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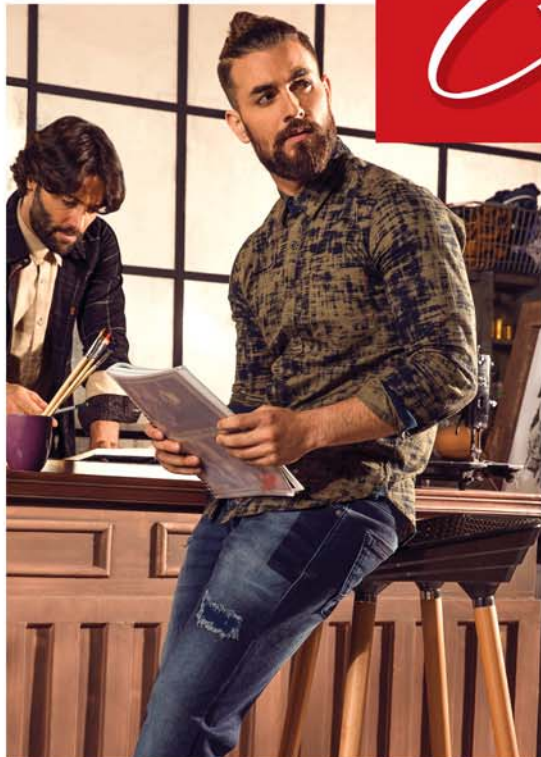
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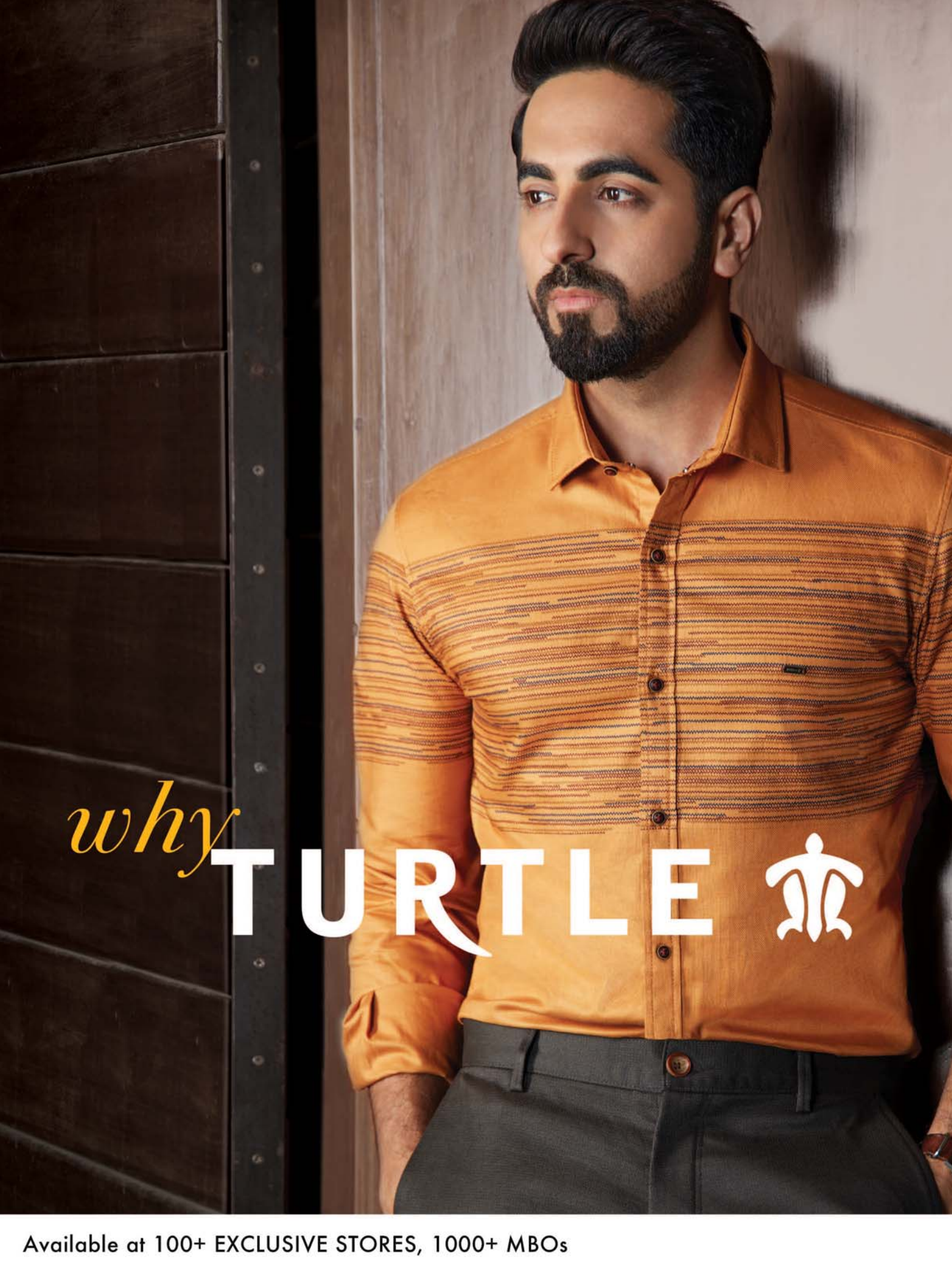
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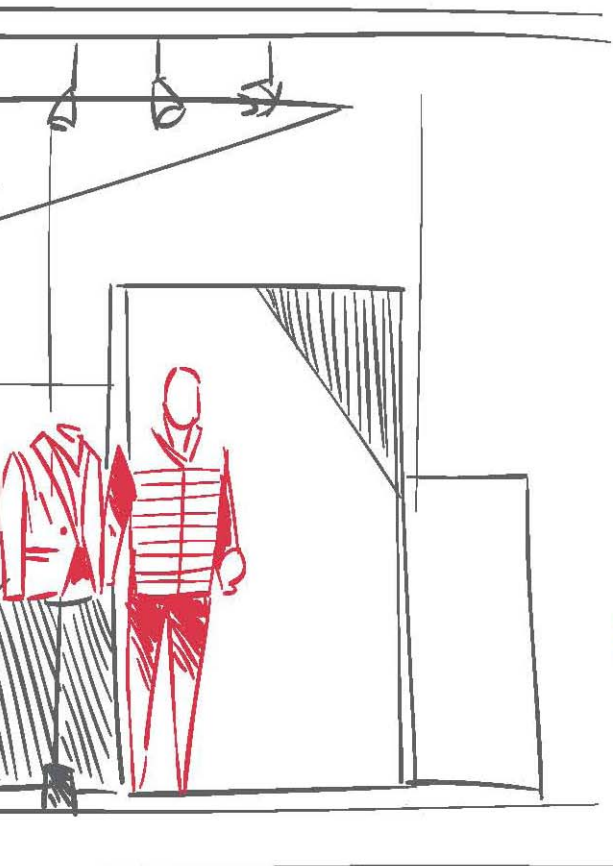
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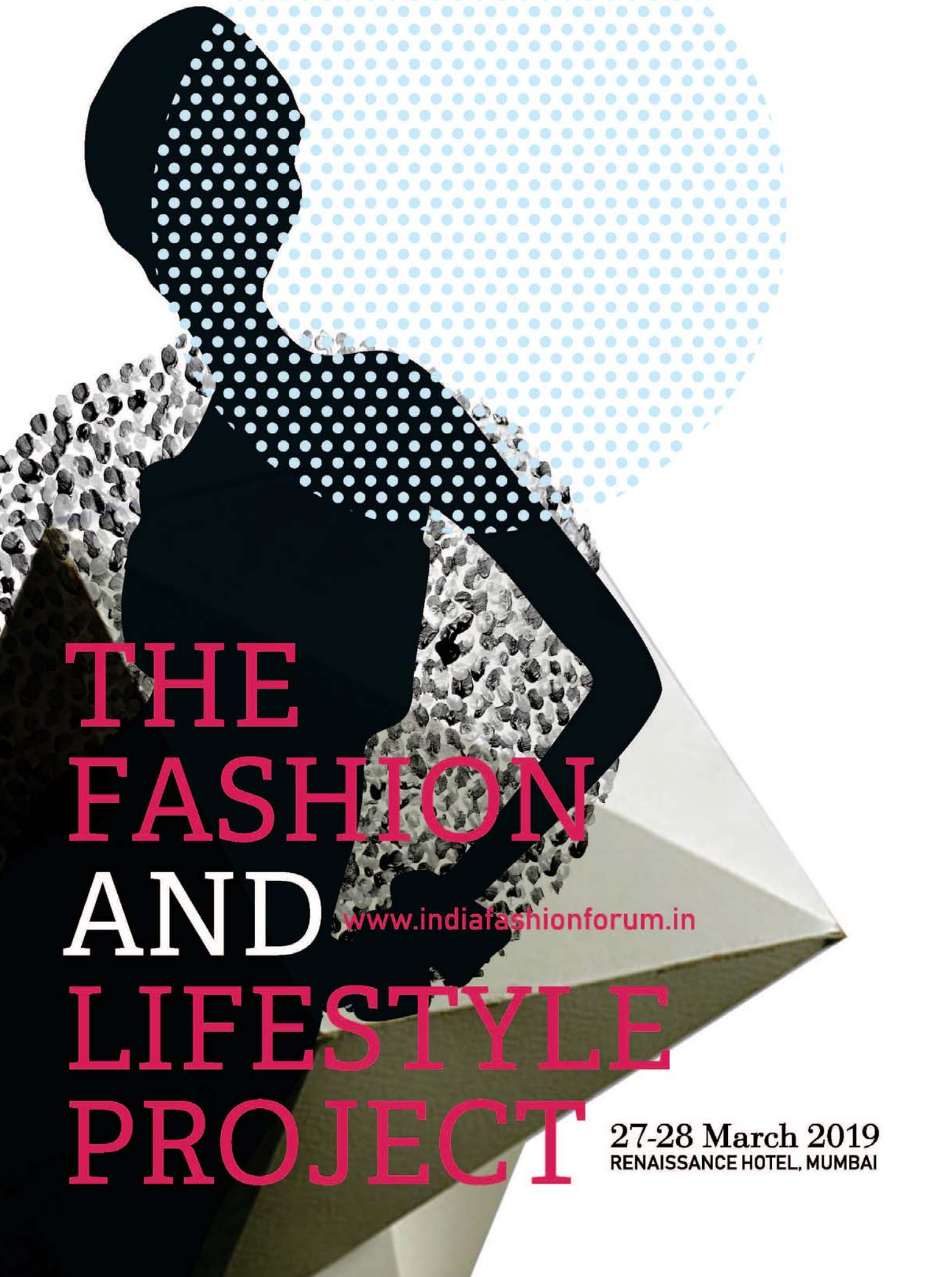
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Dear readers,

Innerwear is out of the closet and is taking giant strides towards become a very vibrant and exclusive fashion category in India. It was a long run and it did take its time, but the clandestine affair that it was, especially women's innerwear, is now an anachronistic anecdote. Today, sheer straps have begun to sneak curious glimpses from racer backs, and colorful thongs now gleam above svelte waistlines marking liberation from the traditional basics retail hegemony. Innerwear has finally stepped out of the veil and is righteously a fashion statement in India now.

The innerwear industry in India is amongst the most lucrative segments in apparel fashion for brands, retailers and investors alike. The rapid evolution of the category has led to branching out of several sub-categories, which now are settings standards on their own. Also, a slew of international and young and dynamic national brands have impinged on the arena, marking the anointing of a phenomenal trend that has compelled the entire industry to spruce up product offerings in terms of both aesthetic and qualitative value as well as innovation. This had led to an increased popularity and demand of innerwear as a whole and has result is an increase in the importance of the category amongst retailers of all sizes and kinds. Thus,

innerwear is fast emerging as a category that Indian retailers must watch much more closely.

Personally, I have a very special connect with the innerwear issue. Every year, as we work on this issue, the progress of the market never amazes me. As you can read in the Technopak research story in this issue, the innerwear category, currently estimated to be worth INR 28,781 crore, accounted for 10 percent of the total apparel market in 2017. The women's segment dominates the innerwear industry in India and is estimated to grow at an impressive CAGR of 12 percent over the next decade in contrast to the men's segment that is plotted to grow at a CAGR of 7 percent.

Apart from innerwear market sizing, segment definition, and discussion on key market trends of the sector in totality, the issue also features in-depth insight on various other the sub-categories that this segment has spawned in the recent years.

Considering the pace at which the innerwear industry is progressing in India, we tried to put focus on the sunrise segments and key innovations and loved it. I hope you love going through the issue too.



**Amitabh Taneja**

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## LETTERS TO THE EDITOR

Congratulations! A wonderful issue. Very detailed and informative. A remarkable study of the denim market. Must say, it's a priceless issue.

**-Amita Srivastav, Ahmedabad**

I just want to compliment you on the big `Denim issue'. I really enjoyed going through the pages on the fashion trends in denim for men, women and kids. This issue was so refreshing and gripping. Well done!

**-Amar Ahuja, New Delhi**

Loved the denim issue. The market research by on the denim wear in India highlighting the denim market size and growth in various segments and the growth opportunities, was very informative. The IBOF team has done a wonderful job. Keep up the good work.

**-Mrinalini Sharma, Gurgaon**

The July issue of Images BOF is truly a `denim bible'. Updating the industry about the latest denim trends in vogue, fabrics, washes, finishes, embellishments, effects, colour choices and about technological refinements. It is all well compiled and beautifully presented. Must say, lot of hard work put in by the team.

**-Ashutosh Garg, Ludhiana**

An amazing issue. So much to read and retain... Besides going through the market studies, trends and innovations in denim, I really enjoyed reading the write up on Denim Dalliiances. It was very interesting to know how the denim fabric inspires some of the top designers of the Indian fashion industry, to work with.

**-Bhaswati Rao, Uttar Pradesh**

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1st Inside Gatefold

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Special innovation with Flap

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# BUSINESS & INNOVATION

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## NATIONAL TRADE FAIR REPORTS F/W 2018

- >> CMAI-NGF
- >> GGMA
- >> WBGMDA

- >> LEWIS HAMILTON  
FOR TOMMY

- >> COLLABORATION
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## BUSINESS & INNOVATION



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Duke brings in a new collection of mercerised cotton t-shirts that channels the legendary and progressive style of New Zealand.

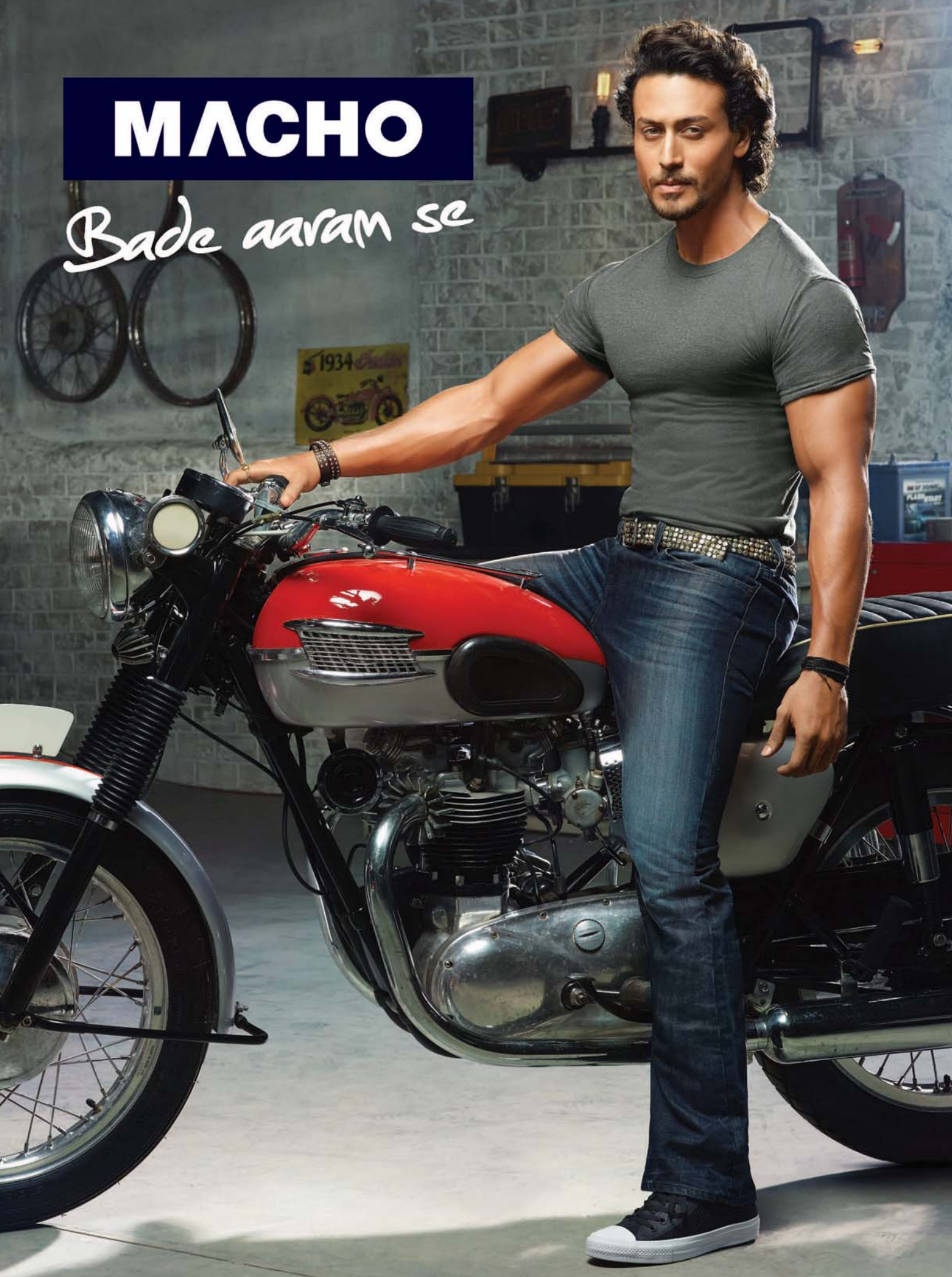
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# MACHO

*Bade aaram se*







# BEING HUMAN

**BRAND:**  
Being Human

**PROMOTER:**  
The Mandhana Retail  
Ventures Ltd.

**LOCATION:**  
Guwahati (G S Road, Sreenagar)

**SIZE OF THE STORE:**  
750 sq.ft.

IMAGES Business of Fashion

**Collection:** Being Human Clothing's apparel range is centred around a fashion forward approach. Its experienced design teams in India and Israel ensure that global design trends are met and international quality standards are assured. The result is a fashionable, trendsetting line of clothing and accessories for men and women, the ultimate goal of which is to cater to a good cause. Being Human Clothing is also predominantly recognised for its strong line of athleisure apparel in easy-to-wear fabrics and styles.

**Store Theme:** The idea behind a warehouse concept with an industrial set-up is to keep products, the key focus in the store. The design and color is very basic so that it is easily adaptable to any kind of collection or categories that are introduced. The key purpose was to make an intelligent store with smart design and reduce the cost of the store. The brand has used recycled wood, very basic fixtures, bare walls and flooring, to keep it very minimalistic. The warehouse is adaptable and each category is easily identifiable at its right location because of the character and essence it shares. It has played around with more city specific elements like graphics and vinyl decals in the store featuring details like the state pin code and the store address in a broken form keeping it very basic yet personalized.

**Store Interior:** This one-of-a-kind concept store is inspired by the look and feel of a warehouse. The store is aesthetically designed with a warehouse base design, set in an environment focussing on an industrial feel. The store dons an edgy look with accents of container sheets, yellow floor guidelines and a neutral colour allowing the merchandise to blend in with the space. The brand has also added subtle elements of metal and wood fittings and rails to create a vibrant yet modern atmosphere at the store.







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# BLACKBERRYS

**BRAND:**  
Blackberrys

**PROMOTER:**  
Mohan Clothing Pvt. Ltd.

**LOCATION:**  
Bengaluru, Karnataka

**SIZE OF THE STORE:**  
1,235 sq.ft.

**Collection:** Best known for its formal wear, the new Blackberrys store offers quirky clothing collection. Having a lot to offer for men with unconventional taste, the brand's latest collection includes limited edition of Race 3 collection and khaki pants with a tincture of twist. Not just clothing, the brand also has a wide range of shoes. All in all, one can buy a complete outfit from one place, thus, making shopping effortless.

**Store Theme:** The theme of the store is very formal. Being one of the biggest men's wear brand, Blackberrys' stores will vibe with anyone visiting the store.

**Store Interiors:** Neither too bright nor too dim, the store has a perfect combination of light and colours of the walls.







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**BRAND:**  
Deal Jeans

**PROMOTER:**  
Deal Global Fashion Pvt. Ltd.

**LOCATION:**  
Imphal, Manipur

**SIZE OF THE STORE:**  
450 sq.ft.

## DEAL JEANS

**Collection:** The collection at the recently launched exclusive outlet is a blend of fresh hues and trendy patterns crafted in 20 categories ranging from chic cropped tops, breezy tops, tunics, flare dresses in top wear and embellished denims, shorts and culottes in bottom wear.

**Store Theme:** Music, screens, projections, modern graphics, fashionable colours, all in place. Deal's exclusive store is distinguished by its strategic location and well-detailed architecture. The store is constructed in a manner which converts it into a spacious trend-setting showcase with a carefully thought through image extending from the window to the arrangement of the merchandise inside.

**Store Interiors:** Deal's standalone store is conceptualized in shades of grey colour scheme on walls and ceilings, lending a dynamic touch to the store and draws attention to the product. Strategically placed day lights throughout the store redefine the ambience making a visit to Deal store a spectacular event. The shelves are designed to make a memorable visual impression on shoppers. This look is complemented by the music, lighting and furnishings which characterize Deal's exclusive outlet, creating a shopping experience in tune with our young customers' interests. The most eye-catching feature of brands visual merchandising makes the window façade look stunning and plays a prominent role towards punctuating the space to highlight the brand's youthful and cutting-edge style.

**Store Designer:** As the store design is standardized which is followed for all stores, the store designing team at Deal Jeans has designed the store.





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# INDYA

The store allows its customers to browse through an exclusive range of luxe fabrics, fits and silhouettes and houses a contemporary range of skirts, peplum tops, crop tops, tunics and palazzos, finding a perfect blend of western and ethnic styles. Indya has reinvented traditional designs to make them simple, sophisticated and distinctly contemporary, thereby creating a fresh take on Indian fashion that is both indigenous and modern.



**BRAND:**  
Indya

**PROMOTER:**  
High Street Essentials Pvt. Ltd.

**LOCATION:**  
Mumbai (Phoenix Market  
City, Kurla)

**SIZE OF THE STORE:**  
730 sq.ft.

Indya first forayed in the offline retail space with a partnership of Future Group's Central Mall. While a major chunk of the company's revenue comes from its online channels, the offline sales from the 9 standalone stores across Delhi, Chennai, Ludhiana and Bengaluru and more than 70 shop-in-shops are also picking up.

