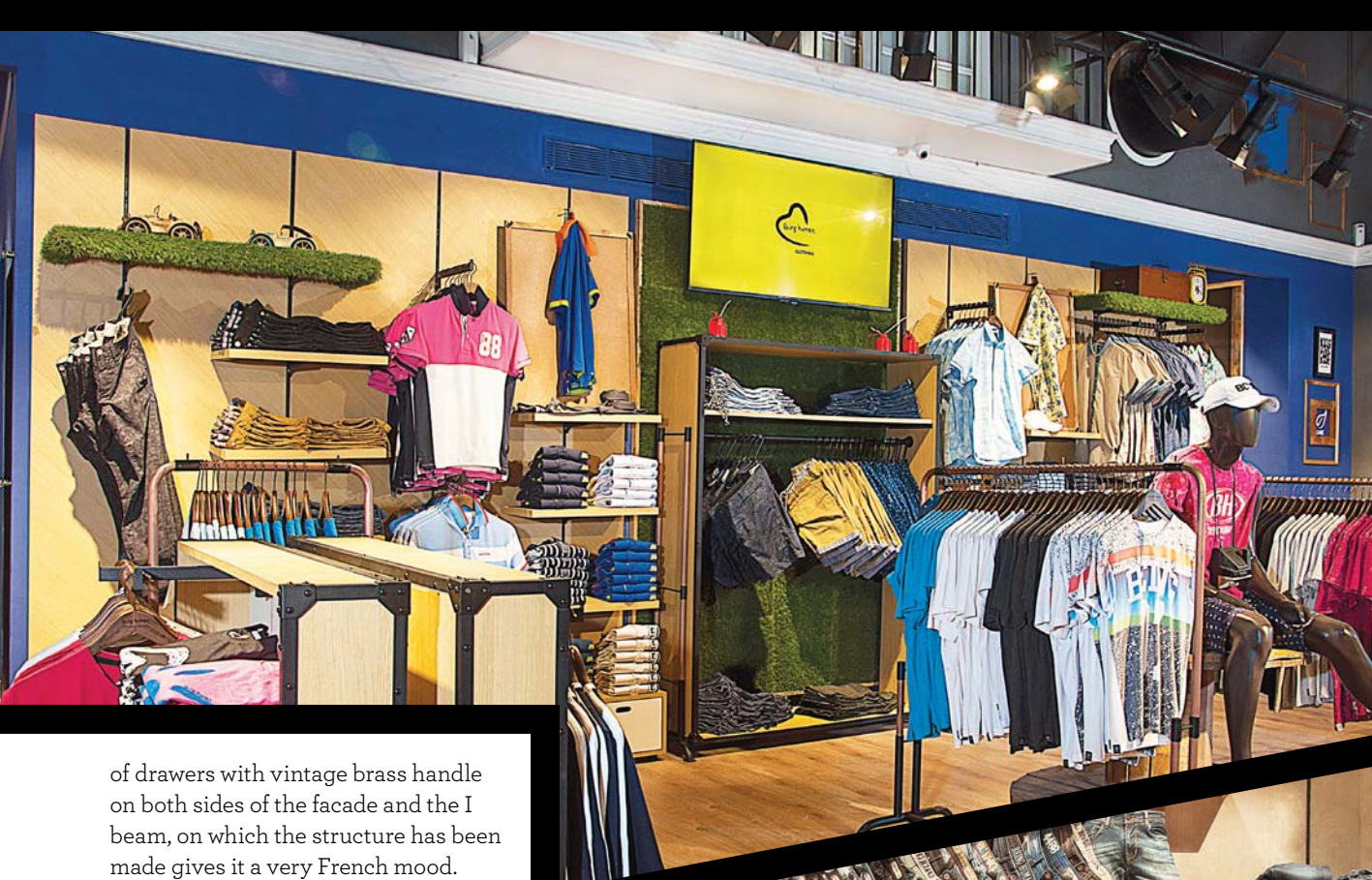
Apparel brand, Being Human Clothing gets a fresh start in Mumbai, with a completely reworked 2,558 sq.ft., 2-storeyed retail space that flaunts the best of the fast fashion brand in an architectural setup reminiscent of 17th century France, during the war with Italy. Located at the Grand Central Mall in Navi Mumbai, the aesthetics of the new store evinces the concept of a 2-storey under-construction building.

Designed by Being Human Clothing's in-house design team, the motivation was to give a new feel to the existing store design by adding elements which would enhance the largeness of the space at Seawoods. The brand has utilised statement elements which were used in bare minimum in its other location stores and made them larger than life at this store. "Like the drawer wall, which ideally is used behind the cash counter in other stores, but at Seawoods we have used it in the façade of the store," says Karan Berry, Creative Head, Being Human Clothing.

The Design

Standing at a staggering height of 19 feet, the Being Human Clothing store at Seawoods looks like a 2-storey building under-construction. The concept of French windows, tessellation

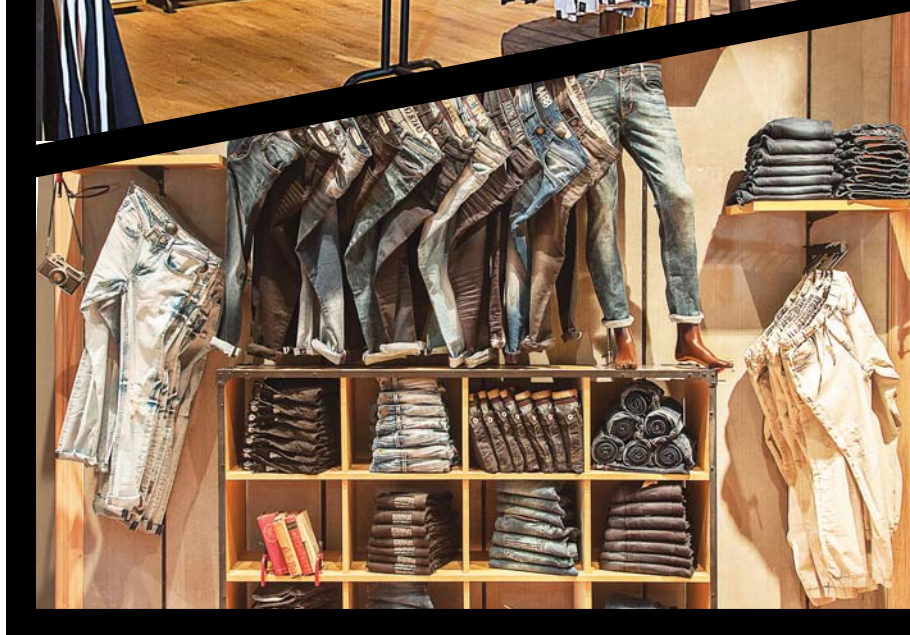
THE FRENCH ALLURE: **BEING HUMAN** @SEAWOODS GRAND CENTRAL MALL, MUMBAI



of drawers with vintage brass handle on both sides of the facade and the I beam, on which the structure has been made gives it a very French mood.

The French windows, made up of wood and glass, serve as a door/window of a house opening on to a balcony. The wall panels are made chiefly of grass and wood with the walls kept bare to give the under constructed feeling. The brand also has added rustic natural textures, like water leakage, to give it a more authentic feel. The floor is built with a mix of wooden flooring and pavers block giving a street like feel in the center of the store. The gazebo is placed on the pavers block in such a way so that everyone who enters the store feels that they are shopping on the streets of France. The merchandise too is displayed in a manner that exemplifies the feel of a street shop.

The ceiling is kept bare with suspended grass and lights give a very open and fresh feeling to the store. The wiring has also been kept bare to give it an unfinished look which adds to the design. The track lights add to the raw and robust feel of the design. The store also features halfway stairs which are mounted on the walls giving the feel of houses on the street. Being Human Clothing has also re-cycled old barber chairs for seating within the store, with



“BEING HUMAN CLOTHING STORE AT SEAWOODS LOOKS LIKE A 2-STORY BUILDING UNDER-CONSTRUCTION. THE CONCEPT OF FRENCH WINDOWS, TESSELLATION OF DRAWERS WITH VINTAGE BRASS HANDLE ON BOTH SIDES OF THE FACADE AND THE I BEAM, ON WHICH THE STRUCTURE HAS BEEN MADE GIVES IT A VERY FRENCH MOOD.”

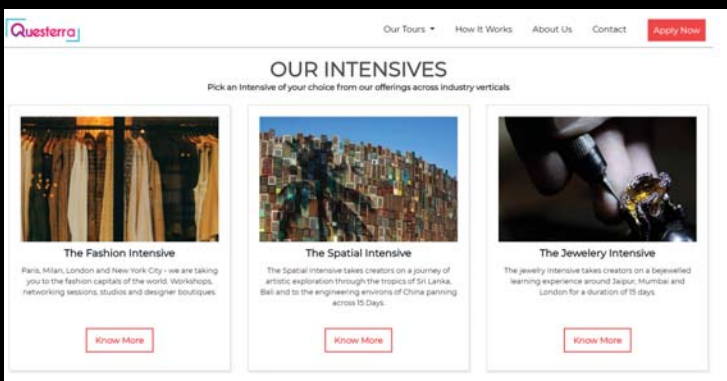
seat covers that are designed in denim patch work. On being asked about the response that the store has hitherto registered, Karan Berry proudly states, “The response has been great so far. This lace and design has helped us to increase the stock capacity which further helps us in displaying more styles and options. Everything is well placed out and give the customer enough space to browse peacefully.” Being Human Clothing aims to keep this design concept unique to the Seawoods store albeit taking elements from it for future stores.



QUESTERRA

CATALYSING FASHION TALENT

Questerra is an interdisciplinary interactive platform that enables its clients to travel the world, the chief purpose of the travel being education. The startup envisages to help its clients learn and broaden their horizon through workshops, networking sessions, and visits to studios and designer boutiques around the globe.



Questerra believes that to accentuate real learning, one must emphasise on earning with a practical and experiential approach, a stark contrast to the education template of today that is largely theoretical and classroom based. The interdisciplinary interactive platform is rooted in the philosophy of deep experiential learning via mentors and curated travel. With a proven guiding voice, a curated experience around a profession aided with insights on local techniques, sustainability, tricks and trades, the startup aims to open up a sea of opportunities for young students and professionals to propel their careers on a global stage. Questerra's creators (consumers) swear by its enhanced practical learning modules, superior mentors and curators, proven destination and itineraries that focus on learning, networking and growth whilst travelling.

With offices in Bengaluru and New York, Questerra is propelled by a team of 8 extremely passionate people who are focussed on creating innovative concepts of learning that last and actually make an impact. The team features a mix from management and tech backgrounds along with media and content specialists.

The Idea

The idea was seeded in the travels of founder Rishabh Manot, who has to his credit travels around the world which he believes has been more impactful than his formal education. "I have been associated with various travel and education startups for over 10 years with two successful exits. I feel that that travel and people impart a higher degree of practical education in ones learning curve and hence I have resorted to making a business model around it," he told IMAGES BoF.

Offerings

As of now, the company offers three "Intensives" — Spatial intensive, Jewellery Intensive and Fashion Intensive. While the Spatial Intensive takes creators on a

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– Rishabh Manot,
Founder, Questerra

journey of artistic exploration, the Jewelry Intensive takes creators on a bejewelled learning experience. The Fashion Intensive is one of Questerra's signature products that is executed at least twice each year. Extensions or shorter versions of the same model are being conceptualised for the benefit of working professionals who cannot take the longer versions. The Fashion intensive will take the creators (participants) on a month long immersive tour - with a week each in the 4 leading fashion capitals - Paris, Milan, London and New York City. The intensive will cover workshops, talks, networking sessions and curated visits to studios, fashion weeks and designer boutiques - that will enable participative and experiential learning.

A pioneering and innovative platform, Questerra seeks to bridge the gap between the need for, and supply of, culturally aware professionals in today's society. The platform is especially beneficial for purchasing houses, design houses, boutique fashion and all kind of professionals from the fashion industry to bring a global perspective of learning, networking and growth in their

business. Over the years, designers, stylists, bloggers, publicists, jewelry designers, entrepreneurs, influencers and fashion enthusiasts have benefitted from the intensives.

Technology Backup

Questerra is seeded in travel and education, and hence banks on a lot of futuristic technology for ideation and idea implementation like AR/VR integration, mood board and colour palette creation, etc. The use of tech in terms of enhancing the user experience is where the platform is focussed, because at the end of the day it has to make the experiences unforgettable so that creators (travellers) can use the inspiration acquired on tour. Questerra also relies heavily on the use of digital media for outreach.

The Response

Questerra has been fairly successful in terms of ideating and executing its offerings as its the first time in the world a product like this has been ideated and launched. Most of the Fashion Intensive participants eventually end up working with international connects that they met on tour. Questerra also acknowledges the support it has hitherto received from academia like NIFTs and others; and corporate platforms that acted as a big booster for the startup. It has also been nominated for several awards over the time.

Questerra has catapulted and moved into the scaling phase and launched the second season of its intensives. It also is launching a new line of intensives including those for culinary arts and filmmakers, among others. "From the experience perspective we are working on our intensive being a greater value add by using cutting edge technology for ideation and recording," says Rishabh Manot.





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GOTS SEMINAR ON 'SUSTAINABILITY AS KEY TO BUSINESS EFFICIENCY'



More than 180 delegates from five countries attended 'GOTS India Seminar 2018', organised by Global Organic Textile Standard (GOTS). The seminar was held at Le Meridien Coimbatore, Tamil Nadu, India on 29th May 2018. The seminar brought together important stakeholders under one roof to discuss efficiency through sustainability. The attendees included International brands and retailers, Indian fashion brands, textile manufacturers, chemical suppliers, testing laboratories, accreditation bodies, academicians, industry organisations, certification bodies, standard bodies, media, service providers, consultants and other important stakeholders from the field of organic textiles and sustainability.

The theme of the seminar was 'Sustainability as Key to Business Efficiency'. With time, focus on sustainable development has significantly increased both in India and the world. Actively implementing guidelines for protection of environment and people is seen as the instrument to secure the future and reputation of operations in the long run, India has made immense progress in terms of processing of organic textiles. As per December 2017 data, out of the 5,024 facilities GOTS certified worldwide, the highest, more than 1,650 are in India.

In his welcome address, Sumit Gupta, Seminar Coordinator and GOTS Representative in India and Bangladesh, introduced the theme and the sessions for the day.





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“H&M AND STANLEY/STELLA RECONFIRMED THEIR COMMITMENT TO ORGANIC TEXTILES AS A PART OF THEIR STRATEGY TO ACHIEVE HIGHER LEVELS OF SUSTAINABILITY IN THEIR RESPECTIVE SUPPLY CHAINS.

Four sessions of the seminar addressed the various aspects of efficiency in sustainable fashion and textile manufacturing. The sessions included buyers’ perspective, chemical compliance, social responsibility and futuristic certification systems.

SESSION 1: Efficiency through Sustainability in Fashion: Buyers’ Perspective – was moderated by Claudia Kersten, Managing Director, GOTS, Germany. Kersten made a short opening presentation and explained how the eco/social efficiency of a product or service is inversely proportional to its non-sustainable eco/social impact. The

speakers in this session were Bruno Van Sielegem, Sustainability & PR Manager, Stanley/Stella, Belgium; Gagan Kapoor, Global Cotton Supply Chain Responsible, H&M and Madhav Lohia, Brand Head, SoulSpace. The Indian brand SoulSpace shared their vision of GOTS certified clothing line for Indian consumers as one of the first movers. International brands H&M and Stanley/Stella reconfirmed their commitment to organic textiles as a part of their strategy to achieve higher levels of sustainability in their respective supply chains.

SESSION 2: Efficiency through GOTS Criteria and Chemical Compliance – was moderated by Prasad Pant, Director - South Asia, ZDHC Foundation. The speakers for this session were Sumit Gupta, Deputy Director Standards Development & Quality Assurance, GOTS; D Subaash Kumaar, Vice President, Anugraha Fashion Mill Pvt. Ltd. It was learnt in the session how tools like GOTS & ZDHC concretely contribute to efficiency since they take over the work regarding chemical compliance management. Subaash Kumaar presented case-study on how investments in environmental compliances have led to increase in savings and therefore led to business efficiency and higher profitability.

SESSION 3: Efficiency through Social Compliance – was moderated by Herbert Ladwig, Policy and Legal Advisor, GOTS, Germany. The speakers in this session were R S Balagurunathan, Founder, Anandi Enterprises; A Narayansamy, General Manager, Armstrong Spinning Mills; Mona Gupta, Founder Director, Sutradhara and Dr. Binay Choudhury, Chairman, CU Inspections and Certifications India Pvt. Ltd. While, Balagurunathan spoke about the inherent social benefits of organic

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farming. It was also evident that it is relatively difficult to measure efficiency in social sector as the most results are long term. We also need to improve communication about social matters- both with the workers and external stakeholders.

SESSION 4: 'Being Future Efficient: Evolution of Standard' – was moderated by Rahul Bhajekar, Managing Director, GOTS. He made a presentation on the session title and shared the ongoing work in the field of GMO testing and the Central Database Project. This was followed by a Panel Discussion on the topic, 'Futuristic Certification Systems for Textile Chemicals'. The panellists were Lars Doemer, Co-Founder, GoBlu International, Germany;

Dr. Pankaj Desai, Head - Research and Development, Colourtex; Dr. Rajesh Ramamurthy, Head - Product Stewardship Asia, Archroma; Dr. Siva Pariti, Global Technical Program Manager, Sustainable Textile Solutions; and Shriram Atgur, Head - Sustainability and Product Stewardship, AEON India. Several panelists opined that Ecolabels like GOTS add value to product and process for both verification and effective communication. Harmonization of MRSLs as well as health and safety of workers at chemical manufacturing facilities was also discussed in the panel.

Subaash Kumar, Vice President, Anugraha Fashion Mill Pvt. Ltd., said, "It was a very positive gathering and

GOTS has done great arrangements at all fronts. I could meet many new friends and I am really happy with the response what I got from the audience at the seminar."

Sumit Gupta, with his closing remarks said, "Indian consumers as well as Indian brands are looking for ecological fashion products, but gaps remain for criteria and communication. GOTS has the potential to fill these gaps by providing uniform criteria for sustainable production and communication in all parts of the supply chain."

Prasad Pant, Director - South Asia for Amsterdam based ZDHC Foundation, "All stakeholders of the industry were present here. I congratulate GOTS team for the success of GOTS India Seminar 2018."

"It was a wonderful gathering of Indian and international high level experts. We had concrete examples of investments in social and environmental aspects leading to business efficiency and profitability," said Claudia Kersten, Managing Director, GOTS.

"I was very pleased with the response we had from across the supply chain, chemical manufacturers included. The speakers were on-point and the audience interaction was excellent. It all goes to show that GOTS in India has a sustained, growing future," said Rahul Bhajekar, Managing Director, GOTS.

ABOUT GOTS

GOTS is the stringent voluntary global standard for the entire post-harvest processing (including ginning, spinning, knitting, weaving, dyeing and manufacturing) of apparel and home textiles made with certified organic fibre (such as organic cotton and organic wool), and includes both environmental and social criteria. Key provisions include a ban on the use of genetically modified organisms (GMOs), highly hazardous chemicals (such as azo dyes and formaldehyde), and child labour, while requiring strong social compliance management systems and strict waste water treatment practices. In 2017 more than 1.74 million people were working in GOTS certified facilities. GOTS was developed by leading international standard setters – Organic Trade Association (USA), Japan Organic Cotton Association, International Association Natural Textile Industry (Germany), and Soil Association (UK) to define globally-recognised requirements that ensure the organic status of textiles, from field to finished product. GOTS is a non-profit organisation which is self financed.



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1 Tarun Thadani, Founder, Fashionablyin (second from right) with Promostyl team
 2 Reece Mitchell, International Marketing Manager, Promostyl addressing the gathering



The French multinational trend-forecasting company, Promostyl has partnered with Mumbai-based fashion startup Fashionablyin to organize fashion networking events in India.

The event which happened on the 5th of July, 2018 at Slink & Bardot, Mumbai was the first instalment of the continuing fashion networking events. The maiden event was a delightful evening with a scrumptious menu by Chef Alexis Gielbaum. The Promostyl team made a presentation on the trends for Spring-Summer 2019 and the event buzzed with a lot of business talk. Some of the attendees included Samarth Hegde & Kabir Mehra, from the recently funded bespoke men's suit brand Herringbone & Sui (H&S), Jankee & Stuti from fancypantsthestore.com – one of Mumbai's most successful boutiques & online websites, Pooja Shah from More Mischief the upcoming Indian multi-designer boutique with stores all over the world and celebrities like Tara Sharma.

Promostyl deciphers the latest and most relevant lifestyle and design currents and anticipates the trends across design, fashion, consumer behavior and marketing to provide clients with a strategic edge in the market place. The company which has already been working with Indian fashion conglomerates like Arvind, Raymond and VIP industries, plans to grow its operations in India significantly over the next 5 years. Reece Mitchell, International Marketing Manager, Promostyl, who is capitalizing on the need for their services in the Indian market said, "India is growing, and we need to be a part of this journey."

Talking on the association Tarun Thadani founder of Fashionablyin – A global b2b fashion directory and virtual trade show platform, stated, "These events are a great way for people to interact and understand more about the importance of design. Brands in India need help with design."

PROMOSTYL BEGINS FASHION NETWORKING IN INDIA





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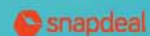
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UNVEILS IT'S SUMMER 'SHIRTS, TROUSERS & DENIMS' COLLECTION



Duke has launched an impressive collection of various styles, colors and sizes in shirts, trousers and denims in its summer'18 collection inspired by the fashion culture of New Zealand. The collection features relaxed office wear and weekend casual wear for men. The range includes fine-crafted washed cotton shirts and formal trousers crafted with a unique and creative design process. Duke is known for its standardized fits, superior quality, wide range and 'fashion-right' styles in its segment, making it the trusted brand amongst consumers.

Being a fashion capital, New Zealand is popular with fashion designers of international repute and this itself was a big motivation for Duke for conducting it's fashion shoot. Duke's shirts and trousers revolve around several interesting concepts and promises to offer a global fashion statement. They are designed for the young men to be worn either for work as a daily office wear or casually for an evening out. The range showcases



bright and effected colours in formal shirts with snug fits and tailored fit comfort. Crafted with fine details, the garments provide maximum comfort and convenience of cotton, and are also easy to maintain. They are specially designed and creatively crafted in different sizes by a team of experts, considering the Indian climatic conditions. The collection also features button-up shirts, made with cotton or poly cotton fabrics in breezy tones that set the mood for those who love to go casual. On the other hand trousers come with a clean look, narrow fit and hidden details inside the waistband. Apart from these, Duke Denims' trends are all about smart and fashionable dressing. Durability and versatility are the key elements of Duke's new denim collection.

The Duke shirts, trousers and denims collection evokes the freshness, which young office goers like to wear to their workplace. The products priced from ₹595 onwards are value for money and always makes a style statement. The collection is available at all Duke exclusive showrooms and leading multi brand outlets.





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WHAT IS DENIM?

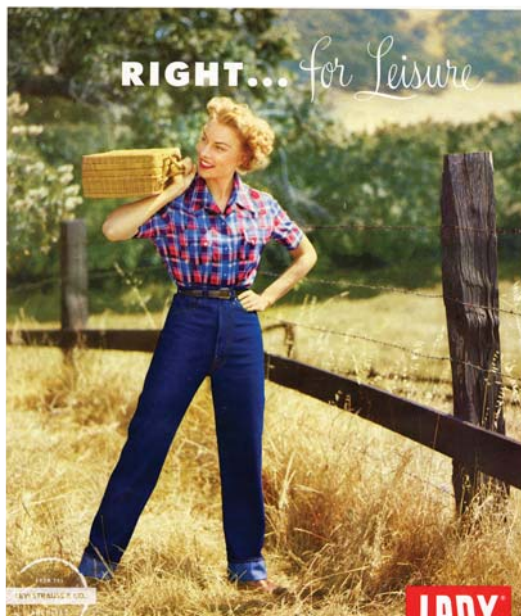
If there's one staple piece of garment you will find in every wardrobe across the world, – it has to be jeans. From the ranches to evolving into a symbol of youth rebellion, jeans are easily one of the most ubiquitous pieces of clothing and has ruled the world for more than a century.

By Mausmi Ambastha, Founder & COO, Stitch Diary

Denim and Its Origin

Denim is basically a sturdy, durable textile made out of cotton fibers using twill weave. It is typically used in apparel manufacturing, but, it also finds alternate usage as application based textiles in seat covers, mobile cases, insulation textiles, etc. In denim fabric, the weft yarn passes under two or more warps. The warp yarns in this fabric are typically dyed in indigo and the weft yarn is white, which gives denim fabric its traditional blue color.

The word 'denim' is derived from the French word "serge de Nimes", a name given to a fabric that originated from the city of Nimes. Denim fabric's usage dates back to 17th century. In the 1800s, the need for strong lasting fabrics for mining workers led to the origin of this fabric. Levi Strauss (businessman) and Jacob Davis (a tailor) came together to invent denim pants, which were made from a durable fabric and reinforced with rivets at high-pressure points to further elongate its life.



THE ORIGINAL WESTERN BLUE JEANS

In the 1930s, Levi Strauss & Co. invented the first blue jeans for women called Lady Levi's® Lot 701.



Still from The Magnificent Seven 1960



Marlon Brando in Denim.

Then, in the 1930s, Hollywood's Western movies brought denim fabric in vogue. In the 1950s, denim became an expression of rebellion for the younger generation. The rest is history! Now, denim fabric is no more just an expression, but an essential part of everyone's closets.

Denim Fabric Manufacturing Process

The process starts with cotton harvesting, ginning, and processing into bales. Bales then are separated into small tufts, which then go into carding. Carded cotton is then converted into slivers, which go into spinning machines that form yarns out of these slivers. Part of this yarn is then dyed, traditionally in chemically synthesized indigo dyes to give it the blue denim shade. Dyed yarn is then 'slashed' by coating it with sizing to make the threads stronger and stiffer.

The dyed yarn and the white yarn are then woven into the final denim fabric, where blue threads form the warp, which is packed closer than the weft of the white thread to give the fabric more blue shade. Once woven, this fabric is ready for finishing processes like removing loose threads, lint removal, and skewing. The resultant fabric is then rolled into fabric rolls ready for shipment.

At the garment stage, this fabric is stacked in layers and cut into

desired patterns, which are then sewed depending upon the design requirements. The sewed garment is then sent to pre washing or stone washing as required. Pre washing is done to make the denim softer, using industrial detergents. While the stone washing gives the garment the sought after faded look. Sand or chemicals are also used in washing process to create the worn-out appearance as the design demands.

The finished pair is then packaged as per requirements and shipped.

Advantages and Qualities of Denim as a Fabric

Denim fabric is mostly used for its strength and durability properties. Traditionally, denim is woven with solely cotton, however, when blended with polyester, shrinkage, and wrinkles in the fabric are reduced. Addition of lycra adds stretchability to the fabric. This fabric is poor in color fastness, and its thickness often makes it comparatively difficult to manoeuvre in sewing operations.

Patents in Denim

The first patent for 'Blue Jeans' went to Jacob W. Davis, jointly with Levis Strauss & Co. on May 20, 1873. The patent was specifically for their copper rivet fasteners used for denim pants.

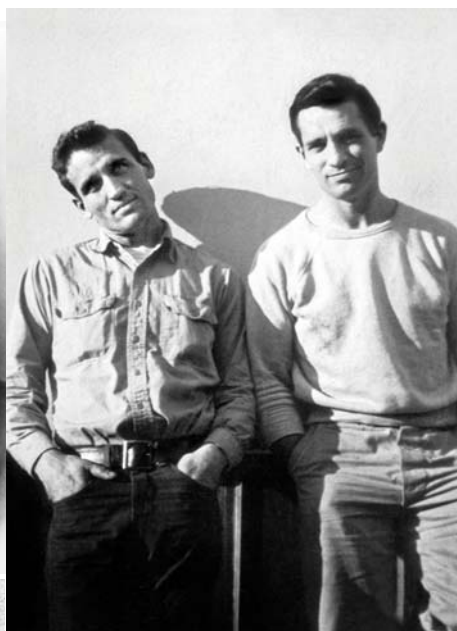
In 2017, Nike patented its "architecturally reinforced denim". The fabric for denim under this patent has moisture management properties, stretch material and garment will have performance zones to make the denim attractive to extreme athletes like skateboarders and BMX riders .

Recent Advancements in Denim:

Denim has seen many trends and fashion cycles, but the recent trend of



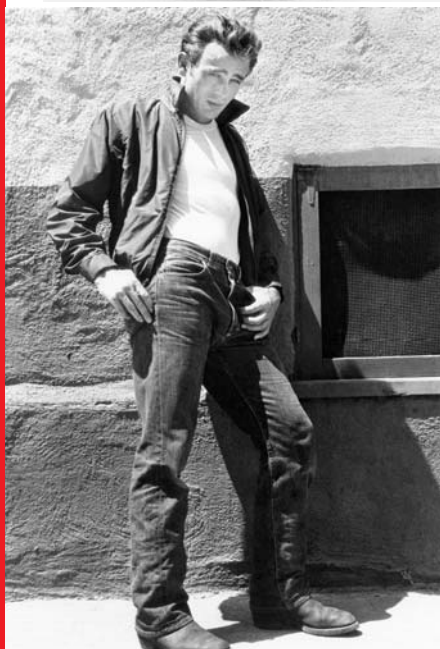
Levi Strauss



Neal Cassady Jack Kerouac in Denims.



Old Levi Strauss Overall ad.



James Dean made denim iconic in Rebel Without a Cause (1955).

“ON THE LINES OF SUSTAINABLE FASHION, BIODEGRADABLE SYNTHETICS AND BIO ELASTOMERS, MAN-MADE ALTERNATIVES FOR COTTON, HEMP OR LINEN, ARE BEING USED IN DENIM TO SEEK FOR A MORE SUSTAINABLE ALTERNATIVE TO RAW MATERIALS.”

athleisure has resulted in a decline in denim demand globally. A new brand called Acynetic is in line with this wellness movement, and is offering a line of denim consisting of knitted separates and outerwear, where indigo yarn is combined with spandex through a circular knitting machine, resulting into zero seams and more comfortable wear (Bobila, 2015).

Denim manufacturers have used Lycra in denim for years now. But, Invista has brought in a new knit denim technology, known as Lycra Hybrid, which is promised to further improve on the amount of stretch and comfort traditional Lycra could offer. Apart from that, Lycra’s dualFX, extremely stretchy denim, and bi-stretch denim are also some innovations in this direction (Bobila, 2015).

Sustainable Production

The fashion industry is the second biggest polluter after oil and gas industry. This has forced the industry to make efforts to reduce their environmental footprints. Vibratory Shear Enhanced Processing (VSEP) technology is a step into that direction. VSEP has long been used in sanitation and filtration processes. This technology is now used in textile industry, where a vibrating membrane is used to remove indigo dye chemicals from water bodies, and reverse osmosis

results in water clearing. Through this process, 100 percent of the indigo dye being discarded is reusable, and 70 percent of water being used is recyclable.

On the lines of sustainable fashion, biodegradable synthetics and bio elastomers, man-made alternatives for cotton, hemp or linen in the form of lyocell, and Refibra are some examples of raw materials that are being used in denim to seek for a more sustainable alternative to raw materials.

Performance denim, where fibers like Cordura, Kevlar, and Dyneema are used with cotton to add strength and comfort to the garment (BOJER, 2018). Instead of powder indigo, a Crystal Clear dyeing technique has been developed by Artistic Milliners and DyStar, in collaboration with G-Star, which can save a significant amount of water, use almost 70 percent fewer chemicals and is also salt-free. Apart from this, nitrogen dyeing, foaming and spray dyeing, etc. are also being experimented with (Bojer, 2018).

Smart finishes like foam coatings, ozone finishing, ammonia finishing, etc. are also being used. Smart denim that can connect to phones and other devices are also being manufactured, while the use of AI in denim designing being researched. 3D-printed jeans, laser finished jeans, ozone washing, etc., are also some innovations being used in the denim industry (Bojer, 2018).





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DECODING INDIA'S FIRST 'FAIRTRADE' DENIM BRAND

'AIZOME'

Touted as India's first-ever 'Fairtrade' denim brand, Aizome is blazing a different trail in the country's denim market by embracing innovative, sustainable raw materials and production technologies. Clearly not a chip off the old block, the newbie brand rather encourages responsible fashion consumption, even as it seeks to hold a special allure for patrons by introducing new designs, structures and colours of denim.

By Namita Bhagat

Invented by Jacob Davis and Levi Strauss in 1873 as pants (jeans) made from denim fabric, the denim has transcended time and geographies to become a global fashion phenomenon. Eventually, this incredible fabric has gone on to find applicability in various more types of garments and fashion accessories. Today, denim inarguably is one of the most favourite attires in everyone's wardrobe – age, gender, pocket-size no bar!

However, despite all our love and craze for denim, one can't deny the fact that our beloved wear comes at a huge price, as denim manufacturing does take a huge toll on the 'Mother Nature'. It's said that about 10,000 litres of water is needed to produce a single pair of jeans. The use of unsustainable raw materials, synthetic dyes and processing techniques like stone and chemical washing are also gravely damaging the ecology.

Importantly, it's not just denim; the overall fashion industry has considerable environmental costs. In recent years, there's been a growing consciousness among regulators, fashion manufacturers and consumers around this issue – and many brands around the world are now coming up with 'sustainable' (eco-friendly) products. Sustainability is the latest buzzword in Indian Fashion as well; although it's time before the idea becomes the core of the country's entire fashion industry. Some sceptics, however, think it's a mere talk without much real impact.

IMAGES Business of Fashion



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INDIA IS ONE OF THE BIGGEST DENIM MANUFACTURERS IN THE WORLD. ADITYA GOYAL AND AKSHAT CHOWDHARY SAW THE GAP AS AN OPPORTUNITY TO CREATE, INNOVATE AND EXPERIMENT WITH NEW DESIGNS, STRUCTURES AND COLOURS THROUGH THEIR NEW BRAND, AIZOME.

Yet, there are also entrepreneurs like Aditya Goyal and Akshat Chaudhary who have chosen to “Walk the Talk”. The brothers-duo and owners—former is the Managing Director and latter is the Director of Surat (India)-based Anubha Industries, a specialist for sustainable denim and piece dyed fabric solutions, have always been ardent advocates of the cause.

Pursuing their commitment, they have co-founded their innovative, sustainable denim brand ‘Aizome’, which is not only India’s first but even Asia’s first ‘Fairtrade’ denim brand.

The beginning

Talking about how the idea germinated, Akshat describes, “My brother Aditya and I have been very passionate about denim from the start. As a new entrant into denim manufacturing, we kept on analyzing new challenges that denim industry was facing. We could see that there has been very little innovation in the denim segment from India especially on the sustainable part.”

Surprisingly, India is one of the biggest denim manufacturers in the world, he points out, adding that they saw the gap as an opportunity to create, innovate and experiment with new designs, structures and colours through their new brand, Aizome.

What’s in the name?

Whilst we are generally familiar with American and European denim brands, the Japanese have quietly mastered the art and technique of high-quality denim making. Today, they are admired for novelty and are a major influence on global denim trends.

Seconds Akshat, “Personally, I have been always inspired by the denim culture in Japan for a very long time. I have been wearing Japanese selvedge denim for years and whenever I buy a new jean I still get very intrigued with the graphical elements that it came with,” he shares. Obviously, he wanted that Aizome should highlight new innovate graphic elements and at the same time keep Japanese sophistication, minimalism and sustainability.

Furthermore, he also highlights that it’s now that one sees denim in different shapes, sizes





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and colours; however, he has always associated denim with Indigo. "Hence, our brand name Aizome was born. It literally means indigo dye; "Ai" the colour indigo, and "Zome" is the common term for dye," Akshat elucidates.

Being a 'Fairtrade' brand

Notably, Aizome is 100 percent Fairtrade Certified and uses organically grown and harvested cotton. According to the Textile Exchange study "Life Cycle Assessment of Organic Cotton Fiber", comparing organic cotton with traditionally grown cotton, postulates that organic cotton has a 46 percent reduced global warming probability, 70 percent less acidification potential, 26 percent reduced eutrophication potential (soil erosion), 91 percent less blue water consumption and 62 percent less primary energy demand.

Furthermore, the brand's USP also lies in the application of sustainable technologies like clean chemistry using bluesign-approved chemicals, waste reduction, air drying and ozone and laser technologies that substantially reduce the amount of water needed for washing.

On the whole, Aizome's key components comprise Fairtrade organic cotton, bluesign, Lycra by Invista, Earth Colors from Archroma and Tencel by Lenzing, appries Akshat. About sourcing, he shares, "We source Fairtrade organic cotton yarn from Indore-based Pratibha Syntex. Fabric and garments are being made by our own mill Anubha Industries which, too, is Fairtrade Certified and is also a bluesign system partner."

Volumes 'n' sales

Spread across 38,000 sq.mt. of space, Anubha's manufacturing facility -

featuring state-of-the-art machinery and equipment - boasts of a production capacity of 20 lakh meters per month. Aizome being a startup is currently working on a low-inventory model, however.

Interestingly also, when most of the fashion brands today are in a mad rush to increase consumer consumption and grow their sales and profits, Aizome has chosen a different path for itself. The brand encourages consumers to buy a pair of jeans that can be worn for a pretty long time notwithstanding the changing fashion seasons.

But, won't this hurt the volumes and sales? "We are not going after volumes or sales. We are defining our passion and innovation towards denim," Akshat maintains. We have even participated in the events such as "Fashion Revolution" to show our transparency and commitment towards "Green and Clean Garment," he quipped.