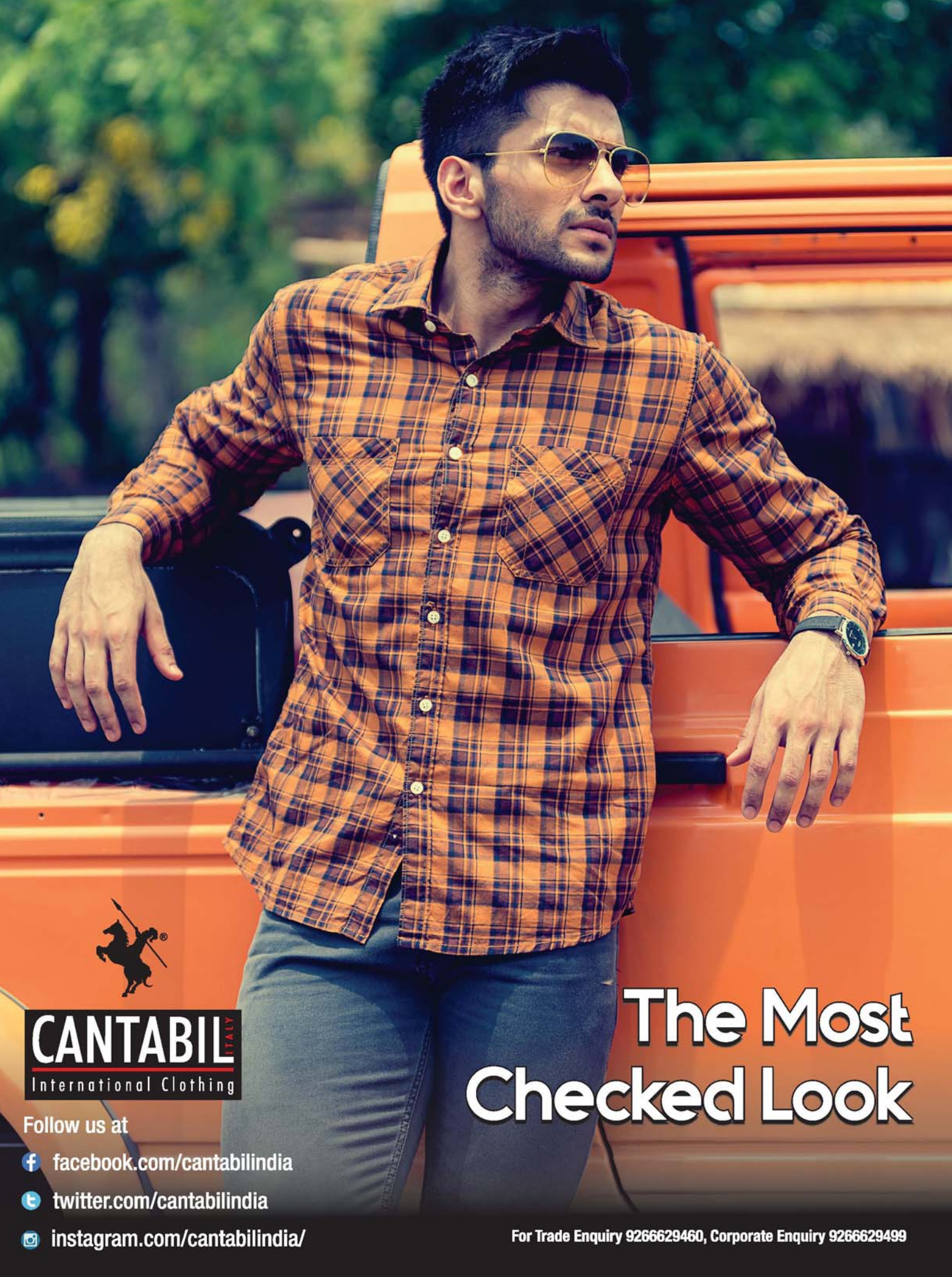
Speaking about the launch of the new store, Tanvi Malik and Shivani Poddar, Co-Founders, Indya said, "The fusion wear segment in India is growing at a rapid pace. We are glad we have been able to successfully cater to the demand of the modern Indian woman through Indya. From a small collection to expansion in 9 stores across the country, the brand has come a long way. Indya's offline sales contribute to 30 percent of the overall revenue, thus

offline expansion has been a natural progression. This year, we have focused on working towards our expansion plans in the online and offline segment and our new store in Mumbai is a step closer in this direction."

This financial year, Indya has planned to invest over 6 crores for their offline expansion and are looking at launching new stores across different cities in the country. The brand has also recently raised ₹5 crores in venture debt from Trifecta Capital and plans to deploy these funds primarily for offline expansion.










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# MARKS & SPENCER

LONDON



# MARKS & SPENCER

**BRAND:**  
Marks & Spencer

**PROMOTER:**  
Marks & Spencer  
Reliance India Pvt. Ltd.

**LOCATION:**  
Aurangabad (Prozone Mall)

**SIZE OF THE STORE:**  
8,000 sq.ft.

The iconic British retailer showcases the best of Marks & Spencer's quality clothing and accessories across womenswear, menswear, kidswear, lingerie and beauty at its newly launched store in Aurangabad. This is the retailer's 64th store in India and 16th store in Maharashtra, with 10 in Mumbai, 1 in Thane and 4 in Pune.

The new store demonstrate M&S' commitment to India, the fastest growing international market for the company. M&S opened its first store in 2001 and has grown to 64 stores across 30 cities, including 22 in emerging markets such as Aurangabad and Bhopal, alongside an increasing presence in online marketplaces. The company recently issued a strong set of results with LFL sales boosted in 2017 by the rise in number of customers choosing to shop with M&S.

At the heart of M&S' clothing offer is exceptional quality and confident style teamed with the latest international trends and fashion. All Marks & Spencer collections are designed and developed by a team of skilled international in-house designers based in London. The new store opens its doors to Aurangabad with the best of its latest collection on offer. Mohit Bhayana, Head of Retail, Marks & Spencer said: "M&S stands for great quality products

at affordable prices and we are really excited to be launching our first store in Aurangabad. We are delighted to have one of the most celebrated actors, Arjun Kapoor to be a part of our launch. He represents the youth of India and personifies fashion and trend which is what M&S is all about. The city has great potential as we see customers here demonstrate a taste for the international fashion and quality we offer to our customers across the world. Our collections, uniquely tailored for our Indian customers, have proved extremely popular across the country and we are looking forward to welcoming the Aurangabad community to our new store."

The Bollywood actor Arjun Kapoor looked dapper in M&S Navy Linen Blend Regular Fit Jacket with a Linen Blend flat front trousers. Commenting on the launch, he said, "I love the fact that Marks & Spencer is now available in Aurangabad. It has always been one of my favourite brands and I keep coming back to M&S for its exceptional quality and great fit. From the new collection available here, I love its shirts, blazers and chinos. With this amazing collection available in store, I am sure people in Aurangabad are going to shop till they drop."







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# PRETTYSECRETS

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**Collection:** The offline store will offer a complete range of products across categories like lingerie, nightwear, activewear and swimwear, all of it at reasonable price points.

**Store Theme:** Pretty Secrets is a young, fun lingerie brand which believes lingerie, need not be boring, rather should be fashionable and comfortable. The brand's store theme reflects its philosophy and also plays high tempo music to relate with the young crowd.

**Store Interiors:** Situated at the main junction with prominent visibility, Prettysecrets' store is easily noticeable from a good distance. Certain modifications are carried out on signage and trial rooms considering the premium locality and to give an upmarket look and feel. The brand has taken all possible measures in-store ensuring optimized utilization of space and to have maximum display capacity.

×

**BRAND:**  
PrettySecrets

**PROMOTER:**  
MTC Ecom Pvt. Ltd.

**LOCATION:**  
Mumbai (Kemps Corner)





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# WOODS

**BRAND:**  
Woods

**PROMOTER:**  
Aero Group

**LOCATION:**  
Chennai (Palladium Mall)

**SIZE OF THE STORE:**  
900 sq.ft.

**Collection:** The store showcases the brand's signature collections, including women's and men's bags, small leather goods, footwear and accessories.

**Store Theme:** The new store is totally equipped with its captivating interiors along with the stunning collection offered by the brand.

**Store Interiors:** The store's exterior features a full-height, illuminated facade framed with glass windows, while the interior features a mix of eclectic and bespoke furniture and objects, accented by custom-designed cabinetry, warm lighting, proprietary carpets and fine millwork.

The store has attractive rich wooden panels and a well-organized display of brand's creations such as footwear, handbags and other accessories on open colossal shelves. The store states its USPs in all modern and dynamic forms so that customers are thoroughly encouraged to stroll through the sections of their choice.







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# YWC

**BRAND:**  
YWC

**PROMOTER:**  
Yuvraj Singh's foundation for cancer awareness, YouWeCan

**LOCATION:**  
Chandigarh (VR Punjab, Mohali)

**Y**WC, the premium sports and lifestyle brand by star cricketer Yuvraj Singh, has launched its second store in India in Mohali, Chandigarh. The first stand-alone store was earlier launched in Varanasi, which received an over whelming response. The store in Mohali, Chandigarh is a natural progression and a location Yuvraj was keen on having a presence in since the launch of the brand. The latest store will now be a flagship store for the brand and will house a vast collection of their latest products across fashion and sports gear.

Commenting at this milestone, Yuvraj Singh stated, "I am really happy that we have launched our second YWC store in my home-town. From the launch of our first store in Varanasi, our experience has been nothing short of extraordinary. We are humbled by the response we have received for our online and offline stores as well. I am now happy to literally bring home my very own brand and make it accessible here at VR Punjab, which is one of the best upcoming fashion and entertainment destinations here in Chandigarh." Speaking at the brand's store launch in Mohali, Chandigarh, Shazmeen Kara, CEO, YWC Fashion said, "We have



received an extremely good response from the collections that we have launched previously via our presence across online and offline stores in India. Looking at the growing demand, we felt the need of having more standalone stores to enhance the brand experience. Launching the store in Chandigarh is especially significant since the city is close to Yuvraj's heart. The sports gear collection and accessories being the recent addition to YWCs wide portfolio, the brand is all set to open its doors and enter the hearts of all in Chandigarh."

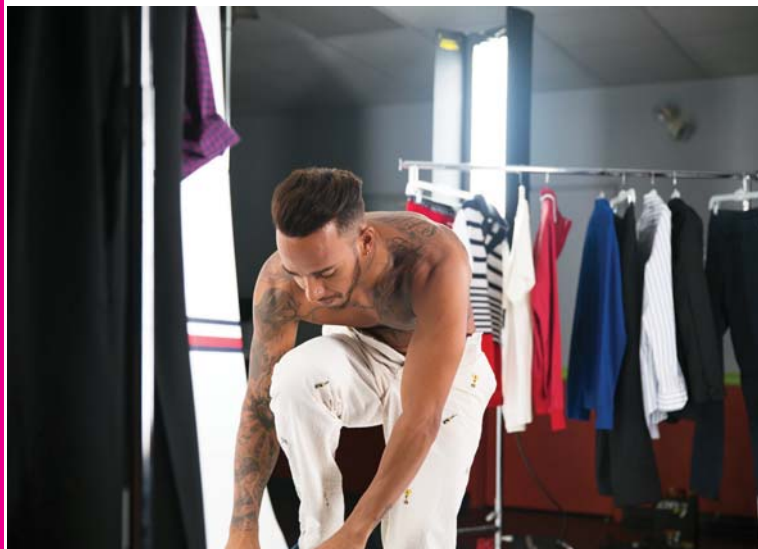
Pawan Agarwal, Founder Partner, Suditi industries, which also licenses, and manufactures YWC products exclusively said, "We are happy to partner with YWC on what I feel is an incredible growth journey over a very short span of time. Right from the ethos of the brand and what it stands

for to the incredible demand and reach we have achieved, the launch of this store is a very important milestone for us." Jermina Menon, VP Marketing, Virtuous Retail, said, "We are delighted to partner with YouWeCan as we continue to be inspired by Punjab's vibrant culture and rich heritage. It is also wonderful to have Yuvraj Singh join us on this special milestone for VR Punjab and we remain committed to expanding this cultural capital region of Chandigarh while bringing the best lifestyle brands to the city."

The brand is also available on Myntra, Jabong and Amazon besides its own e-shopping portal—www.ywcfashion.com. The products range from athleisure t-shirts, track pants, hoodies to caps and sportswear at an attractive price range, from ₹699 to ₹4,999. More significantly, the brand has pledged part proceeds of its sales for Yuvraj Singh's foundation for cancer awareness - YouWeCan. The foundation is intended to continue its vast work towards cancer awareness and prevention by using these proceeds to be self-funded and independent.







# TOMMY HILFIGER

## ANNOUNCES NEW BRAND AMBASSADOR

Lewis Hamilton, the British Formula One ace racer, has been revealed as the new brand ambassador for American fashion bigwig Tommy Hilfiger men's wear. The partnership reflects Tommy Hilfiger's strategic commitment to building on its strong men's wear heritage and further drive the global growth of its men's business, bringing the next generation of fans to the brand.

"I believe in the power of fashion and innovation to celebrate individuality and break conventions, like Tommy Hilfiger," said Lewis Hamilton. "Tommy's designs inspire me to be bold in every outfit that I put together outside of the racing track, expressing my creativity and eclectic style with confidence," he added.

Tommy Hilfiger's brand heritage is closely linked to working with pop culture and sports icons. Lewis harbors a deep desire to be different and carve a new path. He's a musician, an artist, and a lover of extreme sports. And these attributes make him a perfect Tommy Hilfiger brand ambassador.

"I have always admired Lewis' incredible endurance during the race, as well as his unique style off the track, which speak to the new generation of Tommy Guys," said Tommy Hilfiger. "He has built his incredible career as a racing driver with passion, dedication and extremely hard work - values that I embraced when founding my brand. We have a history with Formula One, and this partnership builds on our heritage of collaborations within the world of motorsport."

Lewis Hamilton's career achievements have put him in an elite group of global athletes, and he is regarded as one of the greatest Formula One drivers in history. He holds the record for all-time most pole positions, career points and most wins at different circuits. He has won at least one Grand Prix in every season that he has competed in.





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# CMAI'S 67<sup>th</sup> NATIONAL GARMENT FAIR

## THE MEGA CONVENTION

Showing 916 exhibitors, 986 stalls displaying about 1087 brands of men's wear, women's wear, kidswear and accessories, the 67th National Garment Fair held in Mumbai was India's largest ever garment buyer-seller fair held so far in history.

The Clothing Manufacturers Association of India (CMAI) rolled out the 67th edition of The National Garment Fair from 16th July to 19th July 2018 at the Bombay Exhibition Centre, NSE Complex, Goregaon (East), Mumbai. Touted to be one of the most prodigious convocations of the apparel industry in India, the 2018 edition was inaugurated by Chief Guest Kishore Biyani, Group CEO, Future Group.

Spread across an approximately 6,50,000 sq.ft., area, covering all the halls at the Bombay Exhibition Centre, the B2B event was home to 916 exhibitors and 986 stalls displaying about 1087 brands across men's wear, women's wear, kidswear and accessories. The 2018 edition will go down in history as India's largest ever garment fair held so far.

For the first time, the July Edition of the National Garment Fair has been a 'No Decoration Fair'. This B2B Fair was open only to trade visitors and garment retailers. The business networking sessions between the exhibitors and agents and distributors, high street retailers, national chain stores and e-commerce companies was also one of the key feature.

### Indian Apparel Market

According to Rahul Mehta, President, CMAI, India's domestic apparel market was estimated at USD 67 billion in 2017 which had grown at a CAGR of 10 percent since 2005. Indian domestic market had performed better than the largest consumption regions like the US, EU and Japan, where depressed economic conditions led to lower demand and growth. Due to presence of strong fundamentals, the domestic apparel market size of India was expected to grow at 11-12 percent CAGR and reach about USD 160 billion by 2025.

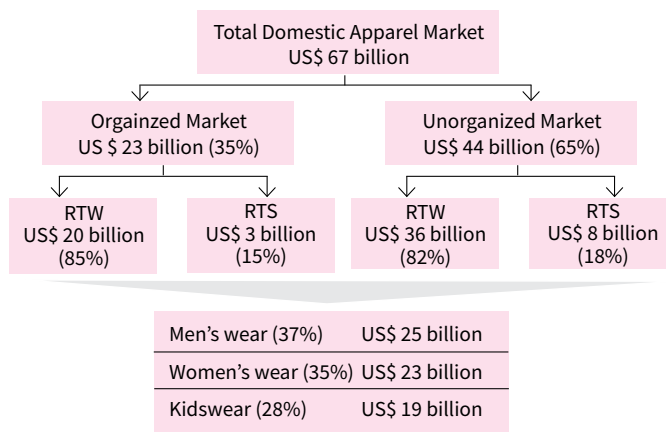
The domestic market size is dominated by ready-to-wear category, market size -USD 56 billion, with 84 percent share



**Category-wise Break-up of Domestic Apparel Market**

CATEGORY	MARKET SIZE (US\$ Billion)	% SHARE
Ethnic Wear	23.8	36%
Bottoms	11.8	18%
Tops	10.8	16%
Intimate wear	4.7	7%
Suits	3.7	6%
Outerwear	3.7	5%
Others*	8.4	13%

\*Others include active wear, dresses, school uniform

**Domestic Market Segmentation**


which is further growing at a CAGR of 10 to 11 percent. The ready-to-stitch market is also gaining momentum as more and more men who have been buying premium or luxury readymade clothing brands want to wear a shirt or a trouser that fits them perfectly. The ready-to-stitch market currently at USD 11 billion is expected to grow at a CAGR of 7 percent and reach about USD 20 billion in 2025.

**Recent Plastic Ban in Maharashtra**

On the recent plastic ban announced by the Government of Maharashtra, Mehta welcomed the clarification issued by the environment department allowing the use of PP bags for wrapping the garments at the manufacturing stage

under a mechanism for the collection of the used PP bags through a buy-back mechanism and ensure the recycling and final disposal of the collected PP bags.

Mehta once again reiterated CMAI's commitment, as a responsible organization, to protect the environment and assured that their members will work hand in hand with the state government and local authorities and ensure that all used PP/plastic bags are responsibly recycled and disposed off.

**Decline in Garment Exports**

Premal Udani, Chairman-Board of Trustees, CMAI stated that apparel exports had taken a beating from October 2017 onwards. The

introduction of GST had resulted in non-refund of several embedded taxes. Consequently apparel exports for the financial year 2017-18 declined by 4 percent to USD 16.7 billion from 17.38 billion in the previous year.

The downturn continues in FY 2018-19 with a month on month decline of 10 percent. The Government has seen this matter and has assured that embedded taxes will be refunded through the drawback route.

**First Apparel Training Center at Asmeeta Texpa, Bhiwandi**

CMAI is setting up their first apparel training centre, spread over 8,000 sq. feet, at AsmeetaTexpa, Kalyan Bhiwandi Industrial Area. The centre shall be operational by the end of this year. This full-fledged training centre shall offer courses for sewing machine operators - basic and advanced, supervisors, quality checkers and finishers and packers and will train up to 4,000 trainees per year.

A Tripartite Memorandum of Understanding between Government of Gujarat, GIDC and CMAI was signed on 10th July 2018 where CMAI shall disseminate information amongst its members promoting Gujarat as a destination for investments.





# WBGMDA

## 46<sup>th</sup> GARMENT BUYERS AND SELLERS MEET

**A report on the 3-day garment's buyers and sellers meet organized by the West Bengal Garment Manufacturers and Dealers Association.**



A three-day long mega garment buyers and sellers meet was organised by the West Bengal Garment Manufacturers and Dealers Association, in July from 27th to 29th, 2018 at the Hotel Peerless Inn (Kolkata) primarily to help garment manufacturers to interact with the all-India buyers and market their products before the festive season.

Sitaram Sharma, President, Bharat Chamber of Commerce inaugurated the garment buyers and sellers meet. Stalwarts in the readymade garment industry and noted industrialists and social workers graced the occasion. A meet guide was also released by the association at the event.

In the welcome address, Hari Kishan Rathi, President of the Association, stated that the burning problem of the readymade garment industry is the introduction of e-way bill for intra-state movement of yarn, fabrics and garment materials above ₹1 lakh for job work and services. The restriction of value

is a matter of concern. It should be irrespective of value and unrestricted movement of such material within the state.

Rathi further said that most of the job workers though skilled, are uneducated and it is impossible for them to generate computerised E-Way Bill. He urged the Bharat Chamber of Commerce to take up the matter with right earnest from Chamber level with the authorities concerned and see that intra-state movement of garment and hosiery material for job work and services is not hampered because of value restriction.

Rathi stated that in the export front, while India is struggling with the problems of decline in exports of readymade garments and textile items, countries like Bangladesh and Vietnam are showing growth. Export of apparel from Eastern India is limited to only a meagre amount around ₹1,300 crores, against all India RMG Export of ₹116,381.24 crores which is USD17,337 billion in dollar terms in 2016-17, whereas a small country of

slightly larger than West Bengal in size, Bangladesh, was aiming at doubling garment exports to USD18 billion in next three years. "We must introspect as to why we are lagging behind? We in the industry, in the Textile Ministry, AEPC must find out the causes and solutions at the earliest. We can procrastinate much to the deterioration of our own prospects in this field," Rathi commented.

Inaugurating the 46th Meet, Sitaram Sharma, President, Bharat Chamber of Commerce, stated that the textile has played an important role in the social, cultural, and economic life of the people globally and it is a matter of pride that India has an overwhelming presence in textiles from fibre to readymade garments. "The sector's importance in the economy is evident from its contributions to GDP, industrial production, export earnings and employment. The contributions of entrepreneurs in our State, in the textile sector, the MSMEs, in particular, are also very significant," he stated.



Sharma expressed that the business community was now facing another set of challenges of the new economic outlook of our country. They faced demonetization and the hurried implementation of GST. “Beside inflation and rising wages are the main factors for our survival in real terms in the near future. It is however, a matter of pride for us that while the global economic growth, is now projected at 3 to 3.5 per cent, India’s GDP growth for 2018-19 is projected at 7 to 7.5 percent.” Cautioning against being complacent, Sharma stated that the industry and trade have to prepare themselves to meet the challenges of new technologies. The entire textile

Sharma informed that the Central Government has allocated an outlay of ₹7,148 crore for the textile sector in 2018-19 as against ₹6,000 crore in 2017-18. Additional support in terms of labour reforms, like PF contribution exemptions, etc have also been extended particularly for the development of the sector. Beside, the pro-active role of the State Government in terms of extending structured incentives through the textile policy is very attractive for the entrepreneurs. There is, therefore, an urgent need to create further awareness about the benefits of the policies. Sharma stated that one of the sources of our strength in the textile sector is our human skill.

interdisciplinary collaboration. Because consumers’ lifestyles have changed over time regard to fashion and beauty, R&D on value-added functional textile is very crucial. New types of fibres called smart fibre are being more and more used by the garment industry in the advanced countries. The indigenous manufacturers need to pay attention in this regard also.

Sharma further stated that West Bengal has been a pioneer in imparting formal education in the textile sector and has one of the oldest colleges for textile technology at Serampore. “We need to collaborate and develop skill development centres to help our



industry from manufacturing to retail, now requires constant infusion of various technologies that are emerging with the advancement in materials science related to fibre. Innovations in design have facilitated the emergence of smart wear, and developments in 3D garment design technology and 3D printing have noticeably reduced the average time it takes from design to manufacturing. Further, AI has allowed the industry to react to consumer needs in real time. He emphasised that we need to acquaint ourselves with the growing trend of industry 4.0, under the guidance of NIFT and AEPC.

We have to nurture these skills through Skill Development Programmes, because the next generation of skilled people may not be interested to take up their ancestral skills. Large garment manufacturers who have the advantage of higher productivity because of advanced and automatic technology have to pay attention to this because hand-made workmanship has another dimension of value addition. The cluster-based production would help to meet the challenges in this direction. Sharma commented that the recent trend of growing diversity and expertise in the fashion and textile field has naturally led to greater

graduates to become more employable. WBGMDA may therefore consider to open a cell for entrepreneurship programme in partnership with NIFT.” Sharma also said that In today’s world tracking of the value chain has become a normal feature and to attract the foreign buyers, and big retail houses, there is a need for a development of high-functional and eco-friendly textile materials. The association has a pool of experts. A help desk may be constituted to guide and motivate the members, Sharma suggested.







# 28<sup>th</sup> GGMA NATIONAL GARMENT FAIR 2018

The 28th edition of the GGMA National Garment Fair 2018, organized by the Gujarat Garment Manufacturers Association was held at Gujarat University Convention Hall at Ahmedabad from 19th to 21st July'18.

The fair was inaugurated by Kaushik Bhai Patel, Revenue Minister of the Gujarat Government and was presided over by Mayor of Ahmedabad, Bijalben Patel. The fair witnessed a significant increase in the participation this year, with nearly 230 exhibitors, which included manufacturers of menswear, women's wear, kidswear and accessories from Gujarat and also from other states. More than 600 brands showcased their latest products for the forthcoming season.

The three day event was visited by more than 20,000 dealers, distributors, retailers, wholesalers and agents from not only Gujarat but also from across India and abroad, who placed their orders in large numbers. The heads and purchase managers of various multi-retail chain stores, who were present at the venue for all three days, placed their orders in large quantities with the participating exhibitors. The visitors felt that the products displayed at the fair were highly fashionable for the forthcoming season and were of very good quality.

The fair was sponsored by the Rajasthan Trading Company and the fashion show was sponsored by Nandan Denim Limited.

The participating companies received bookings for more than 50,000 to two lakh garments. Business worth more than ₹500 crores is estimated to have been done at this unique platform. Business of more than ₹2,000 crore is expected for Gujarat in the forthcoming season. The success of this fair has raised hopes of the entire garment and fabric manufacturing fraternity of Gujarat, who had lately been incurring losses in the industry. More orders shall also generate more employment in the state.

The fair concluded with a lucky draw and 25 participating winners were rewarded with two i10 cars, 19 Activas and four LEDs.







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# TWILLS

## A SUCCESS STORY

Envisioned and nurtured in Andhra Pradesh, Twills began as a dream that soared high, created a niche for itself in one state and then, rapidly spread its wings to other parts of India. Today, the brand is a household name in the Indian fashion sphere. In an exclusive interview with IMAGES BoF, Director, G Srinivasa Naveen, talks about the brand, its retail presence and future plans.

**IBoF: Tell us about your brand. How it started and how has the journey been so far?**

**G Srinivasa Naveen (GSN):** Twills was launched in the year 1999. The brand grew rapidly thereafter and by 2002, we added a complete range of men's wear products such as denims, trousers, casual shirts, semi-formals and t-shirts. The brand launched a 5,000 sq.ft. exclusive store at MG Road, Vijayawada in 2008. By 2019, the brand had expanded operations pan India. We added another milestone by opening our sales and marketing office in Jogeshwari, Mumbai in 2015.

**IBoF: What is the brand's USP and who are your core audience?**

**GSN:** "Value for money products" is the brand USP. Twills is known for its casual wear range that features superior fabrics and the latest trends at mid-segment prices. About 60 percent of our target audience is below the age group of 40 years and 40 percent are the office-going category.

**IBoF: Tell us about your present product portfolio. Of the entire product range, what categories enjoy the most demand?**

**GSN:** We offer a wide range of casual shirts, cotton trousers, denims, t-shirts and semi-casual shirts for men. Of the entire range that we have, we have noticed that casual shirts and trousers tend to sell the most.



- > Country & city of brand origin:  
**INDIA, VIJAYAWADA**
- > Number of countries present in: **3**
- > Year of brand launch: **1999**
- > Total Sales Turnover in India as in FY17-18: **₹215 Crores**
- > Total number of doors, the brand is present in India (on date)
  - EBOs: **96**
  - SISs: **150**
  - MBOs: **3,500**
  - Others: **RELIANCE TRENDS, CENTRAL, LULU, BRAND FACTORY**
- > Number of states present in: **26**
- > Number of cities present in:  
**ALL METROS, TIER -II & III CITIES ACROSS INDIA**
- > Total retail space across EBOs & SISs :  
**1,35,000 SQ.FT.**
- > Average sales per sq. ft. per month for above: **₹9,000**
- > Average bill/ ticket size for above :  
**₹1,200**
- > Same store sales growth rate (for EBOs): **30%**
- > Name of own on-line store :  
**www.twillsonline.com**



— G Srinivasa Naveen,  
Director, Twills

**IBoF: What are the new collections that you have planned for the forthcoming season? Tell us about their key features.**

**GSN:** We believe that conceptualised selling adds to the volume. The brand's designing team comes up with ideas and new sustainable concepts every season. We have promoted the eco spirit and yoga concepts in the past which enjoyed overwhelming response. The brand's main concept for the AW'17 collection revolved around sustainability and was named Swaraj. Ecrú and Khadi based fabrics are used for the garments in this concept. In addition to this, the collection also features various other concepts and is still a huge hit. The concepts for AW'18 are HIM, INDICODE, PAINTED, CLUB and PURE.

**IBoF: What are your plans regarding new product category expansion?**

**GSN:** We are coming up with boys' wear and a complete knitwear range inclusive of all winter products from AW'19.

**IBoF: Tell us about your primary markets. What response are you getting from online markets?**

**GSN:** Twills is present pan India, but honestly, Andhra Pradesh is the brand's strongest market followed by Maharashtra, Uttar Pradesh and Odisha. We were not much active on the online platform till now but from this season, we have started working on our online presence. We aim to have our own portal and market places, very soon.

**IBoF: What are your plans for exploring new markets in India?**

**GSN:** We have a lot of plans in the pipeline to get the brand to the next level. Above all, we are keen on launching EBOs in tier -II and -III cities pan India, about 50 EBOs in the next 5 years. Also, we plan to launch ourselves in about 200 SISs and 2,500 MBOs in the next 2 to 3 years.







# BUGATTI & ICONIC: MARCHING ON TOGETHER

**AstorMueller and Iconic enter into a strategic partnership to retail Bugatti shoes in India**

**A**storMueller, global maker of Bugatti shoes, partners with Iconic to be its exclusive India retail partner. Bugatti is one of the leading premium shoe brands in Europe, with over 4.5 million pairs sold annually, all designed and crafted by AstorMueller. Iconic is a prominent multi-brand premium fashion retail chain present in 17 cities.

Designed by Spanish, German and Italian designers, Bugatti offers a wide range of styles designed for everyone from the traditional businessman to the fashion oriented cosmopolitan and the dynamic sports fashion buyer. The collection features shoes for both men and women and come with many advanced features such as the genial insole, flexicity and the very special hand finished leather. Bugatti Man includes formal and dress shoes, moccasins, boots, sneakers and casual shoes. Bugatti Women offers pumps, boots, sneakers, dress shoes and ballerinas.

According to the partnership, Iconic would distribute and retail Bugatti through various premium retail destinations, including those exclusively for footwear. Following the rollout of the first group of shop-in-shops would be exclusive Bugatti brand stores in key markets, supported by the strength of Iconic's distribution. Iconic also has plans to present the collection on key e-commerce platforms, via the marketplace model.

Pawan Khandelwal, Managing Director, Iconic Fashion, says, "We are happy to partner with AstorMueller to present one of Europe's most successful shoe brands to India. Bugatti is a perfect fit to our premium fashion brands, and we look to take the brand across all main and







*“We launch numerous styles every season, and we actually also have a fantastic, limited pre-season collection. All these will be introduced to India as well.”*

– Ewen Campbell,  
Export Director, AstorMueller Group



*“Bugatti is a perfect fit to our premium fashion brands, and we look to take the brand across all main and emerging markets, through various retail partners across India.”*

– Pawan Khandelwal,  
Managing Director, Iconic Fashion



*“In 35 countries across Europe and the world, Bugatti is one of the most successful shoe brands. Our shoes are recognised for their excellent fit, craftsmanship and attention to detail.”*

– Tim Mueller,  
Chairman, AstorMueller Group



emerging markets, through various retail partners across India. The first step, though, was to introduce Bugatti into our own Iconic stores, and that’s what we are doing very swiftly this quarter. Iconic is a proven destination for those seeking trendsetting fashion, uncompromising quality and premiumness, and our steady focus on our promise has made the brand solid and aspirational. Bugatti is priced just right for those who demand avant garde fashion.”

Tim Mueller, Chairman, AstorMueller Group, says, “We appreciate Iconic growth vision for the brand in the Indian market. In 35 countries across Europe and the world, Bugatti is one of the most successful shoe brands of the last decade. Our shoes are recognised for their excellent fit, craftsmanship and attention to detail. The Indian market has been patiently waiting for us to launch in physical retail, and with our trendsetting collections featuring the latest styles from the streets of Europe, we hope to give the Indian consumer the very best.”

The Autumn Winter 2018 collection is now being introduced ahead of time. Although the launch collection is moderate by Bugatti’s European

standards, the entire range will be introduced on par with Europe. Says, Ewen Campbell, Export Director, AstorMueller Group, “We launch numerous styles every season, and we actually also have a fantastic, limited pre-season collection. All these will be introduced to India as well. Many of these go on to become benchmarks in shoe fashion.”

Says Khandelwal, “The Indian luxury market is worth USD14.5 billion and is rapidly growing. Iconic is positioned as a prestige brand for true fashion enthusiasts with high living standards to upgrade their wardrobes from ordinary mass lifestyle brands to exclusive and premium international brands. Bugatti is precisely one such brand and we have big plans for it.”

The first shop-in-shop, which offers both Bugatti Man and Bugatti Woman collections, is at the Iconic store in the prominent Ambience Mall, Gurugram, which caters to people across age groups from Gurugram and parts of Delhi as well. Other cities will follow in the course of coming weeks, first in Iconic stores and then in other key fashion and footwear retail stores.







# DUKE LAUNCHES NEW MERCERISED COTTON T-SHIRTS COLLECTION 2018

Duke brings in a new mercerized cotton t-shirts collection that channels the legendary and progressive style of New Zealand, a noteworthy emerging global fashion capital. The range presents an exhaustive line of gas mercerized t-shirts made from 100 percent combed fine Egyptian cotton in 2/60s, double twisted yarn and crafted with finest gauge. The brand has utilised imported knitting machines and has especially emphasized on the gassing and mercerized process to enhance sweat absorbing and ensure that the final product is extra light and has super soft feel and sheen. This exclusive range is also a

blend of total comfort, feather feel, long lasting colors and lustrous fabric.

With selections for the beach, weekend and even for formal outings in the city, this collection will let the wearer live the New Zealand life. This range is available in a plethora of colours, to make it vibrant and to cater to a varied taste of large audience. The soft and silky texture of these mercerized 2 ply cotton t-shirts and classic stitching make the range best suited to style with acid washed denim jeans and suede loafers for a casual look with an edge. "Mercerization puts cotton through several layers of quality checks and produces

the ultimate in quality, which we call '24 carat cotton,'" says Kuntal Raj Jain, Director, Duke. Duke has its own brand of lifestyle knitted garments crafted from world-class 100 percent cotton mercerized yarn. Duke is a name to reckon with in the Indian textile sector, for its vertically integrated operations, encompassing 100 percent cotton yarn, fabric knitting, processing and garmenting. The whole range of mercerized t-shirts is available at all Duke exclusive showrooms, leading multi brand outlets and online. These are creatively crafted in different sizes and always make a style statement.



**"Mercerization puts cotton through several layers of quality checks and produces the ultimate in quality, which we call '24 carat cotton'."**

– Kuntal Raj Jain,  
Director, Duke

## ABOUT DUKE

Duke Fashions (India) Ltd. has been conferred with the President's award; three National Awards i.e. Excellent Quality Readymade Garments, Outstanding Entrepreneurship and Quality Garments; crowned with Indian Power Brand at USA. Duke has got these awards for its innovation, product quality, most preferred apparel brand and inspirational leadership who has shaped and continues to shape India's destiny. Duke has an unbeatable marketing network comprising of more than 4,000 multi brand outlets and more than 360 exclusive stores across major cities in India. Moreover the products are also exclusively placed at big chain stores and on online shopping portals.



# THE INNERWEAR STUDY

»» MARKET  
»» TOP TRENDS  
»» TOP PLAYERS

»» MENS, WOMENS,  
KIDS INNERWEAR

»» SLEEP &  
LOUNGE WEAR

»» BEACH &  
RESORTWEAR

»» PIONEER:  
SWEET DREAMS

»» INNERWEAR  
ONLINE

Pic candyskin



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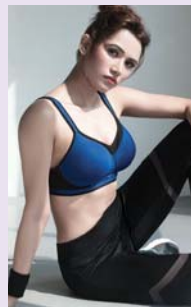
A peek into the world of stylish comfort, where every piece of apparel is beyond basic – Resort Wear.

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## The Innerwear Study 2018



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#### THE INDIAN INNERWEAR MARKET:

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#### THE PERFECT BLEND OF COMFORT & AN 'OOMPH' FACTOR!

Innerwear has emerged as the new fashion add-on and has also helped in boosting the self confidence in a lot of ladies.

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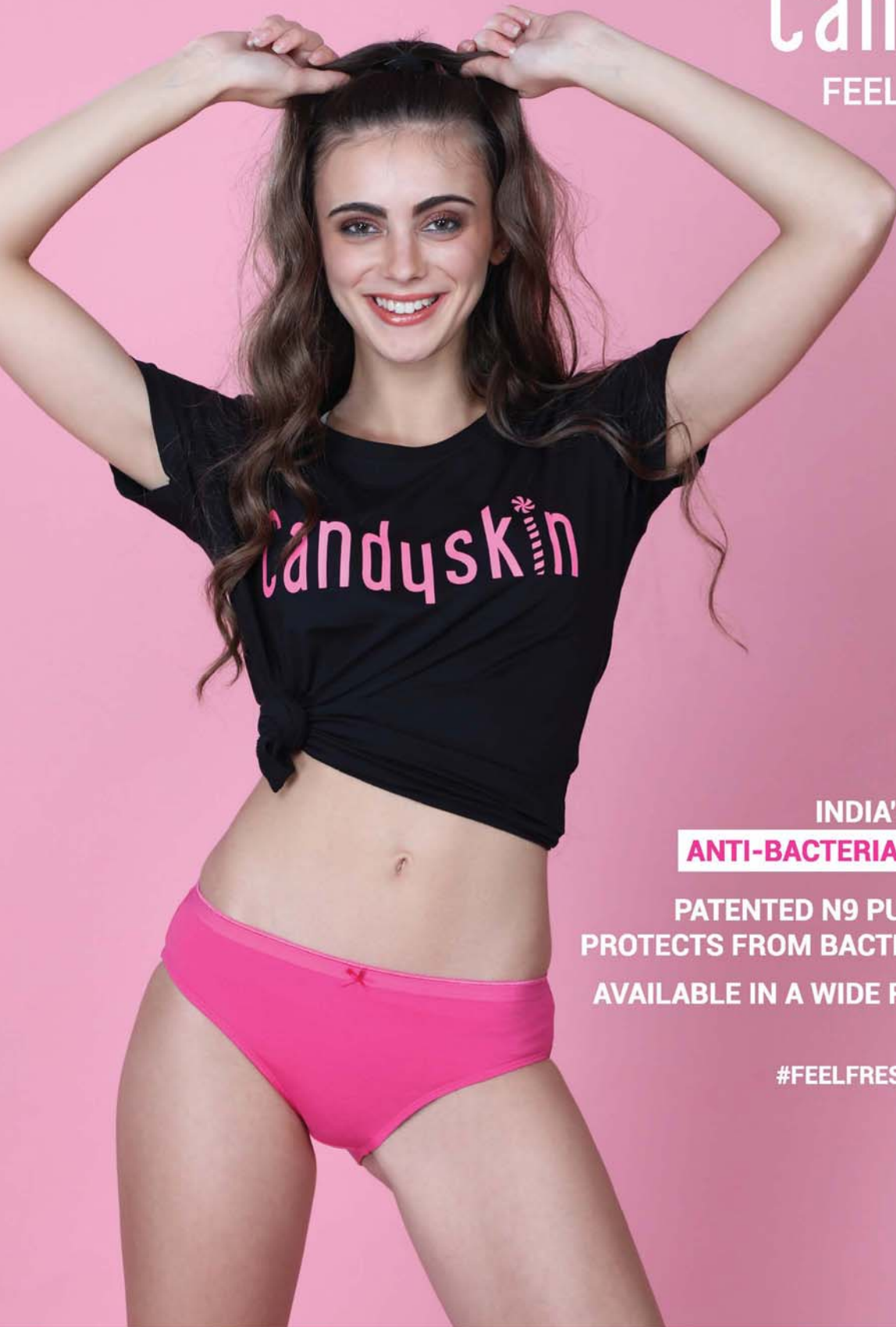
In an exclusive interview with IMAGES BoF, Pradeep Arora opens up about the kids' innerwear industry in India.

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# THE INDIAN INNER WEAR MARKET

## A RESEARCH ANALYSIS

*The innerwear category has broadened from basic requirement of commodity wear to designer wear with emphasis on styling and comfort. The Indian innerwear market holds immense growth potential and is slated to grow phenomenally over the next 5 years. Amit Gugnani, Senior Vice President - Fashion, Technopak, analyses the market size and trends in the segment for men, women and kids.*





Indian Fashion Retail which is currently estimated at ₹ 3,22,209 crore is expected to grow at a CAGR of 7.7 percent over the next decade to reach ₹ 6,74,037 crore by 2027. Among all the fashion categories, innerwear has emerged as one of the fastest growing categories in last few decades. A commodity which was earlier depicted as a day-to-day essential has transformed itself into fashion wear with more emphasis on styling and comfort. Traditionally, the innerwear market was largely fragmented and unorganised. But, in last few years the organised innerwear segment has shown promising growth in both men's and women's categories.

The innerwear category, currently estimated to be worth ₹28,781 crore, accounts for 10 percent of the total apparel market in 2017.

In recent years, the women's innerwear segment has grown consistently and was estimated to be worth ₹18,454 crore in 2017. It is expected to grow at an impressive CAGR of 12 percent over the next decade to reach ₹56,364 crore by 2027.

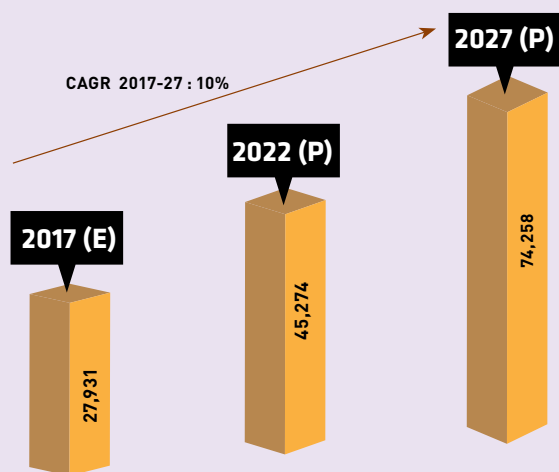
The men's innerwear market, which is estimated to be worth ₹9,477 crore in the year 2017, is estimated to grow at a CAGR of 7 percent to reach ₹17,894 crore by 2027.

Kid's innerwear market was worth ₹850 crore in 2017 and is expected to grow at a CAGR of 12 percent to reach ₹2,640 crore by 2027.

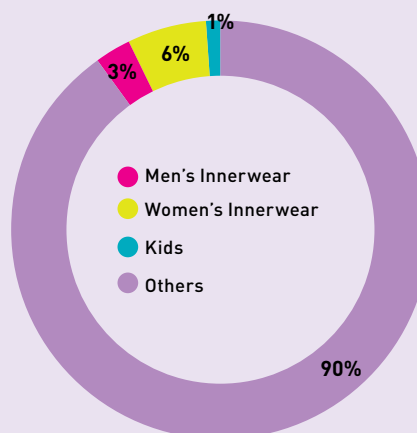
The Indian innerwear market is primarily segmented into men's innerwear and women's innerwear. Currently, the women's segment dominates the innerwear category by constituting 64 percent of the total innerwear market. Men's segment is 33 percent and kids 3 percent of the total innerwear market.



INDIAN INNERWEAR MARKET (INR CR)



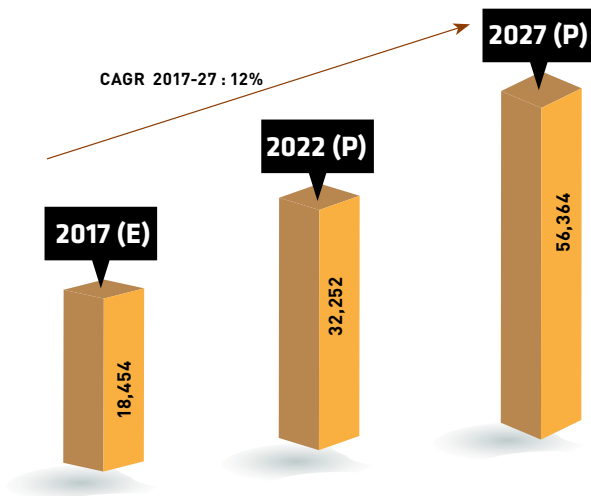
SHARE OF INNERWEAR CATEGORY WITHIN APPAREL CATEGORY (2017)



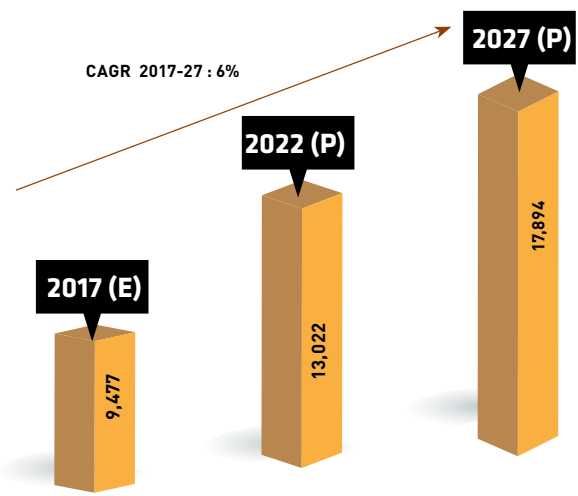
Source: Technopak Analysis



#### WOMEN'S INNERWEAR MARKET (INR CR)



#### MEN'S INNERWEAR MARKET (INR CR)



Source: Technopak Analysis

### WOMEN'S INNERWEAR MARKET

The Indian innerwear market is primarily dominated by women's innerwear which accounts for 64 percent of the total innerwear market and it accounts for 15 percent of the total women's apparel market. Various product categories in women's innerwear are - brassieres, camisoles, panties, tees, nighties, shorts, etc. Brassieres and panties contribute 85 percent of the total women's innerwear segment.