The e-commerce way

Just recently, the brand has launched its own online store, aizomejeans.com. Initially, the store has started off with jeans for men and women - jeans and other denim wear will remain its mainstay; however, later it also has plans to expand its portfolio to include products such as jackets and t-shirts.

Currently, the e-store features Aizome jeans with basic designs and classic cuts, whilst the variants include slim fits, high-rise and skinny jeans, and the pricing starts from ₹5,000 and above.

The Aizome products as of now will be exclusively available through the brand's own e-commerce website, appries Akshat. "We are pushing technology to challenge traditional methods of shopping experience via "Find your Fit" model available on the website," he signs-off.



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Contents



123-244

THE DENIM STUDY



FOCUS: MENS DENIM

THE KEY CATALYSTS OF THE GROWTH MEN'S DENIMS IN INDIA

A look into how and what has made denim a popular choice of men's wear throughout the country.

Pg No. 136-138

TRENDS: MENS DENIM

THE MEN'S DENIM TRENDS IN VOGUE

A sneak peek into what's ruling the preferences of the style conscious Indian young generation when it comes to denims.

Pg No. 140-152

PREMIUM MENS DENIM

PERSPECTIVES ON MEN'S PREMIUM DENIM IN INDIA

With increasing disposable income, Indian men are now starting to look at the premium ranges to satiate their denim desires.

Pg No. 154-155

FOCUS: WOMENS DENIM

THE RISE OF THE WOMEN'S DENIM WEAR MARKET

Women's denim wear is expected to witness an exponential growth in the coming years. We trace the growth drivers and the prospects.

Pg No. 156-158



TRENDS: WOMENS DENIM

DENIM AND WOMEN – EVOLVING RELATIONSHIPS & KEY TRENDS

From umpteen washes to fits, the denim market within the country is working generously to offer fashionable denim wear to their women customers.

Pg No. 160-164

DENIM BRANDS



- 190 Being Human Clothing
- 192 Blood
- 194 CDF Columbia
- 196 Celio
- 198 Courtyard & Kraburs
- 200 Dare Jeans
- 202 Deal Jeans
- 204 Hard Currency
- 206 Impact
- 208 Lee Jeans
- 210 Madame
- 214 Numero Uno
- 216 Parx
- 218 Pepe Jeans
- 220 Puff
- 222 Poison
- 224 Rookies
- 226 Sheriff
- 228 Sin Denim
- 230 Strano Jeans
- 232 Success
- 234 Sunnex
- 236 Texas
- 238 Urban Blackberrys
- 240 Westside
- 242 Woodland
- 244 Yellow Jeans



IMPACT: WOMENS DENIMS

THREE TO TANGO: JEANS, LEGGINGS & JEGGINGS

We hear industry experts share their take on the impact of leggings and jeggings on the denim category.

Pg No. 166-167

DENIMS & SPORTSWEAR

SHELVED FROM SHELVES?

As the athleisure trend sweeps consumer preferences world over, denim brands are compelled to rub shoulders with these new age fashion giants.

Pg No. 168-174

The Denim Study



COVER RESEARCH DENIM WEAR IN INDIA: A MARKET RESEARCH

The Indian denim market promises unmatched value as well as volume growth. Experts from Technopak size the market and delve into its dynamics.

Pg No.126-134

FOCUS: KIDS DENIM

TALES & STORIES: ROCKING THE KIDS DENIM MARKET

Alin Shah, Brand Strategist, Tales & Stories, opens up about the emerging kids denim market and the latest trends and styles.

Pg No.176-177

CAMPAIGN

SHOPPER STOP'S DENIM TO WORK CAMPAIGN

A unique initiative to introduce denims to the everyday work wear wardrobe

Pg No.178-180

CAMPAIGNS

DENIM AD CAMPAIGNS

A look at some of the most memorable denim campaigns over the years.

Pg No.182-183

DENIM COLLECTIONS

RECENT ICONIC COLLECTION LAUNCHES IN INDIA

Highlights of the latest denim collections from some of the most sought after brands of the country.

Pg No.184-188

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DENIM WEAR IN INDIA

A MARKET RESEARCH

The youth driven denim market promises unmatched value as well as volume growth in the overall Indian apparel market. Amit Gugnani, Senior Vice President- Fashion, Technopak sizes the market and delves into its dynamics as a whole. With inputs from Saima Nigar, Associate Consultant- Fashion and Textile Division, Technopak.

In the last two decades, the Indian fashion retail market has witnessed a growing inclination towards western wear and casual wear. Among these segments, denim is among the high growth categories in the domestic apparel market. The current domestic fashion retail market is worth ₹3,22,209 crores and is projected to grow at a compound annual growth rate (CAGR) of 7.7 percent to reach ₹6,74,037 crores by 2027.

DENIM MARKET SIZE & GROWTH

The denim category accounts for a significant share of the casual wear market. The market size of the Indian denim segment is estimated at ₹23,076 crores in 2017. This is projected to grow at a robust CAGR of 12.7 percent to reach ₹41,947 crores by 2022 and ₹76,258 crores by 2027. Men's denim segment contributes about ~84 percent of the market while the women's and kids segments contribute 10 percent and 6 percent respectively.

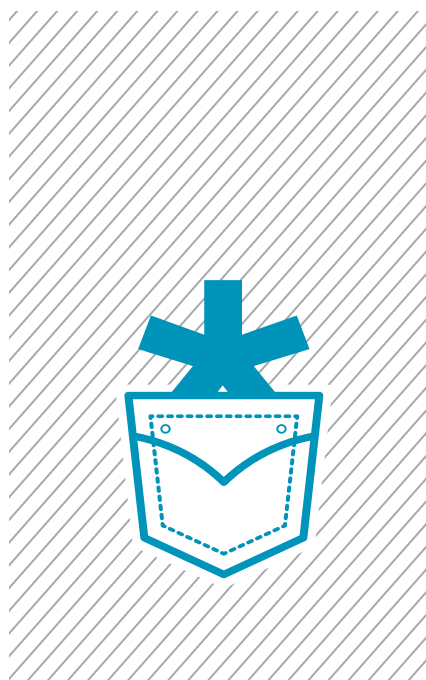
MEN'S DENIM SEGMENT

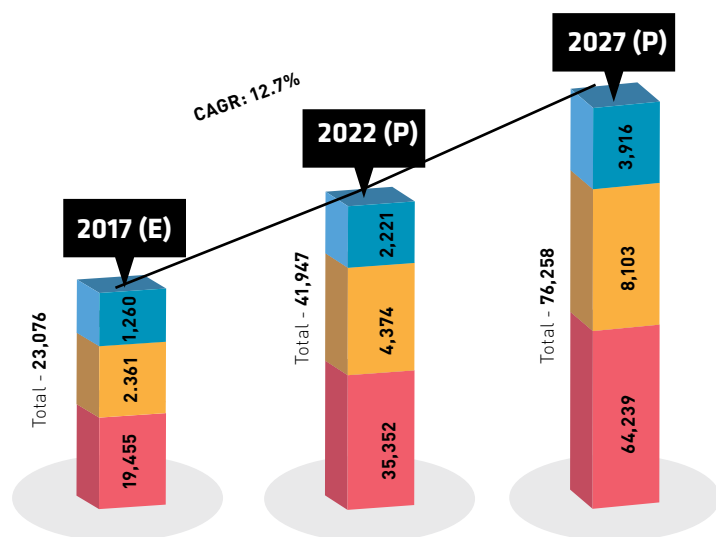
Denim is considered to be one of the most versatile fabrics for men with multiple applications like casualwear, workwear, and everyday use. Men's denim wear accounts for the largest share and is poised to grow at a high CAGR of 12.7 percent over the next decade.

Until a few years ago, denim was popular with men in the urban centers only. However, in the recent years, it has become popular in the semi-urban and rural markets as well, due to growing awareness and social media penetration. This growth in semi-urban and rural markets would chiefly propel the growth of men's denim in the next 10 years.

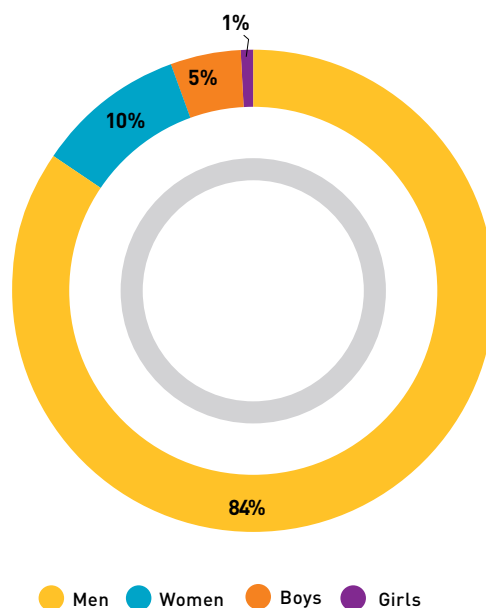
WOMEN'S DENIM SEGMENT

Among other denim wear products, jeans are the most popular among Indian women. Women in different age brackets and of all shapes and



INDIAN DENIM WEAR MARKET 2017 - 2027
(INR CRORES)

INDIAN DENIM WEAR MARKET SHARE 2017



In India, denim apparel consumption is expected to rise across all segments — men's, women's and kids. The incremental growth is especially expected in the mid-premium and premium/luxury segments.

sizes prefer denim as it is comfortable, functional and durable. Denim is also gaining popularity among women due to the comfort provided by stretch denims. Even women who are not at ease with western wear have taken up to wearing jeans by pairing them with Indian ethnic wear like kurtis. This mix and match style is gradually picking up, particularly among women in small towns who come from a traditional background and this is likely to fuel the growth of the segment. Despite having a smaller share of 10 percent, women's denim category is expected to witness higher growth rate of 13.1 percent during the period 2017-27.

The Indian women's wear market, which thrives on fashion trends, is catered to by brands' constant innovation in denim fabrics such as stretch, washes, designs, new colours and feel.

KIDS DENIM SEGMENT

It is the smallest segment in the domestic denim market, but is expected to grow at an impressive rate of 12 percent over the next decade, primarily due to the relatively higher fashion awareness among kids, products innovations and design

choices and higher spending on kids in nuclear middle class families.

KEY TRENDS AND GROWTH DRIVERS

The denim wear segment has always been one of the leading segments in the apparel fashion industry around the world. The blue denim is one of the most ubiquitous wardrobe essentials, and has been so since decades. The denim wear market in India is currently dominated by unorganised players. However, with the entry of international and penetration of Indian brands, the inclination towards branded denims is increasing among consumers. In addition to volume growth, the value growth is expected to increase with rising demand for enhanced product attributes like fashion quotient, stretch and light weight fabric, varying colours, styling and detailing, etc.

In India, denim apparel consumption is expected to rise across all segments — men's, women's and kids. The incremental growth is especially expected in the mid-premium and premium/luxury segments.



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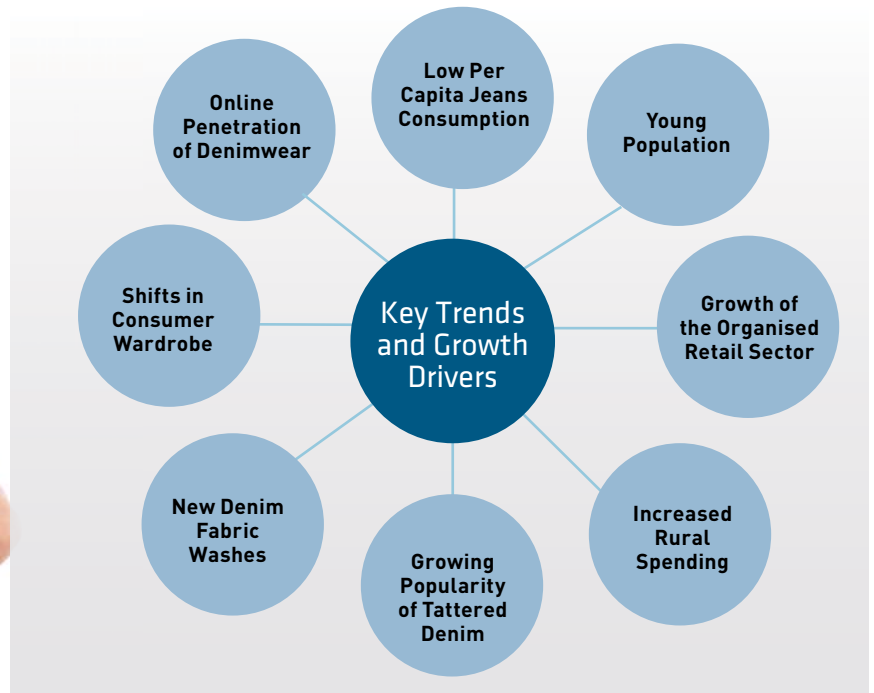
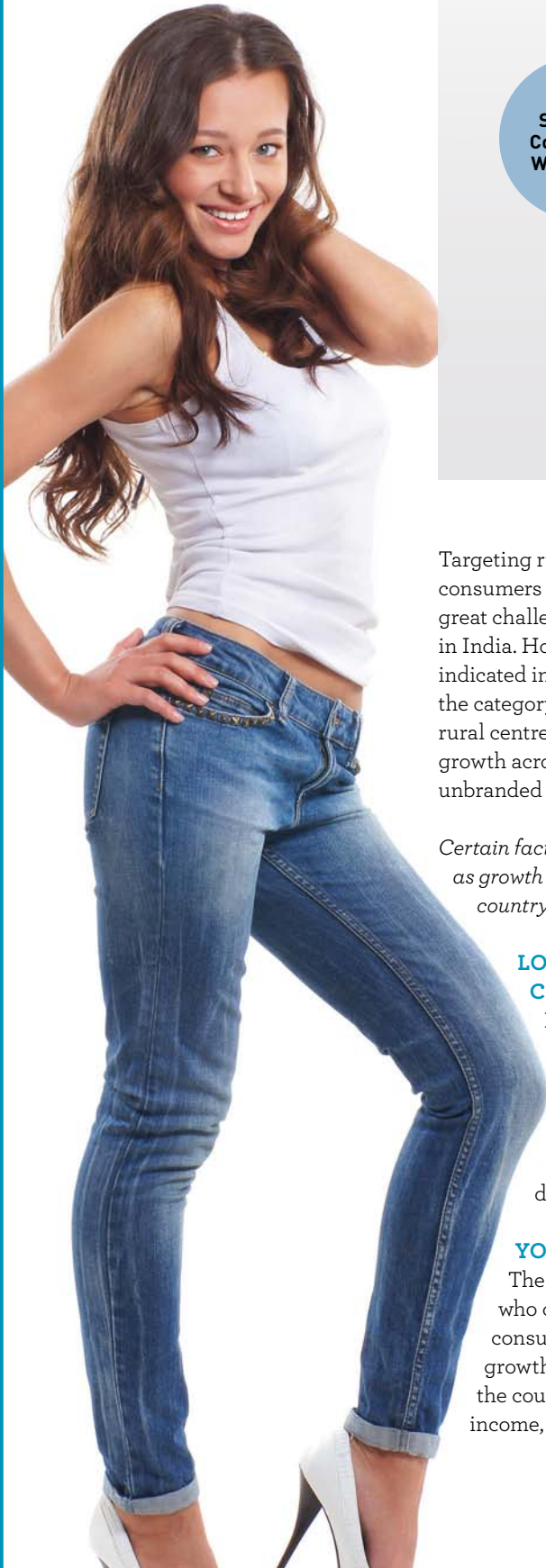


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Targeting rural and sub-urban consumers had till recently been a great challenge for the denim industry in India. However, recent trends have indicated increased penetration of the category across semi-urban and rural centres which shall drive volume growth across mass market and unbranded segments.

Certain factors which are contributing as growth drivers of denim wear in the country are enumerated below:

LOW PER CAPITA JEANS CONSUMPTION

Per capita jeans consumption in India is much lower than that of developed markets, which is a clear indication of scope for growth in the domestic market.

YOUNG POPULATION:

The youth (15 to 29 years olds) who comprise 26 percent of the consuming population, are a key growth driver of denim wear in the country. Increasing disposable income, comfort, quality and brand

consciousness are major reasons behind the increasing acceptance of denims among the young population.

GROWTH OF THE ORGANISED RETAIL SECTOR

The denim wear market is dominated by unbranded denim products which constitute ~70 percent of the market and thus tend to give intense competition to corporatized retail denim players. However, with many international and domestic brands offering denim wear at affordable prices, the inclination towards corporatized retail denim wear is increasing in consumers.

INCREASED RURAL SPENDING

Rural India is developing at a relatively rapid pace and a similar trend has been witnessed in rural spending. With the percolation of mass media, people in rural areas are aware of fashion trends. Their growing inclination towards western wear is another reason for the growing demand of denims in rural areas. The basic and mid-value segment of denim wear, characterised





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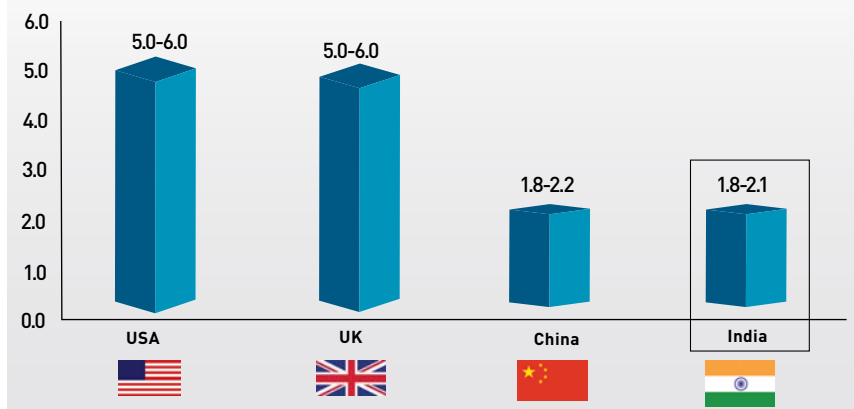
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PER CAPITA JEANS CONSUMPTION/YEAR



by quality and style quotient is the preferred choice of people from rural areas.

GROWING POPULARITY OF TATTERED DENIM

The emergence of tattered denim has provided a perfect option for the fashion conscious youth. Distressed/ripped/tattered denims are not restricted to only jeans but can be seen in jackets, shorts, skirts, etc. These are one of the most stylish must-haves for both men and women. This trend has been re-emerging in more styles every season.

NEW DENIM FABRIC WASHES

Jeans manufacturers are focused on achieving different hues of blue by washing the fabric in certain dyes,

bleaches or other agents that affect the denim colour. Dark indigo, faded blue/vintage/aged, stone wash and distressed jeans are new denim fabric washes in trend these days.

SHIFTS IN CONSUMER'S WARDROBE

The shifts in consumer's wardrobe have propelled the growth for casual wear and denim wear in India. Earlier, fashion was considered a basic need to be purchased on the basis of requirements. Consequently, the typical consumer wardrobe was limited to basic categories like shirts, trousers, winter jackets and sweaters, sarees and salwar kameez. The basic purchase parameters were limited to the basic functions of the cloth, comfort and price. However, with changing socio-cultural values, increased per capita consumption, increasing exposure to international fashion trends and growing disposable income, the apparel market is slowly becoming more occasions specific. This factor has played a significant role in driving the growth of the denim wear segment.

ONLINE PENETRATION OF DENIM WEAR

Increased penetration of the internet coupled with the burgeoning smart phone market has resulted in the growth of e-tailing in India. Due to ease of ordering online, paucity of time, and flexible return policies among other factors, the youth of India are increasingly purchasing online.

The lucrative market opportunity has attracted many pure-play e-tailing players to the lifestyle space. E-tailing players are customizing their online portals to attract the youth who seek style and trendy looks in their fashion products. Lucrative offers from the retailers like cash on delivery, try and buy, easy return policy, etc., are making the e-tailing space competitive and dynamic. Denim has been among the highest growing categories in fashion e-commerce.

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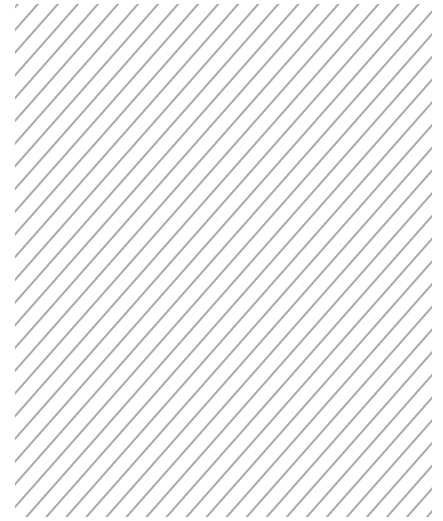
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CONCLUSION

The denim wear market in India is expected to witness very impressive growth over the next decade. With India's expanding economy, booming consumption, urbanising population and growing middle class income, denim wear has a huge opportunity to grow.

The increasing shift of rural fashion market from ethnic wear to western wear is one of the key growth drivers of denim wear in India. The large youth population with rising disposable income and awareness towards fashion will act as a catalyst in the growth of denim wear in the country.

The denim wear market holds high potential for brands and retailers. In order to capitalise on opportunities in the denim wear market, retailers need to focus on factors such as pricing, quality, consumer preferences, etc. Retailers can also leverage the available growth opportunities in the domestic denim wear market by opting for online channels and omni-channels.

In addition, to capitalize on the rural and semi-urban driven growth, brands and retailers can focus on these markets with basic denim products at affordable pricing.





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THE KEY CATALYSTS OF THE GROWTH OF

MIEN'S Denim IN INDIA

Fashion enthusiastic men in India are sure to indulge in different pairs of denims for different occasions. Since their inception in the Indian market, denims have found a special place in every man's wardrobe. Let us understand how and what has made denim a popular choice in men's wear.

Men's denim receives the highest share, when it comes to the augmenting the overall denim market in India. Technopak research states that the men's denim wear accounts for the largest 84 percent share and is poised to grow at a high CAGR of 12.7 percent over the next decade.

There was a time, when men's denim was popular only in the urban cities. However, with the growing economy, the popularity of denim has spread in almost all the stratum. The enhanced sense of zaffinity were few of the key drivers that pushed the choice and gave denim the stance that it has today.

The Culture Drive

At the background are also several cultures that shaped the way for trends in the denim industry, Saurabh Singh, Men's Wear Design Head, Being Human Clothing says that at present the biggest trend shaping the denim sector is the *90's sports* and *90's music*. They are the biggest influences on today's street style and also the generation's pop music. "Other influences are the *sports* and *wellness lifestyle*, which has resulted in the rise of a new style of dressing called athleisure," he added.

Consumers look for comfort and durability and without any doubt denims have successfully catered to these two requirements. "However, people also consider *environment friendly* practices that go into manufacturing denims," said Satyen P Momaya, CEO, Celio.

According to Amit Dhelia, Proprietor, Courtyard, denim is considered to be the most versatile of fabrics for men with multiple applications like casual wear, work wear, and everyday use.

There are ceaseless options for buyers, something that every buyer looks for. Unita Chandan, Creative Director, Hard Currency, elucidated a new position for denims, where the market is providing options for *biker jeans* and *elements that compliment* the present day culture. Styles like paneled jeans, exclusive washes and accessories on jeans are something that the youth are attracted to. She explains that a vast section of the local market seems to be saturated with the blues, and is opting for coloured denims as a change.

Irrespective of the different seasons, and ever-evolving fashion sense, denim will never lose its charm. It will always be a sartorial wardrobe staple that is endlessly wearable. As stated by Neha Shah, Head-Marketing, Pepe Jeans, "The denim market, particularly for menswear, is now transforming. The shift has a lot to do with the *digital boom* and *social media* channels that have led to the creation of the eponymous 'Street Style'. In today's day where bloggers, influencers are shaping fashion norms, denims are being considered as one of the versatile pieces to style. There is no denying that the digital industry has completely changed the way denim is seen today."





Impact on Sales

With the rising demand for men's denim, there has been a tremendous surge in the sales. The Indian denim market is currently dominated by un-organized players. However, with many private labels and international brands entering the Indian apparel market, the demand towards branded denims is increasing among consumers.

The fashion and brand conscious populace will never trade with fashion quotient, stretch and light weight fabric, varying colours, styling and detailing. This demand is sure to affect the future value growth within the denim category. Higher levels of growth of the mid-premium and premium/ luxury segments are also highly expected.

“The Indian denim wear market is expected to witness huge growth in the coming years. With the country's ever-expanding economy, booming consumption, urbanization, and growing middle class purchasing power; denim wear has a huge opportunity to grow. The increasing shift of the rural fashion market from ethnic wear to western wear is one of the key growth drivers of denim industry. The large youth population with rising disposable income and awareness towards fashion will act as a catalyst in the growth of denim wear in the country,” said Kapil Jain, Owner, Yellow Jeans.

Making way for more elevation

Men will always want denim and in India this demand is sure to elevate. With the increase in buying potential, need for style, and ever-emerging styles, big players in the industry are emphasizing upon introducing designs that suit the consumers' preferences. Men look for style blended with comfort, and the denim market is providing it ardently.



The upcoming generation are shifting from the usual style of dressing to a style that's more *in-sync with their personality*. Thus, there is a demand for quirky prints, patchwork denims, distressed denims and also stylish embroidered badges. Therefore, it would not be wrong to state that denim is the 'energy' that is constantly changing forms.

Another major driving factor is the *rise of technology*, where manufacturers are focusing on creating sustainable wear. This too has a big influence in the denim market. Men, today, are environmentally aware, and this is the

reason they are opting for athleisure, with knit denims and hyperfused denims. Kabeer Kodaniyil, Design Head, Urban Blackberrys said, “Urban Blackberrys stakes a more aesthetic take on technology, which drives from lifestyle.”

Who does not follow *celebrity fashion*? The younger generation who is hooked to the internet, knows what the big-shots are wearing. This has given men's denim market another boost. “These days, celebrities are always seen wearing highly fashionable denims and therefore people follow the celebrities they admire and look for denims that help them in creating an impression,” said Hitesh Vadera, Proprietor, Poison Jeans.



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A photograph of two men in denim clothing standing in a garden. The man on the left is wearing a light blue denim shirt and light blue jeans. The man on the right is wearing a darker blue denim shirt with patches and light blue jeans with rips. They are both looking towards the camera. The background features a stone path, green foliage, and a metal trellis structure.

THE MEN'S DENIM TRENDS IN VOGUE

Gone are the days when Indian men bought clothes only when they needed to. Today, Indian men are stylish, they love staying fashionably updated, and more than ever, they want apparel that are trendy and comfortable, both at the same time. Team IMAGES BoF talks to industry leaders to pinpoint the key trends in vogue and also forecast what the future will unveil.



“The jogger denim continues to do well. Grey green cast denim with some visual and denim with 4-way stretch is what we are looking at.”

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



“Stone wash, ice wash, cloud wash are the contemporary rages. All over tinting is also a favourite this season, along with vintage finishing.”

-Amit Dhelia,
Proprietor, Courtyard



“We are expecting alternatives for cotton like indigo dyed polyester or nylon blends. There will be retro-corduroy denims, digital prints on denims and more.”

-Kabeer Kodaniyil,
Design Head, Urban Blackberrys

Since the broad inception of denim in India around the year 1986, the market has only been evolving. Denim, today, is one of the most preferred choices of apparel for men of all ages. In fact, fashion conscious men are looking beyond the classic blue jeans, and are opting for more stylish trends. Let us understand the different trends in men's denim wear in India and know why they are so popular.

The Top Denim Styles

The young generation is looking for denim that is meant to express their personality. Consumers today are style conscious, and at the same time look out for comfort. On being asked what people are preferring, Saurabh Singh, Men's wear Design Head, Being Human Clothing said, “For us, the top selling fits has been skinny, slim and jogger fits, and every season we keep adding new fabrics and wash options to these fits. Jogger fit has seen some

changes now. We don't do the elastic cuff styling anymore. We just keep the elastic draw cord construction on the waist band.” According to Abhishek Shetty, Head Marketing, PR and Loyalty, Celio, the jogger denim continues to do well. “The grey green cast denim with some visual and denim with 4-way stretch is what we are looking at,” he added.

People are also opting for regular straight fit, distressed denims, colour denims, and ankle fit jeans. Biker jeans are another fad that is hitting the market. “David, which is a super skinny fit, has done wonders for us from last 3 seasons. Other than this, our martin (skinny) and morice (slim) have been our all time fit for years now with a combination of contemporary washes,” said Samresh Das, Design Manager, Numero Uno.

A quality pair of jeans is one of those crucial wardrobe must-haves for every modern man. They are classic, effortless and eternally cool.

Tapered jeans is another popular style. Moreover, some prefer their distressed jeans in all forms of ripped, bleached and raw edging. For Rajnish Sethia, Director, Success, the top three selling products are hosiery denim, torn denim and denim joggers. On the other hand, Kabeer Kodaniyil, Design Head, Urban Blackberrys, said, “Green cast/ tinted denim, blue black denims (blue denims with the effect of black colour in random pattern on it), coated denims, which could be of leather or other colour effects, handcrafted sprayed denim, dark washes is what we are focusing on, as they are in demand right now.”

Amrish Shahi, Head Design, Lee Jeans said that for them the basic 5-pocket denim style continues to be the top-selling style. They are now bringing them out, amalgamated with different fits like slim and skinny. “Knitted



“The finishing that is given by laser is unlike any other. Its finishing is brilliant and it takes very little time for the process as compared to sand blasting and stone washing.”

-Neha Shah,
Head-Marketing, Pepe Jeans



“Parx is exploring more options with buttons, rivets, leather trims and metal trims.”

-Pragati Srivastava,
General Manager & Brand Head, Parx



“Mechanical washes like rinse wash, water jet fading, stone wash, mechanical abrasion, laser treatment are what we are looking at.”

-Kapil Jain,
Owner, Yellow Jeans

jogger is another popular style that has incidentally been inspired from the athleisure trend,” he stated.

The Popular Denim Washes

The most popular washes that consumers are demanding are the classic vintage wash with 3D whiskers, full bleached out wash with toweling effect and vintage wash with distressed rip and repairs.

Over the past few decades, with the advent of new technology, different denim washing techniques have been developed. This has been used on different materials in order

to create a larger variety of designs for trendy denim garments, as well as jeans. People also love special color effects and washed/vintage looks.

Amit Dhelia, Proprietor, Courtyard said, “Stone wash, ice wash, cloud wash are the contemporary rages. All over tinting is also a favourite this season, along with vintage finishing.”

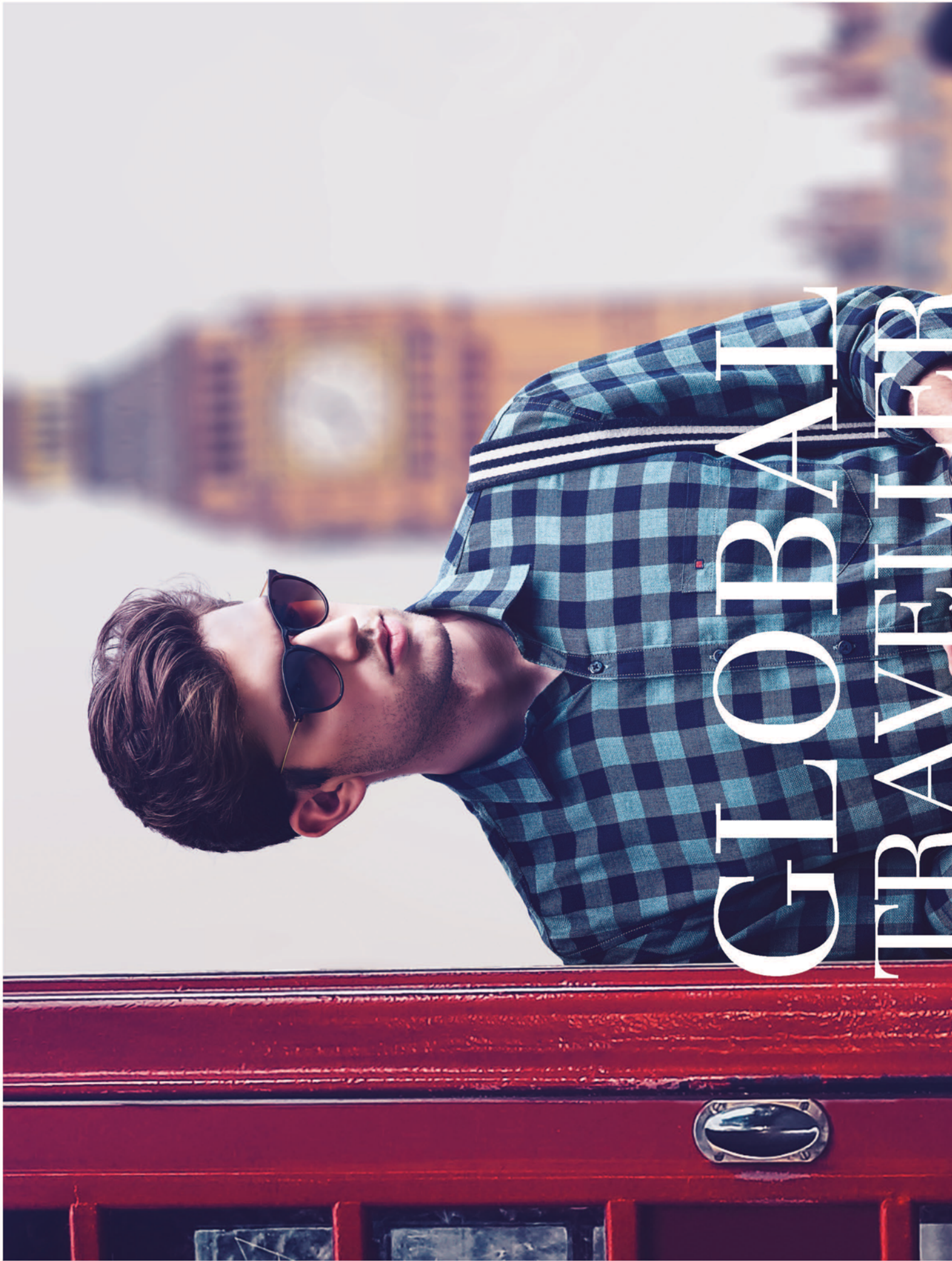
Few of the big players are focusing on different washes, such as washed down and acid washed coloured jeans.

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“The top three selling denim products at Success are hosiery denim, torn denim and denim joggers.”

-Rajnish Sethia,
Director, Success



“Silhouettes like classic regular fit, classic baggy cropped in more natural wash looks would foray in.”

-Samresh Das,
Design Manager, Numero Uno

“Development of some fabulous RFD fabrics by the mills has allowed a wide range of experimenting with colours and washes,” said Unita Chandan, Creative Director, Hard Currency.

Trendy Denim Effects

The vintage wash effects will never grow old. Combining it with towel wash creates a classic yet new look in the jeans, which are currently very popular. This is followed by vintage distressed wash with rip and repair treatment. The young consumer is also very fond of whiskers and fraying.

Umashan Naidoo, Buying Head - Menswear and StudioWest, Westside mentioned that blasting, acid dyeing, bleaching and 3D are few of the effects that are slowly gaining popularity and are hitting the market hard.

“Mechanical washes like rinse wash, water jet fading, stone wash, mechanical abrasion, laser treatment are what we are looking at. Chemical washes like acid wash, ice or snow wash, hydrogen peroxide wash or bleach wash, enzyme wash, ozone fading, spray techniques, over-dyeing and tinting, towel or foam wash are taking the market with a rage,” said Kapil Jain, Owner, Yellow Jeans.

Embellishments That Stand Out

Apart from experimenting in wash effects, few of the renowned manufacturers are also exploring assorted embellishments in denim. Some of the embellishments include different prints, badges, laser, silicon emboss, screen print, leather, metal, PU linings along the hems, and coin pocket zippers.

Speaking of embellishments, Pragati Srivastava, General Manager and



Brand Head, Parx said, “We are exploring options with button/rivets, leather trims and metal trims.”

Certain manufacturers are emphasizing on side stripe on denims, which connects denims to athleisure trend by giving them a sporty feel. The other embellishment is clean and minimal abrasion on the hemlines and pockets.

The Colour Choices

Fashion forward consumers of today are looking for more colour options in denims. They have come ahead of the usual blues and are experimenting more with assorted colours. Some of the commonly preferred colours include rich indigo mid tone, full bleached out tone, deep indigo with subtle wash effects, light grey, dark grey and black. Some even want to stand out with their own fashion statement.

Shahi said, “The true-blue colour 18-dip indigo is still the hottest colour. We also see a trend of olive, ultra-marine blue and blue-black shades.”



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“The jogger fit has seen some changes now. We don’t do the elastic cuff styling anymore. We just keep the elastic draw cord construction on the waist band.”

-Saurabh Singh,
Head - Men’s Wear Designer, Being Human



“Blasting, acid dyeing, bleaching and 3D are few of the effects that are slowly gaining popularity and are hitting the market hard.”

-Umashan Naidoo,
Buying Head - Menswear & StudioWest, Westside



“Development of some fabulous RFD fabrics by the mills has allowed a wide range of experimenting with colours and washes.”

-Unita Chandan,
Creative Director, Hard Currency

The Future Trends

In the fashion industry, trends always keep evolving. There are times when old trends come back to life and there are also times when new trends are discovered. In denim some of the common trends that are expected to

hit the market are cropped fits in skinny or tapered versions, 90s boxy fit, side stripe detail, extreme knee cut outs and more. Fashion is poised to drive the new momentum. People would opt for customization and personalization or denims. There will be a revival of the rigid denim, stretch with durability.

“Metallic denims, doodle prints, printed denims are to be seen in the near future. Reverse printing and ombre denims will see a comeback,” said Chandan.

Das asserted that original 3/1 look will

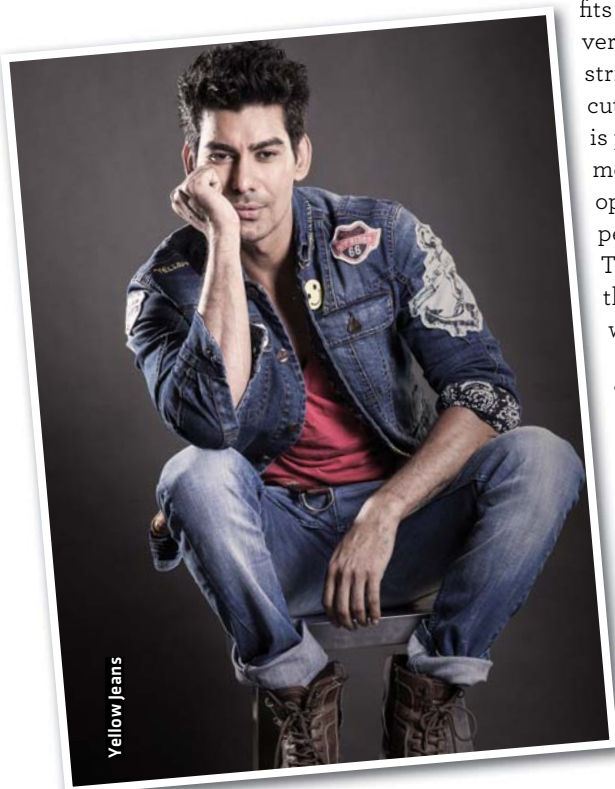
make a comeback very soon, but with a blend of stretch. “Silhouettes like classic regular fit, classic baggy cropped in more natural wash looks would foray in,” he concluded. The future of denim is sustainable.

The big players are also expecting denim formals and environment friendly denims in the future. Kodaniyil said “We are expecting alternatives for cotton like indigo dyed polyester or nylon blends, which reduces the cotton consumption and water usage. There will be retro-corduroy denims, digital prints on denims and more.”

The Age of Technology

Laser is one of the contemporary technologies, which is being used by Indian denim brands. This technology has been used for quite some time now. However, there is a potential gap in manufacturing quantities.

There is room for more technology refinement when it comes to denims in India. “New age laundries need to be introduced, which are completely driven by eco-friendly technologies like laser, ozone, etc., and which



A man with dark hair and a light beard is wearing a long-sleeved, button-down shirt with a complex plaid pattern in shades of blue, yellow, and brown. He is looking directly at the camera with a slight smile. The background is a dimly lit room with a large potted plant and some decorative items.


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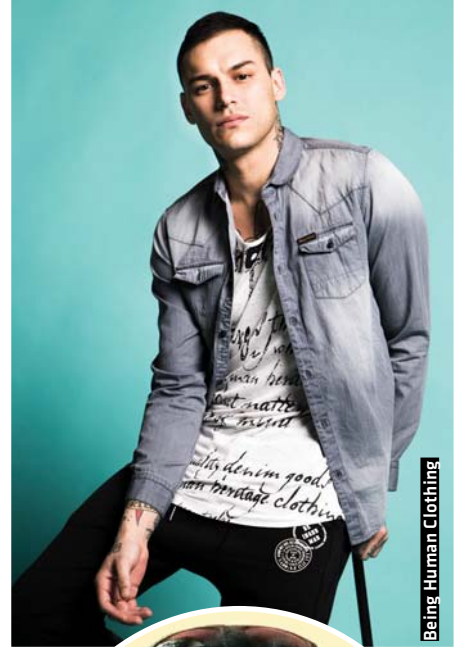
Success



Westside



Pepe jeans



Being Human Clothing



“Knitted jogger is another popular style that has incidentally been inspired from the athleisure trend.”

-Amrish Shahi,
Head Design, Lee Jeans

reduce the consumption of water in production substantially,” elucidated Singh. Whereas, Dhelia stated that laser technology has very limited usage in brands in India, both for operative purpose, as well as financial perspective.

However, though laser technology is not vast in commercial production level in India, yet it is sure to catch momentum gradually. Numero Uno has installed laser technology, since the past ten years. “It helps in cutting down chemicals, uses less water and comes with many creative options to opt for,” said Das.

Neha Shah, Head-Marketing, Pepe Jeans said, “Laser technology is being used in India, as well as worldwide, because of its environment friendly properties. Pepe Jeans incorporates the laser technology and our very own denim customization service—Pepe Jeans Custom Studio—has the option of laser printing on denims. This allows the customer to design their denims with cool quirky messages and prints within less than a minute. The finishing that is given by laser is unlike any

other, because of the precision as well as the timing. Whether it is the design or using laser in denim finishing, the finishing is brilliant and it takes very little time for the process as compared to sand blasting and stone washing.”

Laser technology holds the potential to make it big in the future. This technology gives a handcrafting process by reducing labour by machines, reduces wet and dry process and harmful chemical processes. Laser is catching upon the conventional methods of production. Though the number is not very big in India, yet the future looks lucrative.



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PERSPECTIVES ON MEN'S PREMIUM DENIM IN INDIA

Men will never fall out of love with denim. They need it and they want it; which will only augment with time. Moreover, with increasing amount of disposable income, men are now starting to look at the premium ranges to satiate their denim desires.

There is no denying that Indian denim wear market is sure to witness comprehensive growth in the coming years. Few of the drivers that promoted the market growth are ever-expanding economy of the populace, booming consumption, urbanization, and growing middle class purchasing power. Moreover, there has been a drastic shift of the rural fashion market from ethnic wear to western wear. Today, consumers look for style, quality and comfort. And thus, many manufacturers and brands are focusing on introducing premium denims meant for the new age consumer.

As mentioned by Jack & Jones, craftsmanship, innovation and quality of trims play a huge role in defining denim as premium. The concept of sustainability is increasingly playing a huge role as well. Attention to detail, whether it is the stitch or the embellishments, enhances the status of a denim. "In our top of the line denims, we use premium Italian oil pull up leather back patches for branding and punch through rivets or buttons to give the finished product a premium tag," they affirmed.

The big players of the industry explain the prospects of the luxury and premium denims in India:

Experts' Say

The prospects for luxury and premium segment look very promising. In spite of being a niche category, it is surely a growing one. According to Satyen P Momaya, CEO, Celio the premium denim market in India is quite small and yet one of the fastest growing, in the segment.

Amit Dhelia, Proprietor, Courtyard said, "Growth is immense for luxury and premium denims, since denims have become a staple for every wardrobe. It's used for normal routine purpose, work wear, party wear, luxury wear, essential wear, sportswear and various spheres of life."

Unita Chandan, Creative Director, Hard Currency explained that with the increased exposure of global trends via the internet, premium and luxury brands have become more desirable in the Indian market. Brand awareness has also increased with the social trends, leaning towards use of branded goods. However, she also stated that only time will tell if this trend persists after GST is levied.

"There is a huge demand, as well as a big gap in this area," said Samresh Das, Design Manager, Numero Uno. He explained that the international brands are already present in India. Consumers need to understand and be able to differentiate between the qualities. "Sellers should try their best to justify the product at a particular price bracket to claim its premiumness," he concluded.

Kabeer Kodaniyil, Design Head, Urban Blackberrys has a very positive stance

for the future of premium denim wear. He stated, "Gen Z and millennials have more disposable income. Premium denims definitely will do well, for the core reason that they offer more comfort with more color depth and superior feel. Anyone who values quality will bend towards the premium side of the denims. Urban Blackberrys is launching the premium denims that are handcrafted by international talents, which covers the aspects that are impressive on the fashion side and caters superior quality at the same time." On the other hand, Amrisha Shahi, Head Design, Lee Jeans elucidated that luxury and premium denims will have a special position, as many consumers like to have these as collectibles where the value increases day by day. Similarly, Amrisha Shahi, Head - Design, Lee Jeans stated that they have seen increased demand for

premium fabric. Today's consumer wants a differentiated product and that comes from premium blends. According to them, sustainability and premiumness are two different ways of looking at the price/value construct of a denim. Sometimes, using sustainable ingredients or processes may even drive the price of a product down, thus increasing its value to the end consumer. "Apart from our brand that people love and believe in, we also make sure our target audience gets a superior product experience. It is when the brand story and the product story match, is when the customer truly buys into the brand experience," he elaborated.

At present, denim is considered to be a staple product not only in the major metropolitan cities of India, but also in the Tier II and Tier III cities. There is an increasing acceptability of denim amongst all sections of the Indian society. "The demand for denim has increased substantially. This is the reason all major premium denim brands are coming to India. According to me, India is a very big market so prospect of premium denim is good in the country," said Kapil Jain, Owner, Yellow Jeans.

Players, such as Jack & Jones believe that consumers should understand the premium edge of denims. Brands need to communicate the message through advertisements, campaigns, social media, digital, etc. Jack & Jones give individual focus to different elements that make a denim premium. From stitching to the fit, to sustainable fabric, wash and color, they package information in interesting ways to help educate the customers better.





THE RISE OF THE WOMEN'S DENIM WEAR MARKET

The women's segment in denim is growing steadily since the last two decades compelling brands to frequently introduce revolutionary styles and fits. IMAGES BoF takes a peek into how women's denim market has shaped up in the recent years and become fashionable.

With a 10 percent share in the overall denim market, women's denim is expected to witness an exponential growth in the coming years with industry experts even estimating the figure to reach 30 to 40 percent over a decade. Going by the recent market trends with regards to demand for women's denims, the current figure shall surely triple up in a couple of years if not more.

Denims are often associated with bottom wear, especially for women in India. Not many women opt for denim top wear though we do have apparel brands offering denim finish/ denim look options to choose from. A denim jacket is still hard to find a place in a women's wardrobe and so is a denim skirt. Denim dungrees are often associated with maternity wear but again their reach and demand isn't worth a mention in context to the Indian market.

Market Dynamics

Elaborating on how the women's denim market has shaped-up in recent years, Amit Dhelia, Proprietor, Kraburs shares, "Among all types of denim wear, jeans or trousers are most popular to find in a women's wardrobe. Women in different age brackets of all shapes and sizes like to wear denim as it is comfortable, functional, and durable." One important development that has led to a growth in the demand for denim jeans is its versatility of going well with Indian kurtas and kurtis. Dhelia explains, "Women who are not at ease with western wear have taken up to wearing jeans by pairing them with Indian ethnic wear like kurtis. This mix and match style is gradually picking up, particularly among women in small towns who come from a traditional



background. This is certainly likely to fuel the growth of the segment.”

Denim jeans is the first item to enter a women’s wardrobe while experimenting with western wear. As Sameer Patel, Founder and Chairman, Deal Jeans rightly points out, “Denim has now become a symbol of modern culture. For a majority of the Indian women, denim is not just casual wear anymore as it is more of a fashion statement.”

The Growth Story

The growth in the women’s denim segment has been steady since the last two decades. One reason is its

adaptability with ethnic wear and the other is the inroads being made by fashion trends even in small towns and villages of India. Elaborating on this, Neha Shah, Head-Marketing, Pepe Jeans explains, “The denim wear segment for women has witnessed profound growth over the last decade. Owing to westernization and urbanization and various other factors such as new technologies, styles, finishes, looks and trends denim as a category has captured not only the cities, but also tier -I and -II towns. Denims are widely accepted not because of their functionality but also due to versatility; for instance in smaller towns a lot of young women are seen opting for denims over ethnic wear. Economic factors also have a role to play, disposable incomes, job growth indirectly contribute to consumer spending and in turn impact the fashion industry.”

Shah points out that the preference for brands is not restricted to just urban areas but their aspiration has also reached tier -II and -III cities and towns. She shares, “The organized or branded market is not just favoured in the urban areas but also the rural areas. As more international brands launch in the country and move to tier -II and -III cities, a growing preference is seen among consumers in those towns as it comes with a ‘tag’ that is the brand name as well as the aspirational value. In women’s wear exclusive to the denim category, India is a big market and is continuing to grow year on year at an increasing rate.”

Adapting to Consumer Demand

Brands into women’s denim wear are bringing in revolutionary styles and fits to ensure that the machoness associated with denims is subdued. Yogesh Kuruba, Proprietor, Focus Jeans shares, “The fashion element which is so inherently present in women’s clothes has been taken care of through the introduction of flexible/stretch fabric for different applications. The segment is expected to grow the fastest.”

With pearls, embroidery, Swarovski and the use of vibrant and pastel shades, the macho denim is given a completely feminine turnaround by brands and this has eventually led to its growth. The future for women’s denim wear is slated to see a huge turnaround with women wanting to own not just denim bottoms but also explore denim top wear as well.


Shah concludes with a peek into the road ahead for women’s denim wear segment stating, “According to industry reports, women’s denim wear in India is growing at a very healthy pace every year; in the coming years, it is estimated that the women’s denim wear category is going to contribute at least 9 percent to the overall women’s wear segment.”





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A woman with her hair in a braid, wearing a vibrant red blouse with a delicate floral pattern and light-wash blue denim jeans, is leaning against a textured, light-colored wall. The blouse has a button-down front and flared sleeves. The jeans are fitted and show some wear at the knees.

Denim & WOMEN

EVOLVING RELATIONSHIPS & KEY TRENDS

Denims have made strong inroads in the wardrobe of Indian women where even those who do not wear western clothes can be seen owning a pair of denim jeans or jeggings to be paired with their kurtas / kurtis. And for those who like experimenting with their denim jeans, the market has options which can leave them spoilt for choice. From umpteen washes to fits, the denim market within the country is working generously to offer fashionable denim wear to their women customers. The Images BoF team takes a look.

Where denim bottom wear is common in a women's wardrobe, denim shirts and jackets are yet to make a strong entry. On what makes denim top wear a slow mover, Sameer Patel, Founder and Chairman, Deal Jeans, "Women who buy shirts are mainly professionals who believe in being well-groomed at work or women who do not experiment in fashion with trendy tops but rather prefer a comfortable clothing for their daily wear." Reiterating this point is Amit Dhelia, Proprietor, Kraburs who suggests that women consumers who buy shirts comprise of working women, office goers and college goers in higher percentage and lesser percentage who buy for casual wearing purpose.

Where majority of the industry players feel that denim shirts are preferred more by working women, we also have others who are of the opinion that denim shirts are opted by women who wish to make a strong style statement. Oliver Chaland, Buying Head - Womenswear and Kidswear, Westside shares that women who buy denim shirts are up to date with current fashion. He says, "Denim on denim is a big trend." Profiling a typical denim patron (women), Amrishi Shahi, Head Design, Lee Jeans paints a picture of the girl-next-door who uses denims for her day to day life and is easygoing. To hear it in his words, "This is the core audience of consumers who love and live in denims."

The popularity of denims can also be gauged from the fact that a lot of ethnic wear brands too take the plunge to offer denim kurtis and kurtas for their women customers. If not made from pure denim, the apparels with a denim finish and look too work well for a lot many brands.

Denim Desires

Men and denim have had an age old relationship but their popularity in a women's wardrobe isn't very old. For men, denims are all about comfort more than style and for women it has to be a combination of both with the balance being more tilted towards style and fit. Coming straight to the point on the key differentiator between denims for men and that for women, Chaland states, "Denims need to be sexy for women and they need to re-enforce their curves." This quest to offer women with perfectly fitted denim bottoms has led the brand to enter the category of jeggings. Going by the market trends, jeggings are soon becoming an essential item in a women's wardrobe and it is here to stay.

Dhelia confirms to the fact that for women, denims is all about fit and style. He states, "For men denims mean more of relaxed wear." Elaborating on this further, Patel shares, "For men, a denim is their essential while for women it is a symbol of modern thinking. Today, women judge their level of modernity on the basis of clothing. For women, fits plays a crucial role unlike men, who do not consider minute of details. Women are always keen to be in trend and will search the trendiest offered to them before making their purchase. This habit isn't noticed in men except for a few." Neha Shah, Head - Marketing, Pepe Jeans shares another interesting perspective on why denim brands have to offer a variety in their denim portfolio for their women customers. She explains, "Women are more experimental when it comes to fashion. They prefer varied styles in denims in terms of fits, colours, washes, etc." As far as the effects are concerned, Akhil



"Denims need to be sexy for women and they need to re-enforce their curves."

-Oliver Chaland,
Buying Head - Womenswear & Kidswear,
Westside



"For men, a denim is their essential while for women it is a symbol of modern thinking. Today, women judge their level of modernity on the basis of clothing."

-Sameer Patel,
Founder & Chairman, Deal Jeans

Top Selling Denim Styles

- Skinny Slim Fit • Flair Cropped pants with hems • AOP Lazer Printed • AOP Embroidered • Classic 5-Pocket • Ankle Length • Rigged • High Waisted • Cropped • Ripped Off • Jeggings • Treggings

Popular Washes

- Ice • Cloud • Vintage Finish • Raw • Laser • Stone • Acid • Overdyed • Velvet Finish • Dark and Light Faded Blues and Indigos • Lasered Blue • Smokey Blue • Plain Rinses

Most Popular Effects

- Distressed • Whiskers • Fraying • Tearing • Granding • Scrapping • Spray • Tugging • Patchwork

Popular Denim Fits

- Regular • Skinny • Slim • Flair • Ankle Length • Relaxed • Girlfriend • Pencil • Boot Cut • Ultra Skinny • Boyfriend • High Waisted



“For women, denims is all about fit and style. For men denims mean more of relaxed wear.”

-Amit Dhelia,
Proprietor, Kraburs

Jain, Executive Director, Madame explains, “It depends on season and concepts. Sometimes vintage on denim are more popular with distressed effects. Current season and Spring-Summer ’19 prediction is mostly demand for tonal indigo effects.”

Keeping in mind the above revelations, it would not be an exaggeration to state that women consumers are more difficult to please. Affirming this Dhelia is quick to point out that women do not like to compromise on the fit and style of their denim wear. This makes brands put in more efforts to offer options for their patrons to choose from. As Shahi states, “We need to build in more choices into the women’s portfolio.” Patel adds, “Women are always in a frame of mind to pay for fashion that meet their desires. They take many things into consideration before shopping and the foremost things that rule their decisions are choice and price.”

Begging to differ here is Chaland who minces no words when he says that no matter the gender, each customer today remains difficult to please owing to the advent of social media and a strong influence of global trends. He shares, “Men have become as fashion conscious as women. Both genders are looking at being in trend as a result of which women are not necessarily more difficult to please than men.”



“Today women have an immense option to choose from therefore convincing them is quite a challenging task for every brand.”

-Akhil Jain,
Executive Director, Madame

The Stretch Diaries

The roughness and toughness of denim jeans for a macho look is not what women look out for when they set out to buy a pair for themselves. The more stretchability the fabric has, the more it is preferred by women. The reason is two-fold – fit and comfort. Patel elaborates, “Having the ability to conform to your body shape each time you put them on, stretch is a consideration for both the genders but for women it might be of much concern as women usually wear body hugging denims and stretch plays an important role in flaunting their curves while men are usually comfortable in regular pair of jeans.”





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“Pepe Jeans introduced Powerflex denims in 2016. These revolutionary denims come in a unique fabric with a dual-core technology to create a higher elastic fabrication.”

-Neha Shah,
Head - Marketing, Pepe Jeans



“Our flagship collection, ‘Body Optix’ for women, uses a patented technique that uses laser technology to make the wearer appear slimmer and shapelier, creating a 3D transformation.”

-Amrish Shahi,
Head Design, Lee Jeans

Top Colores

- Black • Light Blue • Midnight Blue
- Dark Blue • Medium Blue • Sports Blue
- Black • White • Grey • Beige • Green
- Denimex • Stone • Ice • Earthy Shades
- Electric Pink • Scarlet Red • Tobacco
- Chocolate • Neutrals • Pastels
- Vibrant Orange • Sepia Tint • White • Teal

Future Trends

- Distressed • Jeggings • Treggings
- Studded • Printed • Insta Patching
- Ecru Wash • Embellished Hems • Lazed Impression • Vintage Wash • Boot Cut
- Worn-out Look with Earthy Shades • Premium Finish • Boyfriend • High Waist With Frays Band Damages • Denim with detailing on sides • Turn-up denim • Metallic-sheen

Making it Stand Out

To stand out from the clutter, each brand has something different to offer to its customers. At Lee Jeans, the brand has introduced a revolutionary concept that makes the wearer look slimmer. This certainly is a complete hit considering women and body fat that shows are age old enemies. Shahi talks about the collection, “Our flagship collection – Body Optix for women, uses a patented technique that uses laser technology to make the wearer appear slimmer and shapelier, creating a 3D transformation. We have gone on to add laces for a transformational effect, where a nice-looking denim can be recognised as a feminine, evening-out denim too.” Shahi talks about their hero offering at Pepe Jeans, “Pepe Jeans introduced Powerflex denims in 2016. These revolutionary denims come in a unique fabric with a dual-core technology – Lycra and polyester yarns; that are spun together to create a higher elastic fabrication with a minimum 60 percent stretch.”

Commenting on the future trend that is surely to grip the women’s denim market, Jain reveals, “Tonal jeans are emerging as the newest direction for 5 pocket styling. The most commercial approach to the item is using core basic denims in slight tonal variations and splitting the jean in half or inserting a




contrast panel on the out seam. They share a good demand for vertical seam – novelty folds and pleats that are key updates to classic regular cuts. These put a modern twist on this staple fit. We shall also witness the youth opting more for cropped slim with retro high-rise fits.” According to Shahi, the future looks bright for stretch and recovery platform where you can move without exerting too much pressure. He elaborates further sharing, “We are seeing bi-stretches besides a good demand for blends like modal, lyocell, bamboo.” On a concluding note, he adds, “The future for denims is going to be all about natural and sustainable blends like Bamboo blends. Future blends will have to have functional properties as well.”





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THREE TO TANGO!

JEANS, LEGGINGS AND JEGGINGS

When it comes to apparel, the basic rule is - the more the merrier! No one, especially women, have ever been heard complaining - "Oh! I have enough clothes!" Earlier it was just the top-wear that gave one the option to explore different styles and fit. As for the bottoms, the best option available would be that of trousers, jeans, skirts, shorts, track pants and pyjamas. With fashion evolving with each passing day, we saw the humble denim facing a healthy competition from jeggings and leggings. Where leggings are mostly opted to be paired with ethnic wear, jeggings have been standing shoulder to shoulder with jeans in a woman's wardrobe. We hear industry experts share their take on the impact of leggings and jeggings on the women's denim category.

Where one may think that the introduction and ready acceptance of leggings and jeggings may have hampered the market for denims, the fact remains that all these three categories seem to be happy in their own space. We see no clash between either of them. The denim jeans have their own set of dedicated audience and if anything, the introduction of denim jeggings have only helped the denim jeans category to grow. A woman who was earlier sceptical of owning and further being spotted in a pair of denim jeans, can now be seen exploring different brands while buying a pair for herself. All thanks to denim jeggings which acquainted her with the versatility of denims.

Dissecting the term 'jeggings', Sameer Patel, Founder and Chairman, Deal Jeans puts the above in place stating, "Leggings and jeans, fused into a revolutionary new form of bottoms called "Jeggings", offer an exceptional level of comfort due to the softness and unparalleled stretchability of the material." No wonder, we have women who now vouch for the pair of jeggings they own and after experiencing the comfort of denims, they take the plunge to go and buy denim jeans for themselves. Reiterating this, Samresh

Das, Design Manager, Numero Uno shares, “Jeggings have boosted the denim sales because of it’s comfort.”

On whether there is an actual impact for leggings and jeggings on the denim jeans market, Amit Dhelia, proprietor, Kraburs shares, “Leggings and jeggings have not much changed the denim market, as these products have also started manufacturing with denim fabric. Denim fabrics have started being used in manufacturing of jeggings and we are also witnessing another emerging category - that of treggings.” Dhelia makes a strong point when he reinstates, “Regular jeans can never go out of style, as nothing can replace it.”



Olivier Chaland, Buying Head - Womenswear and Kidswear, Westside is quick to point out that leggings and jeggings are not a new category. According to him they are supplementary to denims and this is the reason perhaps that makes Chaland claim, “We have not seen any negative impact on regular denims.”

To Each his Own

Where each of the categories has its own audience who seem to be owning almost an equal number of pair within each category, it is interesting to note that going by the trend, jeggings have captured the market very well. Echoing this, Yogesh Kuruba, Proprietor, Focus Jeans shares, “Jeggings have become an ‘essential’ in a woman’s wardrobe and are here to stay.” Elaborating on dynamics of the transition witnessed, Akhil Jain, Executive Director, Madame shares, “The past decade has seen the stretchy, spray-on skinny reign supreme across the women’s market, with stretch, wafer-thin ‘jeggings’ overshadowing original rigid 100 percent cotton denim jeans. Since its arrival in the early 2000s, the skinny jean, as well as its mock-denim legging counterparts, captured the market with its promise of comfort and illusion of a lean figure. The item remains a wardrobe essential, but just as skinny jeans once pushed out bootcut jeans at the end of the 1990s, something

new is on the way.” Explaining how each of these have their own place in a woman’s wardrobe, Neha Shah, Head - Marketing, Pepe Jeans explains, “Leggings and jeggings are generally part of the high performance athleisure line. With the growing impact that athleisure has had on fashion and activewear/lounge wear, both leggings and jeggings are now top sellers alongside denims. What makes this micro-category unique is that it is very fashionable and the versatility of the colours allows for it to be teamed up with almost anything (formal or casual, party wear).”

Future is Fit

A thrust for active lifestyle coupled with westernization in clothing has given a push to denim jeans and jeggings in India. Majority of the brands offering ethnic wear have expanded their product portfolio to include jeggings as well. As for pure denim wear brands, where some of them have included jeggings to be a part of their collection, established denim brands have opted to keep a distance. Amrish Shahi, Head Design, Lee Jeans shares, “Leggings and jeggings work for entry-level brands, not denim leaders.” This may hold true but the fact that jeggings today remain an inseparable part of a woman’s wardrobe cannot be denied either. So it can be safely concluded by saying - The future for jeggings and leggings is FIT!





SHELVED FROM SHELVES?

The rise of the fitness conscious consumer is making a dent on the sales of denim around the world. As the athleisure trend sweeps consumer preferences world over, denim brands are compelled to rub shoulders with these new age fashion giants. Is this the end of denims?

If there's one staple piece of garment you will find in every wardrobe across the world, — it has to be jeans. From the ranches to evolving into a symbol of youth rebellion, jeans are easily one of the most ubiquitous pieces of clothing that have ruled the world since more than a century. After all, could there be anything more comfortable than slipping into your pair of soft used jeans? Had it been a couple of years ago, the answer would have been a sure-shot, unanimous NO, but apparently, preferences have metamorphosed with time and today, a fair section would endorse athleisure over the blue heritage fabric.

In the last few years, casual wear has taken over the world; it infact is one of the most profound cultural changes of the 20th century. As comfortability and practicality started gaining attention among the liberated millennials, the demand for casual wear rose. It became the new symbol of freedom — freedom of choosing how to dress, the freedom of



“With the rise of athleisure, denim also had to adopt and come up with innovations to keep pace with the shift in the lifestyle choices of the new consumers.”

-Saurabh Singh,

Head - Men's Wear Designer, Being Human



“Activewear is increasingly being integrated into daily attire and going premium. From the beaches to offices, athleisure is very much a part of the [modern] lifestyle.”

-Neha Shah,

Head-Marketing, Pepe Jeans



“A modern man is equally concerned about his health, hobby and leisure. So, the impact is so strong that it reflects in his wardrobe.”

-Samresh Das,

Design Manager, Numero Uno

choosing how to present oneself, and freedom to blur the lines between man and woman, old and young, rich and poor. Casual style directly undermined millennia-old rules that dictated noticeable luxury for the rich and functioning work clothes for the poor. The popularity gained such unprecedented momentum that it overtook even denim's popularity title and sales of denim began to wane, especially in the last couple of years.

“One of the biggest challenges for denim is the consumer movement towards active and casual,” Marshal Cohen, Chief Industry Analyst of the prominent market research firm NPD Group wrote in a blog post. Denim pioneers Levi Strauss, which invented the first pair of blue jeans 143 years ago, is among brands that acknowledge that their sales have been threatened by what the fashion industry dubs the athleisure trend. Levi's revealed a 5 percent drop in their world wide sales. Even Piper Jaffray's biannual “Taking Stock of Teens” survey shows

over the last two years teen girls' brand preferences have moved away from denim-centric names like Levi's, Guess, American Eagle, Miss Me Jeans and True Religion and more towards athletic and sportswear names like Nike, Lululemon, Gap's Athleta brand, UnderArmour, Black Diamond, Urban Outfitters and L Brand's Victoria's Secret.

While the decline is propelled specially by the women's section, sales figures of numerous industry heavyweights reveal a fading interest for denim in the modern man too.

Why

Why has yesteryear's synonym for eternal fashion now been prominently threatened by the rising trend of athleisure, one may ask? For one, experts point out, the shift could be partially credited to the fact that jeans are long overdue for a change in terms of design innovation.

There is a huge impact of people's lifestyle on fashion. “The athleisure and sportswear trend has taken the market by storm with the rising

interest in fitness. A modern man is equally concerned about his health, hobby and leisure. So, the impact is so strong that it reflects in his wardrobe,” says Samresh Das, Design Manager, Numero Uno.

The fashion world is ever evolving just as cultures change and human beings do. The cultural shift triggered by the millennial generation spearheading the era of self awareness is what drives the active leisure trend. Industry sentinels express that sportswear boom was brought in by international celebrities sporting and flaunting the trend on social platforms. The appeal of being able to wear the comfort of workout clothes to work, casual or social occasion is irresistible and this temptation fanned the fire. “Activewear is increasingly being integrated into daily attire and going premium. It has now become acceptable—even chic—to wear leggings to work under a dress, or wearing cool tracks with a dressy top. From beaches to the streets to some





offices, athleisure has slowly become part of the [modern] lifestyle,” says Neha Shah, Head-Marketing, Pepe Jeans.

The aftermath

Whatever may the reasons be, denim manufacturers are not the ones to be singing the blues. Taking a cue, more and more industry leaders are shifting focus and have either started investing in athleisure or are struggling to come up with other ways of using the distinctive and hard-wearing dyed blue cotton twill and making it more comfortable and sporty for everyday use. “Impact of sportswear has been substantial on the denim category.

With the rise of athleisure, denim also had to adopt and come up with innovations to keep pace with the shift in the lifestyle choices of the new consumers. Track pants or joggers, the most important sportswear product, was adapted by denim wear to come up with hybrid which we call as jogg jeans,” shares Saurabh Singh, Men’s Wear Design Head, Being Human Clothing.

Of late, jogg jeans are enjoying particular popularity amongst fitness enthusiasts. “Denim joggers are giving a tough challenge to sportswear and athleisure. People are preferring jogg jeans over other sports wear joggers,” claims Amit Dhelia, Proprietor, Courtyard.

Levi’s, under the daft leadership of Chief Product Officer Karyn Hillman, retaliated with a new line of super stretch denims called Levi’s X and an appealing ad campaign featuring Alicia Keys.

Recently, it also unveiled the Revel shaping jeans line for women that



“Denim joggers are giving a tough challenge to sportswear and athleisure. People are preferring jogg jeans over other sportswear joggers.”

-Amit Dhelia,
Proprietor, Courtyard



“Denims are coming back stronger in both genders, thanks to innovations and some brands successfully bringing back the love for the vintage look back with millennials.”

-Satyen P Momaya,
CEO, Celio

utilizes a patented Liquid Shaping Technology coating applied to the inside of the pants and the Lot 700 collection, made of stretch denim that is designed to “flatter, hold and lift”. “Women’s expectations continue to change,” Levi’s Chief Product Officer Karyn Hillman was quoted telling Fast Company. “It’s a breathing, living item of clothing, and we’re going to evolve with it.” Under its Lee brand,





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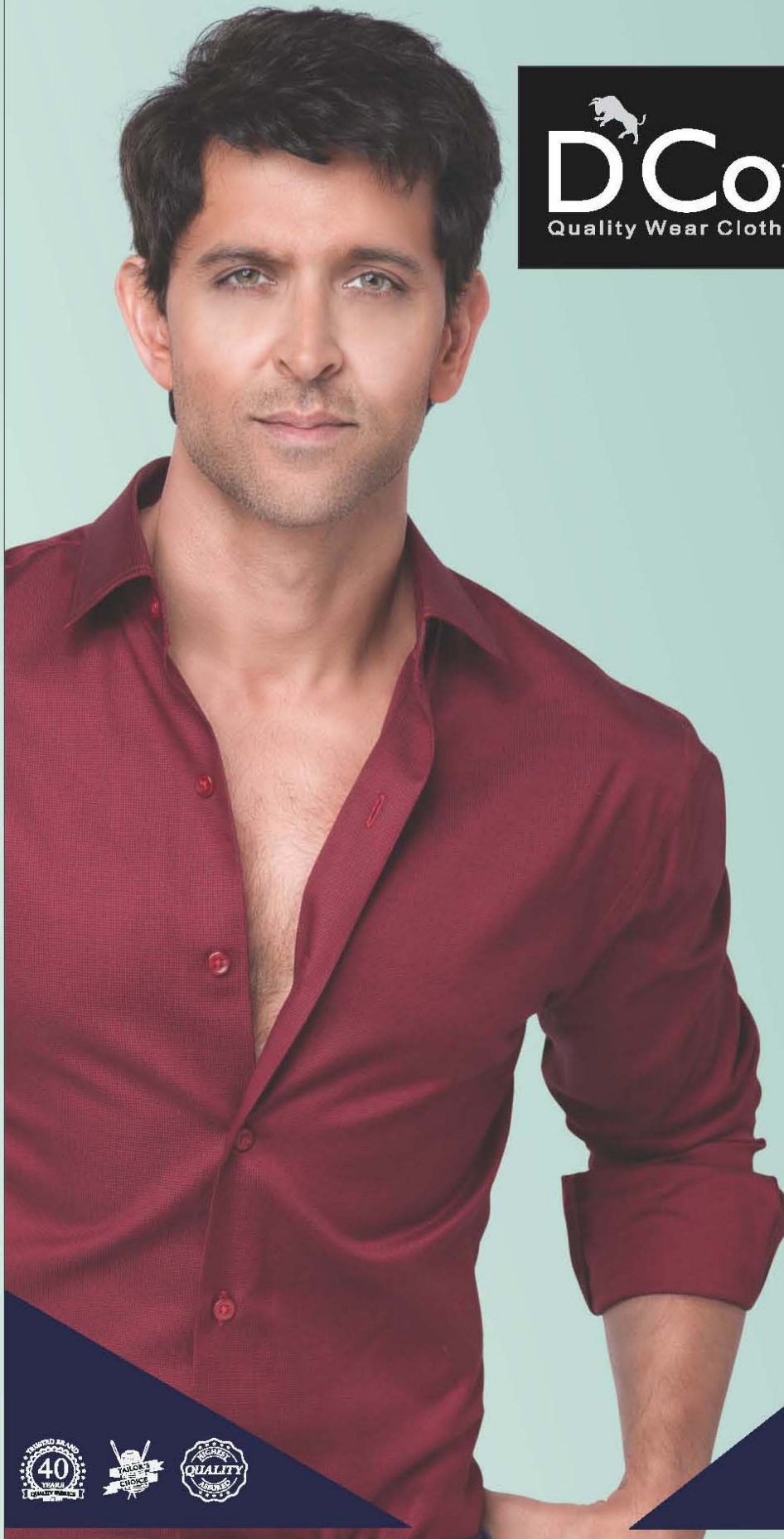
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“These are all temporary phases, that denim has been through before. Both basic and fashion denims are always in and will always be in the future.”

-Dhiraj Akhai Patel,
Director, Strano



“ The trends and innovation in denims keep getting updated and is always evolving since its inception. As a result, I don't think it will slow down as most sporty street styles include denim.”

-Umashan Naidoo,
Buying Head - Menswear & StudioWest, Westside



VF launched a trio of new trendy jeans for women in August. The Heavenly Touch, Curvy Fit and Easy Fit lines use extremely soft denim fabric, but still look like regular denim.

As a casual wear brand Pepe Jeans too has a strong athleisure line that was introduced over a year ago in keeping with industry trends. “As our core offering is denim, we have continued to innovate in this segment and introduce a range of stylish denims in soft, super stretchable and comfortable fabrics that allow the customer to comfortably get active and do chores in them. The Powerflex range of denims from Pepe Jeans are made from a unique fabric with dual-core technology – Lycra and polyester yarns; that are spun together to create a higher elastic fabrication with a minimum 60 percent stretch. The beauty of these denims is that the range comes in a unique thermo-fixed technology to increase the stretch for better comfort and the denim is crafted from unique fabrics that use the latest weaving techniques,” reveals Neha Shah.

Bestseller has introduced knitted jog denims for men with ribbed hems and draw cords which have received an overwhelming response in the market. The company is now working on branded trim details and new fits.

While all these brands are scrambling to comply with consumer preferences by taking product innovations to a new heights while staying true to their roots, a few industry majors were bold enough to venture into active wear with fresh range of products. Legendary Italian designer Adriano Goldschmied, often referred to as the Godfather of Denim, is leaving the denim loom behind in favor of the circular knitting machine for his new active wear line Acynetic, a collection of knits that look like denim but have the stretch, comfort and performance of activewear. “The future is about knit denim. Acynetic has the look of denim but the performance of sport fabric,” he had told Apparel News.

A passing fad?

Interestingly, this is not the first time that denim has faced a rough patch. One came in the mid-1970s, when denim sales fell 3 to 4 percent, while corduroy pants surged in popularity, with sales rising 10 to 12 percent, according to NPD estimates. Marshal Cohen also added jeans sales fell about 3 percent again with the resurgence of khakis in the dawn of the new millennium, the last decline until now.

In spite of all these, fashion sentinels have unanimously voiced that denim has been successfully adapted to different trends in the past and will continue to evolve as per the customer preferences. “These are a temporary phase. Basic and fashion denims are always in,” expresses Dhiraj Akhai Patel, Director, Strano.