Women's innerwear segment is poised to grow at an impressive growth rate of 12 percent over the next decade to reach ₹56,364 crore by 2027 from current market size of ₹ 18,454 crore.

Branded innerwear contributes 38-42 percent of the total women's innerwear market and this share is expected to grow to 45-48 percent of the total women's market by 2022.

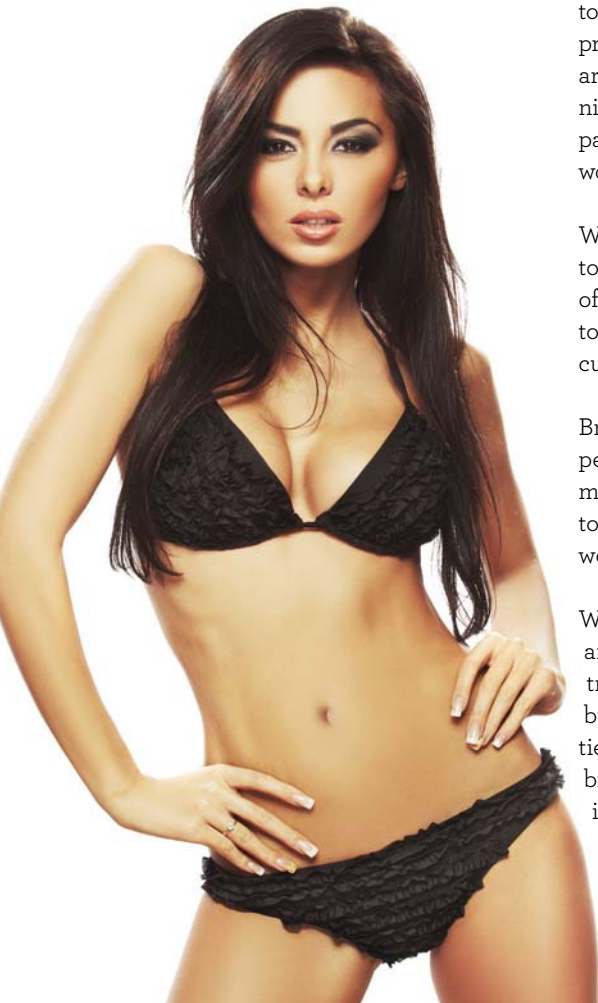
Women are conscious about the brands and styles for their intimate wear. The trend is not restricted to just metros but can be witnessed spreading in tier I, II and III cities. This adoption of branded lingerie has led to influx of international and domestic innerwear brands.



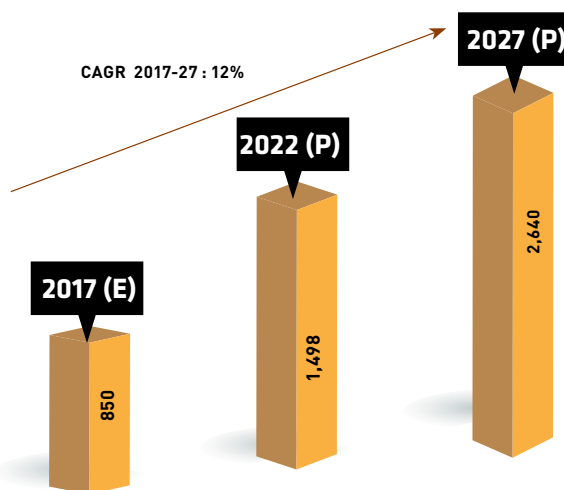
### MEN'S INNERWEAR MARKET

The men's innerwear market is currently valued at ₹ 9,477 crore and is expected to grow at a CAGR of 7 percent over the next decade to reach ₹ 17,894 crore by 2027. It contributes 7 percent of the total men's apparel market.

The market is dominated by a large number of small-scale players making ~60-65 percent of the market fragmented and unorganised. However, the market segment is evolving gradually and moving towards organised retail.





**KIDS INNERWEAR MARKET (INR CR)**


Source: Technopak Analysis



Currently, the women's segment dominates the innerwear category by constituting 64 percent of the total innerwear market. Men's segment is 33 percent and kids 3 percent of the total innerwear market.

**KIDS INNERWEAR MARKET**

The kids segment in the innerwear category is a highly unorganised and fragmented category. Local MBOs and regional players are known for catering to kids' segment of the innerwear market. Although there are some brands for teens' innerwear, they don't have a large assortment. Kids innerwear is estimated to be worth ₹ 850 crore in 2017 and is expected to grow at a promising CAGR of 12 percent over the next decade to reach ₹2,640 crore by 2027.

Till recently, there had been no specialisation in kids' innerwear category. The same players that were manufacturing men's and women's innerwear had extended lines for kids innerwear. But, things are changing and there are specific innerwear brands for kids who are giving plethora of options in kids innerwear segment. Yet, the category holds unexploited potential which gives innerwear brands huge opportunities to tap this segment.

**GROWTH DRIVERS**

The present market trends show an inclination amongst Indian consumers to spend more on innerwear, leading to aggressive growth of this category especially in premium and luxury price segments. The recent mode of retailing through online channels has permeated into the innerwear category as well giving it much exposure to the consumers.

It is evident that Indian innerwear industry has come a long way in last decade and perception of today's consumer towards innerwear has changed. The category is no more considered a basic necessity but a fashion indulgence which gives confidence and feel good factor.





The women's innerwear segment is poised to grow at an impressive growth rate of 12 percent over the next decade to reach ₹56,364 crore by 2027 from current market size of ₹18,454 crore.



#### *Growing Indian middle class- moving up ladder*

Rising disposable income, economic growth and dual income households has led in the emergence of a middle class which is ready to spend and experiment with fashion and style. With more income to spend the middle class has become more brand conscious. This has led to higher value and volume.

#### *Change from need driven to aspiration driven buying*

The recent consumer trends show that price is not the most important criteria anymore for this segment. For evolving consumers, looking good has become an important aspect of life. Therefore, spending on apparel, personal care and grooming is on the rise.

Occasion specific products like seamless bras, strapless bras, padded bras, bralettes, etc. are being sought. There has been a rising demand for functionality based women's innerwear like shapewear, tummy tuckers, etc. for women desiring a slimmer look; non-wired brassieres for woman facing comfort issues after prolonged use of wired ones; and sports bras suitable for physically active women.

#### *Emergence of online retail channels*

The emergence of online retail channels has bolstered sales of premium innerwear among the youth. The fashion conscious women residing in tier I, II cities with limited access to brick and mortar stores are most benefitted through the emergence of online retail in innerwear segment. It has been witnessed that women are the key buyers of innerwear available on online channels.

### **CONCLUSION**

The current innerwear market is poised to grow at impressive pace in near future. The changing demographics, growing youth population ready to experiment with colours, fashion and trends etc. therefore, there are plethora of growth prospects for both international and domestic innerwear brands to expand their current product portfolio and experiment with their offerings.







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# WOMEN'S INNERWEAR

## CEASES TO BE AN INSIDE STORY

Considered to be a second skin, lingerie for women has moved over from being an 'essential' to being an 'indulgence'. Trendy innerwear was earlier restricted to a bit of playing with the cut and adding in see through laces but now trendy is all about bold colours, prints, messages and super bold cuts. We check on the changing trends in the women's innerwear market.

By Zainab S Kazi with inputs from Rosy N Sharma and Gurbir Singh Gulati

IMAGES Business of Fashion

Encapsulating the future trends for the women's innerwear market, Karan Behal, Founder and CEO, Pretty Secrets reveals, "Retro styles with high waist cuts and square necklines will be back. Plus size lingerie, that is lingerie not just graded for bigger sizes but designed for their body type as well. With the body positive movement spreading, every sector of apparel industry will explore in this category. We shall see demand for shape-wear that fits like second skin and not just designed for compression purpose. The fabrics used in shapewear are getting lighter and thinner and this technology will grow in the Indian market over the next few years as well. We shall see more styles in full cover bras with lacy elements and sultry moods. Full cover will not just be a functional category, but will thrive as a sexy luxurious item for women with heavier bust. We shall also have hipster and panties with funky messages based on moods and varying personalities."

>





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***“The women’s innerwear market is one of the fastest growing categories within women’s apparel. Due to rise in the number of working women and improved social-economic outlook, there has been an incremental push across the value chain in this segment.”***

– Pranal Modani,  
Director, C9 Airwear

This is what the future holds but a quick look into the current trends too speaks volumes on the evolution in terms of demand and choice available in this category. “The women’s innerwear market is one of the fastest growing categories within women’s apparel. Due to rise in the number of working women and improved social-economic outlook, there has been an incremental push across the value chain in this segment,” shares Pranal Modani, Director, C9 Airwear. Further elaborating on the reason for the growing demand, Richa V Karla, Founder, Candyskin shares, “Lingerie is not bought only for needs anymore, women have actually started spending money as they have started to become fashion conscious. With rising incomes and greater number of women working, the growth of this

category has been phenomenal. The category is expanding with new lines like athleisure and functional wear at a rapid scale.” Echoing the same, Behal shares, “Innerwear, once purely functional is now collected like a luxury item that makes women look good and feel confident in their own skin. The rise in fast fashion industry in the past decade urges women to learn more about their lingerie needs as per the changing trends of every season.”

With more brands coming into picture, the industry is seeing a gradual fading of the unbranded players. Though there is a long way to go but with an increase in brand consciousness and with brands spreading thick and thin across the country and entering traditional neighborhood lingerie stores as well, we shall witness a change sooner than expected. Confirming this, Sheela Kochouseph, Chief Managing Director, V-Star shares, “The innerwear market is poised to grow at a higher pace of 15 percent. Earlier the market was unorganized but now we can see a tremendous change in the mind set of customers. Today, customers are more brand conscious and demanding. Branded innerwear segment contributes to 35 to 40 per cent of the total women’s inner wear market in India and is expected that branded share will account for 40 to 45 per cent by 2020.”







Pretty Secrets



Candour London



***“There have been innovations in terms of styling. Backless bras with invisible straps, are now skin friendly and easy to wear. Multi-way bras is another classic innovation adopted in India for many women who love wearing highly functional products that can be used in more than one way”.***

**– Karan Behal,**  
Founder and CEO, TLS

### Emerging Categories

Innerwear is no longer about a brassier and panty. It includes a host of other sub categories as well which also includes lounge wear, sleepwear and shapewear. Karla shares, “Athleisure for sure is the most emerging category. It is enabled by improved textile materials that allow sportswear to be comfortable and fashionable and it is becoming a big part of women’s everyday wardrobe.” Behal adds, “Shaping hipster is a product that combines the function of a hipster and a shapewear. Shapewear as a category and a combination of shapewear and lingerie is an emerging innerwear category.” According to Pooja Chitnis, AVP - Design and Product Development, Soie, besides shapewear and active wear, bralettes fall into the emerging category option. Reiterating this, Karla shares, “Currently the biggest trend we see in the innerwear category is bralettes, which are super comfy, and can be worn as outerwear too.”

### What’s Trending

Elaborating on the current trends, Modani reveals, “Seamless innerwear is in vogue now. Under wired brassieres, high waist brief, brassieres with multi-layer straps and long line, see through innerwear are the latest trends in women’s innerwear.” Behal talks about an interesting trend which includes the use of eyelash lace at the hem and edges which is especially used for lacy lingerie. This is especially used to accentuate the look of the outerwear. He adds, “High rise Bikinis with Brazilian cuts to show off the thighs better. Blush pastel colors and natural tones are being picked more often as colors that go well with skin tones are preferred. All natural organic underwear made from sustainable re-purposed plant based fibres are picking up as consumers become more conscious environmentally.” Contrary to the assumption that push up bras are most preferred by women, Grishma Patil, Director, Candour London, shares, “Push up is the thing of the past and the new generation prefers the comfy non-wired bras. Thin padded bras are much preferred. Bodysuits that can be worn as a top with the jeans or otherwise are trending too.”



Pretty Secrets



Candy Skin



V-Star

Behal further elaborates, “In terms of functionality and comfort, the preferred fabrics would be Cotton lycra. Cotton fabrics for bra are most suitable for breathability and comfort. The elastane content in the fabric gives a perfect fit and stretch to contour the curves.” According to Chitnis, synthetics are seeing a rise in demand as well keeping in mind their feature of long lasting look and feel of a product.

Talking about alternative fabrics other than cotton, Karla reiterates Behal on the growing acceptance and demand for fabrics made from natural fibers like beech wood and bamboo. Poyamide, according to Behal, is high on popularity considering its innate feature of being washed in several ways to give different tactile finishes and moulded into seamless styles as well. He shares, “It is a favorite among women who look for stylish lingerie with some sheen.”

### High on Demand

Besides innerwear, the category expansion for innerwear, especially athelisure is adding a boost to the overall demand for innerwear. When it comes to brassiers, Chitnis is of the opinion that non-wired padded and non-padded are picking pace along with brallettes. On the embellishments, Modani shares, “Apart from comfortable fabrics and fit, there is increasing attention to overall styling of innerwear like lustrous, sensual feel, super soft fabrics and



***“Push up is the thing of the past and the new generation prefers the comfy non-wired bras. Thin padded bras are much preferred. Bodysuits that can be worn as a top with the jeans or otherwise are trending too.”***

— Grishma Patil,  
Director, Candour London

Grishma Patil reveals that the total spend on lingerie has increased to buying 2-3 times every 6 months as compared to 2-3 times a year.

### Fabric Play

Cotton remains the king of fabric across apparels including lingerie though a lot many innovations in fabrics are taking place to ensure that a woman indeed feels her lingerie as second skin. Modani shares, “Traditionally innerwear market is dominated by cotton fabrics due to comfort and functionality. However polyamide based innerwear is also witnessing a positive acceptance from Indian women.” Karla bets high on cotton-spandex, nylon-spandex and lenzing modal as being some of the top fabrics for innerwear.





***“Lingerie is not bought only for needs anymore, women have actually started spending money as they have become fashion conscious.”***

– Richa V Karla,  
Founder, Candyskin



***“Synthetics are seeing a rise in demand a well due to their feature of long lasting look and feel of a product.”***

– Pooja Chitnis,  
AVP - Design and Product Development, Soie



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– Sheela Kochouseph,  
Chief Managing Director, V-Star



C9 Airwear

vivid color contrast waistband.” The other embellishments that accentuate the innerwear, include abstract floral prints in bras and lacy trims on panties. “Apart from these, hipster or bikini with lace trim around the hem or at the back is a popular design trend. In terms of embellishments, bras with studded straps, lurex embedded straps or lurex cotton elastane fabrics are popular in lingerie sets. This gives a jazzy glamorous effect with no change in the comfort of the fabric against the skin,” shares Behal. The experts unanimously feel that lingerie with bows and metal charms catch the fancy of the women shopper.

In terms of colours, it is the pink, ultra violet, metallic bright schemes, mix of pastel and bright colours, berry red, mauves, natural tones, hot pink, navy, mint, grey, green, purple and fushia are always in demand.

#### **Counting on the Innovations**

Innovations play an important role to keep any category fresh and this applies to innerwear as well. According to Modani, lighter fabrics which create transparent and opaque effects, super imposed designs and soft silky lace are the latest new thing in the innerwear

segment. Karla shares her views, “Dry-fit bras and anti-bacterial panties are few of the latest innovations we have worked on.” Behal elaborates on the growing acceptance of peach finish that is spreading across the industry, “Peach finish is an example of an innovation that spread quickly throughout all lingerie brands in India owing to its super soft touch even with poly blend fabrics.” He further adds, “There is also innovation in terms of styling with backless bras that have invisible straps that are now skin friendly and easy to wear. Multi-way bras is a classic innovation adopted in India for many women who love wearing highly functional products that can be used in more than one way.”

To conclude, the innerwear category is at an interesting phase and is totally out of its shell. Women no longer shy away from walking to a lingerie store and asking for lingerie that best suits their needs – be it for an intimate holiday with their beloved or innerwear that gives them comfort while at work.





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# MEN'S INNERWEAR MARKET:

## A THOROUGH ASSESSMENT

Men's innerwear is no longer treated as just an undergarment but is worn as a fashionable form of clothing to be flaunted around in. An increased awareness amongst the consumers about health, fitness and hygiene is further influencing the growth in demand of men's innerwear. IMAGES BoF takes a look at the current dynamics.

-By Bharti Sood with inputs from Gurbir Singh Gulati



***“Briefs and vests are the highest selling categories for men’s innerwear and have received mass acceptance for their performance, comfort, fit and style.”***

**– Srikanth Ram, Business Head, Innerwear and Accessories  
Park Avenue**

spend more on their looks, grooming, comfort and as well as on their intimate wear needs. Elaborating on the growth of men’s innerwear, Srikanth Ram, Business Head, Park Avenue - Innerwear and Accessories, shares, “The medium segment is around 25 percent of the total men’s innerwear market size. So medium and premium put together is ₹3170 crores of total business. Premium segment in India is expected to grow at around 21 percent CAGR in next 3 years”. Yogesh Tiwari, CEO, VIP, adds, “Innerwear has come out of its dark closet. From being just a fundamental wear to becoming a fashion quotient, innerwear has brilliantly created a niche for itself in this contemporary market”.

**M**odern consumers, especially the youth, do not hesitate to spend on a comfortable set of innerwear without giving a second thought to its price. The increase in disposable incomes across households and improved standards of living and lifestyle are further fuelling the growth of the men’s innerwear market in India.

According to this issue’s study done by Technopak, the men’s innerwear market has been currently valued at ₹ 9,477 crore and it is expected to grow at a CAGR of 7 percent over the next decade. and is expected to reach ₹ 17,894 crore by 2027. The men’s innerwear market today contributes 7 percent of the total men’s apparel market.

Traditionally the market was dominated by a large number of small-scale players making ~60-65 percent of the market fragmented and unorganised. The market segment is evolving gradually and moving towards organised retail.

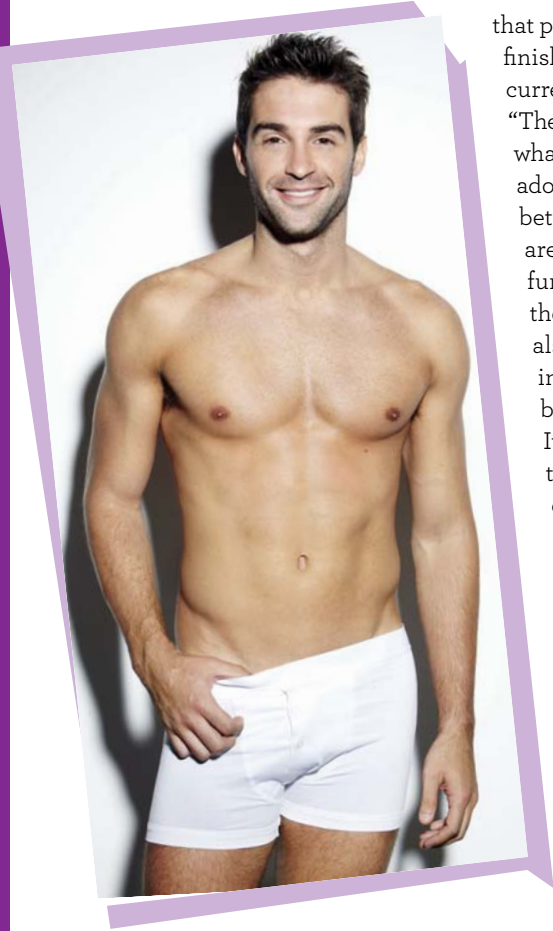
There are now a growing number of players in this category offering a large variety of products in varied designs, fabrics and styles. Thereby, giving the consumer a wider choice of innerwear. Various new brands are successfully entering the category as many men in the urban India have started preferring branded innerwear. The consumers are mostly seen purchasing branded vests, briefs and boxers, offered by most of the leading innerwear brands.

**Growth Drivers**

Today, Indian men have become more fashion conscious and are willing to







### Emerging Categories

The innerwear industry for men is now flooded with choices. Brands are introducing innovative product lines that offer optimum functionality and comfort to the new customer. Apprising on the types of categories emerging in men's innerwear, Srikanth feels that the boxers and fashion innerwear are quite popular. Yogesh avers that sleepwear, loungewear and fitness related – gym vests are much in demand.

### Top Trends

Men's innerwear has also now become more stylish, attractive and sexy. Not only women, even men want to feel fashionable inside out. They look for not only comfort but for a variety in designs and elements, and innovative styles, while choosing their innerwear. Srikanth Ram, observes

that pop colours, prints, and innovative finishes for better comfort is the current trend. According to Yogesh, "The Indian market is adapting to what the western world has already adopted and using. Today the lines between innerwear and outerwear are getting thinner. Innerwear can function as an outerwear. Whereas, the elements of outerwear are also being used in innerwear. For instance, the boxer briefs, has become this generations' Frenchie. It's becoming more important to match innerwear with the outerwear".

### Preferred Fabrics

Comfort is a fundamental necessity, when it comes to innerwear and it is related to perfect size, apt weather and the right fabric used. With the changing preferences of the consumer and various technological advancements, there have been a lot of innovations in terms

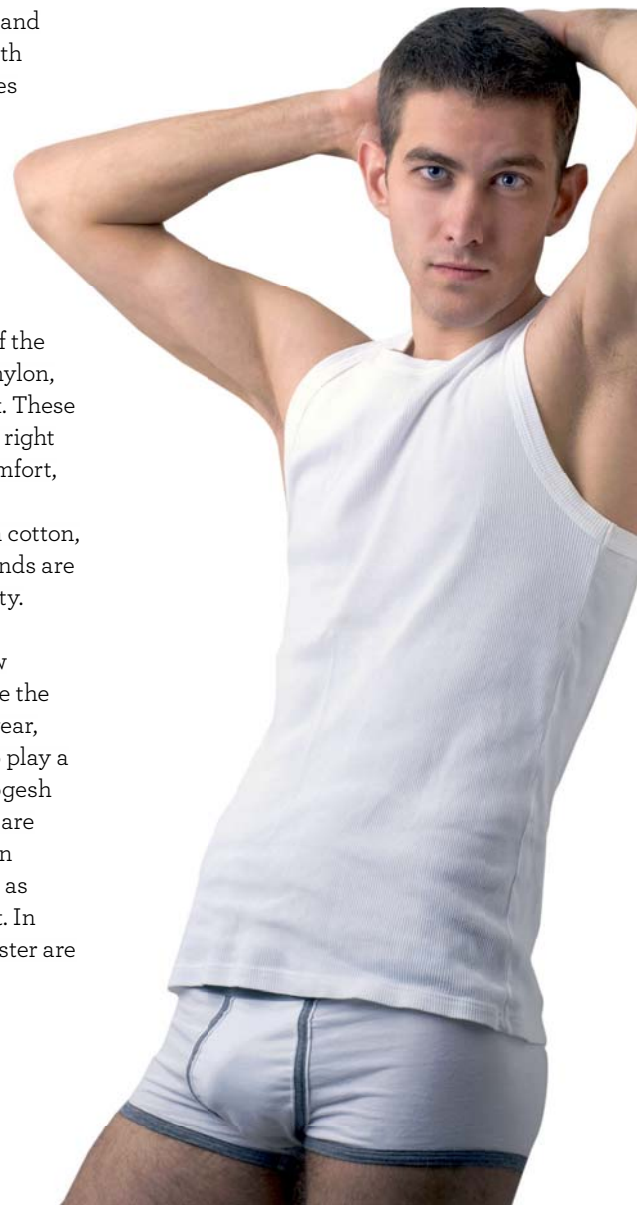
of fabric in the men's innerwear industry. There are a plethora of options in this category. Some of the fabrics mostly used are cotton; nylon, modal, rayon, polyester, and silk. These are blended with spandex in the right proportion to ensure quality, comfort, and durability along with ample flexibility. Innerwear made from cotton, cotton blends, modal, modal blends are high on comfort and functionality.