Voicing his support, Umashan Naidoo, Buying Head - Men's Wear & StudioWest, Westside, says, “Denims will still be a key item despite the sportswear revolution. The trends and innovation in denims keep getting updated and is always evolving since its inception. As a result, I don't think it will slow down as most sporty street styles include denim.”

The athleisure trend is not as volatile as the khakis or corduroy, because athleisure reflects a lifestyle shift as much as a fashion trend and hence it's unlikely to disappear soon. But denim players aren't letting this kill the world's beloved blue fabric. In this period of momentous change in preferences, denim players have exercised rigorous innovations to align their offerings as per the demand of the market. “Athleisure is slowing down to be honest. Denims are coming back stronger in both genders, thanks to innovations and some brands successfully bringing back the love for the vintage look back with millennials,” says Satyen P Momaya, CEO, Celio.



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TALES & STORIES ROCKING THE KIDS DENIM MARKET

According to the latest Technopak report on denim, kids denim is the smallest segment in the domestic denim market, but is expected to grow at an impressive rate of 12 percent over the next decade, primarily due to the relatively higher fashion awareness among parents and kids, product innovations, design choices and higher spending on kids in nuclear middle class families. Images BoF talks to Alin Shah, Brand Strategist, Tales & Stories to understand the kids denim market. Shah who is optimistic about the emerging kids denim market shares his opinion on the current styles, designs, washes and effects in kids denim.

By Rosy N Sharma

Tales & Stories is a premium kids apparel retail chain with 19 stores in 11 cities, an online sales portal and shop-in-shop presence in premium MBOs. The brand is from the house of Artex Apparels, who have been into kids fashion denim manufacturing for more than 30 years, Tales & Stories offers more than 250 designs every season for 0 to 14 year olds. The range includes everything from jeans, shorts, shirts, knit tees, dungarees, dresses, jackets, skirts and a lot more.



-Alin Shah,
Brand Strategist, Tales & Stories

What are the popular elements/embellishments used for the kids?

AS: Sequence, tassels and foil printing are the most liked surface embellishments amongst kids denim. Of course, the bright embroidery is still liked by the customers.

What are the top selling colours?

AS: Mid blue denim with dark blue tint, dark blue with orange on the back, brown tinted denim, ink blue and coloured denim like red, orange, yellow, olive, green, etc.

How has the growth been in the sales of kid's denim?

AS: Last financial year we saw considerable growth in the kids denim category but past quarter has been tough. I still feel very positive about the kids denim market because India still has a huge population of young adults, whose spending power is increasing day by day.

Predict the top trends that will emerge in the future in kid's denim.

AS: Use of lot of man-made fibres like PVC will play a major role in kids denim. The old school patch work is again coming into the picture. A cut and sew of different coloured denim is something I see coming to kids wear.

How important are organic and hygienic fabrics for kids? Do parents ask for it?

AS: It takes up to 5,000 litres of water to make one denim, which is a very serious statistic to note. The solution seems simple by using organic fabrics, dyes, zero discharge washing units, etc., but by incorporating all this the cost of the garment goes up so high that it becomes impossible to compete in the value driven market like India. This can be only solved if government offers heavy subsidies and helps the denim industry become an eco-friendly industry.



...EXCERPTS FROM THE INTERVIEW

What are some of major factors that influence trends in kids denims?

Alin Shah (AS): Due to massive influence from the western culture parents these days want their kids to dress like the way celebrities and famous people dress their kids. Indians are moving from the local flashy taste to soberer looking garments. Young parents dress themselves in a very stylish way and this fashion sense comes down to their kids as well.

Elaborate on the current three top selling denim styles for the kids.

AS: Distressed, Surface Embellishments and Tints! When I see our sale through reports of our EBOs and marketplaces all the denim styles with one of these techniques are selling well. When we analyse the customer requirements, distressed is always topping the list.

Are there some new most preferred denim styles that parents are asking for nowadays?

AS: When you talk about fabrics, parents want the softest possible denim to protect the sensitive skin of their kids, and when it comes to styles they ask for heavy tearing, slim fit, ankle length and breathable light weight denims.

What are the most popular washes?

AS: Towel wash is very popular in the market along with tearing with attractive patch on the back.

What are the most popular effects?

AS: I can see tie-and-dye is becoming popular. A new technology of laser wash is capable of creating wonders. Any kind of design or shape can be washed by using these precise laser washing machines.



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SHOPPERS STOP'S 'DENIM TO WORK' CAMPAIGN

India's leading large-format fashion retailer, Shoppers Stop has introduced the 'Denim to Work' campaign, a unique initiative encouraging working professionals to include denims in their work wear wardrobes. The first-of-its kind campaign is inspired by iconic young CEOs and leaders across industries, a generation that believes in rewriting the rules of the game.

Denims, a cult fashion trend has clearly stood as an expression of freedom and comfort over the years. With new-age companies and start-ups relaxing the norms and with the introduction of Friday dressing and casual dressing to work, denims are increasingly becoming an acceptable dress code at work. With an aim to empower and redefine the new codes of leadership towards building a fresh work culture, 'Denim to Work' is a bold campaign which was introduced by Shoppers Stop to break the mundane tradition of formal wear to office.

Rajiv Suri, Managing Director and CEO, Shoppers Stop shared, "The 'Denim to Work' campaign by Shoppers Stop is a unique initiative encouraging working professionals to include denims in their work wear wardrobes. The first-of-its kind campaign is inspired by iconic young CEOs and leaders across industries, a generation that believes in rewriting the rules of the game,"

Suri further explained that the 'Denim to Work' campaign was targeted towards young professionals. It encouraged them to flaunt their own sense of style and exude confidence at the work place with denims as a part of their work wear wardrobe.

The campaign

Shoppers Stop initiated the campaign in the month of May. The campaign received a vast amount of coverage through print and online mediums which drove conversations around the campaign. The hashtag #RIPtheDesignations garnered 88,49,370 impressions while #DenimToWork had 1,01,70,377 according to Brand24.com. On Facebook and Twitter, Shoppers Stop also tried engaging the netizens by introducing a contest namely #MyDenimStory wherein the participants shared stories on how they used denim as work wear.

"The 'Denim to Work' campaign was rolled out by Shoppers Stop across its 83 stores, and curated and showcased looks that one can



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“Denim joggers are giving a tough challenge to sportswear and athleisure. People are preferring jog jeans over other sportswear joggers.”

-Rajiv Suri,
Customer Care Associate,
MD & CEO, Shoppers Stop

explore through the work week from Monday to Friday. Pepe Jeans, a key sponsor brand along with other participating brands such as LIFE, Wrogn, RS Jeans, Rheson, Femina Flaunt, Only, Lee, Wrangler, Kraus Jeans, Flying Machine, Jack & Jones, USPA Denim Co. and Deal Jeans were a part of the campaign,” Suri revealed.

The campaign was rolled out across multimedia platforms with print, radio, outdoor, and a digital film across key markets in India along with ATL and BTL marketing activities.

Conceptualized by Shoppers Stop’s ad agency, Contract, the digital film for the ‘Denim to Work’ campaign was produced and directed by Mirum. The digital film aimed to break down the rules laid by rigid corporate culture. In line with Shoppers Stop’s brand philosophy ‘Start Something New’, the film features young employees at various levels of hierarchy and how they #RIPtheDesignations to stand out in the system with their own attitude and style. #DenimToWork was a result of common brainstorming sessions between the agency and the brand. The brief revolved around how to reposition denim from its current wardrobe

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choices and give it a role at the workspace. Demin to work is beyond a campaign, it is a shift in attitude.

Commenting on the campaign, Vineet Mahajan, Head of Art, Contract (India) said, “Walking into work wearing a pair of jeans is a common sight now. But denims have never been promoted as workwear. We thought this idea was quite disruptive and we hit the sweet spot of an idea by celebrating the designations of a new age workplace. Shoppers Stop has always broken new ground in fashion retail communication and this one was no different.”

“We have seen the consumer’s mindset evolve through the years due to the

changing dynamics of retail industry. With the aim of being at the forefront of introducing new trends and the increasing affinity towards denims across age groups, we believe a lot more of our consumers will accept denims as part of their work wear wardrobe,” Suri added.

Wearing denims to work is increasingly becoming an acceptable dress code across most industries and is the next formal attire for most corporates. The film inspired young professionals to flaunt their own sense of style and exude confidence at the work place with denims as a part of their work wear wardrobe.



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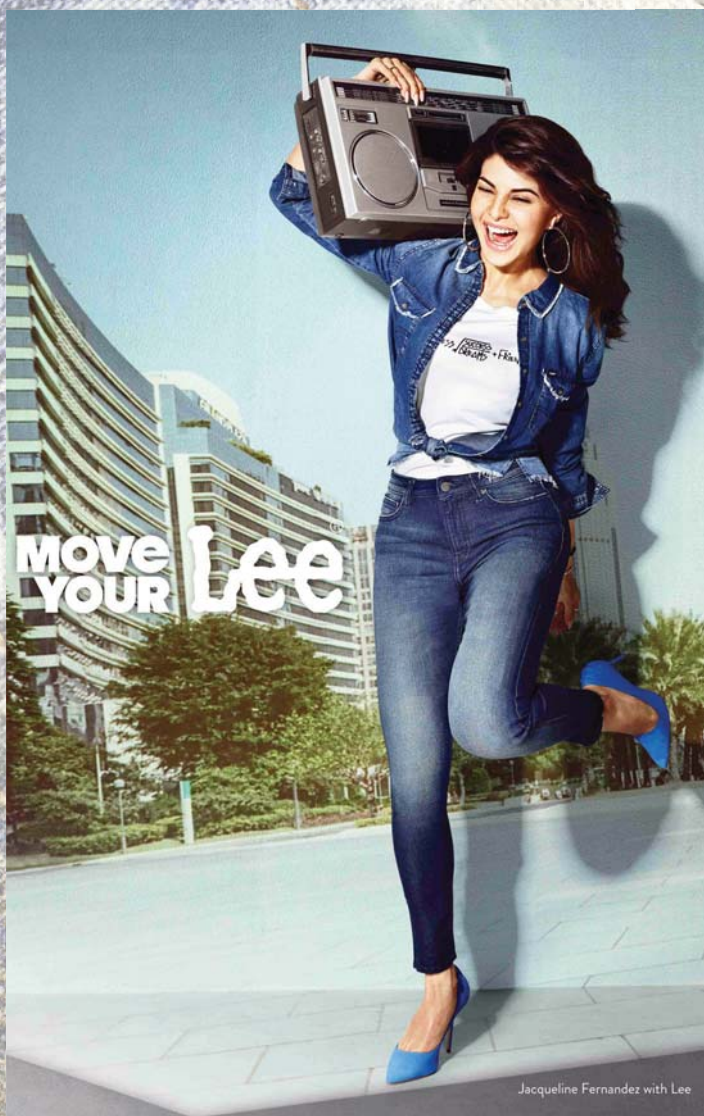
DENIM AD CAMPAIGNS

Denim brands thrive on advertising campaigns. IMAGES BoF takes a look at a few recent ads that made great buzz!



▲ PEPE JEANS

British denim brand Pepe Jeans enlists Georgia May Jagger for the first time as the face of its spring-summer 2016 campaign. Starring alongside Simon Nessman, the blonde sports a casual mix of overalls, denim shirts and plaid shirts. Photographed by Daniel Jackson, Georgia May exudes pure cool in the studio shots. As an extension of the SS16 campaign, Pepe Jeans launched an exciting digital, fashion revolution. The #GetItOnchallenge highlighted in a unique manner the brands latest product innovation – super stretchy 'Powerflex Jeans'.



◀◀ LEE JEANS

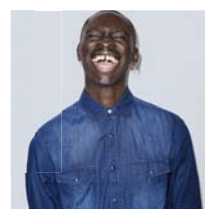
Since its first introduction in 2016, Lee's ground breaking Body Optix collection has been creating body flattering and stylish outfits for Asian females. With the combined power of vision scientists and denim designers, the Spring-Summer 2017 collection delivers the statement styling essentials for optimal 360 degree body enhancement, customised with seasonal features and fashionable cuts.



<< ONLY

Only is essentially a denim brand. In effect, all Only collections reflect the denim attitude, look and image. Only's denim archive addresses the girls who prefer rebellion to compromised peace and believe that compromising conviction is a crime. The brand stands for feminine strength, boldness and tongue-in-cheek humour. With a mission to Denimize The World, Only aims to offer the latest denim trends that add a perfect mix of drama, comfort and fashion to consumer wardrobes. Through its extensive range of options, the brand aspires to begin a denim revolution.

ONLY



a wide choice

a variety of cuts, "regular, straight, slim, skinny, tapered, cropped".

a palette of 10 washes from normal to grey washed which changes its density based on the latest technologies, from simple rinsing to fully washed out



a quality finish

premium finish details inside and out, reinforced stitching, a leather jacron label offering unbeatable value for money.



↓ JACK & JONES

Denim is at the core of Jack & Jones's brand ethos. As the pioneer of street style and denim in India, the brand has been celebrated for establishing innovative styles and fashion that are at par with global trends. Jack & Jones offers the latest denim trends that add a perfect mix of comfort, fashion and individuality to consumer wardrobes. Through its extensive range of options, the brand aspires to lead a denim revolution. The brand's imagery and communication is centered around denim.



unique know-how

check out the "powerflex", "essentiel" and "premium" lines in selvedge denim cotton or woven from natural fibres in all celio stores and at celio.com.



▲ CELIO

Celio is the leader for jeans in France. Jeans, an iconic piece for more than 30 years with its portrait for men with their many facets - their passion, their styles and their attitudes.

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LEE JEANS



2016 – **e-Create**. A collective of sustainability initiatives which use sustainable methods of manufacturing.

2017 – **Body Optix™** collection for women.

2018 – **4-way stretch** for Urban Riders. A comprehensive launch of this happens with the brand campaign 'Move Your Lee'.

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NUMERO UNO

2016 - **Feather Touch Denim.** It's a beautiful product which looks like real denim with a hand feel of a feather. People loved it for the softer hand feel in a pair of denim traditionally known for its ruggedness and this was a point of appreciation.



2017 - **Zero Gravity Jeans.** Super light and super stretch denim for all those young professionals who really spend good 8 hours at work and look for both the comfort of a pair of chinos and look of a jeans. It was a rigorous research and collaboration with Mill, that came out with this product.

2017 - **Boro Jeans.** Boro jeans are hard core denims which were created after re-researching a lot on Japanese garment making and their mending techniques. The whole collection was influenced by Japanese denim and indigo industry as well as the decorative techniques of preserving their old clothes.



PARX



2018 - **Eco Denim.** Sustainable denim, eco-friendly, recycled pet bottle denim, less water usage, zero chemicals used for washing, organic cotton denim.



2018 - **Premium Collection.** Premium denim fabrics like 2-ply cotton, indigoXindigo yarn, premium wash with high colour fastness, premium trims used.



2018 - **Yoga Denim.** Bi-stretch denim with 360 degree stretch, super stretch knit denim, yoga styling.



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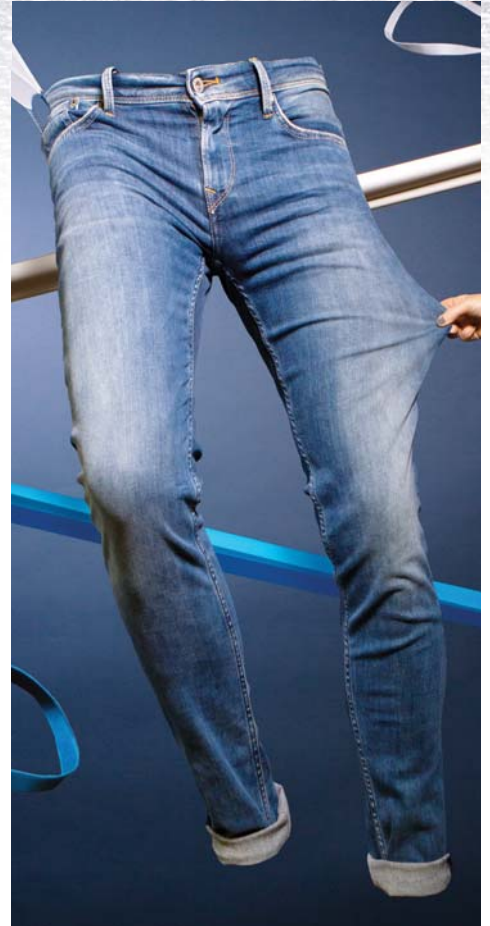
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ONLY

The most recent collections included the launch of the limited-edition **OnlyxMarvel 2018** capsule that was inspired by the *Avengers: Infinity War* movie. It was very popular amongst the target audience and several Bollywood A-listers were spotted wearing styles from this collection.

OnlyxGarfield 2017 capsule was a tribute to the 90's childhood hero and everyone's favourite grumpy cat. The collection awakened childhood nostalgia and managed to establish a new fashion trend.

OnlyForBieber 2017. To celebrate Justin Bieber's first visit to India, Only curated a very interesting and fun campaign that launched the limited-edition OnlyForBieber collection. This initiative however, was not only about creating a collection, it was a holistic campaign that got consumers excited while giving them an opportunity to win tickets to the concert by participating in in-store karaoke competitions.



PEPE JEANS

Powerflex Denims. Launched in Spring Summer 2016, these revolutionary denims come in a unique fabric with dual-core technology – Lycra and polyester yarns; that are spun together to create a higher elastic fabrication with a minimum 60 per cent stretch. Boasting an impressive recovery so that it stays in perfect shape, wearers are treated to the ultimate comfort through this versatile and special elasticity. Powerflex denim is thermo-fixed to increase the stretch for better comfort and the denim is crafted from unique fabrics that use the latest weaving technology.





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●● BEING HUMAN CLOTHING ●●

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

Brand's core audience

The brand's combined ethos are celebrity, charity and fashion. Anyone who believes in these ethos's and are influenced by the same is their psychographic target audience. The brand primarily targets customers in the age group of 18 to 35 years, residing in metros, tier -II and -III towns in the country and belong to SEC B, B+, A, A+ group.

Present product portfolio

The brand's current portfolio has a vivid range of products spanning t-shirts, shirts, denims, shorts, pants, athleisure, jackets in men's wear and tops, denims, dresses and athleisure in women's wear. Their core top selling lines are t-shirts and denims.

Change in demand in denim over the past year or two

Over the years, Being Human Clothing has seen a substantial increase in



KEY INFOGRAPHICS

- > Country & city of origin:
India, Mumbai
- > Number of countries present in: **15**
- > Year of brand launch: **2012**
- > Total number of doors, the brand is present in India
 - EBOs: **67**
 - SISs: **206**
 - MBOs: **63**
- > Number of states present in: **21**
- > Number of cities present in: **87**

demand for denim from its consumers. Now denim is the second biggest product category for them in terms of revenue. And to meet this demand it is increasing the size of its denim collection.

Top selling denim collections

The USP of the brand's denim collection is the superior fits that they offer. Their skinny fit jeans is the best selling fit followed by the slim fit jeans. Apart from the classic blue tones, they also have a wide range of grey and black tones which do very well season after season.

New denim collections planned for the forthcoming season

For the coming Autumn Winter 2018-19 season, the brand has added very sporty street driven styles which have side stripe details in different



techniques like print, tape, resist bleach, etc. Also this season, they are launching their new skinny cropped fit which is a new trend globally.

Retail presence & future expansion plans

After having made an impact in most of the metros and key markets in India, Being Human Clothing are now focusing on expanding their presence largely in tier -II and -III markets across the country. Their plan is to tap into new markets such as the North East, known for its fashion driven consumers. Apart from this region, they will be opening stores in Jamshedpur, Bhubaneswar, Srinagar, Vapi, Nagpur, Hyderabad, Delhi, Guwahati, Noida, Lucknow, Dehradun, Jammu, Raipur, Meerut, Gorakhpur, Gurugram, Cuttack, Imphal, Shillong and Goa this year.





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●● BLOOD ●●

A men's wear brand, Blood offers a range of jeans, chinos, trousers and shirts. The brand is known throughout eastern India for delivering quality at affordable prices. Incepted in 1997 at Kolkata, the brand's main strength lies in cotton trousers and designer jeans. The brand believes in offering the best quality at best price with best in class fabric and skin friendly processing.

Brand's core audience

Blood targets 18 years and above men from tier -I, -II and -III cities, who understand fashion, comfort and value for money.

Present product portfolio

The brand started with jeans, which still remains their core occupying almost 40 to 45 percent of their product portfolio. As of now they are manufacturing jeans, cotton trousers and shirts.

Change in demand in denim over the past year or two

The demand for denim has been ever increasing for over a decade now. The recent years saw a jump with a growth of almost 15 to 20 percent yearly.

Top selling denim collections

The brand's top selling product range comprises fashion and stylish denims created with different patterns and washes. The brand is also doing very well in shirts, which are 100 percent cotton offering maximum comfort and superb fit to cater to the taste of consumers.

New denim collections planned for the forthcoming season

For the forthcoming season, Blood has

recently introduced water resistant cotton trousers, which have been a real hit in the market. Now they are also in the process of introducing highlighted cotton denims

Primary markets and retail presence

As of now, Blood is selling its products through MBO's via agents, and direct retailing. West Bengal is their strongest market followed by Bihar and entire North East, primarily Assam.

Plans for exploring new markets

In the near future the brand plans to explore the markets of Gujarat, Andhra Pradesh and Uttar Pradesh.

Technology deployment/upgradation

The processing units at Blood are getting modernised with the introduction of state-of-art machinery, making the whole process more efficient and cost effective. One such example is the introduction of laser technology in different washes.



KEY INFOGRAPHICS

- > Country & city of origin:
India, Kolkata
- > Year of brand launch: **1997**
- > Total number of doors, the brand is present in India (on date)
● MBOs: **450**
- > Number of cities present in: **75**



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●● CDF COLUMBIA ●●

Launched in 1990, CDF Columbia is known for its class, style and comfort. The brand has shown substantial growth year after year and is a leader in innovations in crafting a perfect pair of jeans. Catering to men from teenagers to middle aged individuals from middle to upper middle class segment, CDF Columbia offers products in innovative and trendy styles.

Brand's core audience

The brand targets the sophisticated youth who understand quality and basic fashion. It caters to both working individuals as well as businessmen, from middle and upper middle class segment.

Present product portfolio

The company manufactures denim bottom wear, cotton trousers, linen trousers and shirts for men. Almost 70 percent of the brand's collection comprises denims, while the rest constitute only 30 percent.

Change in demand in denim over the past year or two

The brand has witnessed significant changes and an increase in demand for denim due to its good quality and durability.

Top selling denim collections

The brand's lycra based knitted denims are their strongest selling range offering a perfect fit and worn out wash-value.

New denim collections planned for the forthcoming season

For the forthcoming season the brand is planning to introduce a vast range of light-weight knitted denims, doby

and structured denims with innovative tearing and worn out washes.

Plans regarding new denim product range/denim category expansion

CDF Columbia also plans to launch various new products like – worn out denim shirts, coloured knitted jeans in 12 to 15 shades in its core category.

Primary markets and retail presence

The brand has strong presence in the states of Maharashtra, Karnataka, Andhra Pradesh, Tamil Nadu and Goa.

Top retailers

The brand's key retailers are – Jaihind Retail Outlets, BSC Group, Topsy Topsy, Milton Group and Gaysons.

Plans for exploring new markets

The brand is focusing on exploring the markets of Madhya Pradesh, Punjab and Rajasthan in future.



KEY INFOGRAPHICS

> Country & city of origin:

India, Mumbai

> Year of brand launch: **1990**

> Total number of doors, the brand is present in India (on date)

● **MBOs: 500+**

> Number of cities present in: **25**

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•• CELIO ••

The French clothing brand, Celio is serving the needs of a la mode men since 1978. It brings a breath of newness to Indian fashion with its chic and relaxed menswear. Present in 60 countries with more than 1,140 outlets, it aims to expand its fashion footprint, and develop style-conscious clothing for generations to come.

Brand's core audience

Celio has pinpointed its target group to the 25 years SEC A Indian male. The brand targets conventional style seekers while also appealing to the progressive consumers. These people might be working or owning their own businesses belonging to middle class affluent households. They are socially connected, style conscious and spend time on leisure.

Present product portfolio

Celio is all about effortless style and fashion because of its European roots. Their products are urban, smart, elegant and very wearable. Each product has a distinct twist of fashion. "Fits and quality" definitely are the strengths of the brand. The offerings can be classified under four product groups – free, urban, smart and essentials.

Free is a denim wear and sportswear range sporting a casual and colourful spirit. It has products like tees, bermudas, cargos and outdoor wears. *Urban* is smart, casual and chic collection with products that are more sophisticated and elegant. The products include linen shirts and bottomwear, jeans, smart polos, chinos, leather or faux leather jackets, etc. In the *Urban* range, there is a lot of detailing in the garments and they can be worn on different occasions such as

casual, work or evenings. The products are cleaner and have a style statement. The *Smart* range offers business and work essentials with a fashion twist. It comprises slim fit shirts, business jackets and bottomwear. In the *Essentials* range, Celio offers a wide selection of well priced basics, for example polos and plain tees, entry priced bermudas, denims and so on.

Denim is a key category among their product mix and contributes to a healthy 30 percent of the product mix.

Change in demand in denim over the past year or two

Celio enjoys a leadership position in the French denim wear market and they are ensuring that they leverage on this pedigree in the Indian market as well. In the last one year, the brand has seen close to 120 percent growth in the denim category. They have achieved the same by ensuring a 360 degree focussed execution strategy whereby the brand invested in consumer engagement, strengthening their product portfolio and ensuring that their distribution points expanded.

Top selling denim collections

The brand's top selling collections present random washes with prominent high low effects. It has used differentiated fabrics like knits and poly blends, and has played with colours like steel blue, etc. The top selling collection offers modern shapes and fits in denim.

New denim collections planned for in the forthcoming season

The new denim collection will offer knit denims with a great hand feel and comfort across a wide range of colours including black, grey, rinse, stone and bleach. Similarly, indigo over-dye on



KEY INFOGRAPHICS

- > Country & city of origin: **France, Paris**
- > Number of countries present in: **60**
- > Year of brand launch: **India 2008, France 1978**
- > Total number of doors, the brand is present in India (on date)
 - EBOs: **40**
 - SIS: **192**
 - MBOs: **64**
 - Others: **33**
- > Number of states present in: **27**
- > Number of cities present in: **95**
- > Total retail space across EBOs & SISs: **110,000 sq.ft.**



an effort to establish Celio as the most preferred international brand.

Progress through online retail

With over 900 million mobile phone subscribers and 432 million internet users, India's e-commerce market is poised for growth in the coming years. The online shopping boom can be attributed to the tech-savvy, socially active, earning and shopping millennial generation. This audience meshes quite well with the brand's vision. Celio is clocking strong double digit growth year-on-year on various e-commerce portals. They will continue to strengthen this business channel even further in the coming years.

Technology deployment/upgradation

Celio is exploring how AI can help them make better decisions. In line with this, they are currently employing solutions which help amalgamate AI and computer vision to make more informed decisions in terms of what kind of products consumers look for. A lot of this can be done on a live time basis and hence helps them correct course.

Omni-channel presence

At Celio, they strongly believe in merging online and offline spaces towards the next wave of growth which is omni-channel retailing. As an organization, they are preparing themselves to be digitally ready and have taken numerous initiatives to further build on this. They are also working in partnership with organizations such as Fynd, which has helped them accelerate the omni-channel piece. They are already seeing about 2 to 3 percent of their consumers adopting omni-channel in a very short period of time which is quite encouraging.

indigo denim enhances the depth and brings to life the richness of indigo. The collection will also feature Italian fabrics, which are 92 percent cotton and are extremely soft to touch.

New denim product range or denim category expansion

Celio plans to launch a differentiated denim product offerings each season and ensures that it provides the best of global fashion to its consumers.

Retail presence and future expansion plans

In terms of retail strategy, Celio covers all key markets such as Mumbai, Delhi, Chennai, Bengaluru, etc. The brand is currently present in 91 cities through its EBOs, SIS, MBOs and distributors. It is additionally present in all major e-commerce channels such as Myntra, Jabong, Amazon, Flipkart, etc. It is planning an aggressive expansion strategy which will be a combination of deeper penetration in the current cities and expansion in to new cities.

Top retailers

Celio's top retail partners include Lifestyle, Shoppers Stop, Central and Pantaloons.

Plans for exploring new markets in India

The brand is extremely bullish about the Indian market and has seen strong resonance in tier -I and -II cities in India. They plan to open stores even in the hinterlands of India in



●● COURTYARD & KRABURS ●●

A retail venture of Artex Creation, Courtyard and Kraburs is a renowned casual wear lifestyle brand established in 2015. Courtyard has been exclusively designed for men, whereas Kraburs caters to the fashion conscious woman of today.

Both the brands focus on denim as well as cottons. Providing trendy collections and creating designs that help young adults and teenagers to express themselves, the brand offers a luxurious range to the consumers at affordable prices. Ever since its inception, the brand has witnessed constant growth and is expanding gradually. Their products are highly appreciated in the market among dealers, retailers and the end-consumers. The brand is presently focusing on jeans for women and also plans to soon launch a range for the juniors as well. So far, it's been a win-win situation for the brand.

Brand's core audience

The brand caters to all age groups from school going teenagers to the working population. The brand's audience comprises both men and women. Their products are designed to meet the requirements of both high-end customers belonging to the luxurious class and mid-segment alike.

Present product portfolio

The brand's product basket comprises jeans, chinos and cotton pants, corduroy trousers, shirts, t-shirts, jackets, suits and blazers for men and denims for women. All products are manufactured keeping in mind the taste of today's youth. The bottom wear range of denim occupies 90 percent

share in the brand's overall portfolio, while the upper wear constitutes ten percent share.

Change in demand in denim over the past year or two

The denim demand graph is on an upscale and the brand is continuously growing with rising demand.

Top selling denim collections

The trending and top selling styles of Courtyard and Kraburs are its jeans with basic 5-pocket styles, cross pocket variations and it's premium designer jeans with a variety of washes and unique fits.

New denim collections planned for the forthcoming season

For the upcoming season the brand is launching a collection of joggers and colour denims with colour offerings of over 15 colours.

Plans regarding new denim product range/denim category expansion

The brand plans to focus on playing with different washes and styles, along with creating sophisticated pocket designs. Various contrast pocketing styles will be introduced to give a vibrant look to the garments. They will also add new concepts of accessorizing, where each accessory will be selected with great precision.

Primary markets and retail presence

The brand's primary retail markets include Bengal, Bihar, Jharkhand, Orissa and Assam and they plan to establish a pan India presence in future. The brand retails through over 500 MBOs and have an EBO in Howrah at Raghav Plaza.



KEY INFOGRAPHICS

>Country & city of brand origin:
India, Kolkata

>Number of countries present in: **1**

>Year of brand launch: **2015**

>Total number of doors, the brand is present in India (on date)

● EBOs: **1**

● SISs: **2**

● MBOs: **500**

>Number of states present in: **5**

>Number of cities present in: **10**

>Total retail space across EBOs:
400 sq.ft.

Top retailers

The brand's top retailers are Citi Choice, Sreerampore; Shree Shopper Ltd., Kolkata; Bazaar Style & Retail, Kolkata; Shivam Enterprise, Durgapur and Lilabati Readymade Center, Durgapur.

Plans for exploring new markets

The brand aims to expand pan India through its wide-spread distribution network, franchisees and EBO'S.

Progress through online retail

Courtyard and Kraburs' products are available on all leading portals like Flipkart, Snapdeal and Amazon and they have been gradually progressing through these channels. The brand also retails through it's own e-commerce portal www.courtyardjeans.com.



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•• DARE JEANS ••

In 1992, Paresh Dedhia, a complete newcomer to the trade put in all his energies and ventured into garment manufacturing. He soon realized the immense scope for branded garments and in 1995 launched flagship brand, Dare to provide stylish bottom wear for men. With a vision and commitment to provide the best fits, washes and fashion at a very affordable price, the brand offers a vast collection of formals, casuals and jeans for men in best quality fabrics sourced from reputed mills.

Brand's core audience

Dare Jeans had entered the garment industry in India specialising in jeans. The brand caters to men of 18 years old and above.

Present product portfolio

Creativity and rich feel form the base of the brand. Dare Jeans are the core products of the company and are very popular and sell extremely well. The jeans come in a variety of fabrics, washes, fits, and colours. The designs are simple and elegant. Denims contribute to about 60 percent of the overall product category of the brand.

Top selling denim collections

This season's top selling denim styles at Dare Jeans include ranges like knitted denims, satin denims and peach finished denims. They have a soft hand feel and are regarded as the best selling products of the company for their superior fabrics and perfect fits.

New denim collections planned for the forthcoming season

For the forthcoming season, Dare Jeans plans to introduce hybrid

KEY INFOGRAPHICS

- >Country & city of origin:
India, Mumbai
- >Number of countries present in: **3**
- >Year of brand launch: **1995**
- >Total sales turnover in India as in FY17-18: **₹27.75 crores**
- >Total number of doors, the brand is present in India (on date)
 - EBOs: **3**
 - SISs: **6**
 - MBOs: **1,200**
- > Number of states present in: **16**
- > Number of cities present in: **110**



denims, which are a mix of knitted and woven denims.

Plans regarding new denim product range/denim category expansion

Denim is the fastest growing category in the product mix of Dare Jeans and the brand expects the momentum to continue in times to come. Dare is focusing on expanding its range and is banking on capitalising latest technological and style related trends that the market has to offer.

Primary markets & retail presence

Dare Jeans' primary markets are spread all over India. The brand is

present in Maharashtra, Gujarat, Rajasthan, Tamil Nadu, Kerala, etc. The brand believes in expanding through exclusive brand outlets and thus plans to increase the number of stores in both metro cities and growing tier-II and III cities.

Top retailers

The brand's top retailers are Pothys (Tamil Nadu), Bindals (Uttar Pradesh), Gupta Creation (Delhi), Sagar (Mumbai) and R S Brothers (Hyderabad).

Progress through online retail

Dare Jeans is present across all major retailers in the country, both vertical and horizontal. Additionally Dare Jeans also retails through online portals like Amazon, Flipkart, etc.



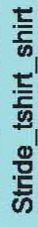


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●● DEAL JEANS ●●



A renowned women's western wear fashion brand, Deal Jeans believes in bringing fresh fashion from every fashion-forward corner of the world to the trend seekers here. Launched as a designer denim brand in the year 2000, the brand today offers 20 exclusive product categories, in around 2500 artistic styles, crafted every year. A retail venture of Deal Global Fashions Pvt. Ltd., Deal Jeans believes in empowering every girl or woman's personality with its clothing and making her stand out in the crowd.

Brand's core audience

The core target of Deal Jeans are women from 18 to 35 years and girls from 6 to 16 years, who are mainly fashion seekers, with a lot of style, attitude and flair.

Present product portfolio

The brand's Spring-Summer '18 collection is a blend of designer denims, stylish summery tops and chic party dresses. Having a strong hold on craftsmanship of designer denims, 32 percent of their collection comprises of denim wear.

Change in demand in denim over the past year or two

Women in India are more style conscious than ever before and demand trends along with comfort. Deal Jeans gives them that high fashion blended comfort element that they crave for! The key change seen in demand is that women are willing to adopt western fashion with much ease and that's where Deal Jeans comes in.



KEY INFOGRAPHICS

>Country & city of origin:
India, Mumbai

>Number of countries present in: **2**

>Year of brand launch: **2000**

>Total sales turnover in India as in
FY17-18: **₹115 crores**

>Total number of doors, the brand is
present in India (on date)

- EBOs: **21**
- SISs: **188**
- MBOs: **866**

>Number of states present in: **27**

>Number of cities present in: **243**

>Total retail space across EBOs & SISs:
33,779 sq. ft.

>Average bill/ticket size for above:
₹3,000

Top selling denim collections

The best sellers of the brand this season have been their high waisted denims, followed by floral motifs adding a pretty touch. Sporty stripes paired with distress finishes have been giving that athletic oomph this season.

New denim collections planned for the forthcoming season

Fringe effects, frayed hems, shredded trims, and western-inspired details will be reigning the forthcoming season.

Plans regarding new denim product range/denim category expansion

The brand's new denim product range for the coming season would have various new washes, embellishments, fits - slim and skinny, which would be dominating the collection. Since the distress and torn effects have worked well for the brand this season, they will continue with the trend for the coming season as well.

Primary markets and retail presence

Deal Jeans, since its inception in 2000, has grown by leaps and bounds and today has a strong pan India presence. Operating through MBOs, LFS, exports, EBOs and online distribution channels, Deal Jeans has set a benchmark in the Indian apparel market. Presently the brand is focusing on tier -II and -III cities, as it foresees immense potential in these cities. Deal is also exploring international markets to expand its presence internationally after catering to the Middle-East region.

Top retailers

Deal Jeans' top retailer are Shoppers Stop, Central and Kapsons.

Plans for exploring new markets

Deal Jeans foresees itself as a leading fashion apparel brand with an exclusive positioning in the high fashion market. The brand has so far launched 21 exclusive brand outlets in India and plans to open 20 stores in the year 2018-19. The brand is operating 1 outlet internationally in Lebanon and plans to add 4 more standalone stores in 2018-19. Deal Jeans envisages a 70 percent growth by next year and also plans to create a global presence in the coming years.

Progress through online retail

With today's generation being internet savvy, online retail has been the next big thing in the fashion industry. Growth of online shopping has helped establish the brand much faster and there are no geographical boundaries anymore. Today the brand is available at all leading online portals such as Myntra, Jabong, abof.com, Shoppersstop.com, etc.

Technology deployment/upgradation

The fashion industry is undergoing significant changes due to the digital revolution. The use of real-time data technology towards inventory management, followed by social media marketing for brand promotion and internet technology, which facilitates to sell online in a better manner, is helping to establish the brand much faster. Use of technology for superior purpose and sophisticated CRM are great opportunities for the brand.