According to Srikanth Ram, new polyester polyamide elastane are the new preferred fabrics for innerwear, whereas functional finishes also play a pivotal role. Sharing his view Yogesh says, "Cotton and cotton blends are the most common fabrics used in innerwear. Elastane is also used as a blend for better fit and comfort. In sportswear, polymide and polyester are

&gt;

***"The Indian market is adapting to what the western world has already adopted and using. Today the lines between innerwear and outerwear are getting thinner. Innerwear can function as an outerwear. Whereas, the elements of outerwear are also being used in innerwear. For instance, the boxer briefs, has become this generations' Frenchie. It's becoming more important to match innerwear with the outerwear"***

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used for their functional benefits”. When it comes to other popular fabrics besides cotton, Yogesh feels, “Modal and modal blends are alternative fabrics used for innerwear. Being a natural yarn, modal lends a super cooling effect just like cotton but is also softer to touch and lighter in weight”.

### Top Selling Product Categories

Shape and fit are the most important aspects, considered by the consumers while buying innerwear. Men’s innerwear consists of products like briefs, vests, boxers, basic t-shirts, shorts, pyjamas, sleepwear and activewear. According to Srikanth briefs and vests are the highest selling categories for men’s innerwear and have received mass acceptance for their performance, comfort, fit and style. As far as popular elements or embellishments used in men’s innerwear, Srikanth feels that men’s innerwear is more about finishes than embellishments. While Yogesh lays emphasis on the outer elastic for superior comfort and durability.

### The Future

Men’s innerwear category is primarily driven by vests and briefs only while the other categories like shorts, pajamas, sleepwear, etc. form a very small fraction and are in the nascent stage. Talking about what will trend in future in innerwear for men, Yogesh feels that boxer briefs as a product are still in a nascent stage. Going forward, this will be adopted by the younger audience, who follow youth icons.

### Latest innovations

Highlighting the advancements in technology and styles, Srikanth shares, “Innovations in innerwear are always subject to offering better comfort and hygiene by virtue of fabric content and product finishes being used”. According to Yogesh “There have been vast innovations in fabrics. The ‘18 hours jersey fabric’ is one such case in point”. Modern consumers, especially the youth, do not hesitate to spend on a comfortable set of innerwear without giving a second thought to its price. Also, increase in disposable incomes across households and improved standards of living and lifestyle are further fuelling the growth of the men’s innerwear market in India.





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# SLEEPWEAR SEES A SUNRISE

With a profusion of factors propelling it, the Indian sleepwear market is expanding like never before. In an exclusive report, IMAGES BoF outlines the growth story of sleepwear, the key influencers, hottest categories and the prevailing trends.

-By Zainab S Kazi with inputs from Rosy N Sharma & Gurbir Singh Gulati



Private Lives

IMAGES Business of Fashion



Private Lives store



Pretty Secrets





Tab 91

When you take a walk in a local vegetable market during morning hours, it is not an uncommon sight to spot women, especially from SEC B and SEC C category going through their market chores of buying vegetables and grocery, dressed in their night gown with a dupatta over it. The trend of sleepwear being worn outdoors to complete petty chores isn't new. But perhaps what has changed is that with an amalgamation of the sleepwear and loungewear, now we have young modern girls/women and at times men too, who do not hesitate to step out in their sleepwear - be it before or after bed.

The plain cotton night gown has not lost its sheen but women across categories today consider 'investing' in sleepwear rather than considering it just as a 'necessity'. Those hooked to the simple night gowns too are seen opting for fancy designs and prints. A two-piece night wear is finding place in wardrobes of an average Indian middle class woman as well. Though above all, what needs to be taken note of is the fact that today sleepwear and loungewear together form the 'relaxed wear' category and their demand is on the rise.

**The Growth Story**

"Sleepwear and loungewear styles have grown so classy and accessible to the public that in recent years we have even seen celebrities and style icons increasingly styling themselves with loungewear in public eye. Sleepwear to street wear is an ongoing trend, with collared suits and loose straight satin pajamas, or an overlapping wrap with matching pyjama set. Chemise and lacey satin night dresses are worn like short dresses. Several such styles are being promoted as outerwear when

in fact the product is just loungewear with class," shares Karan Behal, Founder and CEO, Pretty Secrets. Pretty Secrets has been a leading name to have played an important role in revolutionizing the sleep wear category giving it a 'modern' and 'chic' positioning in India.

Behal further goes on to share how the loungewear market is growing and people are thinking of sleepwear as an item missing from their wardrobe. He shares, "It is growing at roughly 20 per cent CAGR." Adding to this, Pulkit Kapoor, Director, Private Lives, shares "The sleepwear market is showing an encouraging trend." Citing the reason for this, he feels, "The trend has picked up because of change in our lifestyles. Nowadays people spend more on themselves and sleepwear essentially is worn for about 30 percent of the day. That makes it special." Vishal Jain, Founder and CEO, Tab 91 goes on to explain how once considered only as simple indoor wear, lounge wear and sleep wear is seen running on the fashion ramp. "The loungewear industry is shifting from a concept of boring night wear to wardrobe essentials. Western influence, changing trends and busy lives of people are the factors in general bringing about a drastic change in consumer acceptance of loungewear into their day-to-day life," shares Jain. Behal adds, "Other reasons include the fact that consumers are more conscious about right sleepwear and the need to be presentable all the time in today's fast paced life. Also luxury sleepwear markets are growing because of customers' need/want for better fabric."

According to Kapoor, with people upgrading their sleep suits every season and with their availability being across retail markets, the category has witnessed a full-fledged evolution. Jain highlights an important contribution of this evolution having a trickledown







Private Lives store

### Fastest Selling

- Pyjama sets • T-shirts • Jumpsuits • Camisole and leggings
- Bermuda sets • Winter tracksuits

### Top Fabrics

- Pure cotton • Cotton blends • Cotton fleece • Single jersey
- 100 percent terry • Polar fleece • Satin

effect on the entire knits industry. He shares, “The acceptance of sleep and lounge wear is really good and it has the potential to acquire a big share of the overall knits industry. Thus, we see many brands venturing into this space.”

### Influencers

India is a land of different cultures. Each region within the country follows a distinct culture and this difference surpasses religious differences as well. For e.g., in South India, when we talk of prints it is more of ikkat and kalamkari. Embroidery is preferred more in the metros amongst a certain class of people. Cotton has its own fan following and then there is a patronage for satin and rayon too. When we talk of sleep/loungewear, demographic influence has its role to play. Kapoor shares, “In some parts of the country we sell longer tops, full nighties in some and short tops with shorts in some others. Though there is a variance in the categories but overall sleepwear as a segment has similar consumption all across the country.”

Festive occasions influence the purchase of sleep/loungewear as well. Fancy sleepwear is in demand during wedding season and during holiday season there is a rise in demand for ‘active’ sleep/loungewear. Jain shares, “It is easy to spot people wearing lounge wear at airport, colleges, shopping malls, etc.”

On the preference when it comes to fabric, Behal shares, “There are geographic preferences and also people from higher income groups prefer viscose and modal sleepwear.” Kapoor adds, “Our pure cotton maxis are loved by the women aged 40-plus.” Jain points out that, “Students and young professionals have been the first ones to sport loungewear attire, as these outfits give them trendy, casual and physical comfort.”



*“The sleepwear market is showing an encouraging trend. Nowadays people spend more on themselves and sleepwear essentially is worn for about 30 percent of the day. That makes it special.”*

– Pulkit Kapoor,  
Director, Private Lives



*“Sleepwear and loungewear styles have grown so classy and accessible to the public that in recent years we have even seen celebrities and style icons increasingly styling themselves with loungewear in public eye.”*

– Karan Behal,  
Founder & CEO, Pretty Secrets



*“Western influence, changing trends and busy lives of people are the factors win general bringing about a drastic change in consumer acceptance of sleep/loungewear into their day-to-day life.”*

– Vishal Jain,  
Founder & CEO, Tab 91



Private Lives

Where women are the primary influencers for the growth we are witnessing in this category, men too have a role to play. Jain explains, “For women, best selling loungewear includes camisole tops and fitted tees with a strong fashion emphasis, whereas men look for drawstring bottoms and loose-fitting t-shirt tops in cotton and natural-touch fabrics.”

#### Beating the Odds

Where there is no doubt that the sleepwear category is growing multifold, there are still a few challenges faced by those in the industry. Highlighting one such challenge, Kapoor shares, “Customers now want to see new styles every time they walk in. So the shelf life of styles has reduced which becomes a challenge for us in the long run. We stick to small quantities and more number of styles.” Jain adds, “Key challenges are obsolete machinery and technology, power shortage, illicit markets, labour related concerns, GST complexity, raw materials shortage and lack of quality infrastructure in non-metropolitan cities.”

#### Citing the Trends

Each player has something niche to offer to its patrons and the game changer here is a play of both fabrics and style. Kapoor talks about experimenting with different fabric blends to meet the demands from his customers and reveals, “Seamless is the new thing as far as technology is concerned these days. Everyone is adapting to it in the industry. Softer fabrics are more in demand.” Elaborating on what is seen trending these days, he further shares, “For women, we have been doing some extremely fresh colour blocking. This keeps them excited. Embroidery is again back in trend. Delicate eyelid laces are also being used and appreciated off late.”

#### Viscose and Modal Blends

With the consumers spending on sleep/lounge wear and taking a keen interest in following the trends, the category is witnessing a strong growth.







## UP CLOSE WITH A PIONEER:

# SWEET DREAMS

The rapid rise of the sleepwear industry in India is an interesting story in itself. Until a few years back, Indians were not even aware of a separate fashion category called sleepwear. Sleepwear consisted of plain old, comfortable clothes, preferably soft cottons. But the newfound penchant for fashion amongst Indian consumers has bolstered this neglected category into a booming fashion segment that is now considered much more than a fad or a passing trend. Today, sleepwear and lounge-wear are an integral part of every wardrobe around the country. Moreover, they are no longer limited to be worn at night but are also seen being flaunted as underpinnings, or as casual wear during weekends, travel or home.

But, one brand, with a steadfast vision and unflinching dedication was shelling out sleepwear in India, long before Indian consumers were even aware of the term. The brand – Sweet Dreams – which was founded by Hitesh Bhai and Utpal Bhai Ruparelia, over 28 years back, is arguably the pioneer brand in India as far as getting into organized retailing of the sleep and loungewear category. And then, as appreciation for healthier lifestyles matured further, the categories blended smoothly with the rise of athleisure, as



now even encompasses active wear, athleisure, travel wear, yoga wear, gym wear, etc. This has increased the category bandwidth. The lounge-sleepwear segment now provides for the clothing need of almost 128 hours out of a total of 168 hours per week.” Sweet Dreams has been the first organized, pan-India brand to identify and act on this opportunity.

### The Product Range

As a family wear brand, Sweet Dreams targets men, women, girls and boys. It is specially focusing on young Indian couples as they are a major consumer segment today. Currently, their product portfolio comprises sleepwear sets, which are coordinated top and bottom in various fabrics and are in-tune with the latest trends of the international markets.



(L to R) Utpal Ruparelia & Hitesh Ruparelia,  
Managing Directors, Sweet Dreams

one holistic good-living concept. Befittingly, Hitesh Ruparelia is fondly addressed in the industry today as the Father of Sleepwear in India. With about three decades of experience, the brand is today a key contributor to the Indian casual and lounge wear industry. It also is one of the few brands in India that produces over 300+ bottom wear separates for travel, leisure and workout for men and women.



**“Both lounge wear and sleepwear definitely hold BIG scope in the next 5 years. But while the category is growing multifold, it still faces a slew of challenges; the biggest being the fact that about 80 percent of this market is unorganized. All in all, we see a growth of about 15 percent CAGR in this category”**

**-Hitesh Ruparelia,**  
Managing Director, Sweet Dreams

Taking to IMAGES BoF about the drivers of this change, Hitesh Ruparelia recollects, “Do you know what we had to compete with initially — old clothes. In many ways, we Indians were very laid-back about our attitude to rest. The most welcome change that has now come about is a result of the change in overall lifestyle attitudes of the new consumer and how the industry has reacted to that change. Today’s discerning consumer demands suitable clothes for various occasions and activities. Lounge wear-sleepwear





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They boast a collection of 1,000 styles per season only of sets, which could possibly be the largest collection any Indian brand would be offering currently. They also offer a range of tempting intimate sleepwear, which is retailed under the brand name of Signature Collection.

The Signature Collection explores the sensuous side of sleepwear and offers an exquisite collection — from lux robes in satin fabric to sleep sets in modal fabric with cuts and fits that accentuate the right curves. Along with nighties in different styles, the collection also encompasses a wide collection of babydolls in short and long lengths, in a variety of prints and bold colors. Also a part of the collection are bridal sets; from 3 piece sets to 6 piece sets these are perfect for a modern woman's

trousseau. In addition, the entire range comes in bright pink boxes making it a perfect gift for every occasion.

Sweet Dreams also boasts of an exhaustive range of separates including tops and track pants, across 15-20 different fabrics for myriad purposes like travel, lounge, etc. The brand also has the distinction of producing about 300 styles of track pants per season across all genders.

The brand is well known for its range of exquisite athleisure that is made with specialized performance fabrics for the purpose of gym, yoga, dance etc. "Athleisure has become a way of life, be it the "Airport looks" that we spot celebrities in, or be it the youth wearing track pants and fashion pyjamas with almost everything. This is a trend, which is going far and wide. For our latest workout collection, we have

focussed on a plethora of curves and cuts," says Hitesh Ruparelia.

This season Sweet Dreams has introduced a variety of meshes, nets with the right amount of exposure for the modern consumer. Designed with technical elements that make garments both functional and adaptable for any events, the brand's athleisure collection takes the form of a fashion-leisure line. Inspired by the fact that people were starting to want more out of their clothes Sweet Dreams makes versatile pieces that would work with consumers' busy lives, helping them make the transition from home-commute-vacation-post work. Directional colours, fabrications and slim-fit shapes have been introduced, making them more acceptable to wear outside of gym as well.

More recently, the brand was also one of the first movers into a new category called Work Leisure. Hitesh Ruparelia



explains, “The youth of India wants to be comfortable at all times, be at work or off. So, we have designed a special range for young professionals which can be worn throughout the day. It blends with the formal attire of work places and at the same time provides the comfort of a track pant. The same can then be carried on for leisure activities like a casual movie or beer plan.”

#### Technology is the Key to Success

In contemporary times, keep the bar high by banking on modern technologies is indispensable for any manufacturer. Sweet dreams utilises the most modern sewing technology in factories to make garments with super comfortable seams. “Our patterns are made by advanced CAD machines to ensure a perfect 3D garment that snugly fits the human body and ensures relax-wear in actual sense. Our fabric technicians work tirelessly with the the best mills to develop new fabrics with features unmatched by

any other brand in our space. These fabrics adhere to all Euro norms for safety as well as ecology. Our PD team uses advanced draping technology to visualize the designs in actual fabric as a 3D garment. This helps in virtually correcting the silhouettes before making the actual physical sample — leading to sample acceptance ratio of over 95 percent,” says Hitesh Ruparelia.

Sweet Dreams also has a order processing app that lets its dealers filter products by price point, body, color and size wise for a hassle free selection from over 4,000 styles on offer at any given time. Dealers that are not well versed with computers too can easily place their orders vide this app owing to its user friendly interface. Moreover, the brand’s AI enabled SCM seamlessly services over 5,000 delivery points from products manufactured in over 65 manufacturing units. The brand also has a robust design unit that helps it lead among its peers. Sweet Dream’s design team is present both in Ahmedabad and Mumbai. The team consists of about 15-20 people including graphics and fashion designers and is headed by 2 different people, one for the men’s wear category and one for the women’s wear. The new generation is actively involved in the product development bit and hence the processes and inspirations are at par with any international brand. The brand’s forecasts are generally done

**“THE BRAND’S  
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UNITS.”**





## “SWEET DREAMS CONTINUES TO BE THE PIONEER OF SLEEPWEAR WITH A POSITIVE APPROACH TOWARDS BEING SUCCESSFUL IN THE ATHEISURE SPACE.”

from websites like WGSN. “Our usual process starts with color/trend and print forecasts along with creation of mood boards and theme boards for the season. Each season we have a “Hero” category that we focus on. For example we had “Blockbuster bottoms” one season and the range had a huge variety of bottom wear for all purposes and in all fits. We benchmark all good international brands thoroughly and visits to China, Turkey, New York and London for market study and raw material development are frequent,” reveals Hitesh Ruprelia.

### Retail Presence

Today, Sweet Dreams is present pan India across all online platforms, traditional MBOs, retail stores, hosiery shops, and regional LFSes. This network is served through the brand’s distributor count which currently clocks 125. Hitesh Ruprelia states that the number of distributors will also grow to about 300 by the end of 2019. “As of now, we are available at 4,000+ MBOs across 400 cities. This is expected to grow to approximately 10,000 outlets by 2020. We have over 400 individuals in the Field Sales Team to support these distributors and retail points at all times,” states Hitesh Ruprelia.

Within this massive MBO mapping, Sweet Dreams is also present in over 250 counters of large-format national level MBOs like Central, Shoppers Stop, Pantaloons, Reliance, and Arvind, and also in reputed regional large



format MBOs. The brand is planning to soon launch flagship stores across all major cities in India by the end of next year. In the online space, the brand is present in leading platforms like Myntra, Jabong, Flipkart, Amazon, Paytm, etc., helping them to deliver to the remotest corners of the country. The brand also is launching its own e-commerce site by end of the year.

Their brand also has a very peculiar brand message, a rarity in the Indian fashion segment. Sweet Dream’s message is “Hello! Happiness”. Talking about the message, Hitesh Ruprelia adds, “Work life is very stressful in India, and the non-working leisure time at home and with friends are the happiest moments of our life. We want to capture this essence of ‘Happy Life’ and so we want to own the word ‘Happiness’ which is synonymous to ‘joyful moments at home.’” Sweet Dream’s “Hello! Happiness” campaign was launched in Gujarat with 60 hoardings spread across Ahmedabad and Surat. The campaign was also promoted across the country through other media and in LFSes, MBOs and online partner channels. The “Hello! Happiness Song” was also launched

in all cinema halls of Ahmedabad and Surat in April-May 2017.

It is clear that the sleep and lounge wear categories are gaining momentum and are bound to be among the most sought after fashion segment in the near future. “It definitely holds big scope in the next 5 years. But while the category is growing multifold, it still faces a slew of challenges; the biggest being the fact that about 80 percent of this market is unorganized. All in all, we see a growth of about 15 percent CAGR in this category,” says Hitesh Ruprelia.

Sweet Dreams continues to be the pioneer of sleepwear with a positive approach towards being successful in the athleisure space. The legacy created by Utpalbhai and Hiteshbhai Ruprelia is being carried forward by the next generation comprising of Parth, Margi and Gargi Ruprelia. The new generation has infused the brand with renewed vigour and passion, breaching new horizons every single day. It is their firm endeavour to take the brand international in the next 5 years.



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# Stylish On The Beach

The beachwear and resortwear segments are moving at a break-neck speed, which has even prompted opening of exclusive retail outlets for the categories. Trends for travel and relaxation have evolved manifold and so resortwear and destination clothing have become essential looks to flaunt one's lifestyle.

-By Meher Castelino

Decades ago there were just two categories in fashion - Indian and western wear. Then a decade ago these two categories were further divided into bridal and casual wear. When the first fashion week started in India in August 2000 in New Delhi, it was termed as just a fashion week but when two annual fashion weeks were scheduled after the parting of ways between the Fashion Design Council of India in Delhi and Lakmé in Mumbai in 2006, it was decided that they would follow the western format of spring/summer and autumn/winter.

But in March 2010 Lakmé Fashion Week in Mumbai created a new category in fashion called resortwear and so the spring/summer season title was replaced with summer-resort in February/March each year. The resortwear category gave Indian designers the perfect platform to showcase their creativity since a major part of India has a sunny climate that is ideal for resortwear.

In 2012 the resortwear category prompted a full-fledged fashion week called India Resort Fashion Week with Goa as its base. Pallav Ojha created the India Beach Fashion Week brand in 2015 and in 2018 the beachwear and resortwear segments are moving at break-neck speed, which has even prompted the opening of exclusive retail outlets for these two categories.

**RESORT WEAR RAMPS UP**

The pioneer of resortwear in India has to be designer Wendell Rodricks who set up his studio in Goa, his home state in 1993 and brought the languid, easy, style on the ramp from his first fashion show for the Glitterati fashion house in 1990.

The relaxed, uni-size fashion, Wendell presented was loved by both sexes and nearly two decades later has inspired many designers. Keeping his beautiful surroundings Wendell explains his design philosophy.

“After I moved to Goa in 1993, resortwear became one of the foundation stones of my fashion philosophy. It was no easy feat to translate abstract themes such as sea breeze or the ocean into clothing. But we managed to live up to the challenge and today the concept of resortwear and beachwear are very much a part of the Wendell Rodricks label that is enforced in every collection by my successor Schu-



Nidhi Munim



Nidhi Munim



Ken Ferns



Nidhi Munim



len Fernandes. Resort has been a trend in India since the mid 90's. With the access and popularity of Indian beaches, designers and the public realised that what they wear in a resort holiday destination is very different from what they would wear in an urban setting. I know clients who have a Goa wardrobe. They feel these clothes suit a place like Goa and they would rather wear it in a place near the sea. On the other hand, I approach the clothes in such a way that whoever wears the clothes, if they shut their eyes and dream, they are on a Goan holiday because of the light feel of the garment in a crowded city."

Wendell's clients are varied as he states, "Age has nothing to do with resortwear. Mature ladies may prefer a kaftan and a younger millennial may like a cropped top. Resortwear covers a wide range of garments from a gypsy ghagra skirt to a chiffon sari."

The benefits of resortwear Wendell feels are, "Because it is light on the body and on the purse, the best part of resortwear is that you can pile on the accessories. From chunky bracelets to bright strappy footwear, gold, silver and metallic tones for shoes and bags, resort wear and beachwear show off the best of beach, breeze, sun and surf."

The best fabrics for the collections according to Wendell are "Light cottons, linens, breezy silks, chiffons, crepe and satin all make the mark. We don't



Ken Ferns



Aakriti Grover

do prints but other designers who do prints tell me that prints sell well. As for colours-everything goes. From basic white to all the rainbow hues, and from the pastels to neutrals and black."

Ken Ferns is another designer who concentrates on resortwear with hints of swimsuits creeping in. Colour and a profusion of floral and abstract prints are the highlight of Ken's creations that comprise maxi skirts, bralets, ruffled minis, cool covers, sarongs and shrugs.