Omni-channel presence

Dare Jeans has initiated the concept of omni-channel, which shall soon be in the process of delivering desired results.



●● HARD CURRENCY ●●

Established by Paresh Chandan in Bengaluru in 1995, Hard Currency is a denim wear brand for men. They started on a very small scale with limited manpower and production capacity. Within a short span of time they grew into a company, which is well equipped with modern machinery and a production capacity to produce half-a-million pieces per annum.

Brand's core audience

Hard Currency primarily targets 16 to 50 year old, middle-income men who are fashion conscious and appreciate quality products.

Present product portfolio

The company is primarily known as denim makers exclusively for men under two brand names - Hard Currency and 10 Pound. 100 percent of their portfolio constitutes bottom wear.

Change in demand in denim over the past year or two

In the last two years the market has become very price sensitive and unpredictable. There has been considerable demand for the coloured denims.

Top selling denim collections

The brand's top selling items are their coloured denims and ankle fit jeans. The market seems to be saturated with the blues and hence, colours are doing very well.

New denim collections planned for the forthcoming season

Hard Currency is working on introducing a youth oriented collection with bolder designs like biker denims,



KEY INFOGRAPHICS

>Country & city of origin:

India, Bengaluru

>Number of countries present in: **India**

>Year of brand launch: **1995**

>Total sales turnover in India as in FY17-18: **₹18 crores**

>Total number of doors, the brand is present in India (on date)

● **MBOs: 450+**

>Number of states present in: **6**

>Number of cities present in: **20**



doodles, paneled and specially washed denims. Apart from this they are also working on new developments in coloured denim with respect to washes.

Primary markets and retail presence

The brand's primary markets are Kerala and Karnataka. They have a very popular retail presence in both the states. Tier-II and -III cities have also shown great response.

Plans for exploring new markets

Hard Currency continues to grow and evolve as a true lifestyle denim brand. They have already started business in many new regions this year. Along with expanding the regions, they are also planning to penetrate into the existing markets with their new product portfolio.

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●● IMPACT ●●

L launched in 1996, Impact started primarily as a men's bottom wear brand and has been well accepted right from the beginning. Today with presence in more than 200 cities of India, the brand has grown many folds and has carved a niche for itself. Offering a vast product offering of jeans, trousers, t-shirts, shirts and suits for men, the brand's designs are trendy and innovative.

Brand's core audience

Impact targets men in the age group of 18 to 40 years, in both the economy and premium segments.

Present product portfolio

The brand's product portfolio encompasses a vast range of jeans, trousers, t-shirts, shirts and suits for men. Denim contributes about 25 percent of its product portfolio.

Change in demand in denim over the past year or two

The demand has been constantly increasing and still looks strong for the coming years. The shift in acceptability in all age groups and work wear culture have been a major boost for the shift in demand.

Top selling denim collections

The brand's most recognized and top selling denim collections are - fitted, faded, crinkle styles and silky plains.

New denim collections planned for the forthcoming season

The collections are usually based on the current market trend and demand. Impact follows the trends to keep up with the market.

Primary markets and retail presence

Impact's primary key markets as of now are in West Bengal, Jharkhand, Bihar, Assam, Tripura and Odisha.

Top retailers

The brand's top retailers are Adi Readymade Centre, Sodepur, Kolkata; Dwivedi Textile, Salkia, Howrah; Paradise Garments, Jamsedhpur and Jharkhand; Bombay Fashion, Rourkela, Odisha; Punjab Cloth Store, Jharsuguda, Odisha.

Plans for exploring new markets

The brand is planning to be present in the states of Andhra Pradesh and Tamil Nadu.

Technology deployment/upgradation

Impact has a few suppliers who are using laser technology for processing. They look forward to have more such partners with state-of-the-art units for best results.



KEY INFOGRAPHICS

> Country & city of origin:
India, Kolkata

> Year of brand launch: **1996**

> Total sales turnover in India as in
FY17-18: **₹12 crores**

> Total number of doors, the brand is
present in India (on date)

● **MBOs: 750+**

> Number of states present in: **7**

> Number of cities present in: **200+**



ORIGIN



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LEE JEANS

Denim wear brand, Lee is one of the world's most iconic signatures of quality, innovation and craftsmanship. Following the establishment of the H D Lee Mercantile Company by Henry David Lee in Kansas (USA), in 1889, Lee started its journey to become a legendary denim brand. Over the years, Lee has made history with its many product innovations including the world's first-ever zip fly jeans- the 101Z in 1926, the iconic Hair-on-Hide leather label and the Lazy S back pocket stitching. From the launch of the first Lee bib overalls to the 13oz 101 cowboy jeans, Lee has demonstrated an undying passion for innovation, and has transformed itself from a practical and durable work-wear maker to a contemporary and trend setting fashion giant.

Brand's core audience

The core audience for a denim brand will always be - denim lovers!

Present product portfolio

Lee is primarily a denim brand, so denims are the biggest slice of the pie.

Change in demand in denim over the past year or two

The demand is organically increasing in the denim category. A lot of new denim brands are coming into the market.

Top selling denim collections

Urban Riders for men and Body Optix for women are the brand's key collections. This summer, *Urban Riders* offer cooling through different innovations and technologies such as - Instacool, Jade Fusion and Performair.

The *Body Optix* collection offers 360 degree body shaping through a patented technique that uses laser technology to make the wearer appear slimmer and shapelier, creating a 3D transformation.

New denim collections planned for the forthcoming season

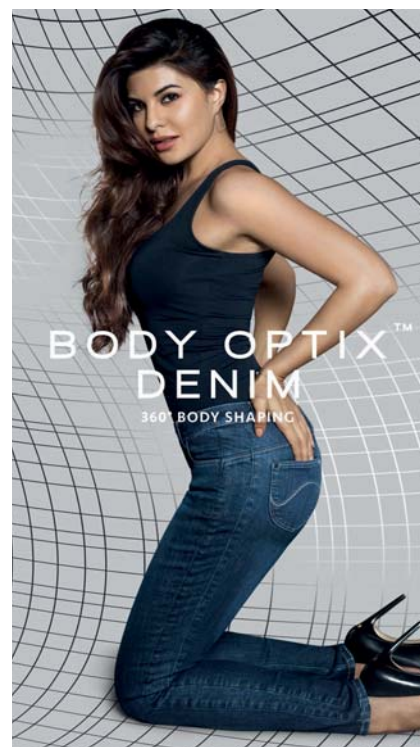
Fringe effects, frayed hems, shredded trims, and western-inspired details will be reigning the forthcoming season.

Plans regarding new denim product range/denim category expansion

Lee is introducing functional denims like all-weather and bi-stretch denims.

Technology deployment/upgradation

Since 2017, Lee has had a laser-focus on the women's category with its Body Optix collection. Body Optix™ is a denim line with styling essentials that combine the science of optics, the study of sight and the behaviour of light, with geodesic shaping, anatomy shading and anatomy warping - a patented technique that uses laser technology to make the wearer appear slimmer and



KEY INFOGRAPHICS

> Country & city of origin:

USA, Kansas

>Year of brand launch: **1889**

shapelier, creating a 3D transformation. Since it is a patented technique, it cannot be copied by other denim brands, and makes their collection unique.



N

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●● MADAME ●●

A fashion-forward brand, Madame is designed and created for all fashion lovers. The brand was founded on January 1, 1993, with its head office in Ludhiana, Punjab and corporate branch offices located at Gurugram and Mumbai. Ever since its inception, the brand has undergone notable expansion. Madame opened its first exclusive store in Mumbai in 2002. By 2010 they had 64 exclusive stores and also 600 multi-brand outlets. In 2014, they had 102 exclusive stores all across India. At present, Madame has expanded all over India with 150 exclusive stores and approximately 400+ multi-brand outlets. Madame aims to open up to 20 stores every year.

Brand's core audience

The brand's core audience consists of young, price-conscious and fashion forward women residing in the urban areas.

Present product portfolio

Madame's present product portfolio includes women's clothing, footwear, handbags and accessories. The share of denim occupies 30 percent in bottom wear and 10 percent in its upper wear range.

Change in demand in denim over the past year or two

Comfort is the new fashion and Madame manufactures denims in such a way that they provide ease to wear and also at the same time allow the customers to stay trendy. This helps in increasing the demand for denim.

Top selling denim collections

The brand's top selling denim collections include jeans and



dungarees. They are high stretch, light weight and have special detailing as per the trend. Minimal communication embroidery, minimal embellished details, double tone indigo with raw edge are the highlights of the collection.

New denim collections planned for the forthcoming season

In the forthcoming season, the brand's main focus is on silhouettes and patterns. Instead of surface developments like hardware embroideries, embellishments and any other surface ornamentations, the brand is focusing on washing techniques like - double tone indigo

shades with uneven hemline. Communicative slogans on the reverse side of the fabric at the bottom hem, printing on the pockets using communicative shimmer and lurex tape have been used this season. Another key highlights of the collection are printed pocket linings, embroidered waist bands and asymmetrical hemlines.

Plans regarding new denim product range/denim category expansion

With increasing demand of the customers for denim, the category undoubtedly will be expanded. In SS19, boyfriend, mom fit, wide legs, culottes, slim fit, skinny fit and flare fit



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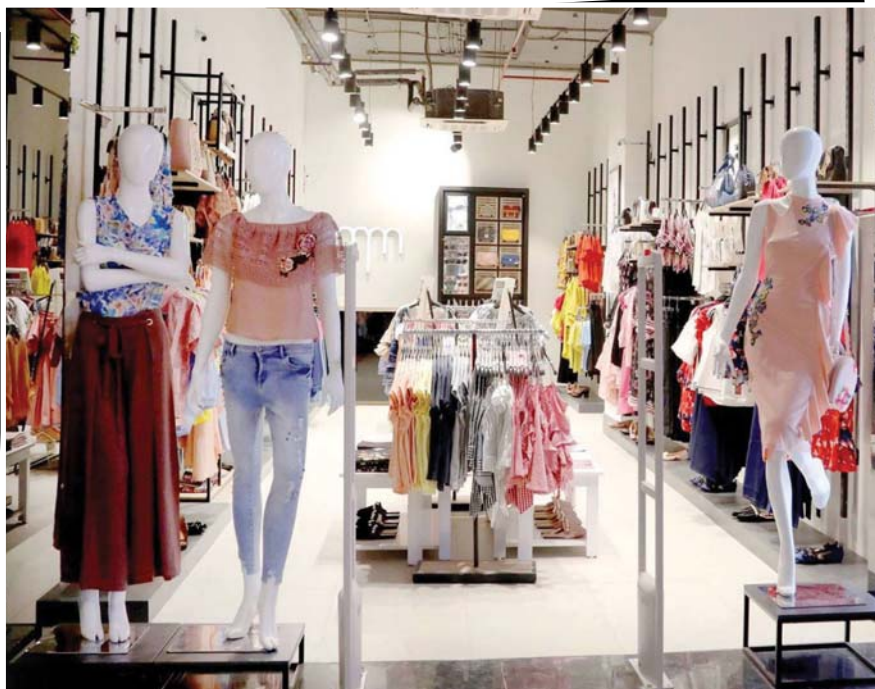
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KEY INFOGRAPHICS

>Country & city of origin:

India, Ludhiana

>Number of countries present in: **3**

>Year of brand launch: **1993**

>Total number of doors, the brand is present in India (on date)

● EBOs: **145**

● SISs: **86**

● MBOs: **400+**

● Others (LFS): **110+**

>Number of states present in: **18**

>Number of cities present in: **66**

>Total retail space across EBOs & SISs:

2,11,000 sq.ft.

>Average sales per sq.ft. per month for above: **₹1,190**

>Average bill/ticket size for above:

₹2,600

>Same store sales growth rate for EBOs: **9%**

>Name of own on-line store:

www.glamly.com

categories will be available in abundance. Use of polyester, knitted, lurex and self-made fabric tapes will be the key highlights of the collection.

Primary markets and retail presence

Investment in the store estate is the brand's key priority as Madame flagship stores account for 60 percent of the group's sales. The plan includes new openings and expansion of existing sites located in priority areas. In the next 5 years, the brand plans to focus on upgrading existing stores and opening approximately 125 new stores in the Middle East and North Africa.

Top retailers

Madame's top retailers are based in Mall Road Shimla, Patiala; Elante Mall Chandigarh; Rohtak; and Rajouri Garden in New Delhi.

Plans for exploring new markets

Exploring new markets is a perpetual task at Madame. The brand's main focus is on exploring new markets and expanding with the need. Every year Madame launches approximately 20 new stores and that's how they do exploration and expansion in a parallel manner.

Technology deployment/upgradation

The brand's online marketplace, Glamly.com houses all its brands namely - Madame, Camla, Aritzya, OPT and Msecret. Technology has positively impacted fashion business in the current scenario. The brand relies on technology a great deal, even when it comes to shopping.

Omni-channel presence

The brand recently launched its online market place, Glamly.com. The brand is also reaching out to its customers through Jabong, Myntra and Amazon and has received fruitful response.



NUMERO UNO

A great visionary and a hard core professional, Narinder Singh saw great potential in denim way back in 80's, when denim had just started making its presence felt in the country's lifestyle. With his strong aesthetics and an eye for fashion he established Numero Uno in 1987 and since then the brand has over the years grown into a dynamic and responsive icon for the youth. It was the first Indian jeans wear brand and since the past 30 years the brand is still going strong and is today one of the most admired jeans wear brands in the country.

Brand's core audience

Numero Uno being a wardrobe brand has a client base starting from 22 years till 40 years. The brand offers a good mix of merchandise to cater to such a wide band of age group.

Present product portfolio

Since Numero Uno is a wardrobe brand, they are denim lead followed by shirts, t-shirts, outerwear, footwear and accessories. Denim contributes 40 percent of the entire business.

Change in demand in denim over the past year or two

Denim being a seasonless product is always highly in demand. The brand feels that there is a technological revolution in the denim industry and new hybrid denims have forayed into the market, creating a hike in demand. In last two years jogger denims and athletic jeans are doing wonders for all brands in the domestic and international markets.



KEY INFOGRAPHICS

>Country & city of origin: **India**

>Year of brand launch: **1987**

>Total number of doors, the brand is present in India (on date)

● EBOs: **210**

● SISs: **50**

● MBOs: **170**

>Number of cities present in **150**

>Name of own on-line store:

www.numerounojeanswear.com

Top selling denim collections

Numero Uno offers three categories in denim, which include – fashion, core and premium core called Espana denim. The brand is doing very well in fashion denims and Espana denims as customers always look for a perceived value in the product they buy. Steadfastly focused towards quality, innovation and value for money, the brand is growing by leaps and bounds. They try their best to offer amazing fabrics, sourced from best mills with a superb combination of washes and supporting trims as value additions.

New denim collections planned for the forthcoming season

Denim is an all season product which always was there, is there and will be in trend forever. The versatility of this fabric allows a designer to play with it the way he desires. For the forthcoming SS'19 season, Numero Uno will be focusing on new washes and interesting detailing outside and inside the jeans. Inspired by the American lifestyle and attitude, fused with Japanese expertise of denim making shall together enable the brand to create this new collection.

Plans regarding new denim product range/denim category expansion

Numero Uno launches new product every season or two. For instance, their super light denim range, which is called Zero Gravity jeans is doing great wonders for the brand. Expansion is a continuous process at Numero Uno and they are growing substantially every year. They work on their sales strategy every quarter and put it into action.

Plans for exploring new markets

The brand plans to expand in East and Central India through franchisees, EBOs model and SIS.

Technology deployment/upgradation

Numero Uno has always been very concerned about the eco system and thus has a state-of-the-art manufacturing facility with ETP with almost zero wastage and zero polluted water. Their biggest technological revolution is their 'One Glass Water Jeans' which save and conserve water for the betterment of the society and the eco-system.





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●● PARX ●●

A men's casual wear brand from the house of Raymond, Parx addresses the complete fashion and lifestyle needs of millennial men. The brand was launched in 1999 and is today one of the most preferred casual wear brands offering continuous innovations infused with international trends and styling. It is positioned to meet the consumer's needs for all day wardrobe solutions, which are addressed through categories like casual, denim, black stag and play.

Brand's core audience

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

Present product portfolio

Parx offers all day casual wear solutions in shirts, knits, trousers, suits and jackets, active wear and denims for the young audience.

Change in demand in denim over the past year or two

Fashion denim has shown a good growth. High fashion washes and special fabrics have been the best contributors in this category.

Top selling denim collections

The top selling denim collections by Parx consist of - eco denim (recycle PET, PCW, chemical free wash), yoga denim and the premium collection known for their fits and feel.

New denim collections planned for the forthcoming season

For the upcoming season, Parx plans to launch Chrome Denims (coloured denims/dyed weft), X-fit (bi-stretch denims) and Smart Denims.

Top retailers

Central, Reliance Trends, Shoppers Stop, Brand Factory and Mega Mart.

Plans for exploring new markets

Parx is planning to enlarge its presence by opening 25 to 30 EBO's in FY 2018-19 under the FOFO model, which will help increase Parx's reach in the market in tier-II and -III cities. This will also help in boosting the sale through other channels, especially MBO's, which have 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.

Technology deployment/upgradation

Technology across different product categories has helped the brand immensely. The brand has adopted various technological innovations in yarns and finishes such as bi-stretch in trousers (product marketed by Yoga Chinos in SS '18); bi-stretch in denims (product marketed by Yoga Denims in SS'18). Bamboo/Tencel etc., fibers are used in the shirting range, which has enhanced usage for the end customers.

Parx has also adopted various innovations in denim fabric. They use Lyocell, a regenerated, biodegradable fabric made from bleached wood pulp; Modal, made from sustainable harvested beech trees; organic cotton, made without the use of synthetic pesticides, fertilizers and GMOs, produced with 84 percent less water and no toxic dyes; PCW, a yarn made from PCW like old denim clothing, which requires 10 times less water usage.

The brand also employs recycled pet bottle technique, where 8 bottles make one pair of jeans and reduce carbon footprint by 2.5 times.



KEY INFOGRAPHICS

>Country & city of origin:
India, Mumbai

>Number of countries present in: **India**

>Year of brand launch: **1999**

>Total sales turnover in India as in FY17-18: **₹218 crores**

>Total number of doors, the brand is present in India (on date)

● EBOs: **20**

● SISs: **177**

● MBOs: **650**

● Others: **820 (The Raymond Shop)**

>Number of cities present in: **650**

>Total retail space across EBOs & SISs:
17,000 sq. ft.

>Average sales per sq. ft. per month for above: **₹10,399**

>Average bill/ticket size for above:
₹3,125

>Name of own on-line store:
www.raymondnext.com

>Share of sales from on-line: **4%**

Omni-channel presence

Parx has adopted a multi-channel sales approach that provides the customer with an integrated shopping experience. The customers can either shop online from a desktop or mobile device on raymondnext.com, or from the brand's exclusive outlets, lifestyle stores, multi brand outlets or the Raymond shop, and the experience will be seamless.





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Salve Mannequins Co.

●● PEPE JEANS ●●

Founded in 1973, Pepe Jeans is a brainchild of Shah brothers from Kenya - Nitin, Arun and Milan Shah who revolutionized London's fashion scenario by creating stylish and trendy jeans unlike the customary ordinary looking denim available in those days. In 1989, Pepe entered India and quickly captured the imagination of the 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 they are committed to reinventing denim fashion, using new washes and innovations season after season.

Pepe Jeans London is at the forefront of international denim-led fashion with every collection season on season. This has been possible because of the brand's commitment to create strong fashion led collections, the hottest multimedia marketing campaigns and the most exciting retail environments while remaining sincere to the Pepe Jeans DNA and in particular to its roots in London's Portobello Road from where the brand originated.

Brand's core audience

Pepe Jeans is for the young at heart. The brand caters to the fashion forward men and women who want stylish and trendy denims that fit well and are affordable. The quality, fabric, fit, color, wash, price, feel, etc., together influence the customer's purchase decision.

Present product portfolio

Pepe Jeans India manufactures a vast range of chic, casual wear for men, women and kids. Jeans being their core

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

Change in demand in denim over the past year or two

Owing to its versatility, stylishness and comfort factor and the extensive choices which are available in fabric, colors, fits, finishes and functionality, denim is a high growth category. Pepe Jeans foresees a growing demand of denim, and is doing various innovations to create the best in denim

wear that may appeal to its target audience, as well as for acquiring new customers.

New denim collections planned for the forthcoming season

Men's and ladies denim wear will consist of interesting washes with stylish fits. The brand has created classic denim pieces that can be worn everyday. In terms of colours, deep dark blues with blue tones, greys and camel tones are the key highlights. Pepe Jeans has introduced a new range of denims called 'Wiser Wash' in a bid of being conscious towards the environment. These eco-friendly denims minimize water consumption





KEY INFOGRAPHICS

>Country & city of origin:
UK, London

>Year of brand launch: **1989 in India**

>Total number of doors, the brand is present in India (on date)

- EBOs: **234**
- MBOs: **1,350**

>Number of states present in: **13**

>Number of cities present in: **21**

and do not compromise on the overall look and feel of denim.

Plans regarding new denim product range/denim category expansion

Innovation is at the heart of everything the brand does. Pepe Jeans makes constant endeavor to introduce products that are in keeping with the latest trends and ensure maximum comfort.

Primary markets and retail presence

Pepe Jeans is present across India in 13 states and 21 cities and for them all their markets are very important. The brand is planning to open about 40 to 50 stores in the next 2 to 3 years across the country.

Plans for exploring new markets

The brand plans to increase the number of stores in both metro cities as well as growing tier -II and -III cities, with an increased focus on brand outlets.

Progress through online retail

Consumers today buy from varied channels. They shop not only from just an EBO but also from a departmental store or even online. Pepe Jeans believe that e-retail and brick and mortar stores are not competing ideas. They are making constant endeavour to understand their customers and leverage technology to evolve the customer experience. Currently Pepe Jeans e-retails through partners like Myntra, Jabong, Amazon, Flipkart, Cilory and Ajo. Their objective is to ensure that their consumers have a 'wow' experience every time they shop from Pepe Jeans - be it through the stores or via e-retail.

Technology deployment/upgradation

Technology is critical in both - the front-end and back-end of the business. While reviewing the front end, the brand is proud to confirm that they are one of the first denim brands in the country to offer a denim customization service to their customers.

Pepe Jeans' custom studio allows the customers to step into the design seat and customize their denim in a few easy steps. At first, they have to pick a laser print to be tattooed on the denim. Next choose the fastenings - be it buttons, rivets or tacks. Then select the brush of the garment and where exactly they want it. Lastly, they are required to choose the colours they want the print to be in. Pepe Jeans' customization service empowers the customer with the opportunity for personalization; and therein lays a powerful tool that will revolutionize denim fashion in India. Currently, the Pepe Jeans custom studio facility is available at 5 locations across India, at their flagship stores in Mumbai, Delhi, Gurugram, Bengaluru and Kolkata.

In terms of back-end, the brand has the ability to predict fashion. They have tied up with Stylumia, a fashion analytics site that goes to all the websites and gathers data on which styles are considered 'in' at the moment and which colour and style is selling well. This helps in decoding the consumer buying needs. With this tool, Pepe Jeans is able to tap crucial information to predict current fashion in a better way, to get the right kind of merchandise and understand the global trends. All these factors really help in moving from art to art and science, and this mixture of art and science helps the brand to become more productive.



●● PUFF ●●

Incorporated in 1989 by Mehta Garments, Puff was among the first denim brands created in India. Having launched Puff so early, the company is credited as being one of the few companies in Ahmedabad that started the revolution in the ready-to-wear garment business. Today, it stands tall amongst the few large branded apparel manufacturers in India.

Brand's core audience

The brand is targeted at men in the age group of 18 to 50 years.

Present product portfolio

Puff is known for its range of basic denims that come in a variety of fits and washes. In denims, rather than indigos the brand has a lot of pastel colors in ecru denim. The brand's denim collection commands a share of about 25 percent of the total product portfolio.

Collections planned for the forthcoming season

Innovation has been the hallmark of Puff trouser collection. For the forthcoming seasons too, the brand's design team has worked strongly on creating an electrifying array of product lines in a variety of fabrics and cuts, using the latest technology and processes.

Plans regarding new cotton chinos product range or category expansion

The brand is launching trendy fabrics in ankle length and smart slim fits with a bit of touch up patterns that exude an all-time-wear look. The brand also aims to utilize more of imported fabric like Fourway lycra and fabric made out of Modal yarns.



Retail presence & future expansion plans

Puff is currently expanding its distribution network in East India, Bihar and Assam.

Top retailers

Puff's key retailers are Pothys, Incense and Charmas.

Plans for exploring new markets in India

Puff is vying to expand its presence in Bihar, Uttarakhand, Jharkhand, Karnataka, Tamil Nadu, Kerala and Assam, where it is currently not present. In addition, the brand aims to start export businesses and is looking at the US as a market for supplying its products. Overall, the brand plans to expand its presence throughout the country with its existing product range.



KEY INFOGRAPHICS

>Country & city of origin:
India, Ahmedabad

>Year of brand launch: **1989**

>Total number of doors, the brand is present in India (on date)

● **MBOs: 700**

>Number of cities present in: **25 (tier-I); 65 (tier-II); 45 (tier-III)**

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●● POISON JEANS ●●

Established in 1980 with primary focus on basic denims for men, Poison jeans has over the years evolved immensely. The brand is becoming synonymous with superior quality, fabric innovations and perfect fit. Today Poison Jeans is regarded as one of India's fastest growing denim companies and stands for its youthful styling and cutting edge appeal. The brand, which so far focused on basic denims is now also introducing a highly fashionable and trendy denims range for men.

Brand's core audience

Poison products are suitable for all age groups of men who like fashion.

Present product portfolio

Poison is specifically doing men's denim jeans. The range consists of basic denims, jog denims, dobby and fashion denims. Denim occupies 100 percent share of its product portfolio.

Change in demand in denim over the past year or two

The Indian denim industry has evolved over the years. The demand for denim is ever increasing and there can be no replacement for denim. More and more people are switching over to jeans. Even the older age group prefer wearing denims nowadays.

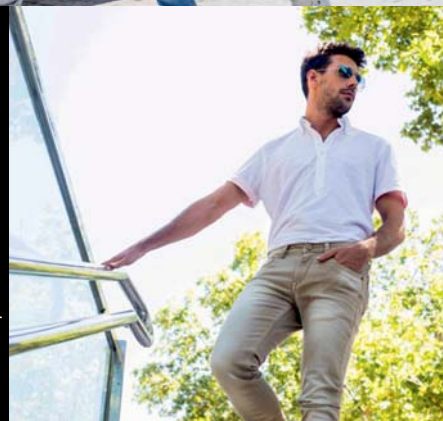
Top selling denim collections

The brand's topmost selling denim collection is their range of coloured denim chinos. The highlight of product is that these come in about 32 pastel colors, which is a very new concept in denim. The collection features chic styles, detailed cuts and a variety of contemporary fits.



KEY INFOGRAPHICS

- > Country & city of origin:
India, Mumbai
- > Number of countries present in: **India**
- > Year of brand launch: **1980**
- > Total number of doors, the brand is present in India (on date)
 - SISs: **100**
 - MBOs: **1,000**
- > Number of states present in: **20**
- > Number of cities present in: **150**



New denim collections planned for the forthcoming season

After the success of their color denim chinos range, the brand is now coming up with linen look denims, khadi look denims, and structured look denims in various color options.

Primary markets and retail presence

Poison Jeans is prominently present in Maharashtra, Gujarat, Andhra Pradesh, and other states. The brand is also planning to soon enter the North East states of India.

Top retailers

R S Brothers, Hyderabad; J.C Brothers, Hyderabad; Pothys, Chennai; Jai Hind, Pune; and G3 Fashions, Gujarat.

Technology deployment/upgradation

The brand's recent initiative is expansion in it's finishing department, where they have installed automated iron machines.





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●● ROOKIES ●●

Launched in 2009 by Finesse Fashion Pvt. Ltd., Rookies offer a premium range of men's denim. Its promoter, Ramnish Verma is the visionary behind the birth of the brand and along with his design team he has gradually nurtured the brand and created a space for itself in the competitive market. Rookies is currently sold along with all major brands in the country. Offering a perfect fit, feel and appearance, Rookies jeans are created for those who like a glamorous, sophisticated look with an urban touch and casual feel.

Brand's core audience

Initially the brand was targeted towards youth and youngsters who crave for international fashion. But over the years the acceptance is seen across all age groups.

Present product portfolio

The strength of Rookies are its denims and cargoes. The brand has also added shirts and t-shirts to complete the wardrobe. They are also slowly creating their own exclusive spaces to increase their share steadily in the retail arena.

Change in demand in denim over the past year or two

The demand for denims has gone up in the last two years and is showing an upward graph every season.

Top selling denim collections

Rookies is known for its jog/knitted denims and the distressed denims, which have enabled the brand to create a name for itself in the denim industry.

New denim collections planned for the forthcoming season

The brand has ventured into new fits as per the market requirement. Sprinsteen, the ankle length denim



and Zeppelin are the brand's new collections for the upcoming season.

Plans regarding new denim product range/denim category expansion

Denim joggers and style pants are creating their own space in the youth category. Rookies is planning to add new fits and also an elite range for the matured customers.

Primary markets and retail presence

Rookies has a wide presence in the markets of Mumbai, Gujarat, Punjab and upper North, Delhi, West Bengal, Chattisgarh and Andhra Pradesh. The brand is slowly and steadily nurturing other states as well, as per its capacity to supply.

Top retailers

The brand has presence at Lifestyle and all other major retailers across India.

Plans for exploring new markets

Rookies is majorly looking into expanding in tier -II and -III cities, which are slowly catching up with international fashion.

Progress through online retail

The brand has not been very aggressive retailing online, but is still present in major e-commerce portals.



KEY INFOGRAPHICS

>Country & city of origin:
India, Mumbai

>Number of countries present in: **5**

>Year of brand launch: **2009**

>Total sales turnover in India as in FY16-17: **₹25 crores**

>Total number of doors, the brand is present in India (on date)

- EBOs: **2**
- SISs: **125**
- MBOs: **750+**

>Number of states present in:

Pan India

>Number of cities present in:

All cities

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●● SHERIFF ●●

The men's wear brand, Sheriff started by making only shirts for men way back in 1985.

Later t-shirts and then more products, including denim were added in its portfolio to offer a complete menswear range to the consumers. Today, the brand holds a strong position in North and East India. Featuring the best of fabrics, cuts and styling, the brand Sheriff takes pride in providing contemporary fashion and high-value garments at affordable prices.

Brand's core audience

The brand's target consumers are the young, dynamic urban males who have a taste for quality and fashion.

Present product portfolio

Sheriff is a complete menswear brand, with denim holding a strong position in it's portfolio. The brand's denim range occupies 24 percent of its overall product portfolio.

Change in demand in denim over the past year or two

Denim is going strong and there is no looking back. Denim is taking over the casual wear and is also becoming a hot favourite for the corporates and travellers as well. The brand is also expecting an aggressive growth in this category.

Top selling denim collections

The best sellers of the brand this season are the basics, core and more.



KEY INFOGRAPHICS

- > Country & city of origin:
India, Kolkata
- > Year of brand launch: **1985**
- > Total number of doors, the brand is present in India (on date)
 - EBOs: **15**
 - MBOs: **400+**
- > Number of states present in: **10**
- > Number of cities present in: **35**

New denim collections planned for the forthcoming season

For this coming season, the brand is experimenting with new colours and new fits and there has been much appreciation of the collection. They are keeping it simple. The brand is also working on sweat free, infinity stretch and organic denims.





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•• SIN DENIM ••

Sin Denim is the flagship brand of Clothing Culture Ltd., the textile and apparel division of Balkrishna Industries.

Launched in 2013, Sin Denim is a premium menswear brand designed by Italy's premier fashion house, Studio Moda Creativa at Milan. With a vibrant and young design team in India, the brand presents fresh fashion and latest trends for the youth and has been welcomed with open arms everywhere. From presence in multi-brand outlets to an established large format stores, the brand has created a continuous buzz for its quality and creativity, through out its journey so far. Today Sin Denim is one of the most sought after denim brands in the country.

Brand's core audience

The brand targets 18 to 25 years old men who love fashion to the core. Their target is experimental and edgy and do not follow any rulebook.

Present product portfolio

The brand's present portfolio comprises 50 percent jeans, 30 percent casual shirts and the balance 20 percent constitutes cotton trousers, t-shirts and jackets.

Change in demand in denim over the past year or two

Sin Denim is specially designed keeping in mind the requirement of the youth of today, who are ever ready to try out new fashions in denim. This makes the brand very popular amongst the country's youth and they have had their endorsement year after year, which propels the brand to surge ahead.

Top selling denim collections

The Stubborn Black collection, which is a jet black denims range of Sin Denim has been a consistent performer. Apart from this their indigo collection as well as the light coloured denims are doing extremely well.

New denim collections planned for the forthcoming season

Track Denims, zero denims and radiums are the proposed new and exciting introductions that the brand is working on this season.

Primary markets and retail presence

Presently, the brand is very strong in the southern, eastern and northern markets. They also plan to make their presence felt in the non-represented markets in the coming year.

Top retailers

Sin Denims is doing well in large format stores like Central and Reliance Trends, apart from all other leading MBO'S in the markets mentioned.



KEY INFOGRAPHICS

>Country & city of origin: **Italy**

>Number of countries present in: **10**

>Year of brand launch: **2013**

>Total number of doors, the brand is present in India (on date)

● EBOs: **10**

● SISs: **150**

● MBOs: **1,400**

>Number of states present in: **25**

>Number of cities present in: **500**

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●● STRANO JEANS ●●

Denim brand, Strano was launched in 2016 by its co-founders, Dhiraj Patel and Late Karsanbhai Mota, who had been into the business since 1998. After having achieved great success in men's formal wear and establishing Slazer, the founders felt that along with the formal trousers, the Indian fashion savvy youth also desires to have more denim in his wardrobe. Thus, the brand Strano was introduced to cater to the mass audience with high-end jeans. Strano is a mix of technology and creativity and has grown significantly as a distinct denim player in the Indian market.

Brand's core audience

The brand targets all customer segments. The basics are worn by the elderly customers and fashion by the teenagers.

Present product portfolio

Strano's denim collection features different types of fabrics in trendy styles. Imported denims in different colours too are available at a decent price range.

Change in demand in denim over the past year or two

There has been a tremendous increase in sales of basic denims. Denims in different colours too are in great demand.

Top selling denim collections

The brand's highest selling collection is their basics range, which comes in a variety of colours and is affordable in terms of price.

New denim collections planned for the forthcoming season

The brand is constantly innovating to introduce various kinds of fabrics. They also plan to launch an imported range



of denims in different colours, torn denims and fashion denims.

Plans regarding new denim product range/denim category expansion

Strano Jeans plan to introduce a new range in basic denims and different colour ranges.

Primary markets and retail presence

The brand has a strong presence in Delhi, Punjab, Haryana, Maharashtra, Andhra Pradesh. The brand lays more focus on B- and C- tier cities.

Top retailers

The brand mainly retails through the following retailers - Narang Garments, Delhi; Raj Menswear, Tumsar, Nagpur; Shri Naresh Cloth Showroom, Tanuku, Vijaywada; Softwear Marketing, Vijaywada; Zamkudi, Borivali.

Plans for exploring new markets

Strano Jeans plan to go personally to each retailer for their feedback and for marketing their products.



KEY INFOGRAPHICS

>Country & city of origin:

India, Mumbai

>Number of countries present in: **India**

>Year of brand launch: **2016**

>Total sales turnover In India as in FY17-18: **₹5 crores**

>Total number of doors, the brand is present in India (as on date)

● MBOs: **500**

>Number of states present in: **10**

>Number of cities present in: **150**



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For Trade/ Franchise Inquiries Contact:

Delhi Off:
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•• SUCCESS ••

Established in 1996 by Agwani Fashion Pvt. Ltd., Success is a men's fashion brand. Today, the brand has come of age assembling a complete men's wardrobe, consisting primarily of suits, blazers, jackets, waist coats, shirts, trousers, denims and accessories, broadly classified into formal, casual and party-wear segments. Their garments are handcrafted using unique skills that the modern world considers archaic or lost, providing a carefully made clothes inspired from Saville Row Tailoring. They pay heed to the versatile needs of today's man and equal importance is given in terms of style, fabric, durability and price.

Brand's core audience

Success caters to middle class as well as upper class customers. Their denim range targets young customers 18 years old and above.

Present product portfolio

Basically the core products of the brand are suits, blazers and trousers. Their product range also includes shirts, t-shirts and denims. The denim wear is chic and trendy that promises quality, comfort and style and contributes around ten percent of its product range.

Change in demand in denim over the past year or two

The demand of denims is on the downward side as far as Success is concerned. On the contrary in the denim segment "RFD's" demand has increased tremendously.

Top selling denim collections

The brand's top selling denims collections are its knitted denims and RFD'S.



New denim collections planned for the forthcoming season

The brand plans to introduce various different varieties of knitted denims and new colours in RFD'S and torn denims.

Plans regarding new denim product range/denim category expansion

Success is working on developing new styles and newer fabrics and plan to expand their denim category, but at a slower pace, as they are more popular as a formal brand.

Primary markets and retail presence

As of now the brand's retail platform (EBOs) are limited to the eastern part of India. They are also present in few renowned Large Format Stores throughout the country.

Plans for exploring new markets

Success intends to enlarge its presence on a pan India basis, and also focus across tier -II and -III cities in India.



KEY INFOGRAPHICS

>Country & city of origin:

India, Kolkata

>Year of brand launch: **1996**

>Total number of doors, the brand is present in India (on date)

- EBOs: **25+**
- SISs: **10+**
- MBOs: **375+**

>Number of states present in: **10+**

>Number of cities present in: **40+**



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•• SUNNEX JEANS ••

Established in the year 1980 by Annapurna Apparels Ltd., Sunnex Jeans is one of the pioneers in the denim industry. The brand has grown steadily over the years and has a very strong presence in the domestic south and west markets. Sunnex jeans also has a dominant presence in the Gulf region with consumer loyalty leadership in countries like UAE, Oman, Qatar, Kuwait, Bahrain, Saudi Arabia, etc. Equipped with impeccable manufacturing facilities and in-house dedicated departments for design, research and development, sampling and merchandising enables them to produce high quality denim and cotton casuals.

Brand's core audience

The brand's core audience comprises men in the age group of 21 to 40 years.

Present product portfolio

The brand's product basket includes a wide range of denims, cotton trousers and shirts. Denims occupy more than 65 percent of their overall sale percentage.

Change in demand in denim over the past year or two

The demand has been slowly gaining momentum in the value fashion segment. People look forward to discount festivals, etc. where you get a good branded product but at a fraction of its real value.

Top selling denim collections

The Sunnex fashion range is very popular. They have also come up with a new type of fashion range which is design trademarked. It's an innovation that was missing in this industry for a long time.



KEY INFOGRAPHICS

- > Country & city of origin:
India, Mumbai
- > Number of countries present in: **9-10,**
- > Year of brand launch: **1980**
- > Total number of doors, the brand is present in India (on date)
 - EBOs: **3**
 - SISs: **7**
 - MBOs: **885+**
- > Number of states present in: **12-14,**
- > Number of cities present in: **125+**
- > Name of own on-line store:
www.sunnexjeans.com



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TEXAS

Established in the year 1992 by Detail Clothing Ltd., Texas offers the best in lifestyle fashion, with products ranging from denims, trousers, shorts and casual shirts. The brand has, in a short span of time, made its products available in 18 states with more than 900 multi brand outlets across India.

Brand's core audience

The brand offers a plethora of fits and styles, which can be worn by an 18-year old college student to a 60 year old grandfather.

Present product portfolio

The brand's product basket comprises of jeans, trousers, shorts and casual shirts for men made in finest of fabrics and styles. Denims occupy almost 70 percent of the entire portfolio, be it denim bottoms or denim shirts.

Change in demand in denim over the past year or two

Over the past couple of years the demand for denims has surely increased considering the fact that many corporates have moved to a casual approach towards what their employees wear to work.

Top selling denim collections

The brand's range of color denims, which are being manufactured with multiple fabrics and look options, have been well appreciated and are selling well. These denims give a look of classic chinos along with comfort of denims.

New denim collections planned for the forthcoming season

For the forthcoming season, the brand is coming up with a new collection



KEY INFOGRAPHICS

>Country & city of origin:

India, Mumbai

>Number of countries present in:

3-4 countries

>Year of brand launch: **1992**

>Total sales turnover in India as in FY17-18: **₹15 crores**

>Total number of doors, the brand is present in India (on date):

- EBOs: **7**
- MBOs: **893+**

>Number of states present in: **15**

>Number of cities present in: **70-80**

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

>Average sales per sq.ft. per month for above: **₹700**

>Average bill/ ticket size for above: **₹1,200**

>Same store sales growth rate for EBOs: **5%**

of denims in different colors for its customers. Texas Jeans is also experimenting with different fits, with the introduction of Ankle Fit and Easy Fit, to name a few.

Plans regarding new denim product range/denim category expansion

The main aim of Texas jeans is to provide its customers a fresh look and a quality product, at the most affordable prices possible.

Primary markets & retail presence

The brand has a very strong presence in states like - Kerala, Andhra Pradesh, Goa, with presence in almost all the top end shops.

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•• URBAN BLACKBERRYS ••



The latest offering from the house of India's leading menswear brand Blackberrys - *Urban* was launched to offer denim wear with other wardrobe essentials. The brand offers hipster wear to the audacious, confident and expressive youth. While, the parent brand, Blackberrys is well known for its formal wear and party wear, they identified the growing needs of the free-spirited men of today. The *Urban* collection speaks to the curious tribe that follows trends and constantly evolves in the fashion journey.

Brand's core audience

Urban Blackberrys caters to the young and free spirited men who prefer dressing in hipster style. It is for those candid and confident young men who seek denim wear, statement shirts, tees and trousers. The brand's core audience comprises men of 18 to 25 years age group.

Present product portfolio

The brand's product basket stocks a wide range of denims, shirts, t-shirts, trousers, knits, jackets and shorts.

Change in demand in denim over the past year or two

Urban Blackberrys is Blackberrys youngest offering in the market and has grown 125 percent in volume in the last financial year. The numbers have definitely increased as they increased their style options in their signature fit options.

Top selling denim collections

This season, *stay black*, *grey washes*, *knitted denims*, *tinted* and *ice washed denims* are most in demand. The stay black range retains the blackest black for a longer time, while the ice wash collection features an extreme washed out look.



Urban Blackberrys as a brand has offerings which are close to the runway collection, which are fashionable yet commercial.

Top retailers

Kapsons, Jade Blue, J C Retail, Sree Shivam and Pothys.

Plans for exploring new markets

The brand plans to expand horizontally and vertically alike, with both exclusive stores and dealer networks. At the moment they are planning to launch 15 COCO and 35 FOFO Urban Blackberrys exclusive stores. They will be close to a 150 module format by July'18 and would be adding another 80 doors by January'19 with the launch of their SS'19 collection.

Progress through online retail

Urban Blackberrys is working along with channel partners for their online retail along with their own website which offers their latest collection. The brand feels that online retail has great potential and they look forward to embracing it.

Technology deployment/upgradation

In terms of their marketing strategy, the brand uses all media vehicles with huge presence in the digital space. A 360 degree marketing approach leading to best of the class consumer experience is the route for new opportunities. The brand is very active in the digital space, and also introduces various in-store activities for consumer engagement.

Omni-channel presence

The Indian retail industry has emerged as one of the most dynamic and fast paced industries in India. At present Urban Blackberrys is on an expansion mode, where the plan is to have more expansion with the physical stores as well as through online portals.



New denim collections planned for the forthcoming season

The brand has taken onboard talents and services from international platforms to provide a premium collection. Their selection is based on the superiority because of the fabrics with long cotton fibres. The fabrics have a superior hand feel and better colour wash effects and colour depth. Hyper-fused detailing is also the key forthcoming feature in their upcoming collection along with sprayed denims, which gives a richer handcrafted look.

Plans regarding new denim product range/denim category expansion

There is a huge opportunity in exploring denim wear. At Urban Blackberrys, they aim to draw at least 30 percent of sales from denims in this financial year. Men look for a great fit, and that's the whole idea when it comes to identifying what they seek. The brand believes in not only giving multiple options but also in defining the ultimate fit options.

Primary markets and retail presence

Urban Blackberrys's core audience are late millennials and Gen Z. There is a potential gap in the market, that caters to the needs of this audience.



KEY INFOGRAPHICS

> Country & city of brand origin:

India, Delhi

> Year of brand launch: **1987**

> Total number of doors, the brand is present in India (on date)

● EBOs: **210**

● SISs: **50**

● MBOs: **170**

> Number of cities present in: **150**

> Name of own on-line store:

www.numerounojeanswear.com

●● WESTSIDE ●●

Established in 1998 as part of the Tata Group, Trent Ltd. operates Westside, one of India's largest and fastest growing chain of retail stores. The company has already established 129 Westside stores measuring 8,000-34,000 sq. ft. across 63 cities. The Westside format offers an exclusive range of its own branded fashion apparel and continues to be the mainstay of the retailing business of the company.

Present product portfolio

Operating with a predominantly exclusive brands model, Westside offers apparel, footwear and accessories for men, women and children, along with cosmetics, lingerie, furnishings, décor and a range of home accessories.

Plans for exploring new markets

Westside is present in 57 cities and have a pan India presence through their online partner Tata Cliq. Since numerous micro-markets with significant growth potential are emerging across India, Westside continues to monitor opportunities in these micro-markets and establish presence as appropriate.

Progress through online retail

Westside retails online exclusively through Tata Cliq.

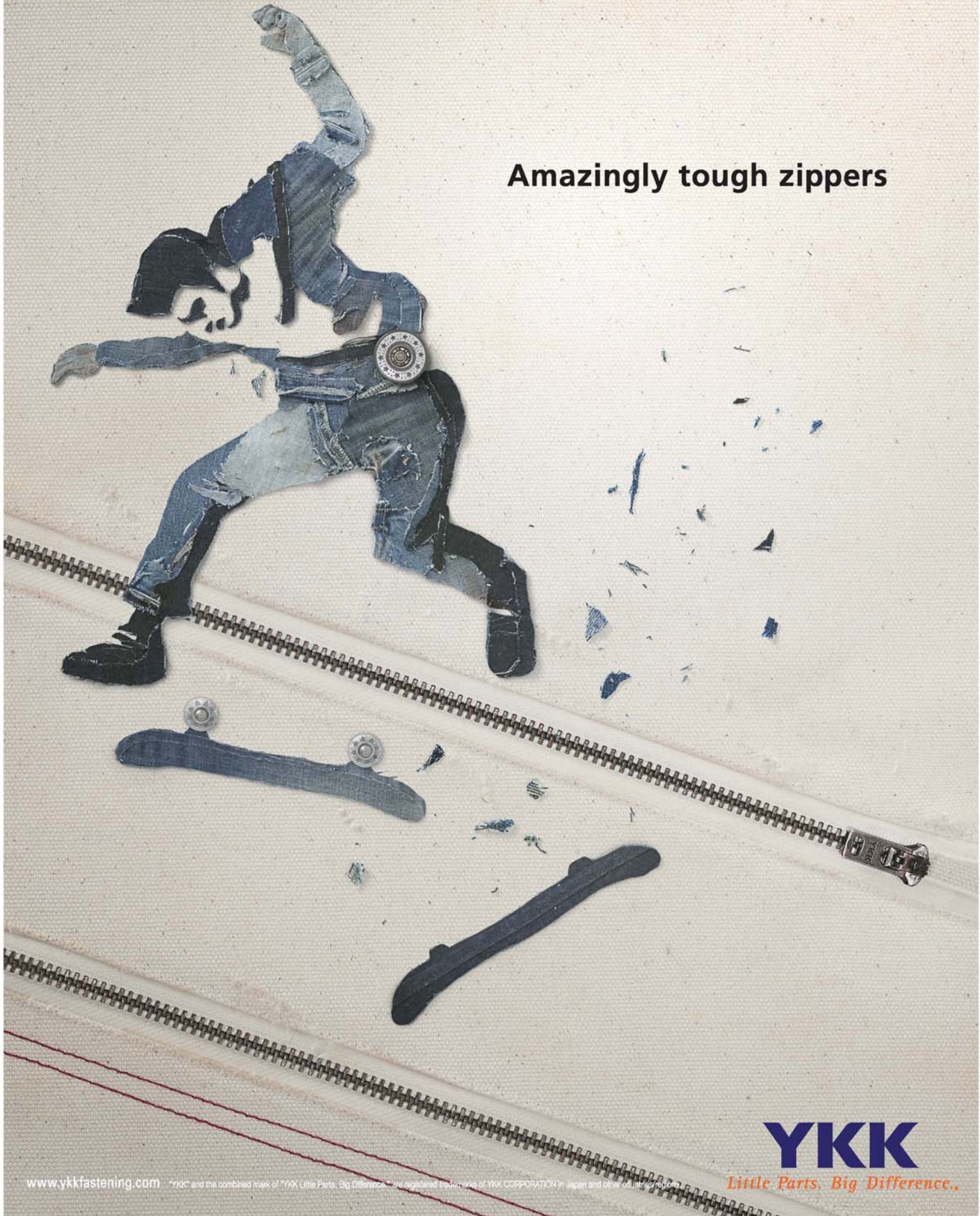


KEY INFOGRAPHICS

- > Country & city of origin :
India, Mumbai
- > Number of countries present in: **India**
- > Year of brand launch: **1998**
- > Total number of doors, the brand is present in India (on date)
● EBOs: **131**
- > Number of cities present in: **57**
- > Total retail space across EBOs:
15-30,000 sq.ft. per store
- > Name of own on-line store:
www.tatacliq.com/westside

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WOODLAND

The brand 'Woodland' owned by Aero Group was started in Quebec, Canada for making winter boots. They entered India in 1992 when the Indian footwear market and created a new category of specialized 'outdoor adventure sports' shoes. The success of their shoes encouraged them to explore new segments like clothes, handbags, and the like. Woodland also offers a high quality range of denims for both men and women. The collection is very fascinating and is available in varied colors options such as dark blue, ice blue, black and grey priced at ₹2,000 and above.

Brand's core audience

Woodland caters to the urban youth (both men and women) looking out for adventure and are aged between 17-25 years, who are mostly students, college kids and professionals.

Primary markets and retail presence

The brand targets malls and main markets of the tier-I, -II and III cities for Woodland stores. Since their products are of premium category, Woodland opens its stores only in the posh areas of metro cities. The brand is planning to set up shop-in-shops with existing retailers in countries like Canada and South Africa, where retail is fairly organized.

Plans for exploring new markets

Woodland is planning to add another 60 stores in this financial year that would be an equivalent combination of small towns and metros. The brand is currently working on entering more foreign countries in the near future to increase its International presence.



Progress through online retail

Woodland's online sales are growing at a faster rate and they expect them to grow to 40 per cent within the next three to four years. The brand plans to concentrate on a seamless approach via available shopping channels, i.e. mobile internet devices, computers, brick-and-mortar stores, television, radio, direct mail, in-store experience and so on.

Technology deployment/upgradation

Woodland has been collaborating with social media influencers and expanding their online stores. The brand has received significant response from their aggressive use of the digital medium.

KEY INFOGRAPHICS

- > Name of the brand: **Woodland**
- > Name of the company: **Aero Group**
- > Year of brand launch: **1960**
- > Country & city of brand origin: **Quebec, Canada**
- > Number of countries present in: **More than 40 countries.**
- > Total Sales Turnover in India in FY17-18: **₹1,200 crores**
- > Own on-line store: **woodlandworldwide.com**

Omni-Channel Presence

The brand's online sales are growing at a faster rate and they expect it to grow to 40 per cent in three to four years. Their EMI scheme for online sales has proved very beneficial for the brand, and is in fact one of the prime reasons for the growth of their online sales.

Soon after the scheme was launched, it generated a tremendous response from the customers. Nearly 15 percent of the brand's sales are now being done through this scheme.



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●● YELLOW JEANS ●●

Launched in 2009, Yellow Jeans exemplifies the raw masculinity of denim with smart street-wear panache. Incorporating international trends and the latest in fashion technology, the collection at Yellow Jeans is a combination of good quality, fit, fashion and price. The brand is passionate to work with the timeless innovations and is continuously evolving to create beautiful products with stylish cuts and innovative washes. Craftsmanship and innovation have been at the heart of everything that Yellow Jeans does.

Brand's core audience

The brand caters to the large youth population from the age group of 18 to 40 years, with rising disposable income and awareness towards fashion.

Present product portfolio

Currently the brand is making shirts in both denim and non denim, shorts, jeans and denim jackets (waist coats). Denim occupies 65 percent of their overall business.

Top selling denim collections

The ankle length jeans, the ripped denims with raw bottom edges, the earthy coloured denims, the slim fit jeans are some of the top selling denim collections of the brand.

New denim collections planned for the forthcoming season

The brand has introduced coloured denim bottoms, which include 5 to 6 different colours, other than the regular indigo blue and black denims.

Plans regarding new denim product range/denim category expansion

Yellow Jeans is starting a customised women's wear denim collection. It includes dresses, denim jeans, tops, shirts, hot pants—basically anything and everything in denims that women can wear on a make-to-order basis. It's a one stop tailoring shop for the denim lovers.

Technology deployment/upgradation

The denim industry consumes a very high amount of water, energy and chemicals. Fortunately Yellow Jeans have started adopting sustainable methods of denim production like using less water and chemicals to reduce the environmental impact. They are also adopting the laser technology, which is a revolution in the denim industry, as it gives perfection, saves the environment, and at the same time increases the production capacity.



KEY INFOGRAPHICS

>Country & city of origin:

India, Mumbai

>Number of countries present in: **India**

>Year of brand launch: **2012**

>Total number of doors, the brand is present in India (as on date)

● EBOs: **2**

● MBOs: **200+**

>Name of own on-line store:

www.yellowjeans.com



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East India

Piyali Oberoi | piyalioberoi@imagesgroup.in, +91 9331171388

Editorial Contacts

Surabhi Khosla
surabhikhosla@imagesgroup.in

Charu Lamba
charulamba@imagesgroup.in



NEXT ISSUE

INNERWEAR

SPECIAL ISSUE

IMAGES AUGUST 2018

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The rapid pace at which the innerwear market is growing in India is evidence of the fact that Indians are spending more on innerwear than ever before. Growing at a close to double digit CAGR, which is even higher than the average growth rate of the overall apparel industry, innerwear has evolved from a basic commodity to comfort, fashion and lifestyle and recently even to designer and luxury wear.

The August 2018 'Innerwear Special' issue of IMAGES Business of Fashion will study the rapidly growing innerwear market in India and outline the opportunities and challenges being faced by brands, retailers and the segment as a whole. Features on new brands, new trends in fabrics, design, finishes, colour choices, new fits, . . . and much more.

HIGHLIGHTS OF THE 'INNERWEAR SPECIAL' ISSUE:

- Innerwear market sizing
- Trends and dynamics
- Innerwear retailing excellence
- Top innerwear brands
- Emerging specialty brands
- Online sales of innerwear
- Sleepwear, lounge wear and shapewear
- Growing popularity of swimwear & beachwear
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- Innerwear for kids and teens
- Latest innovations in innerwear
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TO PARTICIPATE PLEASE TALK TO OUR BUSINESS DEVELOPMENT ADVISORS:

BUSINESS HEAD: Santosh Menezes, +91 9820371767, santoshmenezes@imagesgroup.in

NORTH: Shivani Lorai, +91 9811511038, shivanilorai@imagesgroup.in

Deep Ghosh, +91 9871765550, deepghosh@imagesgroup.in

EAST: Pragati Kumar Sinha, +91 9804338455, pragatisinha@imagesgroup.in

WEST: Radhika George, +91 9833446767, radhikageorge@imagesgroup.in

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FASHION CREATION

DENIM GOES ETHNIC

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PIC: SHRUTI SANCHETTI



**COLLABORATION
BIRLA CELLULOSE
PARTNERS WITH ANKUR
TEXTILES TO LAUNCH A
RANGE OF MULTI FIBER
FABRICS**

The partnership aims to launch a wide range of LIVA fabrics with 100 percent modal, 100 percent viscose and viscose blends as an alternate to traditional fabric for new age Indian women.

Pg No. 250

**DESIGN ICONS
DENIM DALLIANCES:
INDIA'S ACE FASHION
DESIGNERS**

Top designers Ritu Beri, Jatinn Kochhar and Raghavendra Rathore's take on denim and it's its standing in the Indian fashion industry.

Pg No. 252-256

Ethnic Denims

DENIM GOES ETHNIC

Rigorous innovations in denim coupled with ever evolving styling solutions has resulted in numerous denim concepts coming to life. The latest in trend, in India, is an ethnic makeover to denim.

Pg No. 258-269

Denim Innovation

**SAHIRA: DENIMINIZING
ETHNIC WEAR**

IMAGES BoF talks to Dilip Doultani, Chairman, Sahira, about his take on denims and what they're doing to move the needle.

Pg No.270-274

Perspective

**INVIYA: THE COMEBACK OF
DENIM**

INVIYA® I-400 spandex is a ground breaking innovation that provides denim manufacturers an edge and a marketing tool.

Pg No. 276

Sustainable brands

**LESSONS IN
SUSTAINABILITY:
GLOBAL BRANDS**

An increasing number of denim brands are taking the road to being sustainable of late, committing themselves to both the people and the planet. A look at the forerunners of this revolution from around the globe.

Pg No. 277-286

**KUYICHI
MONKEEGENES
G-STAR RAW
PATAGONA**

Denim Blends

**NEW VISTAS IN DENIM:
SILK DENIMS**

Development of silk denim by the Central Silk Board, Bengaluru has added a new dimension to denim and the fashion world.

Pg No. 290-292



Denim Textiles

LNJ DENIMS

IMAGES BoF speaks to Prabir Bandyopadhyay, CEO, LNJ Denims to know about the company's initiatives and top innovations made in the denim fibre industry in India.

Pg No. 296-297

Incubation

**ARCHROMA: PIONEERING
SUSTAINABLE DENIM
INNOVATIONS**

IMAGES BoF talks to Navneet Krishnan, Brand Solutions - South Asia, about the company's current developments and its strategic vision for more sustainable denim production.

Pg No. 298-299

Fibers

**RELAN: THE NEXT GEN
FIBER**

A look into RIL's portfolio of specialty fabrics R|Elan™ and how it can be integrated into denims for enhanced aesthetics and performance attributes.

Pg No. 300-302

Trims & Accessories

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Pg No. 304

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BIRLA CELLULOSE PARTNERS WITH ANKUR TEXTILES

TO LAUNCH A RANGE OF MULTI FIBER FABRICS

Birla Cellulose, has collaborated with Ankur Textiles, (a part of the US\$ 1.7 billion textile-to-technology conglomerate), a lifestyle division of Arvind limited to launch a wide range of LIVA fabrics with 100 percent modal, 100 percent viscose and viscose blends as an alternate to traditional fabric for new age Indian women. These include

use of technology, has enabled us to develop fabrics that offer both styles with comfort for consumers. Our in-house design team will continue to introduce more such trendy collections in the future to delight our customers.” He further added, “For more than five decades, Ankur has been designing high-quality voiles ranging from 100 percent cotton to all fancy blends that are available throughout India and exported to Switzerland, Middle East, China, Thailand and Africa. A heritage brand, Ankur develops high-quality fabrics for womenswear and menswear.”

Speaking on the collaboration, Manohar Samuel, President - Marketing, Birla Cellulose, expressed, “Collaborating with like minded brands is part of our business strategy and we are happy to partner with Ankur Textiles. This association allows us to reach millions of women through their wide range of distribution with an assurance of high quality fabrics which are nature based and fluid. This is just the beginning; we are looking forward to a long term collaboration with Ankur Textile.”

These fabrics will be available across retail points throughout the country in a range of colors, textures and prints. This will enable not just the retail consumers but boutique owners, designers and small retailers to access LIVA's fluid fabric to create their own fluid designs.

fabrics like Zoya, Glam and Glory, Blossom, Charm-me and Lilac which can be tailor-made into western and ethnic womenswear such as dresses, blouses, kurtis and tunics. Available in a wide range of colours, textures, and prints, these fabrics will be available at women's wear MBOs (Multi Brand Outlets) in the price range of ₹180 to ₹300 per meter.

Speaking at the launch, Brijesh Bhati, CEO, Ankur Textiles, said, “The launch of this collection marks our expansion into multi-fibre fabrics as a fashionable alternative to cotton. Our expertise in textile fabrics, combined with the





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DENIM DALLIANCES

INDIA'S ACE FASHION DESIGNERS

Denim was initially used by workers in and around Europe during the 1800s. Gradually, during the 1930s, Hollywood stars adopted the style in most of the western movies, where almost all of them were seen wearing jeans. With time, Denim started changing the tides of fashion and brands like Wrangler and Lee started manufacturing designer jeans. The demand only kept increasing, and then there was no looking back. IMAGES BoF takes a look at what top designers like Ritu Beri, Jatinn Kochhar and Raghavendra Rathore have to say about this piece of fabric and its standing in the Indian fashion industry.

By Niyorkona Saikia & Bharti Sood

The denim market is already witnessing brilliant growth and is expected to grow even more. Explaining the evolution of the market, Ritu Beri explained that denim has always been an important item of clothing, since many decades. Denim garments came into existence during the 18th century, a time when there was abundant production of cotton. During that period, it gained importance due to its aspects of durability, which benefited physical labourers. During the 19th century the garment was popularized by Levi Strauss, a well known name in the jeans world. Denim clothing was manufactured by them for miners. The 20th century saw jeans as a top fad of pop culture. Western cowboy movies portrayed people wearing blue jeans. The 50s witnessed the cloth becoming a craze of the teen age population. Manufacturers utilized the situation by coming up with innovative designs, new colors, embroidery and patch work. During the 60s and 70s, bell bottoms and hip hugger patterns became popular. It was during the 80s, that denims started drawing attention of fashion designers. New and glamorous patterns were created and were brought to limelight by popular models in commercials. Puffy pants, puffy shoulder pads, and puffy hair became a style. In the 90s, it became one of the most sought-after garments. To



Image courtesy: Ritu Beri



Image courtesy: Ritu Beri



Image courtesy: Ritu Beri

skim the cream of the denim market, manufacturers then, came up with various innovative ideas of using the denim fabric like poodle skirts, caps, handbags, etc. It was during that time denim sales skyrocketed. Even today, denim is in high demand. The generation today saves money to buy branded designer denims. And the reason behind this inspired resurgence is the publicity given by celebrities. Celebrities are spotted wearing designer denims even for events where formal attire is normally expected. This is surely one demand that will never go down.

In India, fashion retail is an ever evolving sector. The industry is expected to grow at a 9.7 percent Compound Annual Growth Rate (CAGR) and within it the market is also witnessing growing demand for western and casual wear, especially denim. In fact the denim market has seen tremendous growth of ₹20,205 crores in 2016 and is expected to grow 14.5 percent CAGR while reaching ₹39,651 crores by 2021, and ₹77,999 crore by 2026 [Source: Indiaretailing.com].

The Rising Demand

Few ace Indian designers express their opinion on the rising demand for denim and how they have created their own niche in the Industry. Speaking on what interested them, Ritu Beri, a top international fashion designer said that denims have marked a culture of over 140 years or maybe more. She said, “The history of denim is long and colorful. Denims are comfortable, stylish and offer countless outfit possibilities. It is a fashion staple that isn’t going away anywhere anytime soon.” Elaborating upon the inspiration to work with denim, fashion designer Jatinn Kochhar said that he has been in love with denim ever since his childhood. He loves the versatility of the fabric and has introduced fascinating pieces of denim

pant suits, overcoats, parkas, culottes and dresses. “It’s a way of life for me, so it was natural for me to dwell on denim fabric,” he said. On the other hand, what inspired Fashion Designer, Raghavendra Rathore to work with denims is its timeless quality. This motivated him to create Jodhpur pants and customized denims combined with the signature RR Bandhgala.

Denim is an adaptable fabric. This gives designers the ease and freedom to experiment with the fabric and introduce new products for the customers. Styles and preferences only keep upgrading and designers understand that in order to keep pace with the rising demands of the customers, they need to come up with styles that are accepted and acknowledged.

The Modernization

Traditionally, denim was manufactured from 100 percent cotton. However, with changing time and preferences, a variety of denims are available in the market today. Denim blended with polyester is at present one of the most popular, as it bears with shrinkage and crease. Stretchable jeans are another popular choice among the new generation buyers, owing to their fit and comfort. On being asked about the styles that they are bringing forth with denim, Ritu Beri stated that she has always loved working with denims and prefers to mix different materials like lace, embroideries, patches, leather, etc., while designing something. The versatility of denim makes way for many other styles. Jatinn Kochhar said that he explores the fusion wear and also ethnic wear, incorporating denim fabric. “I would love to design a super light-weight denim saree,” he added. Whereas, Raghavendra Rathore focuses on detailing of the accessories, patterns and custom trims.





RITU BERI

“My design is intrinsically feminine and romantic, with a flamboyant twist. My style is about enhancing a woman’s individuality and persona. Also, I love to see my women looking glamorous. I was the first Asian to head a French fashion house. During those times, no Indian designer had done a show in Paris. There was a lot of pressure to succeed and the international world of fashion at that time was not exactly open to India, like it is today. I never stop dreaming. My vision for the future of the domestic fashion industry for Indian designers is to develop corporate fashion houses along the lines of their successful western counterparts. I am negotiating with certain international brands and hopefully interesting stuff will happen soon. I want to explore the impossibilities and work in an inspired mode only to satisfy myself and my passion.”



Image courtesy: Jatin Kochhar

Styles That Never Die Out

Every fashion designer gets high on experimenting with new styles. Describing their fashion creations with denim, Ritu Beri said, “I launched a few signature denim pieces in my show in 2003 - Paris, Mid Summer Night’s Dream Show, and in 2009 - Wills Lakme India Fashion Week. Working with denim is a designer’s delight!” Raghavendra Rathore recollected that he had created specially designed evening wear using denim. “Also signature R R Jodhpur breeches have been recreated in denim to give it a modern appeal to the new age customers,” he said.

Denim has always been in trend, irrespective of the season. Elaborating upon the upcoming denim trends for next year, Ritu Beri said that major focus would be on light-weight jeans that come with skinny legs that scrunch up. People would also look for back pocket zippers, button flaps,

and colourful stitches, as it attracts visually from a distance. Bell legged jeans combined with aqua wash is also in the market. Light-weight jeans with multi-directional weave and detailed back pockets give an arresting look to the wearer. Skinny jeans in indigo and black shades, denim tops and jackets are most sought after by women. Washed denims present a casual mood with intellectual looks and magnetic persona that a women wishes to have. “The best part is that denims are available in rainbow colours, to satisfy the needs of the fashion savvy women,” she concluded.



Image courtesy: Raghavendra Rathore

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JATINN KOCHHAR

"I launched my first label when I was nineteen, without any formal training in fashion. I believe my creative inclination is what kept me strive for what I am today. My focus was to amalgamate the soulful Indian heritage with true urban influences, and this is what has shaped my design ideology. I have showcased my fashion creations across the globe. I have had shows in metro cities in India. I have also spread my wings when it comes to Indian television fashion. I have also appeared as an anchor and guest anchor in several television shows where I have expressed my styling concepts. I was also heading the National Institute of Fashion Design as the Director General for 2000-2001. I have been writing on fashion and other lifestyle related topics for some of the leading dailies as well as for fashion and lifestyle publications."

RAGHAVENDRA RATHORE

"I emphasize on made-to-measure and bespoke services. And I hold pride in having over two decades of experience in constructing one of its kind suits, Nehru waistcoats bandhgala's, kurtas and achkans. We have proudly set up stores across India, to service and customize wardrobe solutions, with customer's personal inputs. Each bespoke station has a designer to assist the customers in selecting world-class fabrics from Italy, customized hand-woven fabrics made on looms across India, and with the perfect choice of silhouettes that one may find most comforting and versatile."



The Indian Denim Sorority

Speaking on the Indian industry and its contribution to denim, Ritu Beri said that designers have played an integral part in this within corporates by constantly upgrading the market with new products. For instance, Arvind Mill had launched its Flying Machine and Raymond had launched GAS, an Italian denim brand. Denims are something that can never get over worked. There is always a scope of reinventing new styles in denim. On the contrary and speaking about the designer entrepreneurs, Jatinn Kochhar said, "Indian designers have been too occupied doing ethnic/wedding clothing, and denim seems to have taken a back seat. Occasionally, one gets to see a few denims in resort wear lines done by Indian designers." Expressing their personal favourite denim styles, Ritu Beri said, "Be it a jean, jacket, cap or any other product, the spirit of fashion in denim lures me

to have every possible style to be a part of my wardrobe." Jatinn Kochhar prefers slim fits and oversized styles and Raghavendra Rathore has his love for thin washed travel denim shirts that also has the utility as an outdoor shirt. "Dark navy coated unwashed denims are ideal for evening wear dressing with a crisp un-tucked shirt look," he stated.

With the growing Indian economy, the consumption rate is also augmenting. The growing middle class purchasing power has aided in the growth of denim wear in the country. Everyone wants to look smart and presentable and today, they have the money to cater to this aspiration. The denim market indeed has a promising future and there is huge potential for manufacturers, brands, as well as retailers. That too at a growth that is very palpable!





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DENIM Goes Ethnic

Rigorous innovations in denim coupled with ever evolving styling solutions has resulted in numerous denim concepts coming to life. The latest in trend, in India, is a ethnic makeover to denim.

BY Meher Castelino

It is amazing how a single fabric has remained on top of the fashion charts ever since it first hit the style calendar. It started with being made into the hardy favourite 5-pocket jeans, then moved to shirts and trousers for the fashion conscious dressers and then slowly crept onto the glamour list with celebs wearing it in its entire glittering avatar for western wear.

We are talking about denim, the sturdy, trusted, fabric that is still keeping the top jeans wear brands like Levi's, Lee, Wrangler and many more in business even after decades. Who would have thought that a fabric created for the Gold Rush miners in the 19th century, which moved to France, got its characteristic blue hue from the 18th century Genoese sailors, would one day be the darling of the global fashion industry?

So the wonderful Serges-de-Nimes (cloth of Nimes) as it was called in France, which the Americans shortened to just Denim, has reinvented itself season after season and year after year, to create magic on the catwalks of the global fashion capitals.

From casual wear like jeans and shirts, to stylish western wear for men and women, denim has now moved into the ethnic wear genre, which has further given it a longer fashion impetus on the style charts.

The Ethnic Designers' Visions

When one talks of ethnic wear it revolves mainly around the versatile kurtas, churidars, lehengas, cholis and saris. Denim has crept into all these categories with the greatest of ease with designers offering a wide range of options.

Designer Shruti Sancheti who works with traditional weaves from all over India has created stylish Avant Garde ethnic wear from denim as she has realised the popularity of the fabric. "There are different variations available in denim and since India has sultry weather, light weight chambray denim and linen denim is apt for ethnic wear because firstly they are more fluid and secondly one can breathe in these



Shruti Sancheti

>



fabrics. The response to these garments was phenomenal and we must have sold over 100 odd pieces of the cropped tops and lehengas and to the best of my knowledge, most girls wore these for the Mehndi function. The prices are between ₹10,000 to ₹25,000 depending on the construction and embroidery. The advantages of working with denim are that it is a youthful, global, contemporary, fabric and ethnic wear can look edgy; also it is sturdy so it is easy to embroider and construct. However the fabric has a mind of its own so sometimes it's difficult to drape it and also in spite of adding



experiment with in context of surface ornamentation, dye techniques, printing, etc. Denim is an economical textile to experiment with and now we all have organic, naturally, dyed, varieties. People still perceive denim as a purely western wear fabric and have a causal approach. When it comes to ethnic wear shirting weights of denim are the best for ethnic designs as it has the right fall and right fluidity, complementing the grace and elegance of ethnic ensembles. Avoid heavy weight trouser fabrics as they are bulky and contribute to extra weight to the already flared ethnic ensembles. Lycra based denim makes a great choice for fitted sleeve details, choli blouses

intricate embroidery and surface ornamentation, there are chances it can still look casual," informs Shruti who has created simple, basic kurtas, cold-shouldered, embellished, cholis with ornate lehengas, some stunning heavily embroidered, long, kurta with jacket as well as lungi with cropped top and bustier.

When it comes to fusion ethnic wear, denim can be mixed with traditional Indian weaves that present an unconventional look as created by Aniket Satam. "Denim is such a versatile and sturdy material to

and even churidars. I incorporated a mélange of denim fabrics with traditional hand woven Ikat Rumal from Odisha. These cropped tops are multifunctional and a rage amongst youngsters who like to flaunt heritage with a twist. They can easily be worn over tops or flared, tiered, skirts and also go very well with a saris as modern boxy blouses. Today's Indian consumer wants to stand out in the crowd without losing its pride for local crafts and infusing versatile denim with ethnic textiles surely works very





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offering. With distressed jeans being in the limelight and nearly every international and Indian celeb ensuring that the shredded, torn, tattered, denim jeans are the height of fashion, designer Diksha Khanna felt that it is time to create a sari in distressed denim and her efforts have won her a lot of applause from even India's style icon, Bollywood, trendsetter Sonam Kapoor who wore her shredded, threaded, denim sari

and created a storm on the internet. Priced between ₹10,000 to ₹30,000 Diksha reveals why she opted to reinvent the sari in denim.

"The Indian sari always brings you back home. This six yards of love is extremely close to my heart so there had to be a sari in the collection, and I thought a stitched denim sari would be a great way to connect with our younger generation who love this frame enhancing silhouette but are sceptical of embracing it due to manageability issues."

So why did Diksha select denim? "Ethnic wear looks best when it drapes well around the body, so the denim chosen should be lightweight, not more than 5 oz. - 6 oz. in fact, the lower the number, softer and more flexible the fabric falls. Also, the desired volume can be added to ethnic ensembles when choosing lightweight denim. Denim is pretty durable, something you can own for ages and it transforms with you and changes, gets a bit frayed and looks beautiful. It absorbs sweat and moisture making it a good fabric to wear for any time of the year. The response to our hand distressed denim pieces was phenomenal. Indian consumers have become truly conscious and experimental in their fashion choices, and the market for cross over concepts has become larger. So our hand distressed denim sari fitted the bill perfectly."

well. I have also experimented with batik techniques on light weight denim to create abstract surface designs and crafted oversize Kimono jackets, which can be layered over lehengas and even a sari for that matter," reveals Aniket whose fusion wear is between ₹6,000 to ₹7,000.

For Mayyur Girotra the lehenga is perfect for denim and he teams it with a shirt and short tank top all in indigo but with lavish Indian colourful embroidery on the hem of the lehenga. This gives ethnic wear a young trendy feel, which will appeal to the fashionistas who want to present a look that is Indian but with a stylish twist.

The Denim 6-Yard Wonder

The 6-yard wonder or the beloved Indian traditional sari has been given many innovations by the designers. From being the sari-gown to the lungi-sari, to the pre-stitched version and the draped sexy option, it is little wonder that designers are now looking at the denim sari as another

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Diksha has noted that from the response received, the denim sari when worn with a shirt turns the wearer into an instant showstopper which has been very appealing to the younger buyers.