Asmita Marwa is known for her relaxed cool resort looks, which offer an almost Zen like appearance with drapes and lay-



Nidhi Munim



Nidhi Munim

ers in solid hues but with sheer organic fabrics being a favourite. Kaftans, dhoti pants, angular togas, layered maxis, beach robes and long layered dresses offer a fashionable choice.

The Verandah label by Anjali Patel Mehta is a specialist with a holiday wardrobe and so the garments have fun prints for skirts, strappy blouses, printed halter maxis and floor length shrugs.

filled, collection of beachwear and resortwear creations that appeal to Indian as well as western buyers.

“I think we straddle resortwear as it is a big chunk of what we do. While most of what we make also works well for urban lives in cities with warm climates but as a category to tick, it would be resortwear. The need for travel, relaxation, experience, escapism has increased manifold in the last decade and so it is mostly the



Aniket Satam



Asmita Marwa

Designer Sounia Gohil has a great line of resortwear with white as its base for short covers, will-power midis, bikinis with shrugs, long slit skirts, off-shoulder blouses and sheer beach robes over swimwear.

Aniket Satam keeps it young and trendy with simple shift dresses, sheer maxis over playsuits and baggy shorts with cropped tops.

Anupamaa Dayal is another resortwear specialist whose label is known for the bright, vibrant, prints and colours. Launched in 2004, since then Anupamaa is seen at most fashion weeks in India and abroad with her fluid, carefree, fun

mature woman who loves the concept of resortwear,” informs Anupamaa who creates two collections a year and keeps them really happy with large florals, mixed prints and bold graphics.

Anupamaa agrees that Indian designers are creating more resortwear as, “It is our strength. Our fabrics are light and we handle fluid silhouettes much better than structured. Also our strengths of colour, print, textile and crafts are very well suited to seaside wear needs.”

**AN AQUA SPLASH**

Creating quite a sensation, designers Shivan Bhatiya and Narresh Kukreja for their label Shivan-Narresh became the







first Indian designers to make a splash on the Indian and international fashion scene with their swimwear line in 2008. Since then their vibrant beach and resort wear collections have dazzled Bollywood, Hollywood and celebrities.

Every collection from the designing duo has an innovative theme with interesting construction and fabrics used for the beachwear and resortwear. The one-piece swimsuits, bikinis, monokinis and trinkinis have unique designs, while the colourful resortwear prints are used for the amazing maxis, sarongs, and even resort bridal wear trousseaux like lehengas, blouses, saree gowns and dupattas. Often inspired by well-known artists and resort destinations their specially created fabrics are the USP of the brand. Besides using Lycra and neoprene, they also have techno forward fabrics that can act against chlorine, sand, peeling, curling, sunscreen and oil. The designing duo is also known for their colour blocking and the choice of hues they use, which are bold and daring.

Nidhi Munim is another designer who has devoted her brand since 2012 mainly to swimwear with colourful beach covers added on. Her creations have been featured for the Kingfisher calendar and also for the Miss India contests.

“The swimwear and beachwear category is becoming a lifestyle segment, moving out of its niche category to being a mainstream category in India. For me,



**“WITH SOCIAL PLATFORMS BEING SUPER-ACTIVE, RESORT AND DESTINATION CLOTHING HAS BECOME AN ESSENTIAL TOOL TO FLAUNT ONE’S STYLE WHILE TRAVELLING.**

it’s definitely a lifestyle that I thrive in. The Indian market has become more conscious and accepting swimwear and beachwear as a category. Indian women want to make an effort to look their most gorgeous selves during their holidays and are willing to work towards building the right wardrobe that suits their body type. The consumer profile for this category is very varied. Right from the teenager to the mature women, any age and any size have become more aware and confident with body positivity to sport the right swimwear and beachwear that suits their body type. With the evolving consumer who is more of a globe trotter and a well travelled customer, the need for swimwear and beachwear has grown and matured and so has the market.”

Nidhi creates four collections a year driven by the festive and travel seasons. “Pops and monotones are classic ‘must haves’ in this category. Our USP is our ikat print series, which makes for our signature statement print every season,” informs Nidhi.

Designer Aakriti Grover’s flirtatious label is totally devoted to swimwear in bright solids as well as multi-coloured stripes since 2013. From swimwear to playsuits, bodysuits and bikinis, Aakriti has them with tiny covers or sarong saris for evening glamour.





Shivan Narresh



Wendell Rodricks



Verandah



Wendell Rodricks



Anupamaa Dayal

### RETAILING RESORTWEAR

With beachwear and resortwear turning into very important categories the retail industry has realised its need, which prompted Pallav Ojha the name behind the India Beach Fashion Week concept in India since 2015 to start a beach and resortwear store COMO in Goa to fill this void in 2017. The 2000 sq.ft. ultra modern outlet is a big attraction in the resort state.

“The category of beachwear and resortwear is taking centre stage lately with the global travel trends. Across the globe there has been a shift in middle, upper middle and higher income consumers planning minimum 2 travel trips to a maximum of 8 to 10 international and local travel destinations across the year. With social platforms being super-active, resort and destination clothing has become an essential tool to flaunt one’s style while travelling. From long vacations to short trips, destination wear is a key driver to express one’s individuality and fashion statement while travelling,” informs Pallav.

According to Pallav, “A survey, in 2014 shows the global swimwear and resortwear market was worth USD20.9 billion. By 2019, this number is expected to hit USD 28.3 billion. In recent years, major fashion brands like Stella McCartney, Ralph Lauren, Roberto Cavalli, Louis Vuitton, Versace, Moschino, Tony Burch and Givenchy, have all started offering luxury swimwear apart from independent design labels who see this as an opportunity to build numbers as well as express their design sensibilities for this category.”

The COMO - Designers Collective focuses on destination wear as a complete package with day prêt, swimwear, evening and party wear, while one is holidaying, attending a destination wedding or cruising along and it has a holistic approach towards the entire category with statement clothing, trendy jewellery, edgy accessories, footwear and other



Aakriti Grover







key essentials. COMO has also created opportunity for over 60 designers from India and abroad to be focussed to work under this category. The price point has been controlled with ensembles starting at ₹3,000 onwards, jewellery and accessories starting at ₹1,500 only.

Pallav adds, “Travel and holidaying has become a part of ones to-do-list now and it’s not only subjected to the upper income groups. The world is gradually moving towards the new age traveller phenomena like the 60’s and 70’s however with a different style and sophistication. Boho-chic is not only a fashionable word for the blogs; we see it every day while our consumers shop at COMO. As mentioned earlier, social media has become a key driver to push this lifestyle and today flaunting stylish travel pictures is part of one’s social mandate. This has also built a community like experience to share experiences, travel details, places to visit and shop, while they travel. This phenomenon is only getting bigger and prominent across age groups, income groups and influencers.”

The popular fabrics for resortwear vary from chiffons, georgettes to linen and comfortable cottons. Unique blends of cotton, viscose, nylon, polyester-mesh, polyester-stretch, mesh cotton, polyester nylon, polyester mesh, nylon taffeta, polyamide and scuba amongst others.

“An important key driver is the comfort, hence spandex and stretch materials have been largely used across category to ensure style, sophistication along with movement. Another interesting category we have just launched is the designer fitness clothing, while you travel, which is the beginning of another unique category by itself. Mature women love this category! While they may have a more refined taste, we ensure customisation as per their choice of designer, fabrics and size specifications,” observes Pallav.

The popularity of this category is spiralling upwards as Pallav notes, “This is a category, which helps designers express their individuality in the most interesting manner. Indian designers are exporting resortwear and beachwear in huge numbers across the continents. The buyers have started loving the design sensibilities of Indian designers lately as it’s only getting matured every day. The colours, shapes, surface ornamentation, fabrics, silhouettes have gradually become more refined. The cultural and art influence of India is now being depicted keeping in mind the global consumer. While Indian and bridal wear has been building huge revenues for designers in the last 35 years, the designers now want to break free and focus onto a new global category, reach out to more audiences, even if the inspiration is India. Resort and destination weddings connected to this category are a huge revenue churning for designers. Both established and young designers have started focussing on this category for both traditional Indian and western brides. The collection for a destination wedding is designed, keeping in mind the journey across the days from cocktails, pool parties, beach wedding and other key occasions.”

Having been connected with resort and beach fashion for so many years Pallav sees a bright and growing future for these segments. “This category will only get bigger and better in the years to come as the consumers across the globe with various geographical challenges have realised the way to Nirvana is travel. They are looking at ‘beach-to-bar’ solutions while they travel and it’s not limited to a specific style or silhouette. As consumers travel more often, the swimwear category is expanding beyond bathing suits and espadrilles and giving birth to a new genre of holiday destination wear that works in the city as well as on the sand and includes items like crochet shorts, palazzo pants, cotton kaftans, embroidered cover-ups, beach hats, canvas bags, Bohemian sandals and fringed tunics,” concludes Pallav.





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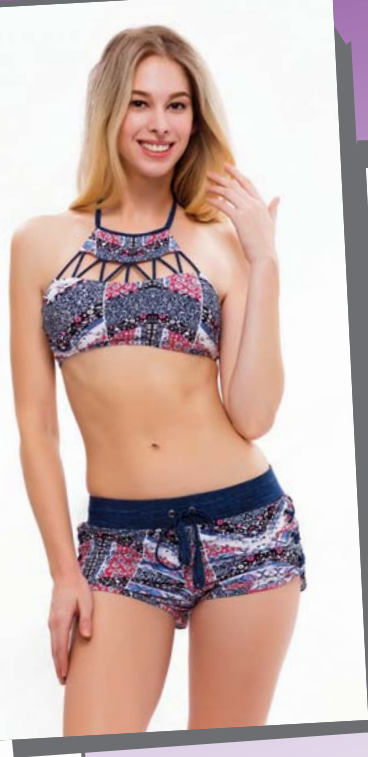


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# SUNSEEKER:

## TAPPING THE EMERGING OPPORTUNITIES IN INDIAN BEACHWEAR MARKET

**IMAGES Business of Fashion talks to Karen Lou, Global Brand Manager, Sunseeker, which entered the Indian market recently and aims to dominate the beachwear wear market. Lou sheds light on the emerging opportunities in the segment and insights on the globally trending designs and style.**

**-By Rosy N Sharma**

**E**stablished in Australia in 1970, Sunseeker is a chic, affordable and high quality swimwear brand. The brand has been known for its high quality fabrics which give a 'second skin' feel to the wearer. It launches 2 collections in a year and offers about 130 styles in each collection, including men, women and kids.

With over 500 points-of-sale in more than 30 countries, the brand caters to a wide target market. It has recently entered the Indian market and aims to dominate the beachwear market through its young, fresh and trendy designs.

## EXCERPTS FROM THE INTERVIEW

**IBoF: Tell us about the emerging beachwear market in India.**

**Karen Lou (KL):** India is expected to be the second largest market for this category. Although the market is still at its nascent stage but it is definitely showing a great potential for the growth of beachwear in the country.

**IBoF: Do demographic and socio-economic factors influence beachwear consumption in India?**

**KL:** The fast growing economy, large young consuming population in the country has made India a highly lucrative market. India has the world's largest youth population. This has opened unprecedented retail market opportunities.

**IBoF: How are consumers accepting this emerging apparel segment in India? Is it a popular section in any retail space today?**

**KL:** Current Indian market trends have more of core and basic styles. Seeing the progress of the country, we can expect that India will trend itself towards these international styles soon in years to come.

*"India is expected to be the second largest market for beachwear. Although, the market is still at its nascent stage but it is definitely showing a great potential for growth especially the swimwear market has been particularly strong as people have begun to take both health and recreational activities far more seriously."*

– Karen Lou,  
Global Brand Manager, Sunseeker

**IBoF: Is beachwear only popular among women in India or it does enjoy popularity among men too?**

**KL:** The growth of the India men's beachwear market especially the swimwear market has been particularly strong as people have begun to take both health and recreational activities far more seriously.

**IBoF: Tell us about the challenges, if any, faced by the Indian beachwear market now.**

**KL:** The challenge is how we can differentiate our brand from others. The fast fashion brands are also foreseeing rapid growth of fashionable swim/resort/beachwear market. So they have started to release swimwear and beachwear too. But I believe with our persistence on quality and design details, consumers will stay loyal with our brand. Swimwear is still a functional item after all.

**IBoF: What are the opportunities in this segment?**

**KL:** Growing interest in aquatic activities, the increasing accessibility to weekend getaways, beaches and overseas vacations are the factors that drive the growth of this segment. People are getting more and more used to publicly carrying their bodies at beaches and pools in India. Therefore, I expect there is a considerable growth in the segment.

**IBoF: According to you, which are the fastest selling products in beachwear?**

**KL:** Cross front or tie front swimsuits, monokinis, high-waisted bikinis, high neck bikinis and beach dresses.

**IBoF: What are some of the popular fabric options in beachwear?**

**KL:** High shine fabric, mesh, velvet and lace are going to be the trend in coming seasons. Textured fabrics like dobby or jacquard with prints are popular too. Other fabrics like polyester has been the leading fabric in the swimwear market for several years, sometimes blended





with Lycra. Polyester fabric usually has high performance in water, it dries quick, has exceptional breathability, and gives a comfortable fit.

**IBoF: What are the popular embellishments in trend in beachwear?**

**KL:** Hand woven embellishments, beadings, embroideries, decorative stitches and tassels.

**IBoF: What are the latest trends and designs that are in vogue right now? Also, shed some light on the new technologies, styles and fabrics used.**

**KL:** New fabrics like lace and velvet are playing a important role, creating effortless beach looks for customers. Sports inspired designs are also loved by the market, together with strong colours like orange and yellow.

Apart from these, micro fiber is a relatively new technology for swimwear. It gives the product a soft and smooth hand feel, providing a more comfortable wearing experience for consumers. We are getting lots of positive feedback on it.

**IBoF: What are the top trends in beachwear for both men and women now?**

**KL:** Crop shapes, lingerie-inspirations, off-shoulders, frills and retro styles are the trends for women. Casual wear details like buckles, stripe tapes for men, shorter board shorts for men are going to be loved as well.

**IBoF: According to you what is beachwear?**

**KL:** Great fitting with stunning fabrics and contemporary designs, all guaranteed to make you feel terrific, in and out of the water is what it is.

**IBoF: What are the main defining products of beachwear?**

**KL:** The bikini has a large share of the global swimwear market, but we can't ignore the one-piece swimsuit and are expecting it to continue to grow.

**IBoF: Tell us about your latest beachwear collection.**

**KL:** We are featuring a lot of trendy elements in our collection like print-on-print, ruffles and frills, laser cut patterns, sporty looks, etc. We believe customers will find what they favour in our large range.

**IBoF: Predict top trends that will emerge in the future in innerwear for both men and women.**

**KL:** Strappy swimsuits, gym-to-swim styles, retro halter, hardware bikini and teeny swimwear are going to be the trends for women. Details like eyelets, jacquard elastics, colour blocking, geometric prints and sport inspired embellishments are going to be popular for men's beach wear designs.

**IBoF: Tell us about your retail model and its current mapping across India.**

**KL:** We are now working with different agencies all over the world to explore opportunities in different regions. We are also planning to do more online campaigns, so that more consumers all over the world can know about our brand. We also do retail licensed merchandise for many years. We have collaborations with buyers from Europe, US, Singapore, etc. and trying to develop the same in India.

**IBoF: What are your retail expansion plans?**

**KL:** We will keep observing our costumers' needs on swimwear, and will expand our swimwear category accordingly. We aim to expand into the Asia Pacific market in the coming few years, as there is still a large scope to expand in that region.



**“STRAPPY SWIMSUITS, GYM-TO-SWIM STYLES, RETRO HALTER, HARDWARE BIKINI AND TEENY SWIMWEAR ARE GOING TO BE THE TRENDS FOR WOMEN.”**



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# RESORT WEAR

## CRUISES AHEAD

## @ THE SPEED OF KNOTS

People are working hard, playing hard and travelling to their heart's content. And keeping up with their style quotients, are the contemporary Resort Wear collections. Mobility per se has now become trendier!

-By Niyorkona Saikia with inputs from Rosy N Sharma



Shivan & Narresh



Shivan & Narresh

Let us dive into the world of stylish comfort where every piece of apparel is beyond basic-Resort Wear.

Resortwear, also referred as 'cruise wear', is one genre of fashion that is witnessing a rapid growth in the fashion industry, globally. With the fast moving age that we are living in, people want clothes that complement their flexibility, while keeping them comfortable. This is where resortwear plays a very important role. Let us take a thorough look into the Indian market and understand the stance of resortwear from the experts in the industry.

### The Trend

Resortwear is the clothing, which is mostly worn while traveling and on vacations, especially in warm weather climates. It is generally easy to pack, lightweight, and comfortable. Initially the holiday makers in the West were accustomed to breaking away from the bustle of the city and escaping to warmer climates, thus sashaying in resort wear for their retreats. The category has gradually evolved from classic designs to more innovative and crisp silhouettes, along with bolder prints to celebrate the decadent lifestyle of getaways.

In accordance with the new age and more relevant to the Indian fashion, resortwear can be defined





Shivan & Narresh



Shivan & Narresh



Shivan & Narresh



*“With vanishing global boundaries for travel and fashion, the Indian millennial wishes to be at par with their contemporaries. Inevitably, the demand for resortwear is seeing a rapid upward transition.”*

– Designer Duo, Shivan & Narresh, Creative Director, Shivan & Narresh



Suman Nathwani Resort

as something which is minimal and comfortable in fashion. Something that is off beat for holidays and destination occasions!

**Assorted Categories**

Resortwear comprises versatile apparels and accessories including flowy cover ups, kaftans, capes, sarongs, pareos and bustier and bodysuits that can be repurposed as swimsuits for women. Men’s category is experiencing an evolution and includes classic polos, espadrilles, fitted resort trousers, swim shorts among other attires.

The categories in this segment are defined by how and when it’s worn. Cover ups and sarongs are specifically designed to wear over swimsuits and

lounges at the beach or poolside. When it comes to year round collection, the main category under resortwear is made of silhouettes that can be styled as per one’s needs and the occasion. “This category is for people whose sense of fashion is very relaxed yet stylish. Few examples of such designs would be embroidered kaftan dresses, georgette drop waist dresses, strappy tops and playful skirts,” said ace designer, Nandita Mahtani.

**The Fastest Selling Styles**

The most common resortwear styles preferred by women are dresses, shirts and shorts. However, the category is ever changing, with new styles being introduced every season.

Explaining about the different styles Narresh Kukreja, Creative Director, Shivan & Narresh said that women being more assertive about their bodies and men redefining their personal style and taste, the fastest selling attire happen to be the flowy kaftans and capes for women and crisp polos and espadrilles for men, owing to their functionality and suitability for







***“Resortwear is for people whose sense of fashion is very relaxed yet stylish. Such as embroidered kaftan dresses, georgette drop waist dresses, strappy tops and playful skirts.”***

**– Nandita Mahtani,**  
Fashion Designer

getaways. On the other hand, Khyati Nathwani, Creative Head, Suman Nathwani Resort, said, “The fastest rolling or selling range in resortwear would be the prêt range, as it is more versatile. The people are getting more social and technology friendly. Thus due to social media influence, more and more clothes are needed. Cottons are an affordable range and fashion conscious people are slowly changing and shifting from brands to designer labels even when it comes to clothes for their day-to-day activities.”

### **The Latest Collections**

Rimi Nayak, Designer, mentioned that her latest collection Colour Me Your Kind – CMYK is a vibrant range of draped toga dresses, long shirts, jumpsuits and maxi dresses in colourful prints. Naresh focuses on his EdoMer series, which has been envisaged from the disposition of getaways and escapades, using intriguing prints and embellishments to cater to the millennials. He said,

“The amalgamation of the bold tropical botany with the meticulous Shivan & Narresh signature Skeinwork has led to the creation of sensuous silhouettes. The exuberant La Digue, vivacious Eden and soothing Sour Sop collections have been essentially curated to engage the millennials.” Khyati stated, “Our latest collection was developed in the month of March, which was more holiday centric. We had developed a range in khadi and cottons with dramatic cuts and drapes suited for exotic holidays and easier occasion wear. We, as a brand, are minimal in nature with clean drapes and cuts. We emphasize on simpler couture and more offbeat prêt.”

Nandita focuses on slightly dressier outfits. Her collection flows from easy-to-wear silhouettes in double georgette, pure crepes, self-sequenced fabrics to metallic and lurex fabrics. “Taking cues from the flamingo and quirky motif trend, each motif was meticulously hand embroidered within a more abstract design in blush pink, shades of rainbow, beige gold and silver,” she stated.

### **The Growing Trend**

Resortwear market has grown very fast in India over the years. With people travelling abroad more frequently these days, it has created a huge demand.



***“The fastest rolling or selling range in resortwear is the prêt range, as it is more versatile. As people are getting more social and technology friendly, due to social media influence, more and more clothes are needed.”***

**– (LtoR) Khyati Nathwani with Suman Nathwani**

Creative Head, Suman Nathwani Resort



Suman Nathwani Resort

The trend of resortwear came into the mainstream fashion scene in India in the year 2010 when Lakme Fashion Week changed their yearly fashion calendar and made it more suitable for the Indian market, and introduced Summer/Resort as a season for fashion week. Since then, Indian consumers became more aware of the resortwear category of clothing.

Speaking on the market trend, Narresh said that the resortwear market is in its nascent stage in India. Owing to the rapid growth in the disposal income and to cater to the evolving needs of the millennials, consumers are spending more on travel. With vanishing global boundaries for travel and fashion, the Indian millennial wishes to be at par with their contemporaries and redefine the benchmark for resortwear. “Inevitably, the demand for the category, though currently at a steady pace of growth, is seeing a rapid upward transition”, he added.

Today, everyone is travelling. Moreover, with the social media craze, everyone is lot more exposed to fashion and styling. A holiday wardrobe is a must and this really boosts the resort wear market.

### **The Promising Market for Resort Wear**

The growing demand for travel is fostering the need for versatile attires that adapts to various occasions. This is the prime catalyst that is boosting the resort wear segment. This segment is seeing a tremendous popularity especially amongst the women population, and therefore there are a numerous silhouettes available in the market today.

Another strong point is the functionality of the attire. While women have been most enthusiastic about the body-affirming trend of resort wear, the interests of men have caught on as well. With brands offering staple men’s pieces such as polos, classic trousers, sheeter swim shorts



Rimi Nayak

and crisp holiday shirts with modern design elements, the market for the same is also steadily growing.

Elucidating upon the potential of resortwear, Rimi said that the segment has enormous potential in the apparel segment. She said, “There is a huge opportunity as more and more people are travelling around the globe. Also, with destination wedding being popular in India, and a number of theme parties taking place during the bachelorette and cocktail parties in cruise and beach during the wedding, it cites a potential market opportunity.”

Today, the market is way more open to new designers and innovative ideas especially for resortwear. There is also a huge potential for the designers and fashions related to this segment. Furthermore, with so many international brands like Zara and H&M opening in India there is a high demand for fashion, creating so many more opportunities in the fashion industry than before. Resortwear can go from very niche beach wear to extremely boho styled clothes to a more New Yorker style of holiday wear - the potential of this segment is what you can make of it.

### **The Consumer Preferences**

Rimi states that Indian consumers love the maxi dresses the most in the resortwear category. According to Narresh, the millennials and the





earning population of India is opting for experiences, rather than items of monetary value. Destination getaways, resort retreats and holidays are no longer luxuries. Moreover, the modern Indian woman has begun to embrace and flaunt her curves, and so aims to own versatile pieces that are sensual as well as elegant. Indian men are not far behind and also indulge in resort wear pieces in a gradually quickening pace.

“I think one cannot define a particular section that enjoys this range. Everyone is traveling and has the liberty of exposure to international fashion; every one wishes to be on point in their fashion game, at least aspire for it. Thus, the popularity only sees a growth,” said Khyati.

Today, the target market is not limited to people from an affluent background. The consumer ranges from people belonging to middle class and even youngsters. They travel, they celebrate, and they go for brunches, sundowners, parties and are social media fashion influencers. Thus, the exposure to resortwear is only accelerating with time.

#### Women v/s Men

Resortwear has gained popularity in both the sexes. Everyone wants comfort, and everyone wants to look trendy. In men, shorts and the Hawaiian shirts have gained a lot of popularity as resort wear. Young generation men are as fashion conscious as the women population. “I think the stereotype of men who don’t like shopping will come to an end soon. A lot of men do spend time styling and dressing themselves”, said Nandita. Twinning is one of the biggest trends for couples today. Apart from that, luxurious getaways call for stylish accessorizing to complement the colours and vivacious prints. With the men’s resortwear category evolving, bolder and more vibrant prints, along with subtle and serene colour palettes are on high demands. The key trends



Rimi Nayak

in resortwear for both men and women mainly comprise of shirts and dresses in Fabrics with exotic floral prints or embroidered linen and cotton fabrics. But when it comes to the later festive part of the year the trends shift to—bling with minimalism. “One of my favorites, all white is a huge trend in resortwear for men and women. Very minimal and monochrome is always chic. Subtle plaids inspired from nautical colours and silhouettes are finding their way into resortwear,” explained Nandita.

#### The Future of Resortwear

With increasing disposable income, increasing need to travel, and rising demand of staying fashionably comfortable, resortwear is all poised to emerge even more.

According to Rimi, beachwear will also emerge as a trend. Swimsuits and swim-suit cover ups will gain popularity in the coming years. Embroidered coordinated top and bottoms, extensive volume clothing, bold prints, pop colours, short outfits, crop tops, shorts for women and men will witness a high demand. “Metallic shimmer, lurex fabrics, iridescent metallics will make a big wave.



**“With destination wedding being popular in India, and a number of theme parties taking place during the wedding, resortwear cites a potential market opportunity..”**

— Rimi Nayak,  
Fashion Designer



Nandita Mahtani

Resortwear has always resonated with pastels and white, I think a pop of colour is going to be seen soon. Happy colours like shocking pink and royal blue will be loved by fashion conscious women. Pop culture, cartoon characters to hip hop mainstream references will also see a tremendous growth,” concluded Nandita.





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THE SHIRTS & TROUSERS ISSUE

**July'18**

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**August'18**

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**September'18**

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\*Thermals \* Study on Fashion Accessories

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# THE PERFECT BLEND OF COMFORT & AN 'OOMPH' FACTOR!

Innerwear is no longer just a bare necessity. It is not shoved inside the last, 'almost invisible', drawers of women's wardrobes anymore. It has emerged as the new fashion add-on and has also helped in boosting the self confidence in a lot of ladies.

Women today, are bold, expressive and strong. They have perfected different professions and have created a respectable position for themselves in the society. They are not afraid to want things that make them happy and they thrive in making their dream possible. Therefore, these women want more than just 'basic' innerwear. They want comfort, style, and a certain level of sensuality!

With ever increasing demand for stylish and comfortable innerwear, the market in India is accelerating at a rapid pace. You will find a wide array of assorted innerwear collections offered by different brands. These brands understand the need of the age and are wonderfully satiating the desires of every woman. Herein, we will share some insights about the innerwear market and the consumer demands through two highly acclaimed brands.

## The Business Cycle

Elucidating upon the current business scenario and the operating business model, Soumya Kant, Vice President, Clovia said that the brand emphasizes upon designing and distributing premium fashion lingerie, innerwear, nightwear and shapewear. They sell through both multi-brand stores, as well as exclusive stores and also online stores. The brand is one of the fastest growing in terms of sales and volumes. As an online player, they control the entire ecosystem, from design-to-delivery with in-house design studio, and raw-material procurement capabilities. Though the manufacturing is outsourced to exclusive 3rd party job workers, the quality of the material is monitored under strict supervision.

"Approximately 5,00,000 units of Clovia products are shipped across 650+ cities in India every month. We use smart technology and big data analytics for smart management of our inventory, ensuring we have a highly consumer-relevant range at all times with high sell-through rates, resulting in industry best inventory holding," said Kant. Pretty Secrets is another name that has created a niche for itself. With its headquarters in Mumbai, the brand caters to high demand of lingerie styles. Explaining about the business process, Joyjeet Banerjee, Vice President - Online Business, Pretty Secrets, said that the brand started out as





a women's sleepwear brand with its presence in major departmental stores such as Shoppers Stop, Pantaloons, Globus, Central, etc. as well as over 300 MBO's. From its advent as a solitary category player the brand diversified its range in 2012 through e-tailing on PrettySecrets.com.

### Target Customers

For any business, understanding the core customer is very crucial. This is similar in case of the innerwear industry. The brands analyze the demands and preferences of the market, and strategizes the manufacturing and production accordingly. On being asked about the focused customers, Soumya Kant stated that Clovia initially targeted working women in the age bracket of 25 to 32. At present, they have also included the younger generation

between 18 and 24 years of age.

"Though the younger generation do not spend as much as those between 25 to 32 years, yet they shop more often," she added.

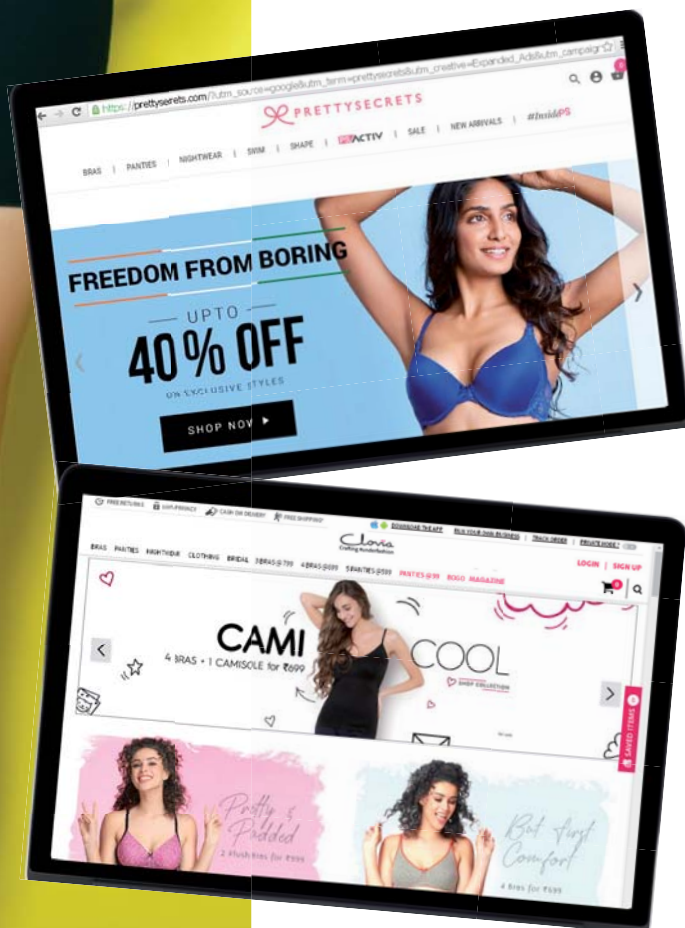
On the other hand, Pretty Secrets focuses more on women belonging to the 25 to 35 years age group. These include both working women as well as homemakers. "Our prime customer base belongs to tier -II and -III cities of India. These are the women who want to stay updated with current trends, but do not have the budget to invest in luxury pieces. We give them affordable comfort," said Banerjee.

### All About The Brand

Clovia started as a 'bras and briefs' brand. Later they extended into nightwear, shapewear and loungewear owing to the rising demand for the same. Within the categories, they have introduced a lot of sub-categories too. Like for example, in their bra range, they have beginner's bras and nursing, as well as sizes till 44F. They launch over 200 new options including colors and prints, per month across women's bras, briefs, nightwear, shapewear, loungewear, resortwear, swimwear, leisurewear and activewear categories.

Clovia sells its products through e-store clovia.com; through various partner sites such as Myntra, Jabong, Flipkart and Amazon; and from their offline stores. Currently they are delivering their products to 970 cities and to over 13,000 pin codes. The brand has recently forayed into the international market with the launch of their first franchise outlet in Nepal. And they are actively planning on expanding their national, as well as international footprint.

The total turnover of the brand for FY18 has been ₹52 crores. Clovia has the team, the mix, the ethics, the products and the head start to be the leader in the lingerie space. While the brand







Pretty Secrets store



Clovia store



***“Clovia emphasizes upon designing and distributing premium fashion lingerie, innerwear, nightwear and shapewear. Selling through multi-brand stores, exclusive stores and online stores, we are one of the fastest growing brands in terms of sales and volumes.”***

– Soumya Kant,  
Vice President, Clovia

continues to grow in the online space, they are rapidly setting footprints in offline retail as well.

Talking about Pretty Secrets, Banerjee explained that the brand has been instrumental in introducing higher fashion quotients in line with global trends, but at reasonable prices. The brand believes in innovation, as its core. One of the brand’s USPs is pop colours and prints.

“We are a style seeking brand where fashion meets function and comfort, and the choice for every woman’s lingerie needs. The brand’s portfolio consists of 1,200+ products including lingerie, nightwear, activewear and swimwear. We have two seasonal launches (Spring-Summer) and (Autumn -Winter) with 300 style collection in each season spread across cross-category. With 2 season launches

and 2 injection rounds per season, we put in a lot of research into product development,” said Banerjee. Pretty Secrets have been partnering with international online market places for over 2 years. Their international exposure is currently limited, but the brand is aiming to grow that exponentially. They have also partnered with some of the biggest e-commerce websites of UAE and South East Asia, Souq.com and Lazada.com respectively. The company has grown 70 percent over the last FY and is projecting a 150 percent growth this FY.

### **The Plan**

Speaking of the future plans regarding brand or product range expansion, Kant said that as the product-market fit has been a roaring success for Clovia and with the positive feedback and customer response/retention, the brand is focusing on meeting the rising demands and ensuring growth on all channels of distribution. Clovia, at present, is expanding its reach both online and offline. They are focusing on presenting a holistic experience for the customers and the sellers. One of their distribution highlights include recently launched shop-in-shops in leading MBOs in the NCR region. “We have launched 9 franchisee Clovia stores in Delhi-NCR. Started a new distribution model – Clovia Partnership Program. Clovia under this program invites women around the country to start educating other women about sizing and fits and run their own enterprise by selling Clovia products from the comfort of their home. We have around 100 members on board already. There’s no focus on building new brands in the near future. However, we will always be on lookout for newer opportunities under the Clovia umbrella,” Kant added.

### **The Online Innerwear Market**

Innerwear or lingerie is a rapidly growing market. It has come much beyond its past stagnancy. Last few years have seen an unprecedented growth in

awareness – both from sizing/hygiene as well as fashion perspective. While the overall apparel category is growing at 8 to 9 percent CAGR, lingerie is pegged to grow anywhere between 15 to 22 percent annually. The innerwear online shopping is estimated to be growing at 50 to 65 percent annually.

Speaking on the online sales and customer preferences, Kant said that Clovia witnesses an approximate of over 3K transactions on their website per day. She also stated that the customers come back to their website within 3 months of the first purchase.

Banerjee mentioned that around 1,000 to 5,000 units are sold online per day. “The online business of Pretty Secret has grown 39 percent over last year and is pegged to grow even higher with strategic tie-up with Myntra,” he added.

**Resolving Online Criticality**

The lack of knowledge about various sizes and fits makes it difficult for a client to choose the perfect size and design. At Clovia, they have come up with a breakthrough technology and have created a tool called the “Fit Test” to solve this fundamental problem.



**“Pretty Secrets is a style seeking brand where fashion meets function and comfort. Out portfolio consists of 1,200+ products including lingerie, nightwear, activewear and swimwear.”**

– Joyjeet Banerjee,  
Vice President - Online Business, Pretty Secrets

The brand did extensive research and developed this test that asks a woman 5 questions about her body type and then recommends the right bra. This has led to high customer satisfaction score. Highlighting on the online criticalities, Banerjee said that Pretty Secrets has realized that a push bra fits different from a seamless bra and that has an impact on size. So to overcome this size

problem the brand released content around it. They are emphasizing on making the size selection more visual and interactive.

**Where Are The Men?**

The innerwear market is primarily dominated by women. Men’s innerwear comprises 35 percent of the market, while women’s innerwear comprises around 65 percent. Couple this growth with rising youth population, rise of women spenders, increasing disposable income and a need for more solution based approach – you witness a growth in this segment. Banerjee mentioned that men form a good 25 percent of traffic when it comes to online sales. The scenario changes with offline retail, which is largely women.

**The Potential Market**

The tier -II and -III cities are where the next wave of internet growth is happening. The aspiration for brands and the unavailability of high fashion products gives a perfect reason for companies with a strong web presence to reach these pockets.

Some of the tier -II and -III centers where Clovia has seen good traction are Panchkula, Udaipur, Vellore, Bareilly, Siliguri, Bhatinda, Agra and Nagpur among others.

In case of PrettySecrets, around 55 percent of today’s sales come from these cities. Fifty percent of their stores are in tier -II and -III cities and they witness a significant demand coming from there.

**The Ceaseless Need For Comfort & Style**

The innerwear market is one of the most potential markets in the entire apparel industry. With the rising demand for style and comfort, and with the ease of buying innerwear online, the market is all poised for greater growths!







# SPORTS-INSPIRED INNERWEAR RULING THE ROOST

Based out of Kolkata, La Lingerie is a multi-brand innerwear store offering all sorts of premium national and international brands. Images BoF talks to Dharmendra Nathwani, Partner, La Lingerie to understand the evolving trends in innerwear

Launched in 1997, La Lingerie is a popular innerwear retail store with its headoffice in Kolkata, West Bengal. The multi-brand innerwear store is the brain child of Dharmendra Nathwani, who has over 20 years of rich experience in innerwear and is supported by his wife, Suman Nathwani who is a renowned intimate wear designer herself. Stacked with the most premium and best quality innerwear, the store offers Indian and international lingerie including, sleepwear, loungewear, swim and beachwear.

At present, La Lingerie stores are based in Kolkata (West Bengal), Ahmedabad (Gujarat) and Noida (Delhi-NCR). The brand is spreading its wings to other cities including - Bengaluru, Delhi and Mumbai. Similarly, with the advent of online shopping, the branded multi-retail store takes a special initiative to be available to the consumers through its own portal [www.lalingerie.in](http://www.lalingerie.in).

**IBoF: How has been the growth of men's and women's innerwear?**

**Dharmendra Nathwani (DN):** The innerwear market is showing substantial growth. Today, the segment is getting considerable importance in everyone's wardrobe.

**IBoF: What are the emerging categories and top trends in innerwear?**

**DN:** Sports-inspired innerwear is the new emerging range in innerwear. For men, colourful styles, boy shorts, etc. are quite popular trends. For women, it is the push-ups, bigger cup sizes and bridal collections that are in great demand.

**IBoF: In terms of functionality and comfort, which are the preferred fabrics for innerwear?**

**DN:** Cotton is always highly preferred over any other fabric in this segment due to its features and comfort. With latest advancements, there is a vast array of comfortable fabrics available and being used in manufacturing innerwear. Recently, the spandex cotton blends and spandex polyamide fabrics are being greatly preferred for innerwear for both men and women.

**IBoF: What is the highest selling product category for men?**

**DN:** The basic V-cut briefs are the highest selling range among men's innerwear.

**IBoF: What is the highest selling product category for women?**

**DN:** Since the Indian females have more voluptuous figures, the basic bigger cup size styles are the highest selling range.

**IBoF: What are the popular elements/embellishments in vogue today?**

**DN:** Laces are the most popular embellishment in women's innerwear. A lacey innerwear range is usually in great demand and bought by most of the women. On the contrary, the men's collection is very basic and it is more about finishes than playing with embellishments.

**IBoF: What are the top colours predicted for the forth coming season?**

**DN:** Black, red, mustard, olive and grey are the colours that will reign this season for both men's and women's innerwear.

**IBoF: Predict top trends that will emerge in the future in innerwear for men and women.**

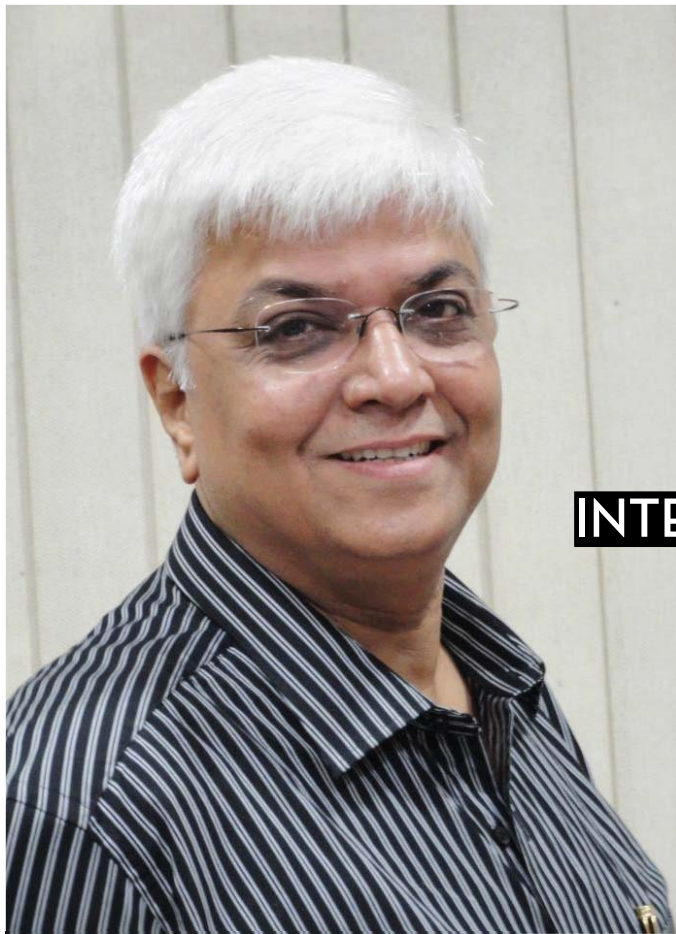
**DN:** For men, sports-inspired innerwear, fashionable and colourful innerwear, boy shorts and tongs will be popular future trends. While for women, sports-inspired, bridal collections, colorful innerwear, larger cupsize and underwired range of collections will be the preferred future trends.

**IBoF: What are the latest innovations in innerwear development that you have seen in India and abroad?**

**DN:** We are almost catching up with the fashion and trends prevalent in the outside world. However, India still lags behind in creating awareness about wearing the right sized innerwear and about knowing one's right band and cupsize. At La Lingerie, we have attendants in the stores to help our customers choose the right sized innerwear. Also, the availability of bigger cup sized products manufactured by the companies, is comparatively increasing. Awareness about breast cancer is also gaining momentum amongst the consumers.







# INSIGHTS FROM THE EAST

## INTERVIEWING PRADEEP ARORA

Pradeep Arora is one of the most prolific faces of the Indian fashion industry. With four brands and five companies under his belt, Arora is not only an influential figure in the kidswear segment but is often credited with helping shape the West Bengal hosiery industry with his company Cotton Casuals (India) Pvt. Today, Arora manages four other companies as well- Creative Casuals (India) Pvt. Ltd., Candid Casuals (India) Pvt. Ltd., Classic Casuals (India) Pvt. Ltd., and Cozy Casuals (India) Pvt. Ltd., along with Zero, Teddy, Simply, and Smarty.

*In an exclusive interview with IMAGES BoF, the pioneer opens up about the kids' innerwear industry in India.*

**IBoF: Please tell us about the kids' innerwear market in India.**

**Pradeep Arora (PA):** India's booming population increase rate sees approximately 34 babies born every minute. At least, this is what the internet documents and I am sure it is more or less accurate.

Now considering that a baby or a kid needs at least 12 pieces of apparel a day which they outgrow every 3 months, it's but only natural that the kidswear industry in India is booming. This especially holds true today with the parents' growing penchant for quality branded products especially when it comes to kids.

**IBoF: How has the growth of kids' innerwear been over the years?**

**PA:** It is growing at an astounding rate everyday. In fact, it is one of the fastest growing categories in the Indian fashion industry. Modern parents, armed with double income are more conscious and want nothing but the best for their children. At the same time, kids of today are much more aware of the trends than their erstwhile generations and are very particular about their sartorial needs. As a result, this segment is gaining momentum by the day.

**IBoF: As a veteran in the industry, do you see any major change in demand in kids' innerwear in the last few years?**

**PA:** The only change I can see is that the demand has snowballed at



an astonishing rate over the years. People are getting increasingly conscious about the fabric they want for the baby or kids. There is unsurpassed demand of skin friendly properties in kids' innerwear now and a fair section educated class is rejecting non cotton fabric.

**IBoF: What are the most popular fabric options for kids innerwear?**

**PA:** Only cotton! It can be different counts thinner or thicker as per the need but when it comes to kids' innerwear, cotton is king and the most demanded fabric.

**IBoF: What are the fastest moving categories for boys and girls when it comes to innerwear?**

**PA:** Slips and vests are probably the fastest selling for obvious reasons but at the same time it's a difficult question to answer. Similar to adults, kids too require assorted type of undergarments.

The requirements may vary across age groups or geographies but most customers want a full range, ie., vests, undies, slips, leggings, etc.

**IBoF: Elaborate on the current top trends in innerwear for kids both in terms of styles and colours?**

**PA:** Variety is the key, to be honest. The bigger the range, the more options brands and retailers have for their consumers. Currently, it has been witnessed that there is an increasing inclination towards sporty designs.

In terms of colours, pink for girls and blue for boys has traditionally been ruling the market. But these days, customers are very unpredictable when it comes to choosing colors, so in my opinion, brands and retailers should have a variety of colours to appease their consumers.

**IBoF: What, according to you, are the challenges in manufacturing for kids' innerwear?**

**PA:** Quality, price and range are the biggest challenges in manufacturing. Quality and fit tops the priority list of kids' innerwear consumers. You have to give them the best quality at competitive prices. Moreover, you have to keep in mind that anytime the innerwear can become outerwear depending on the season.

**IBoF: How important is character licensing in kids innerwear range?**

**PA:** It is important but not for babies as they don't ask for it. The parents want good quality at a reasonable price. It is only important after 4 years of age or when the child asks for it. But still 1 piece in one character is enough.

×



**>> ZERO**

Launched in 1990 by Cotton Casuals (India) Pvt. Ltd., Zero is a kids wear brand that specialises in infant wear. Today, it is a leading player in the kids wear section and offers a unique range of products in 100 percent cotton fabric. Soft fabric, soft colours, patterns, cute designs, all together make Zero products comfortable to wear and soothing for a baby.