Diksha has also brought her version of a pinafore kurta, which follows the worn-out distressed appearance.

The New Age Ethnic Look

Fashion students have also been inspired by denim as a fabric that is ideal for ethnic wear. The Premilila Vitaldas Polytechnic's Chrysalis 2018 show presented the prize winning "Deccan Decoded" collection, which was a great

mix of denim, Khaan and Warli paintings for dhoti pants, bundies, kurtas and unconventional bundgala jackets. The National Institute of Interior and Fashion Design's Fashion Pulse 2018 collection called "Denim Divas" by the students was a trendy look given to the lehenga with multiple slits and tassels.

Le Mark Institute of Art's annual Le Marque 2018 show had a denim line in indigo and washed hues for sharara style pants, bundgala inspired jackets and fitted lehengas.

The SDPS Women's University, Indore students gave denim a grand look with regal flowing lehengas teamed with corsets in washed and unwashed denim fabrics. The students of B D Somani Institute of Art and Fashion Technology in 2017 were enamored to such an extent by denim that they created an elaborate embellished bridal wear look with contrast ethnic multi hued weaves to add colour and called it "Mela Mélange".

Ethnic Denim Labels

On the ready-to-wear front brands like FBB from the Future Group, Biba and Ethnicity devote a lot of their creations to ethnic denim wear.

The FBB brand, which has upped its fashion quotient on all fronts - from clothes to beauty contests has added denim for its ethnic line for ladies and men's wear. Deborah Belho of FBB Marketing informs about the line and its popularity. "The advantages of denim are that the overall look is very attractive and the hand feel of Tencel denim is very good so









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SDPS Women's University

not only off-line but also on-line on their own website as well as numerous national e-commerce sites. The ethnic denim collections have an interesting mix of prints, washes, detailing and embellishments in silhouettes that appeal to the trend setting women. With an affordable price range of ₹1,300 to ₹3,000, Siddharath Bindra, Managing Director, Biba Apparels Pvt. Ltd., reveals why denim is an ideal fabric for ethnic wear.

“The advantages are that it’s a classic fabric that makes a great style statement especially when it comes to ethnic wear. Another plus point is that the fabric is very stable with a good longevity and besides that it is a cotton textile ideal for India. There could be a few disadvantages like it requires specific washes and treatments. Also it is season specific in terms of ethnic wear, which is generally preferred for the autumn/winter season.” However he concludes by saying, “Biba has always introduced new fabrics and concepts in ethnic wear and the response to denim collections has been very good and greatly accepted by the customers.”

On Line Sensation

When it comes to online fashion, ethnic denim wear seems to break the internet with nearly every Indian e-commerce site offering a profusion of styles that will please every stylist and budget. Ajio.com has a trendy offering that will suit all ages when it comes to kurtas with cropped or cigarette pants, and churidars. The kurta look is also a hot favourite along with kurtas so sites like Myntra, Limeroad, Amazon, Flipkart, Snapdeal, Jabong, Jaypore, Voonik, and many more have collections that are almost never ending in style and variety and are offered throughout the year.

One can scroll down endlessly and discover hundreds of kurtas, kurtis for men and women. In fact at times it seems as if the ethnic denim wear boom has outclassed the jeans and shirts category completely and the collections are not only mind-blowing in style and design but very pocket friendly.



the garments drape well and are comfortable. The only disadvantage could be that there may be shade variations after many washes so there could be rejections.” According to Deborah the best weight is between 5.5 oz. and 6 oz. for normal or Tencel denim. “The response to denim ethnic wear is very good as we sold 77 percent in 13 weeks. The prices for tops with discharge prints and washes are between ₹699 to ₹899 and for kurtas ₹999 to ₹1,299.”

The Ethnicity brand, which has a chain of stores that is seen all over India has a wide range of ethnic men’s and women’s denim wear. “What makes ethnic wear in denim different and appealing to customers is that the silhouettes are contemporary but with a traditional touch. Denim is so versatile that it has absolutely no disadvantages. It caters to customers of all age groups and the best weight would be 5.5 oz. and the price range is ₹1,499 to ₹2,299,” informs Anil Deshmukh of Ethnicity. The brand has an interesting collection of simple men’s kurtas and kurta shirts but for the ladies there are embroidered kurtas and kurtis that are ideal for semi formal wear in washed or unwashed denim.

Biba one of the biggest women’s ethnic wear brands in India with a network of stores all over the country has been in business for three decades and offers ethnic denim wear



Ajio.com



SAHIRA

DENIMISING KURTIS & GOWNS

“Denim is an open canvas and it has no bounds for an artist to use their creativity,” believes Dilip Doultani, Chairman, Sahira. The brand is known across the country for infusing new life to denim with their line of denim kurtis and skirts. IMAGES BoF talks to the innovator about what they’re doing to move the needle.

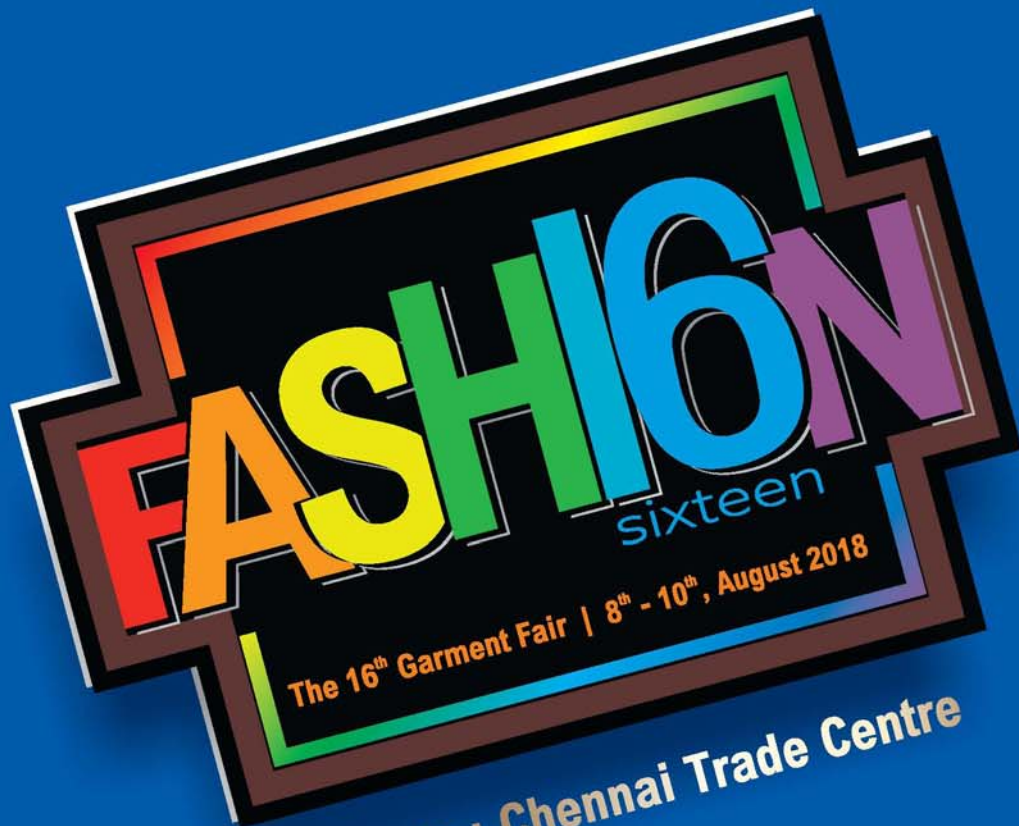
Sahira’s journey dates back to 2015, when the brand was launched with a passionate vision of catering premium quality in ethnic and Indo-western apparels. Their commitment to quality and customer needs has ensured that the journey till date has been nothing less than a chariot of progress, with thousands of happy consumers and a loyalty rate of around 75 percent. The brand’s key demography is an aware urban audience between a broad age spectrum of 16 years to 54 years. The brand caters to a niche public which is quality sensitive and not price sensitive.

Sahira’s current portfolio comprises of kurtis, Indo-western gowns and ensembles, bottom wear, stoles, jackets and many more. Denim occupies nearly 20 percent share. It is one of the handful brands which uses giza and pima cotton in denims and probably the only brand in women’s ethnic to use such qualities. The brand is now famed for its denim kurtis, and Indo-western gowns made out of the finest of denim fabrics in the range of 2.5 to 4.0 Oz. Today, plain kurtas with multiple wash and shade options, printed denim kurtas and A lines are the top selling products of the brand.

For the upcoming season, the brand is planning to play a lot with indigo top dyeing applied on the fabric and not the yarn. This has been its signature development this year and the brand is very optimistic about its reception. In other denim apparels, Sahira has focused on embellishments done through pearls and appliques and are working more on premium and fine quality to make sure that the comfort level is maintained.

Today, the brand has a dominant presence in western and central India. It is also present in many other states across India through direct dealers and has a distribution channel across few. The brand plans to increase its distribution channels this year by 5 more states and focus on increasing the presence through SIS and EBOs. The brand is also strengthening its online presence and is optimistic about embracing a strong omni-channel strategy in the near future.

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Venue : Chennai Trade Centre

Communications with respect to
16th Garment Fair to be addressed to :

Chennai Apparel Association
C/o R.D. Fashions, 201, "B" Block,
Shivalaya Building 2nd Floor,
118, C-in-C Road, Egmore, Chennai 600008.
Email-caatime@gmail.com
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FASHION SHOW 
and GALA DINNER
9th, August 2018 at 7.30 pm



“Denim has over the years broken the barrier of being generalised as a rigid bottom wear fabric. It is evident that many well known designers too have incorporated its usage.”

-Dilip Doultani,
Chairman, Sahira

IBoF: How has the women’s denim market shaped-up in the recent years?

DD: Phenomenal! I personally have been a denim lover since years and I have observed that all these years, denim has been underplayed specially when it comes to using it for topwear in women’s wear like we do in India. What we are currently witnessing is just the start of denim in the particular demography and in the years to come, the market seems promising to me.

Denim has over the years broken the barrier of being generalised as a rigid bottom wear fabric. It is evident that many well known designers too have incorporated its usage and we are proud to be one of the handful brands in India which use authentic denim in ethnic wear.

IBoF: What would be the estimated market for women’s denim in India and by what rate is it growing?

DD: I particularly don’t know about the generic figures as it is totally volatile and also season oriented. Also, the resilience to dynamise the product and playing safe by other manufacturers also affects the market size. But if we talk about our brand Sahira, denim holds around 20 percent of our developmental portfolio. What started with a mere 5 percent in the year 2015 has now reached 20 percent and we are in the process of increasing it day by day as the market has accepted it with so much warmth. We are quite optimistic about it.

IBoF: Tell us about the profile of women consumers who buy denim kurtis?

DD: Earlier, at Sahira, we observed a conversion rate in the demography of 17 years to 40 years. Since our designs are influenced from western tastes it was not uncommon for 40 plus women to not adapt to it very easily. However, after reworking on designing by giving a bit of ethnic touch we saw a change in the group which expanded till the age of 54 years. Size is not a concern these days in fashion and we proudly sell 3XL denim outfits in our range.

IBoF: How do women think of denim differently than men?

DD: Men prefer denim apparels to get that raw and musky feel which clearly reflects in the designs we see in the range of men’s wear. However, women in denim like to keep it more subtle as far as if I talk about our brand. We possess a 4 decade long history with denim. We have dealt with top denim fabric manufacturers worldwide all these years and I myself know the top dyeing techniques with indigo which I learnt back when I was just 17 years old. So you can also say that its a tribute from our side where we keep a positively biased view on fashion in denim and we are today probably the best available brand in ethnic wear and Indo-western in denim fabric.

IBoF: Do you believe that women customers are more difficult to please?

DD: Infact, it has been other way round for us. Of what I have heard from my friends in leading men’s wear brands world over and also when I look at myself as a shopper the truth is very different. Men’s shopping habits are simple and not so fussy, yet to make them reach the trial room and the conversion there on is really tough. On the other end, once you send your garment to a trial room with a female shopper, the conversion ratio is quite substantial than a male shopper. However, I maintain a firm belief that if the product is lucrative, the effort of pleasing someone is more than 70 percent taken care of. Women customers demand new fashion frequently but men are more rational when it comes to shopping.



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KEY INFOGRAPHICS

- > Country & city of brand origin: **Ahmedabad, India**
- > Number of countries present in: **3**
- > Year of brand launch: **2015**
- > Total sales turnover in India as in FY17-18: **₹3 Cr**
- > Total number of doors, the brand is present in India (on date): **150+**
 - EBOs: **4**
 - SISs: **6**
 - MBOs: **70**
 - Others: **100+**
- > Number of states present in: **18**
- > Number of cities present in: **185**
- > Average bill/ ticket size: **₹1,699**
- > Same store sales growth rate in EBOs: **40%**
- > Name of e-store: **www.sahirstore.in**
- > Share of sales from online: **20%**



IBoF: Elaborate on the current 3 top selling denim styles.

DD: In bottom wear, there are a lot of things going on. Our bottom wear range, a label named Lively by Sahira, delivers the best in range bottom wear. Current bottom wear trends are ruled by various creations in embellishments, appliqués and also distressed has been a forever trending variation. We are also looking forward to disrupt the bottom wear industry by introducing tie dyed bottom wear with multitone and dualtones in denim.

However, in topwear we offer a lot of options by using the best features of denim. The results as you can see are phenomenal which are a result of the years of hardwork we have put into our company.

IBoF: What do you think are the most popular washes now?

DD: Every wash speaks for itself in denim. As far as I believe, rinse wash, mid wash and ice wash have been forever trending as they are. For us, we like to play a lot with basics and shell out products that age like fine wine.

IBoF: Which international denim brands do you appreciate?

DD: I cannot really say about the popularity, but when I talk about myself I find Tommy Hilfiger's Scanton as my personal favourite and Levi's and GAS are doing great in the market too. They are probably the only brands which I have observed are seriously dedicated to denim, which reflects in the precision of their fits and quality along with styles, which are versatile.

IBoF: What, according to you, are the popular elements/embellishments in denim?

DD: Sequins, floral appliqués, pearls, etc., are some of the popular applications used to add that extra element in the bottom wear. We use

them in top wear too. Denim is an open canvas and it has no bounds for an artist to use their creativity in the same. Our brand Sahira has used other embellishments and elements too which you can see in the pictures.

IBoF: What are the 5 top selling colors in denim today?

DD: Dark blue, mid blue and light blue with black and grey are the highest selling colors. However, once in a while a set of colors emerges which runs for quite a time but these 5 colors have always been timeless.

IBoF: How popular is stretch if compared across men's denim and women's?

DD: Stretch is like a staple feature in women's wear as women's fashion revolves around curves and fits which enhance them. Stretch gives the fabric the liberty it requires. Of late, there has been a lot of requirement coming out for stretch in men's denims too. So you can say stretch is now an integral part of denim fashion.

IBoF: Predict top 5 trends that will emerge in the future in women's denim.

DD: In the years to come we can expect a revolution in denim with yard dyed creations like checks and stripes, self embroidered fabrics, sparklers, etc. Time will tell what will trend and when it will trend.

IBoF: Comment on the impact of the emergence of leggings and jeggings on the denim category.

DD: There has been a positive impact as leisure and luxury is blended here and the garment is given multiple utility, however I believe knitted denim qualities and 100 percent stretch fabrics lack that raw feel of denim. They give more of a knitted, single jersey and pique kind of a feel.



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THE COMEBACK OF DENIM

Since, about, the past 3 years, “athleisure” has taken over the casual clothing segment by storm. “Athleisure” – as per Merriam Webster is defined as – “casual clothing designed to be worn both for exercising and for general use”.

The athleisure trend is on the rise and it doesn't seem to be stopping any time soon in the near future which is also evident from Morgan Stanley's prediction of athleisure market crossing a whopping number of \$300 billion by 2020. The rise of athleisure is resulting in the slacking of demand for denim globally and is forcing denim companies to innovate with new fibers and finishes.

These days, consumers are more aware and conscious about what they wear and how they carry themselves. The millennials are playing a decisive role in this drastic shift in the apparel

industry, focusing more on making a style statement without compromising on the element of comfort.

In today's world, fashion is represented by comfort and adaptable style. We can clearly see on runways that big brands and fashion labels are increasing their line of “active casual wear” rather than focusing on making “out-of-the-box fashion-statement” clothing lines. This change in lifestyle and focus on comfort has started fading the “glory” of our beloved denim.

To an extent, consumers are moving away from denims and into buying yoga pants, leggings, lounge pants, etc. One of the major reasons for this is the portrayal of denim as not so comfortable clothing. This image of denim needs to be changed, and therefore now we can see many big denim manufacturers focusing on changing how denim is portrayed to the consumers. Technological attempts to

innovate denim in order to make it more comfortable, stylish and adaptable are going on in the denim manufacturing industry.

All this, along with clearly communicating and demonstrating to the consumers about denim being adaptable and comfortable is essential to bring back our beloved denim.

INVIYA® I-400 spandex when mixed with cotton yarn to make denim fabric brings out these much desired properties in the final denim, thus providing the denim manufacturers an edge and a marketing tool. This also helps them to show and convey to the end consumers that their chosen denim is more comfortable, more adaptable and also provides them a perfect fit.

It is indisputable that if the denim is to continue its legacy as “the wardrobe staple” it has to up its game in the areas of comfort, adaptability and providing perfect fit to the end consumer.

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ABOUT THE AUTHOR:

Rachna Rajan handles the branding and promotional activities of the Indorama's spandex brand, INVIYA® in India. Rajan has worked in diverse backgrounds in marketing, branding and research that gives an added advantage to promote INVIYA® efficiently to its consumers. Academically, she holds dual master's degree in marketing and human resources with a bachelor's degree in textile technology.

LESSONS IN SUSTAINABILITY: GLOBAL BRANDS

A very few fabrics have been able to achieve the stellar popularity that denim has over the years. From the ranches to evolving into a symbol of youth rebellion to being the forerunner of the global casual wear revolution, denim has traversed an interesting trajectory. Since the early 1900s the garment has been continually experimented and subjected bountiful of styles, cuts fits, silhouettes, etc. The only sustaining factor is it's burgeoning dominance over wardrobes across the circumference of the globe, irrespective of gender and age.

But it's only lately that the sustainability concerns of producing this beloved blue fabric has come to the forefront. Denim production typically involves the use of dangerous chemicals to grow conventional cotton and creates millions of gallons of waste water in the dyeing process. A study by Levi Strauss & Co., found that producing one pair of Levi jeans requires a staggering 3781 litres of water. With 10 percent of the world's population currently deprived of access to clean water, these statistics put an alarming perspective on our denim purchases.

Water consumption isn't the only ethical concern with denim. While cotton takes up 2.4 percent agricultural land, it accounts for more than 11 percent of global pesticide use. In addition to the pesticides used in cotton production, harmful chemicals may also be used extensively in denim's dyeing process. All too often, the jeans are sewn in factories where employees work and live in substandard conditions.

All in all, denim is a "dirty business" with severe social and environmental consequences. Considering this, an increasing number of denim brands are taking the road to sustainability of late, committing themselves to both the people and the planet. In the next few pages, we showcase the brands – Kuyuchi, Monkee Genes, G-Star Raw, and Pantagonia – that are making waves with their conscious efforts to improve and change the standards of life cycle of denim.





KUYICHI

Kuyichi chooses their suppliers and sustainable materials with great care. By integrating new techniques and materials—like post-consumer recycled fibres—they still position themselves as pioneers.

Since 2016 they took on a new course. Though the core of Kuyichi is still the same, but they added other values to their brand. All leather patches were replaced with a patch made of jacron. Jacron is made of recycled paper, is washable and very resistant material and makes all Kuyichi denims vegan proof.

Kuyichi feels that the future will be determined by slow fashion over fast fashion, so they have stopped making a big seasonal collection. Most of their collection consists of long lasting denims that are available season after season. A big part of their collection consists of 'Never out of Stock' denims. Denims, which are available season after season and reproduced when needed. So that the consumers can re-find their favourite pair of jeans even seasons later.

Their style conscious jeans have a clean look with signature details, like the hidden rivet at the back pocket and copper details. Pure production, pure denim, pure goods.

Production Set Up

Kuyichi's denim facilities are located in Turkey, Pakistan and Italy. Their new

Kuyichi Pure Goods is a Dutch denim brand, which introduced their first pair of organic denim into the market in 2001 and they have been leading the industry in ethics and transparency ever since. Their journey began in 2000 when the founders of Kuyichi - NGO Solidaridad were shocked to see the pollution and poverty in the cotton industry in Peru, South America. So Kuyichi started creating pure goods out of organic cotton and started making organic jeans.



range of tops will also be produced in Turkey. They try to source their fabrics and trims from close to their production sites to limit the carbon footprint. Transparency is a core value of Kuyichi. They publish about their suppliers on their 'Pure Production' page with full descriptions and certifications on the site and communicate about their process towards the most sustainable denims.

The Collection

Kuyichi loves to collaborate with like minded people and have thus joined forces with Justdiggit; an NGO that cools down the planet by restoring deserted lands. Kuyichi had produced a statement Tee for men and women which cools down the planet. All the profits of this project go to the land restoration projects of Justdiggit.

Kuyichi will also be collaborating with Sympany by year-end to make a new Post-Consumer Recycled Denim - PCRD - jeans. Sympany is a Dutch garment collector who supports charity projects in India and Africa with their profits. For this collaboration Kuyichi combined their own collected denim with theirs and re-integrated these into new jeans. These worn out jeans are

shredded to fibres by Recover, then made into a beautiful fabric with 20 percent PCRD by Royo and is finally made into one men and one women denim by SARP. A part of the profits are to go to an African charity project which supports women in Malawi.

For their new Spring Summer tops collection Kuyichi has teamed up with Antoine Peters. The collection consisting of different styles including tops, dresses and sweats is inspired by the rainbow (Kuyichi is the Peruvian god of the rainbow and positivity) and shall be showcased at various fairs.

Retail Mapping

The brand retails through 125 shops mostly situated in the Netherlands, Germany and Belgium and also from some single shops across rest of Europe. A lot of shops they sell in have a focus on sustainability. Kuyichi is also represented in denim shops and boutiques.

Online Presence

Kuyichi sells through its own webshops across the world. All packages are sent out in a packaging made of 60 percent recycled film packaging.

Innovations or new concepts in structuring and fits

Kuyichi makes your favourite fit in new washes over the seasons. This way





the consumers can come back to them when their favourite pair of denim needs replacing and buy exactly the same or the same fit in another colour/wash.

Fabrics and trims

The brand uses all 100 percent GOTS certified organic cotton in its garments, which is 100 percent pesticide free and reduces CO2 emissions by 60 percent as compared to the conventional cotton. It chooses all its fibres with care and uses preferred fibres 96.9 percent of the time.

Kuyichi chooses the sustainable option every time. This majorly decreases the

environmental impact of its garments and also has a positive impact on the people who work in their supply chain. Besides it means that you wear purer garments and denim on your own skin without hazardous chemicals or pesticides.

Since 2012 Kuyichi has been using recycled cotton in its denim fabrics. Used cotton is shredded and re-spun into a new one-of-a-kind yarn. Recycling greatly reduces the water, energy and chemicals needed to produce new fiber. A part of its 2017 denim collection consists of 13 percent and 29 percent recycled cotton. They aim to use more recycled cotton fabric in the future.

Their light washed denim collection contains 36 percent tencel, made of eucalyptus wood pulp.

Kuyichi denim can be recognised by signature details, like its hidden rivet on the back pocket and the use of a lot of copper details. Besides that, all its styles have their own details like the straps on the nick and the higher coin pocket on the amy. This makes each style recognisable.

Premium-ness in a denim brand

Premium-ness lies in the way a pair of jeans forms to your body, gets worn in and starts to tell its own story – your life story. The way it will live with you, how you wear it in and how it will follow your body.

Premiumness is also shown in the details and finishing of denim. Good craftsmanship and attention to details is where denim truly can distinguish itself from the crowd. That's why Kuyichi spends a lot of time in the detailing of its jeans.

Sustainability and eco-friendly end-to-end processes

Kuyichi believes that sustainability is not just a trend. "Consumers are asking for more and more transparency about where and how their clothing is made. The fashion industry is slowly shifting towards better practices and more responsible production. Even most of the bigger - fast - fashion brands are reacting to this shift. If the brands are unable to manage to shift the whole fashion system to a more sustainable way of producing, they won't be doing their part of fixing up this global problem, that concerns all," says Zoé Daemen, Marketing, PR and CSR Manager, Kuyichi Pure Goods.



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hazardous substances and using new techniques like laser and ozone machinery.

In the laser technique, instead of using sandpaper or chemicals, a computer burns the fades in the denim. A washing pattern is first designed which shows where and how visible the fades need to be. This design is transferred to the laser machine, which burns the fades into the jeans. Besides reducing the use of water, power and chemicals, this technique also reduces the loss of fabric strength by 50 percent and the efficiency of a workplace by 500 percent.

The ozone machinery is used to replace stone wash. It bleaches the fabric without the use of any bleach and chemicals, or stones. Instead of using water, this technique uses atmospheric air. Once the machine is filled with ozone gas, it starts tumbling and gives the garments their natural worn-in look. At the end of the cycle, the machine transforms the ozone back into air and releases it back into the atmosphere. When using the ozone technique, water savings are up to 67 percent, chemical savings up to 85 percent and power savings up to 62 percent.

Appreciation from the industry

Kuyichi chooses its suppliers with care and have a sustainable mindset in every decision they make. Over the years Kuyichi has become an appreciated denim brand that is known for their pioneering position in sustainable denim. They've created denims that included recycled cotton, hemp, linen, tencel and even soy fibres. These concepts were well received and celebrated.



Initiatives towards sustainability and eco-friendly processes

It all started with organic cotton tees made from tanguish cotton from Peru. Kuyichi wanted to show that it is possible for a fashionable brand to also take care of people and the planet. Thus they quickly shifted to making organic cotton denims. Being a Dutch brand and denim being the most commonly worn cotton garment, this seemed to be a logical step for the brand. Kuyichi has been making organic jeans ever since by adapting new – sustainable – materials and techniques to keep pioneering in reducing negative impact on the planet and increasing positive impact on the people who make them.

Presently, the brand is mostly focusing on adapting more and more post-consumer recycled fibres and other recycled materials in it's 'Pure Goods'. To make this more tangible they have committed to the Global Fashion Agenda.

Besides Kuyichi is also working on reducing the impact of their washes when it comes to water, energy, chemicals and worker impact. This is done by eliminating and replacing

“Consumers are asking for more and more transparency about where and how their clothing is made. The fashion industry is slowly shifting towards better practices and more responsible production. Even most of the bigger - fast - fashion brands are reacting to this shift. If the brands are unable to manage to shift the whole fashion system to a more sustainable way of producing, they won't be doing their part of fixing up this global problem, that concerns all,”

-Zoé Daemen,
Marketing, PR & CSR Manager,
Kuyichi Pure Goods.



MONKEE GENES

Monkee Genes was launched in 2006 in Derbyshire, UK, with an aim to offer something vibrant and youthful to the denim market. The team set out to dispel the myth that sustainable fashion was dull and expensive. Since then, the brand has grown offering organic jeans and ethical fashion to cater to all tastes. The collection features innovative fits produced sustainably and ethically.

Images BoF speaks to Phillip Wildbore, Founder and Designer, Monkee Genes who has created a natural evolution in jeanswear.

IBoF: Tell us little bit about the history of your company and your key milestones.

Phillip Wildbore (PW): I worked with John Ingram, who created Guys 'N Dolls Boutique and the Westerner which was the first jeans store in the UK. I designed my first skin-tight jeans with no stretch when I was 19 years old. By the age of 26 I launched my own brand which evolved into Road Jeans – an iconic label from the 90s.

I had been aware for a long time that the jeans industry had a very dark side. The ridiculous situation of landing jeans in the UK for £3 was too incredible to equate. I wanted to create jeans with an edge, made with a coincidence for both the workers and the planet, which Monkee Genes achieved initially and has been the first jean to be awarded with Soil Association Certification. My main aim is to give the jeans a rhythm and to ensure unparalleled feel given they are crafted using a fabric that has a sensual handling.

IBoF: Tell us about your production set up.

PW: We currently have four manufacturing partners – two in India, one in Pakistan and our oldest one in Indonesia, who I have worked with since the very beginning of Monkee Genes. I can proudly state that all our production plants have GOTS creditation.

IBoF: What are your latest collections, their theme and the key elements?

PW: Last year, we introduced wider blocks based on original 90s patterns from the Iconic Road range. There is a similar feeling amongst politically disinterested youth who are desperate to have a non-conformist style (anti-high street). It is a great opportunity for individual designs to flourish in this mass fodder of throw-away crap that is over-produced, creating only landfill and misery.

We have introduced a complete range of skin-tight jeans, high waisted, elastic and slim fit jeans for both men and women. Our range of wider cuts is inspired from the original 90s block, which are really starting to bounce now. Currently we are in the last part of developing a recycled polyester/organic cotton for our Organic Flex collection.

IBoF: Tell us about your current retail mapping across the world. How many countries are you present in and how many stores do you have?

PW: We are opening our own platforms in Germany, Switzerland, Austria and France through Zalando. Similarly, we are also launching ourself in New Zealand and Australia with Iconic and in the U.K with Next Directory and House of Fraser. In the USA, we have launched new showrooms in Los Angeles and New York and are ready to expand further.

IBoF: Tell us also about your online sales network.

PW: Our own online store is growing and unlike large online companies, our returns are minimal. My main concern is the growing unsustainable habit of ordering four/five pairs of jeans and



“Monkee Genes was created to bring out true rhythm from your natural sensitivity. We achieve this by using carefully sourced fabrics made by people who care because they are being cared for! The Monkee Genes design, when all the ingredients are added in, evolves into a piece of clothing which you can't wait to put back on. Looking after your body and soul; this is the natural evolution of jeanswear, this is Monkee Genes!”

-Phil Wildbore,
Founder and Designer of Monkee Genes

only purchasing one. On our own site we don't have this problem. The large online platforms seem to encourage this consumer behavior with free credit and paid for returns, instead they pass the cost onto suppliers.

IBoF: Are there any key attributes you maintain in fabrics, trims, accessories, etc., that are brand mandates and also help set your brand apart from the other brands?

PW: Producing 'your favourite pair of jeans' is my personal goal. You know, the types that you grab from the laundry bin. To achieve this we develop our own fabrics, like the Black Jet denim, which features black weft and black warp and remains black wash after wash.

IBoF: How important do you think it is for a brand to adopt sustainability and eco-friendly end-to-end processes today and what are the

dangers for the brand for not doing so?

PW: Walk into a factory that is GOTS certified and you will feel the difference. I'm currently using a factory that used to produce for around £10/pair on the high street. The factory owner got two mavericks to take over, who introduced the entire infrastructure but it is not possible when your main customer only wants to pay \$5/7. They introduced light, hi-tech machines and laundry and are now paying better wages. The staff's attitude went through the roof, along with quality. It's an easy equation to be honest.

IBoF: Tell us in detail about your journey, efforts and initiatives towards sustainability and eco-friendly processes.

PW: When I was a kid I used to cut the grass for my grandad. Gradually, I took over his entire vegetable garden and was growing loads of vegetables at the age of 14. Gardening is all about re-cycling and it sort of grew on me. I didn't understand that I was learning life lessons until much later. Now I've been producing jeans for nearly 40 years understanding what our customer loves about Monkee Genes.

How has this been recognized and appreciated?

PW: Meeting people who find out you are responsible for their favourite jeans is a very satisfying moment. Recently, I went to a wedding and I was introduced as the guy behind Road Jean (my first label) to a bunch of people in a bar, everybody was reminiscing about the brand and it was such an extremely happy environment.



G-STAR RAW

Founded in 1989, G-Star Raw remains driven by the sole philosophy of "Just the Product". With this dedication to quality and progress, the brand represents the forefront of the denim industry, producing pioneering products and rapidly growing into a global brand. Introducing a '3D Denim' approach to jeans construction in 1996 with the creation of the G-Star Elwood, G-Star now offers a wide range of apparel, accessories, footwear, and eyewear, alongside its jeans core.

G-Star RAW has recently launched its most sustainable jeans ever in partnership with Dystar, Artistic Milliners, and Saitex. A part of its SS '18 collection, the G-Star Elwood RFTPi jean is an evidence of G-Star Raw's industry leading innovation prowess. Developed by analyzing each part of the denim design process and exploring how to reduce environmental impact at every step, the G-Star Elwood RFTPi jean marks a milestone in sustainable denim manufacturing.

How is the G-Star Elwood RFTPi Jean made

G-Star partnered with its suppliers to develop the cleanest indigo dyeing process in the world - which is the world's first. Working with DyStar and Artistic Milliners, G-Star has adopted the hitherto cleanest indigo technology, which uses 70 percent less chemicals, no salts and produces a no salt by-product during the reduction and dyeing process. It consequently saves on water and leaves clean and recyclable water effluent.

Sustainable washing techniques

G-Star uses the most sustainable washing techniques. It partnered with Saitex to make and wash the garments with utmost care for both people and the environment. By employing sustainable technologies, good chemistry and renewable energies, 98 percent of the water is recycled and re-used and the rest 2 percent gets evaporated, leaving no water to be wasted or discharged into the local environment.

Use of 100 percent organic cotton

G-Star uses only 100 percent organic cotton, which is grown without synthetic fertilizers and toxic pesticides. This helps in sustaining and improving the health of soil, ecosystems and societies.

Removing components not conducive to recycling

G-Star removes all other components not conducive to easy recycling. It even removes all rivets and zippers and instead uses eco-finished metal buttons. In addition, all labelling and carton packaging is also responsibly sourced.

Creating 'Cradle to Cradle Certified' denim

In pioneering these new means of production, while maintaining uncompromising dedication to quality and style, G-Star aims to be an instrument for change in the denim industry - leading the way for independents and other global brands alike. As a result, G-Star worked with its mill partner to certify the newly developed denim fabric. This fabric is the first denim ever to be Cradle to Cradle Certified™ at the Gold Level by the Cradle to Cradle Products Innovation Institute. G-Star and its mill partner have created an open-source access to their most sustainable denim fabric development processes, which can be accessed through the Institute's Fashion Positive Materials Library.

The G-Star Elwood RFTPi jean, together with its counterpart the D-Star RFTPi denim jacket, will be available in stores and online for both men and women soon.



IMAGES Business of Fashion





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PATAGONIA

Building the best product by causing no unnecessary harm, using business to inspire and implement solutions to reduce impact on environment crisis, is what Patagonia stands for.

Patagonia Inc., is an American clothing company that sells outdoor clothing marketed as sustainable. The company was founded by Yvon Chouinard in 1973, and is based in Ventura, California. Yvon Chouinard got his start as a climber in 1953 as a 14-year-old member of the Southern California Falconry Club, which trained hawks and falcons for hunting. In the fall of 1994, the company made the decision of taking its cotton sportswear 100 percent organic by 1996. By 1996, Patagonia garments made of cotton were organic, and have been ever since. Over the years, Patagonia has achieved a cult following owing to its stellar earth-friendly business practices,

The filthy business of conventional denim, vis-a-vis its sustainability mandate, drove Patagonia to rethink the entire process. Through innovative technology, Patagonia is changing the way denim is made and raising the bar for environmental and human rights practices. It now uses eco-friendly materials and processing to give their customers the best denim product for their active lifestyles. Patagonia denim uses only 100 percent organic cotton grown without GMO seeds, synthetic fertilizers, pesticides or herbicides. An innovative dyeing process enables



them to reduce dramatically the use of water, energy and chemicals and produce less carbon dioxide as compared to conventional denim dyeing processes.

Organic Cotton

Denim fabric is made with cotton—a natural fiber. But the conventionally grown cotton is one of the dirtiest crops on the planet. That's why since 1996 Patagonia have used only organically grown cotton farmed without the usual mix of synthetic pesticides, herbicides, defoliants and fertilizers that can pollute water and air. Organic cotton agriculture uses non-GMO seeds and leverages nature-based solutions to manage pests and build healthy soil. All of the cotton in their denim jeans is organically grown.

Dyeing

When it comes to giving denim its signature blue, most dye houses use synthetic indigo dye applied on huge production lines that use a lot of water and energy. Indigo doesn't adhere readily to denim, which makes the dyeing, rinsing and garment-washing process resource intensive. Patagonia

employs Archroma Advanced Denim Technology, an innovative dye process that colors it with sulfur dyestuffs that bond more easily. This results in much shorter production lines that use 84 percent less water, 30 percent less energy and emit 25 percent less CO₂ compared to conventional denim dyeing processes. Since Patagonia do not sandblast, bleach or stonewash their denim to make it look worn, they avoid the serious social and environmental downsides of doing so.

Fair Trade Certified™ Sewing

Patagonia denim jeans are Fair Trade Certified® for sewing. Partnering with Fair Trade USA is one of the ways they are helping the garment workers get closer to a living wage. For each piece of Fair Trade Certified clothing, they pay a premium workers can use to improve their communities and elevate their standard of living. The workers decide how to use the money. They might choose to build a school or a health center, create a scholarship or take it as a bonus.



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NEW VISTAS IN DENIM

SILK DENIM

The development of silk denim by the Central Silk Board, Bengaluru has added a new dimension to denim and the fashion world. Besides having the soft and smooth feel of silk, silk denim garments are also lighter in weight and very comfortable to be worn in all seasons. Bharti Sood of Images BoF spoke to Shankar. S. Kotrannavar, Assistant Director (Insp), Central Silk Board, Bengaluru to know about the fabric attributes of silk denim, various new innovations done and how the organization was creating awareness to promote the fabric.

IBoF: What are the key attributes of silk denim garments?

Shankar S Kotrannavar (SSK): Natural silk has been one of the most popular fabrics because of its unique properties like, soft, supple, strong and lighter in weight than any other natural fiber. Silk is priced for its lightness with warmth, sheerness with strength and delicacy with resiliency. Silk fabrics retain their shape and resist wrinkling rather well. Silk has pliability and suppleness and that aided by its elasticity and resilience give it an excellent drape ability. Silk is a non-conductor of heat. Since silk prevents body heat from radiating outward, it is desirable as a winter apparel. Also silk being fine and strong can be made into very fine yarns and woven into light-weight denim fabrics.

Silk denim is a very successful effort in innovation of silk. Silk denim garments are soft to touch, lighter in weight, comfortable to wear in all seasons besides having a luxurious and smooth feel of silk. Eri silk denims are cool in summer and warm in winter.

The Eri silk yarn is a spun yarn and is bulkier. This permits the body heat and air to pass freely through the open construction of denim fabrics. This aspect makes it suitable to be worn in summer as well. The good absorptive properties of silk also contribute to its comfort for warmer atmosphere.



– Shankar S Kotrannavar,
Assistant Director (Insp),
Central Silk Board, Bengaluru

IBoF: What are the different varieties of silk denim fabrics?

SSK: Silk denim fabric comes in various varieties—100 percent Eri silk denim, 100 percent Mulberry silk denim and Eri and wool combination denim.

IBoF: What all products are made in Silk denim?

SSK: Silk denim is used to make men's shirts, trousers, jackets, kids wear, ladies wear and tops. It is also used to make ladies' hand bags, pouches, blazers, etc.

IBoF: What new innovations have been done in silk denim in last two years?

SSK: In the North East Eri silk denim fabrics were developed on handloom using locally produced hand spun and mill spun Eri yarn with natural indigo dyes under the project "Development and Commercialization of Hand-woven Eri silk denim fabric in North East". These fabrics are converted into designer garments - shirts, tops and dresses.

IBoF: What makes Eri silk denim apt for winter?

SSK: The Eri silk yarn is a spun yarn and is bulkier. The warmth properties of Eri silk fibre are equivalent to wool, which make Eri silk suitable for winter.

IBoF: What initiatives are you taking to promote silk denims?

SSK: The Central Silk Board has taken initiative to promote the silk denims through technological intervention and translating this information with entrepreneurs to commercialize the same through them. Central Silk Board has developed power-loom denim fabrics through M/s. Cauvery Fabrics, Bengaluru, and has also initiated commercialization of handloom silk denim products, both in plain and jacquard designs, through M/s. Five P's Venture Pvt. Ltd., Erode, Tamil Nadu. The silk denims produced by them have already been sold both in domestic and export markets.

Central Silk Board had undertaken all the activities relating to the development of denim fabric, like, from sourcing of the yarn and technology dissemination to coordination with the entrepreneur. Central Silk Board has also commercialized these silk denims through M/s. Raymond, M/s. Neelima Silks.

Recently at Textile India 2017 held during June 30 - July 2, 2017 at Gandhinagar, Gujarat, an MOA was signed between the Central Silk Board and M/s. Five P's Venture Pvt. Ltd., Erode and with well-known Designer Ms. Deepika Govind of Bengaluru for further development, promotion and marketing of silk denim products.

Awareness of the silk denim is being created on regular basis by holding workshops, designers' meets, interaction with exporters and manufacturers at places like Bengaluru, New Delhi, Chennai and Mumbai and also by displaying the silk products developed by Central Silk Board and sharing of technical parameters associated with them and commercialization of the products. Apart from exhibiting these products at the theme pavilion in the exhibitions organized by SMOI across India such



as Pravasi Diwas at Bengaluru, Textile India 2017 at Gandhinagar, North-East Exhibition at New Delhi and Shillong, India International Silk Fair at New Delhi, to name a few, efforts were also made to enhance the awareness levels amongst the entrepreneurs and the visiting public about the silk denim products developed by the Central Silk Board.

IBoF: Since silk denim is costlier than the cotton denim, how well has the market accepted silk denim?

SSK: Though the silk denim is costlier than cotton ones, the niche market has accepted the silk denim garments because of their special features like soft to touch, smooth feel, light-in-weight, comfortable to wear in all seasons. The Eri silk has good thermal properties, which make the garments to feel warm in winter and cool in summer.

The silk x cotton and silk x linen union denim fabrics are most cost-effective without losing their comfort and silky appearance.

IBoF: What efforts are being made by the Central Silk Board to increase the production capacity of silk denim?

SSK: The Central Silk Board is on regular basis conducting interaction programmes with the entrepreneurs, designers and manufacturers. In order to have collaborative projects with NIFT, NIFT-TEA and AIFD, we are also working in clusters to give a thrust to increase production capacity in silk denim.

IBoF: How many stores and outlets do you have? Out of those how many stores showcase the silk denim range?

SSK: As an R&D organization, the Central Silk Board is not involved in production and marketing of silk and silk products. However, the Central Silk Board supports the manufacturers and entrepreneurs in marketing their products by offering space in its marketing outlets i.e., Vanya Shoppes for Vanya products in designated metros like, New Delhi and Bengaluru.

IBoF: What initiatives are being taken to tie up with major brands in India for silk denim?

SSK: Since Central Silk Board is an R&D organization and is involved in development of R&D work through the entrepreneurs, it has tied up with few major brands like Raymond.

IBoF: Do you have any plans to tie up with the international brands to promote silk denim?

SSK: At present, Central Silk Board is involved with the development of clusters and the entrepreneurs and is helping them to improve their livelihood through design intervention leading to higher value realization.

IBoF: What is the benefit of tying up with the designers?

SSK: Tying up with fashion designers helps to convert silk denim into fashionable garments, which will add a new dimension to the silk denims and to the fashion world. Silk and silk blended denim apparels, made-ups and other lifestyle products would open up a whole new range of fabrics to the younger generation. The Central Silk Board has recently signed an agreement with a well-known fashion designer Ms. Deepika Govind of Bengaluru for further development and promotion of silk denim products.

IBoF: Do you have any plans of selling silk denim products through online stores?

SSK: Central Silk Board is not directly involved in the production and marketing of silk denim or any silk for that matter, on its own, however, manufacturers and entrepreneurs interested in promoting these products through the online stores may avail the assistance of Central Silk Board and Silk Mark Organisation of India.

IBoF: Is silk denim making its niche in the global markets? What are the strengths and bottlenecks in its path of progress?

SSK: Yes, silk denim is making its niche in the global markets. Our strength is Eri silk, which is a natural and eco-friendly silk. It is fashionable and comfortable in all seasons.

The major bottleneck in our path of progress is that we are unable to meet the demand due to limited availability of quality raw material.



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INDIA BUSINESS OF FASHION REPORT 2018

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(15TH EDITION)



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For the past 15 years, The India Business of Fashion Report (IBOFR), has been the ultimate guide to the Business of Fashion in India. Historically, the IBOFR encompasses exclusive reports from leading international and Indian fashion consulting and research leaders, and is also a rundown of the top developments and trends - meaningfully juxtaposed against the backdrop of events and people who created the bits of history that year. The vision is to ever deliver a comprehensive and meaningful synopsis to the business as currently seen and to serve as the seminal national report.

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Highlights of Fair

- Free entry for all retailers on producing their shops visiting card.
- Pick-up and drop facility will be provided to all retailers from Ramgopalpet, Koti and Divan Devdi.
- Promotion of Garment industry in the states of Telangana and Andhra Pradesh (Expecting more than 5000 retailers)
- Fair Venue is having Four different zones fully airconditioned.
 1. Brand Wagon
 2. Gold Wing Premium
 3. Gold Wing
 4. Platinum Wing
- Rooms are available at Venue. Participant can avail room facilities at their own cost.

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LNJ Denim



- Prabir Bandyopadhyay,
CEO - LNJ Denim

LNJ Denim is always looking for fresh innovations and differentiated products, utilising the inherent strengths of our sister concerns and new technologies. There are several innovative product developments in the making, focusing mainly on sustainability and multi-fibre/functional aspects of performance.



LNJ Denim was established in 2007 under RSWM Limited (the flagship company of LNJ Bhilwara Group). With a manufacturing capacity of 25 million metres annually, LNJ Denim has earned an excellent reputation amongst international and domestic brands as an innovator and a quality supplier of denim fabric. LNJ Denim is committed to processes and technologies that help keep the environment green and their business sustainable. They also offer fabrics dyed with advanced techniques that use less water and fewer chemicals.

IMAGES BoF spoke to Prabir Bandyopadhyay, CEO, LNJ Denim to know about the company's initiatives and top innovations made in the denim fibre industry in India.

IBoF: Tell us about the varieties in your present product portfolio.

Prabir Bandyopadhyay (PB): We are manufacturers and exporters from India, making all qualities from 4 oz till 15 oz - 100 percent cotton/cotton stretch and poly stretch, shirting, yarn dyed, selvedge denim, stripes, checks, jacquard denims knit look denims and doobby weave denims. LNJ Denim is one of the forerunners in the field of Post Consumer Waste Recycled denim products, in addition to being 100 percent organic, 100 percent BCI sustainable denim products.

IBoF: Tell us about your main production plants and total capacities and how are you trying to increase this in the next 2-3 years?

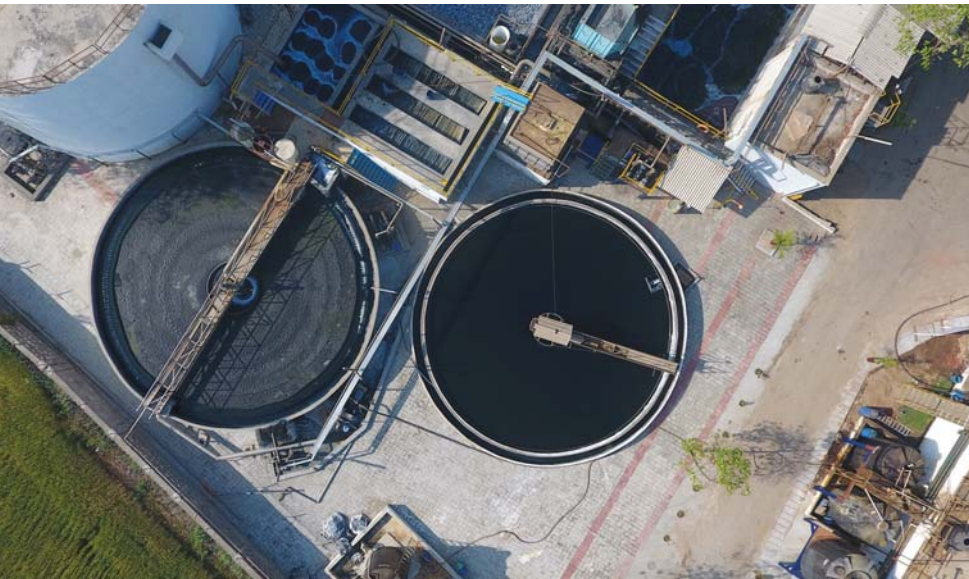
PB: The production facility of LNJ Denim is located in Mordi, Banswara Dist (Rajasthan), which has an installed capacity to manufacture 25 million metres per annum. Future expansion is in planning stages.

IBoF: Which top denim brands/retailers are you supplying to in the domestic markets?

PB: We are supplying our denim fabrics to Levis, Allen Solly, Van Heusen, Louis Philippe, Mufti, Spykar, Killer, Clothing Culture, Future Lifestyle, Gini & Jony, Pepe, Raymond Apparels, Arvind Lifestyle Brands, Reliance Retail and Mynta.

IBoF: What are the new collections that you have planned for in the forthcoming season.

PB: LNJ Denim launches two seasonal collections every year. We are currently presenting our Autumn-Winter '19 collection and products are currently being developed for our SS20 collection.



IBoF: What are your plans regarding product or category expansion?

PB: LNJ Denim is always looking for fresh innovations and differentiated products, utilising the inherent strengths of our sister concerns and new technologies. There are several innovative product developments in the making, focusing mainly on sustainability and multi-fibre/functional aspects of performance.

IBoF: What are your plans for exploring new markets in India and abroad?

PB: LNJ Denim strives to increase its footprint across the Indian and International brands, private labels and retail space.

IBoF: What was your turnover last FY (16-17)

PB: The company witnessed a turnover of ₹397 crores in FY 2016-17.

IBoF: At what rate is the denim fabric industry growing? How has the demand varied over the last 2 to 3 years?

PB: The Indian denim fabric industry is growing at a rate of 10 to 12 percent per annum. The demand has shifted towards wider width denim fabrics in knit look and doobby weaves.

IBoF: How do you define the denim fabric industry and what are its main segments?

PB: The Indian denim industry is a highly segmented area consisting of national level brands, regional brands, large format store retail chains and the largest segment being the unorganized non-branded garment segment.

IBoF: How important is the domestic retail market for Indian denim fabric manufacturers?

PB: As retail sales grow, the requirement of fabric will increase. We expect that retail sales in domestic market should grow rapidly, resulting in additional demand for fabric.

IBoF: Are the most preferred denim varieties in India the same as in western markets? Why?

PB: The Indian domestic segment is seeing an increased demand for knit look and doobby fabrics, a trend that has tapered off internationally. The western markets are looking for more antique washed products, a return to rigid, rugged looking garment finishes.

IBoF: How has stretch denim evolved in recent years?

PB: From comfort stretch denims, the taste has moved towards super stretch denims, with up to 45 to 50 percent stretch-ability and beyond.

IBoF: What are the recent innovations you have seen in denim fabrics in India?

PB: The availability of Post Consumer Waste recycled denim is definitely the top innovation that has been made in denim fabrics in India. LNJ Denim is a forerunner in the field and has established in-house capacities to manufacture PCW recycled denim fabric.

IBoF: What are your top 5 predictions on denim fabric preference trends for the coming seasons?

PB: Sustainability and preservation of water, energy and important resources will be the keys for fabric preferences in the coming seasons. Good hand feel, comfort and superior aesthetics of the fabric will be of prime importance.



ARCHROMA

PIONEERING SUSTAINABLE DENIM INNOVATION

Archroma is synonymous with innovation that aids brand owners develop to textile solutions that are both more ecologically and economically sustainable. In an exclusive feature, IMAGES BoF talks to Navneet Krishnan, Brand Solutions - South Asia, about the company's current developments and its strategic vision for more sustainable denim production.

IBoF: Brief us about the company, its history etc.

Navneet Krishnan (NK): Archroma is a global color and specialty chemicals company headquartered in Reinach near Basel, Switzerland. It operates with 3,000 employees over 35 countries and with 24 production sites. Its three businesses – Brand & Performance Textile Specialties, Packaging & Paper Specialties, and Coatings, Adhesives & Sealants – deliver specialized performance and color solutions to meet customers' needs in their local markets, touching and coloring people's lives every day, everywhere.

As a global leader in color and specialty chemicals, together with trusted heritage, new product solution packages and innovations, we aim to be a reliable partner for the textile mills as well as major brands and retailers for the textile chain from creation to the final garment.

IBoF: Tell us about Archroma's efforts towards sustainable fabrics and fashion.

NK: Archroma is committed to challenging the status quo in the deep belief that it can make its industry sustainable; an approach reflected in its innovations, world-class quality standards, high service levels and cost-efficiency. Products enhanced, colors enhanced, performance enhanced – "Life enhanced".

The company collaborates and partners with brands and retailers to offer concepts and innovations and with a backbone of sustainability, such as our ADVANCED DENIM and Earthcolors® technologies.

IBoF: What are the different value added features that you provide to textile manufacturers?

NK: We offer intelligent chemistries, which are endorsed by some of the most important eco-standards, to the industry and design processes that are smart. This enables the textile industry to adopt processes wherever there is an opportunity to optimize the process resulting in savings in water, energy, time and reducing emission of CO₂





-Navneet Krishnan,
Brand Solutions – South Asia,
Archroma India Pvt. Ltd.

Further, with our comprehensive ONE WAY process simulator, we can tangibly and accurately show the saving in these resources using our signature processes. Thus, we have a system that can assist in a competitive cost of production and savings in valuable resources. In a nutshell, we add value in terms of balancing the cost of compliance with a more sustainable production. This coupled with innovations and concepts in line with the need of consumers and brands makes Archroma a preferred partner to the industry.

IBoF: Tell us on the latest offer of Earthcolors® and what successes do you see in the market with Earthcolors.

NK: Earthcolors® is Archroma’s patented new method of synthesizing dyes to produce warm shades from nature. The technology helps to create a traceable biosynthetic dye derived from natural waste products of agricultural and herbal industries; leaving the edible part still available for food consumption.

Our Earthcolors® technology helps to reduce the negative impact on water footprint and preserve human wellness, natural resources and climate change compared to conventional synthetic dyestuffs. In addition, the up cycling of waste from other industries contribute

to a circular economy. Earthcolors® was honored with the prestigious Outdoor Gold Industry Award 2017 in the sustainable innovations category. The technology is currently exclusive to brands & retailers and dyes supplied to approved mills to support the efforts of brands & retailers towards transparency and traceability. Many brands and retailers, like Patagonia, Kathmandu and Peter England, have already launched collections based on Earthcolors®.

IBoF: Tell us about the innovative solutions that Archroma offers to denim textile players.

NK: Denim has continuously evolved from being a work wear to a fashion driven product across the years. Archroma offers complete package solutions to the denim industry right from fibre to finishing. Especially in dyeing, we have come out with our offering of Denisol® Indigo 30 liq, a pre-reduced indigo solution which is aniline free and manufactured in Archroma’s “zero water discharge” production facility at Jamsharoo, Pakistan.

We are the proud inventors of the multi award winning ADVANCED DENIM dyeing technology allowing significant water and resource savings in dyeing. Apart from classic blues with advanced denim technology, we provide a wide and colourful portfolio from earthy tones, military and khaki greens, vibrant colours, black and grey denims.



These dyeing concepts coupled with wash down and functional effects solutions from Archroma makes Archroma a leading player in the denim segment. Brands like Patagonia and G-star have selected ADVANCED DENIM for denim collections.

IBoF: Tell us about Archroma’s laboratories in India.

NK: We have a full-fledged laboratory in India at Thane with state-of-the-art equipment. The lab is used for developmental activities and helps in assisting our customers to collaborate with us for joint projects. In addition, we are uniquely positioned in India to have an NABL certified product stewardship lab. The lab is equipped with modern analytical equipment to ensure screening of raw materials and finished products in line with the global compliance requirements.

IBoF: What are some of the most exciting innovations that you are working on right now?

NK: Archroma is committed to developing innovative products and processes that are safer for the consumer and for the environment. We are today touching the value chain from creativity to execution. Archroma’s Color Atlas with more color choices, convenient design, improved efficiency and online digital tool helps streamline the process from creation of color and design to its actual production in the textile mill.

What excites us is our mindset to be innovative in leading the change that is required to challenge the status quo to make our industry sustainable across this value chain.

A striking example is our new aniline-free (below limits of detection) denim indigo dye that we introduced as a sneak preview at the recent Planet Textiles 2018 Conference in Vancouver, Canada. The brand new dye provides a non-toxic way to produce the traditional, iconic indigo blue that consumers associate with denim and jeans.





R | Elan™

THE NEXT GEN FIBER

In order to satisfy the increasing consumer demand for high functionality polyester, Reliance has undertaken an initiative to fully integrated the entire supply chain to provide support to make it sustainable. This will ensure higher brand delight for the end-users as well as increased value at every level of the textile value chain.

RIL has recently launched a new range of innovative newage fabrics under an umbrella brand - R|Elan™ that includes a portfolio of specialty fabrics which are a perfect blend of 'art' and 'smart', the fabrics will be providing enhanced aesthetics, performance and comfort. RIL works closely with its Hub Excellence Partners (HEP) to standardise quality and product attributes of R|Elan™ fabrics.

As a Next Gen Fabric 2.0, R|Elan™ fabrics are made from specially engineered fibres that provide perfect fusion of functionality and fashion. Through this Reliance aims to fulfill the needs of all consumers, across all apparel segments like activewear, denim, formal wear and womenswear.

The R|Elan™ fabrics are powered by various unique innovative technologies that enhance the functionality, product characteristics, and also the sustainability quotient. These have been specially designed to create extraordinary impact and provide unmatched experience to consumers.

Following are the R|Elan™ brands that RIL has created based on varied technologies:

R|Elan™ Fabric 2.0 powered by Kooltex is a specially-engineered fabric with inherent moisture management mechanism that keeps the user cool and dry in hot climate. The permanent three-stage wicking mechanism ensures that the sweat is quickly transported to the garment's outer surface, spreads over a larger area, and evaporates fast.

R|Elan™ Fabric 2.0 powered by Feelfresh is a high-performance fabric that limits bad odour in garments even after prolonged usage. It uses a unique silver nano-particle technology that limits the growth of microbes and bacteria, thereby giving the fabric long-lasting anti-odour properties.

R|Elan™ Fabric 2.0 powered by Supersoft is made from one of the finest fibres in the world. This feather-touch fabric is used to create luxurious aesthetics and enhanced drape in high-end formal shirting.

R|Elan™ Fabric 2.0 powered by FreeFlow is a fluid fabric that creates exquisite, flowy ethnic and western wear for women.



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R|Elan™ Fabric 2.0 powered by SuperBlack is a rich black fabric for every occasion – be it a formal business meeting or an informal social event. The black shade lasts for the lifetime of the garment, irrespective of repeated laundry cycles.

R|Elan™ Fabric 2.0 powered by GreenGold is a fabric with unmatched eco-credentials. The fabric is made by recycling post-consumer PET bottles, using renewable energy sources, and has one of the lowest carbon footprints in the world. GreenGold can be made from pre-coloured fibres, which remove

R|Elan™ Fabric 2.0 powered by DuraFit is a rugged stretchable fabric providing enhanced shape retention.

The Denim Connection

Polyester infused denims are one of the most sought after choices in the fashion industry because of the enhanced aesthetics and performance attributes. The inclusion of RIL's innovative technology based polyester provides a pair of jeans unique high performance attributes such as moisture management, anti-odour, stretch and high recovery, light-weight, longevity and sustainability quotient.

significantly enhanced its capacities in key product lines and has improved its global rankings in the main products of the polyester chain.

Importantly, the new projects have materially improved RIL's cost positions in these products with appropriate choice of feedstock, technology and scale. Globally, RIL is the second largest producer of Polyester Filament Yarn (PFY) and Polyester Staple Fibre (PSF) with 2.36 MMTA and 7th largest producer of Polyethylene Terephthalate (PET) producer with 1.13 MMTA capacity.

Top Clients

RIL has recently tied up the US based VF Corp., maker of Wrangler Jeans; and with Myntra owner of Mast & Harbour to co-brand the pair of Jeans. The tie-up signifies uninterrupted high standard quality fabric supply to the brands and RIL's appropriate R|Elan™ technology gets co-branding on the product tags. RIL is also in the advanced stages of discussion with many international and domestic brands.

About Reliance Industries Limited

Reliance Industries Limited (RIL), founded by Padma Vibhushan Shri Dhirubhai H. Ambani four decades ago, is India's largest private sector company. RIL's activities span hydrocarbon exploration and production, petroleum refining and marketing, petrochemicals, retail and 4G digital services.

In 2004, RIL became the first private sector company from India to make it to the Fortune Global 500 list of 'World's Largest Corporations'. It currently ranks 203rd in terms of revenues, and 110th in terms of profits. The company stands 83rd in the 'Forbes Global 2000' rankings for 2018 – the top-most among Indian companies.



the need for downstream dyeing, thereby saving water, energy and chemicals. **GreenGold is Oekotex certified, making it safe for even baby products, in addition to ISO 9001, ISO 14001 and OHSAS 18001. It is GRS (Global Recycled Standard) certified as well – a major requirement for global brands.** RIL is one of the few Indian companies that meets the Responsible Care requirements of the American Chemistry Council.

R|Elan™ Fabric 2.0 powered by AirTherm is light and comfortable, and yet provides warmth. Its hollow structure traps air, providing thermal insulation.

RIL is experiencing very strong traction for its high performance polyesters from denim manufactures as the leading brands, fashion designers, apparel manufactures are trying to meet the robust demand from end consumers. The robust demand trend is expected to continue as more and more people experience the delight of owning a unique pair of jeans. The demand from denim segment is one of the fastest growing in the entire gamut of RIL.

Infrastructure

RIL has recently accomplished one of the largest petrochemicals capacity expansion in the world. Over the course of the last three years, RIL has



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Dated : 24/4/2018

Dear Participants,

"Greetings of the Season to all of you"

We take immense pleasure in acknowledging the fact that KHAGA has successfully completed 26 years. KHAGA was started with the main objective of creating a common platform for the retailers and wholesalers of Hosiery and Garment Industry in Karnataka. A place that helps create moments that fill your business establishment in full capacity. A wave of optimism is sweeping over us. To fulfill this objective KHAGA started with Buyers and sellers meet every year. This year KHAGA is organizing its **4TH INNOVATIVE BUYERS AND SELLERS MEET** on 6th, 7th and 8th August 2018 at Hotel Bangalore International, Bangalore.

This meet will bring the buyers and sellers together. This meet will have the best brands, showcasing their latest designs and the best retailers of South India coming in for bidding for the designs. This meet is also being planned keeping in mind about the upcoming festivals of the South India i.e., Ganesh Chaturthi, Dasara, Deepavali and Christmas. Thus giving ample reason for the retailer to buy new designs for the occasions.

Due to availability of limited rooms Interested parties kindly contact the following members for booking details.

1. **Rajendra Baheti** - 98441 24961 Project Chairman
2. **Shailesh Mehta** - 94489 56237 Project Member
3. **Gaurav Sharma** - 99000 50723 Project Member

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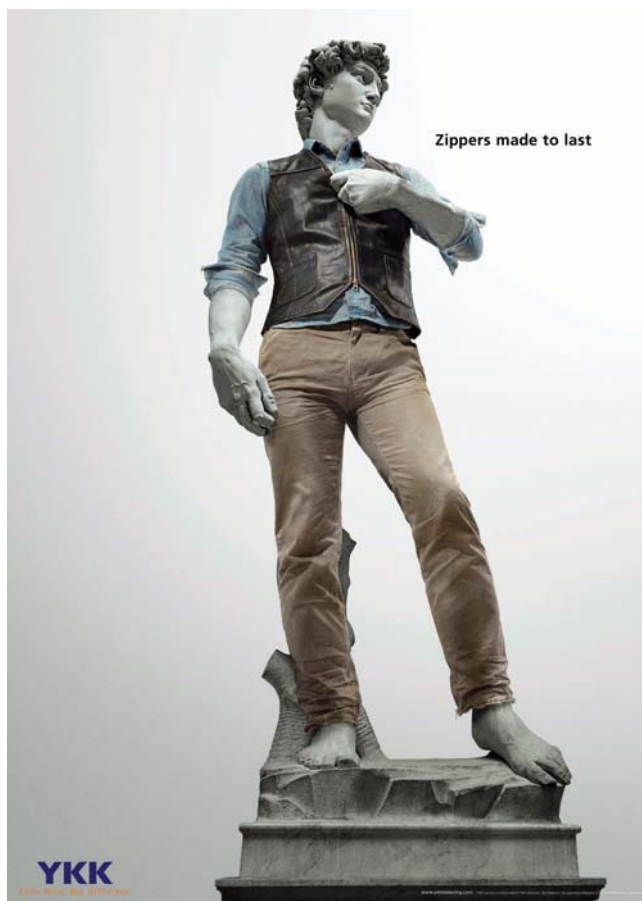
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YKK

YKK is a renowned producer and marketer of fastening products for more than 80 years. It was founded by Tadao Yoshida in Higashi Nihonbashi, Japan (Tokyo) in 1934. To meet the changing market climate, the company has divided its company into six global regions, that together contribute to the globalization of its customers' businesses.

Brand USP

YKK is a complete one-stop-shop for all your fastening and trimming needs. It has strong market share in the garment and apparel industry across the world.

Target Group

The company targets the entire apparel and textile industry including manufacturers, exporters, etc., that require any kind of zippers. It also serves luggage, leather and accessories manufacturers along with allied

industries like home furnishings, workwear, automobile, etc.

Product Basket

YKK manufactures zippers, snaps, buttons and buckles. YKK believes in a unified quality around the globe and delivers the best quality and services.

Network

YKK operates through 144 affiliated companies in 71 countries with over 40,000 employees. In India, it has branch offices in Gurugram, Noida, Kanpur, Jaipur, Ludhiana, Hyderabad, Kochi, Bengaluru, Kolkata, Mumbai, Tirupur, Chennai and Ahmedabad

Newest Products

YKK India, has launched customised pullers (rubber and die casting) and is soon launching a variety of new finishes in zippers.



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EDITORIAL CALENDAR: 2018-19

April'18

THE IFF 2018 REPORT

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.

For editorial queries mail rajanvarma@gmail.com

TO PARTICIPATE IN THIS SPECIAL ISSUE PLEASE TALK TO OUR BUSINESS DEVELOPMENT ADVISORS:

BUSINESS HEAD: Santosh Menezes, +91 9820371767, santoshmenezes@imagesgroup.in |

NORTH: Shivani Lorai, +91 9811511038, shivnilorai@imagesgroup.in | **EAST:** Pragati Kumar Sinha, +91 9804338455, pragatisinha@imagesgroup.in |

WEST: Radhika George, +91 9833446767, radhikageorge@imagesgroup.in | **AHMEDABAD:** Monark J. Barot, +91 9560090520,

monarkbarot@imagesgroup.in | **SOUTH:** Smriti Bhagat, +91 9686902343, smritibhagat@imagesgroup.in

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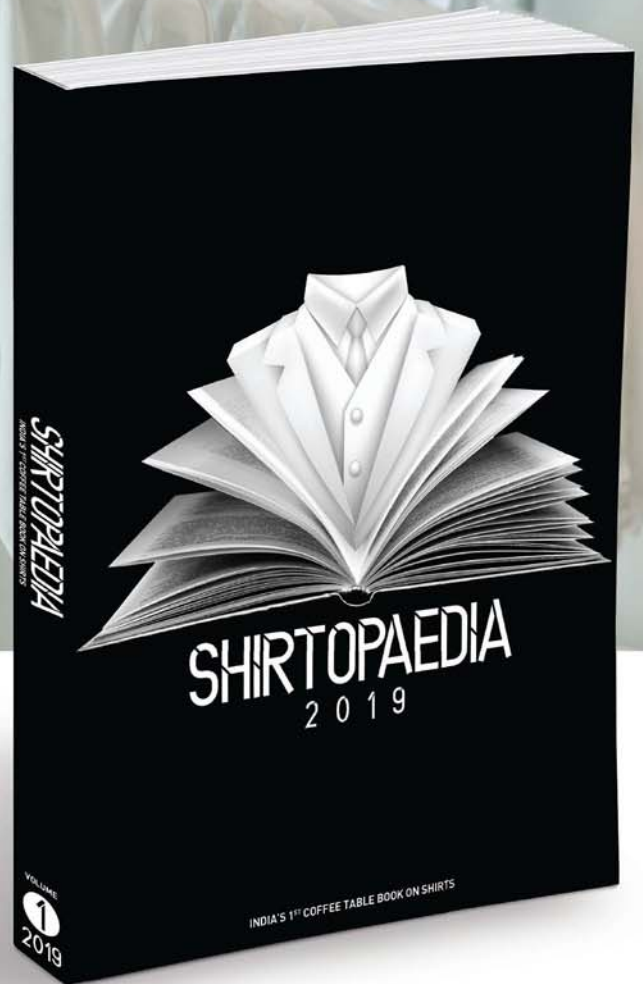
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INDIA'S 1st COFFEE TABLE BOOK ON SHIRTS



India is a Shirt Country. Shirts dominate t-shirts in an average Indian male's wardrobe and consequently the men's shirts category is one of the largest in the domestic market. Shirts have also prominently led the development of the ready-made garment industry in India. Brand building in shirts was rewarded by brand loyalty and this led to the birth of many of India's biggest fashion brands. The market has since grown with rapid casualization, the emergence of be-spoke, and the acceptance of designer and super-premium shirts. Much larger women participation in work force has led to the rise of women's shirts as well.

IMAGES Group is proud to announce the making of India's first ever study on shirts. The subject of shirts is a critical issue for all fashion players in India. In this special volume, we present a research on the size, segments and opportunities in the Indian Shirts Market, we will also map the super-premium, premium, designer, mid and economy segments individually.

Research and academic organizations interested in participating can mail to rajanvarma@imagesgroup.in

WE WILL ALSO...

- Present India's finest shirt brands and shirting fabric manufacturers
- Debate upon the blurring lines between formal and casual shirts
- Study the impact of global brands on Indian shirt market
- Study made-2-measure and customization in shirts
- Project the top trends for shirting in 2019-20

TO PARTICIPATE IN THESE SPECIAL ISSUES AND FOR PACKAGE OFFERS PLEASE TALK TO OUR BUSINESS DEVELOPMENT ADVISORS:

BUSINESS HEAD: Santosh Menezes, +91 9820371767, santoshmenezes@imagesgroup.in

NORTH:

Shivani Lorai, +91 9811511038
shivnilorai@imagesgroup.in

Deep Ghosh, +91 9871765550
deepghoshimagesgroup.in

WEST:

Radhika George, +91 9833446767
radhikageorge@imagesgroup.in

SOUTH:

Smruti Bhagat, +91 9686902343
smritibhagat@imagesgroup.in

EAST:

Pragati Kumar Sinha, +91 9804338455
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HIGHLIGHTS OF THE NEXT THREE ISSUES

AUGUST 2018 THE INNERWEAR SPECIAL ISSUE: The innerwear category has truly come out of the closet. With better shopping experiences and choices, and a need to both look good and feel good innerwear is booming. A report.

SEPTEMBER 2018 OCCASION, DESIGNER, WEDDING & WINTER WEAR: The cusp of Fall Winter ushers in the festive season, the most powerful stimulant for fashion consumption in India. Detailed reports on trends and what's in vogue.

OCTOBER 2018 THE WOMEN'S WEAR ISSUE: Women's apparel is set to be the fastest growing segment in India's apparel market. We also take a look into two more rapidly growing fashion categories — **Thermals** and **Fashion Accessories**, and the opportunities in each of these categories.

*Trade Fair Special Issues to be launched at leading garment fairs across the country.

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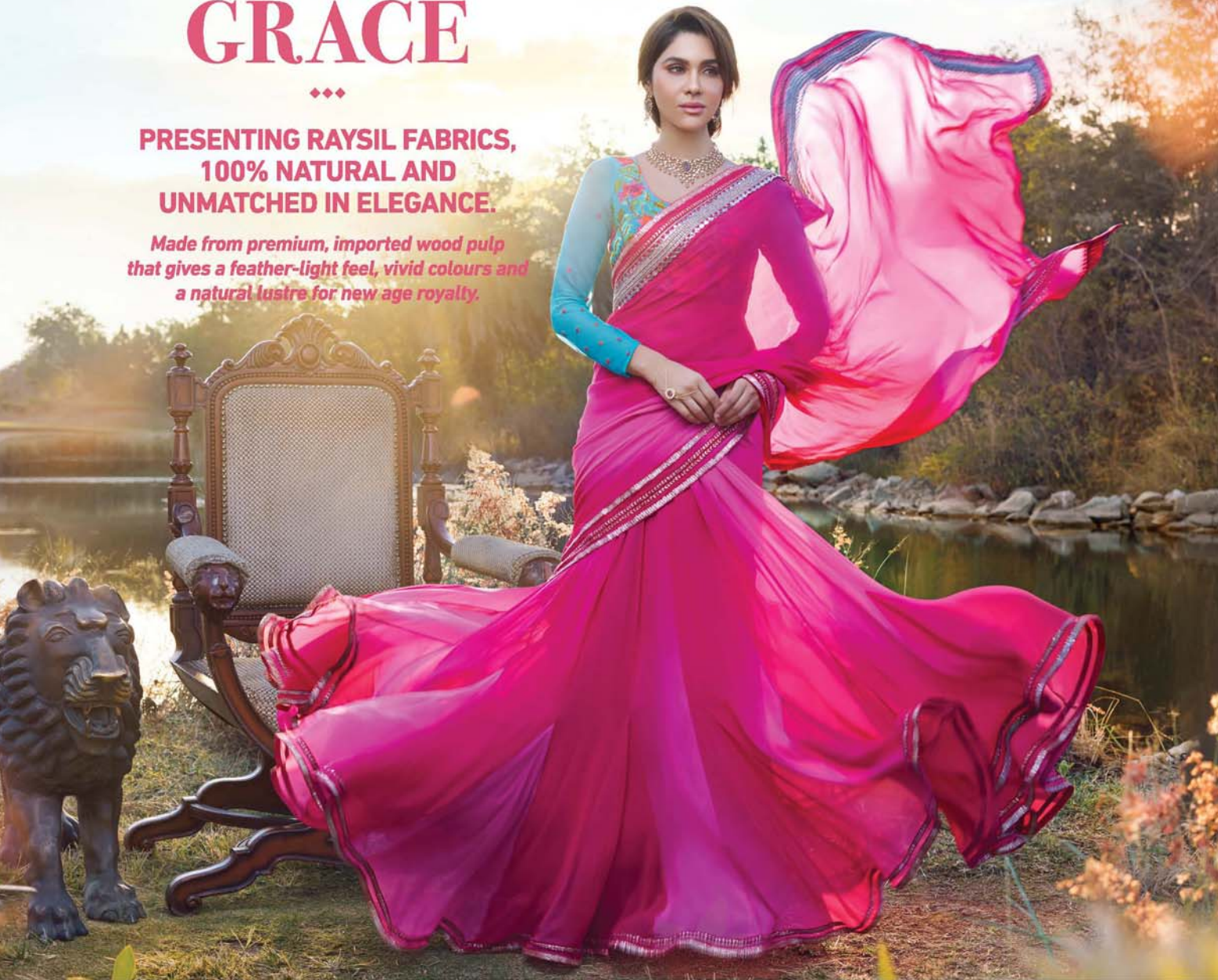
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