**>> SIMPLY**

Simply, as the brand name suggests, manufactures simple basic products for infants to four year old kids. The company was launched in 1998 and has been manufacturing products like slips, vests, panties, briefs, shorts, tops, frocks, baby suits, mittens, booties, caps, towels, napkins and gift boxes which are 100 percent cotton and designed especially for the comfort of babies.

**>> TEDDY**

The brand, Teddy, was started in 1993 and specialised in babasuits. Later it kept on adding various products to its portfolio such as capri sets, frocks, night suits, leggings, half pants, t-shirts, etc. Today, it offers a full range of collection for kids from one-to-six years of age.

**>> SMARTY**

Incepted in 2007, Smarty started as a brand catering to the kids in the age group of 1-8 years. Tasting success, it expanded its portfolio in the following years and came up with a collection for the kids and teens in the age bracket of 1- 18 years.



# >> C9 AIRWEAR <<

**Company:** Sangam Lifestyles Venture Ltd. | **Year of launch:** 2015

Launched in 2015, C9 Airwear is an emerging lifestyle brand. In keeping with the needs and lifestyle of the women of today, the brand brings to the table a range of progressive seamless wear to maximize flexibility, mobility and performance, while enhancing comfort and confidence. It aspires to establish a new outlook towards intimate wear, active wear, yoga wear, shape wear and leisure wear for women today as it blends seamlessly with their lifestyle while meeting their aspiration for range, colour and style.

## Core focus customers

C9 Airwear symbolizes the multiple facets of a woman's life. The spaces she navigates every day and the forms in which she expresses herself. It encompasses the essence of what it means to be a woman through myriad roles that she performs in her everyday life.



It's internal research and designing team is continuously innovating new fits and designs such as brassieres for teens and sports, thongs, bikinis, hipsters, padded tube bras, etc.

## Product range or category expansion plans

The brand has plans to introduce new categories in cut-and-sew segment with more range of seamless garments. It also plans to launch new designs in slim-fit active leggings, capris and offer track pants, joggers, shorts, etc.

## Primary markets

The brand follows a multiple prolonged sales strategy wherein primary markets form its core areas. These markets enable them to further penetrate in the markets far and wide.

## Retail presence

C9 Airwear brand is available through 1,000 retail outlets across the country. Its products are available in large format stores such as Central and premier shops pan India.

## Top retailers

C9 Airwear retails through major distributors and retailers across the country.

## Progress through online retail

C9 Airwear products are getting an overwhelming response from online platforms like Flipkart, Amazon, Myntra, etc., and social media sites like Facebook, Twitter and Instagram. The brand also has a company-owned portal, [www.C9fashion.com](http://www.C9fashion.com).



## Product portfolio

The brand offers a variety of product ranges in intimate wear, active wear, yoga wear, shape wear and leisure wear for today's women.

## Latest collection and its theme

The brand has introduced a new range of innerwear such as panties, padded brassieres and sportswear with various fits. Vibrant colours with cool impact and in trendy patterns are the hallmark of its latest design theme for the current season.

## Most innovative products in the collection

C9 Airwear innerwear has made a mark in the Indian market due to its quality and comfort. The brand's latest new ranges of innerwear are based on the theme of convenience and performance.



# >> CANDOUR LONDON <<

**Company:** Candour London Fashion Culture Pvt. Ltd. | **Year of launch:** 2016

A youth lingerie brand, Candour London caters to an audience who feels young at heart. It is a premium-to-value lingerie brand that attempts to bridge the gap between Indian women and their love for lingerie. It offers bras, panties, nightwear and lounge wear.

## Core focus customers

The brand's target group emphasizes on 18 to 35 year old females. Nonetheless, it's designs are also widely used by other age groups in the market.

## Product portfolio

Candour London's product basket consists of 5 segments namely bras, panties, nightwear, loungewear and sets.

## Latest collection and its theme

The brand's latest collection focuses on non-wired fashion bras, which are fashionable along with offering comfort. The colours and prints cater to the tastes of their customers.

## The top most innovative product in the collection

The brand has introduced fabrics that were not being used earlier in lingerie manufacturing such as brushed micro fibre fabric, which was taken well by the customers.

## Primary markets

The brand is majorly available in multi-brands outlets in the major metropolitan cities across the West, North and East regions.

## Top retailers

The brand's top retailers comprise Gopalsons (Delhi), Noor Traders (Punjab), Fashion Plaza (Chandigarh), Amarsons (Mumbai), RS Attire (Pune) and Mahalsa (Nasik).

## Plans for exploring new markets in India

The brand aims to enter into more MBO's in the existing regions. It also has plans to enter the markets of South India as early as possible. It also plans to open a flagship store in Mumbai soon.

## Progress through online retail

Being new to the online marketplace, the brand is still making space for itself and its products. However, it received good returns during the time it had partnered with major online players.

## Turnover last FY (16-17) and the brand's aim for the next 2-3 years

The brand touched ₹10 crores in the last FY 2016-2017.

## CAGR over the last 3 financial years and the brand's aim for the next 2-3 years

The brand has been growing at a rate of 10 to 12 percent. It is aiming to grow at 18 to 22 percent in the next 2 years.





# >> CANDYSKIN <<

**Company:** RVK | **Year of launch:** 2017

A premium lingerie brand made for women, by women, Candyskin is an intimate apparel brand that creates sexy, comfortable, great fitting styles with an x-factor at affordable price. The brand is known for its unique styles created in line with the brand's exquisite taste and following international trends. It's collections scream deliciousness out loud which makes women come alive, and help them fuel that confidence, grace and elegance within themselves.

## Core focus customers

The brand's core customers are urban, stylish, aspirational, well travelled, tech savvy and brand conscious women between the age group of 16 to 45 years.

## Product portfolio

The brand's complete collections include a set of push up, padded non-wired, unlined, demi, t-shirt and wire-free bras, bodysuits, camisoles, briefs, bodyshorts, thongs, seamless and cheeky panties, and shapewear.

## Latest collection and its theme

The brand's latest collection comprises sweat absorbent bras. These padded non-wired bras are lined with cool feel mesh and are perfect for the summer and monsoon season. It has also introduced anti-bacterial panties for women for the first time in India.

## Most innovative products in the collection

All the products by the brand offer an x-factor. For example, its sweat absorbent bras are lined with cool feel mesh in order to keep the wearer fresh all day. Along with this, its panties are anti-bacterial to avoid bacterial and yeast infections.



## Product range or category expansion plans

The brand is expanding into categories such as nightwear, sportswear, athleisure and shapewear.

## Primary markets

The brand considers pan India as its primary market place and is contemplating to explore the international market.



## Retail presence

The brand currently operates through 120 stores pan India which include large format stores such as Central. It aims to be present in over 500 stores within the next 3 years.

## Top retailers

The brand's prominent retail partners include Betty (Mumbai), Cinderella (Delhi), Gopal Sons (Delhi), Central (Mumbai, Surat and Bengaluru) and La Lingerie (Kolkata and Ahmedabad).

## Plans for exploring new markets in India

The brand is progressing to enter tier-II cities. As part of its brand building exercise, it is creating awareness and teaching its customers about how the brand's product functionality can benefit them.

## Progress through online retail

The brand is present on all leading e-commerce websites such as Myntra, Jabong, Nykaa, etc., and also operates via its own website, [www.candyskin.com](http://www.candyskin.com).





## >> FRENCHIE <<

**Company:** VIP Clothing Ltd. | **Year of launch:** 1980s

Established in the 1980s by Maxwell Industries and now called the VIP Clothing Ltd., Frenchie marked the advent of mini-briefs in India. Original in concept and design, the innerwear brand for men took the young urban Indian male by fantasy and gave them a taste of international style.

### Core focus customers

The brand focuses on males between 25 to 30 years of age, residing in SEC A and B in tier -I and -II towns.

### Product portfolio

The current product portfolio consists of the core range which caters to the masses as well as a newly launched collection of mass premium products. The brand sells all innerwear products ranging from briefs and trunks to regular vest and gym vests.

### Latest collection and its theme

Frenchie Casuals is the newest collection that the brand has launched. The products have been designed keeping the sensibilities of the urban male in mind. The collection exudes the fashion consciousness that urban youth have now come to represent.

### Most innovative products in the collection

The brand has introduced a new round neck vest with sleeves that is on body diameter, tailored shoulder and sleeves. These features make

the product follow the body movement without riding up and creating gathers under the arm.

### Product range or category expansion plans

The brand is aiming at strengthening its kids' portfolio which is currently under development.

### Primary markets

Close to 50 percent of the brand's business flows from the states in South India. Besides South India, Maharashtra is its key market.

### Retail presence

The brand has 2 company-owned exclusive brand stores in Mumbai. It is also present in 9 renowned large format stores with 1,200 stores across the country.

### Top retailers

Big Bazaar, Dmart, Vishal, Walmart and ABRL are among its top retail partners.

### Plans for exploring new markets in India

The brand is aiming to expand its business outside its core markets, which is mainly the non-South markets.

### Progress through online retail

The brand primarily sells through the company-owned web-store. It is also present at the top e-commerce platforms such as Amazon, Flipkart, Snapdeal and Shopclues.







# >> PRETTYSECRETS <<

**Company:** MTC Ecom Pvt. Ltd. | **Year of launch:** 2011

The intimate wear brand, Prettysecrets is one of the fastest growing brands in India. Created by Karan Behal in 2011, the brand started out as a women's sleepwear brand with its presence in major departmental stores such as Shoppers Stop, Pantaloons, Globus, Central, etc., as well as over 300 MBO's. From its advent as a solitary category player, it diversified its range in 2012 and grew through e-tailing on [PrettySecrets.com](http://PrettySecrets.com).

### **Core focus customers**

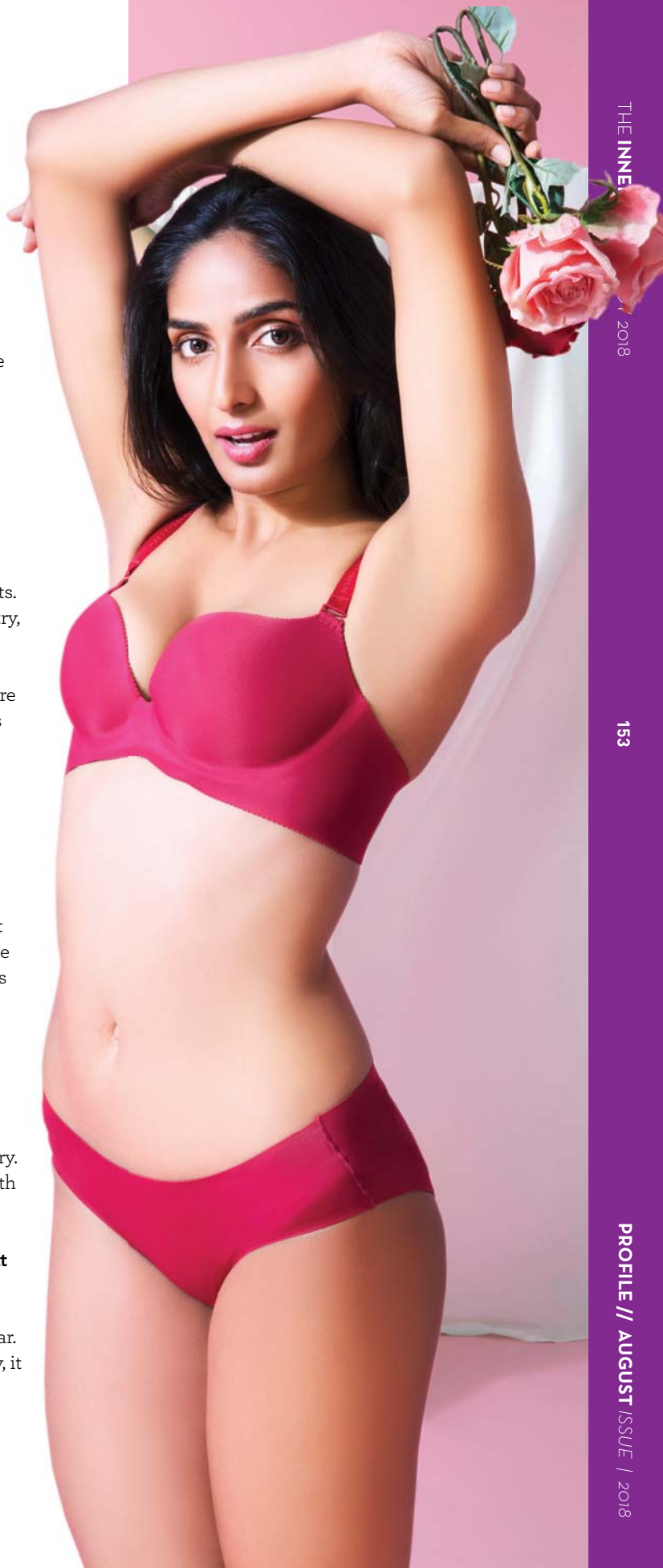
The brand's target audience is between the age of 25 to 35 years, inclusive of both working women and homemakers. They mostly belong to tier -II and -III cities of India. These are the women who want to stay updated with current trends but do not have the budget to invest in luxury pieces but they also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

### **Product portfolio**

Prettysecrets has been instrumental in introducing higher fashion quotients in line with global trends to the market at reasonable prices. Innovation is at the core of everything the brand does. It is a style seeking brand where fashion meets function and comfort, and the choice for every woman's lingerie needs. Its portfolio consists of 1,200+ products including lingerie, nightwear, activewear and swimwear. It has two seasonal launches spring-summer and autumn-winter with 300 style collection in each season spread across cross-category. With 2 season launches and 2 injection rounds per season, it puts in a lot of research into product development.

### **The latest collection and its theme**

The spring-summer 2018 is all about bright and bold colour palette, including electric fuchsia, sunny yellow, with emphasis on use of texture in not just a visual but also a tactile way. It is about modern day climate utilizing definitive textures, graphic prints like fresh bloom, geometrics, plaids, abstracts to match spring and a potent colour philosophy. Its basix collection is inspired from everyday 9-to-5 wear, which is inherently easy to look after and is also available in plethora of colours and prints to keep it away from being boring. With its basix collection, the brand focuses on 'structure is key'. The basics range consists of everyday lingerie that is chic, comfortable, above all fashionable and elegant. From seamless bras and sexy silhouettes to padded wired, non-wired and non-padded, the range offers timeless styles.



### **Most innovative products in the collection**

The brand's miracle fit collection provides a unique fit for women and gives high support without any discomfort. This season, the brand is re-introducing this collection with exciting new technology. The beauty of miracle fit lies in the smooth seamless construction of this product, which gives a comfortable fit without digging into the skin. The molded construction gives a natural lift and avoids side buldges, which is a unique feature of their top selling product.

### **Product range or category expansion plans**

The brand is armed with multi category. Besides lingerie, it is also strong in nightwear, activewear and swimwear. Its multi-channel distribution largely through [www.prettysecrets.com](http://www.prettysecrets.com), which caters to over 20,000 pin codes across the country, all major online marketplaces, exclusive brand outlets and multi-brand outlets across the country gives them a strong edge over the other lingerie brands in India. The products are a perfect blend of style and comfort. The brand understands that the topmost requirement for innerwear is comfort and quality, but it also believes that comfort does not have to be boring.

### **Retail presence**

The brand opened its first exclusive retail outlet in April 2017 and now has 24 stores across 10 states panning all 4 corners of the country. It has already set stage to ensure that it reaches 100 stores by the end of 2018 and 300 stores by the end of 2019. It currently sells through 350 trade stores across the country and aims to get to 1,500 stores by end of 2019. All of this coupled with growing its market share on online marketplaces and making PrettySecrets.com the largest culmination of brand loyalists.

### **Plans for exploring new markets in India**

The brand is planning to open more EBOs across the country. Also, it is focusing more on non winter markets like the South and West India.

### **CAGR over the last 3 financial years and aims for the next 2-3 years**

The company has grown 70 percent over the last financial year and is projecting a 150 percent growth this financial year. Prettysecrets launched it's first store in April 2017, and today, it has 25 stores.





# >> RED ROSE <<

**Company:** Sagar Products | **Year of launch:** 1977

Established in 1977 by the Vora brothers, Red Rose by Sagar Products has carved a niche for itself as a leading intimate wear brand in India. The brand firmly believes in the philosophy that it's all about what you wear inside, projects beauty and confidence outside. Consistent quality, high inner fashion and utmost comfort are its core strengths.

## Core focus customers

Red Rose aims to target two sets of customers—first, women in the age group of 30 years and above, and secondly young females in the age group of 18 years and above.

## Product portfolio

The brand offers panties, camisoles, nightwear, shapewear, lounge wear, inner accessories and kids undergarments.

## Latest innerwear collection and its theme

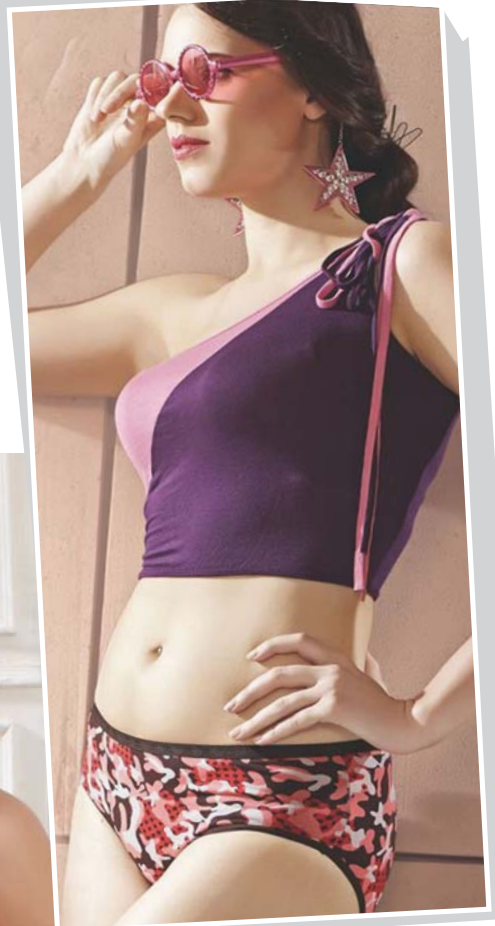
The brand has introduced digital print panties in its latest collection. According to the brand this is the first time that such a collection has been introduced in the market. Also, this is very different from the imported panties that are available in the market. Women of today are bold and experimental when it comes to lingerie and the brand is confident that the collection will bring the “wow” factor to their lingerie wardrobe. Every detail from design to packaging and promotions has been worked out to minute details and they are extremely optimistic about this collection.

## Most innovative products in the collection

The brand has introduced innovative innerwear collections such as period briefs, padded shape enhancer briefs, pregnancy briefs, etc.

## Progress through online retail

The brand is available at all leading portals like Myntra, Jabong, Flipkart, Snapdeal, Paytm, Limeroad, Tata Cliq, etc.



# >> SOIE <<

**Company:** Ginza Industries Ltd. | **Year of launch:** 2010

Soie encompasses a complete premium apparels brand with lingerie as its core product offering. The brand offers quality, affordable and inspiring clothing for the fashion-conscious, independent young women who want to dress well and pay less. Launched in 2010 by Ginza Industries, today Soie has presence in multi brand outlets, exclusive retail outlets and a robust social media presence.

## Core focus customers

Soie focuses on working and non-working women in the age group of 20 to 40 years, looking for the right fit and good quality products.

## Product portfolio

The brand currently offers fashion, core basics, active, beginners, bonded and seamless in bras. It also has panty packs, shapewears, nightwear and girl's innerwears in its product portfolio.

## Latest collection and its theme

The latest collection showcases lacy bridal, typographic active, pastel colour blocked bras. The brand's core basic collection would have unique jacquard detailed foams, invisible wires and extreme support full figured bras.

## Most innovative products in the collection

Soie has used a special cocona fabric in its new sports bra style CB-906. It is a special fabric made from volcanic sand and activated carbon from coconut shells. The fabric gives moisture

wicking, and cooling and heating effect to the body depending on the climate.

## Product range or category expansion plans

The brand has plans to introduce a range of full-figured support bras for heavy bust lines.

## Primary markets

Soie's primary markets comprise Mumbai and the rest of Maharashtra. It also has a strong presence in Delhi-NCR, Gujarat, the upper northern India and the North-East region.

## Retail presence

Soie's current retail present includes 7 EBOs, 1,000+ MBOs and 53 LFS and 12 SIS in India.

## Top retailers

The brand's top retailers are Shopper Stop, Central and Pantaloons in the large format store segment. Similarly, Myntra, Amazon, Nykaa, Jabong, etc., are its online channel partners. It is present in all leading MBO's across the country.

## Plans for exploring new markets in India

The brand is planning to increase its presence in South India by tapping all the big family retail stores.

## Progress through online retail

In the online space, the brand is growing at a pace of 50 percent increase year-on-year.





# >> TAB 91 <<

**Company:** Garvit Knitwear | **Year of launch:** 2014

Launched in 2013, Tab 91 is redefining the casual wear market by introducing extremely trendy and colourful collections that have proven popular with shoppers. The brand is offering products crafted in perfection using high quality fabrics, in-house designers and careful machining for men and women. It has been built and grown on a simple philosophy of three Fs—Fabric, Fit and Finish. It is steadily getting recognition in the garment industry in India.

## Core focus customers

Tab 91 targets youngsters between 16 to 35 years of age. It offers a complete range of fashion wear with modern designs for people who are young at heart. It helps people who wanted to look smart and trendy, yet want an affordable product.

## Product portfolio

The brand's product basket is divided into winter and summer range. Its summer collection encompasses men's collar and round neck t-shirts, linen kurtas, fashion joggers, shorts, capris, bermudas and loungewear.

While, the winter range comprises cotton pullovers, full sleeve t-shirts, light weight knitwear sweatshirts, fleece sweatshirts, fleece track suits for men, and fancy yarn cardigans, sweatshirts, knitted coats, trench coats, lounge wear and accessories for women.

## Latest collection and its theme

At present, the brand is developing its Spring-Summer 2019 collection which includes bermudas, lowers, hi-street fashion shirts, tops, dresses, jumpsuits, urban tunics, shrugs, shorts, capris, narrow pants, leggings, track suits and solid t-shirts for men and women.

## Most innovative products in the collection

The brand's most innovative products are its light weight fabrics and good quality designs, which makes them the preferred choice of one and all.

## Product range or category expansion plans

Tab 91 is planning to introduce a new range in the men's casual shirts as category expansion.

## Primary markets

Being based out of North India, the brand's primary market includes the region of North, West and the North-East. It is aggressively trying to enter the markets of South India.

## Retail presence

Currently, the brand is available in 1,350 MBOs in India. In the next 2 years, it has plans to open at least 10 EBOs in the North India.

## Plans for exploring new markets in India

The brand has been receiving great appreciation for its designs, price range and quality of the products. It has been experiencing great demand for its products in tier -I and -II cities. Its next target is to explore the markets of South India.

## Progress through online retail

The brand's products are available at all leading e-commerce platforms such as Myntra, Jabong, Amazon, Paytm, Flipkart, Snapdeal, Voonik, Shopclues and Rediff. It has been continuously increasing its share in the e-commerce space.

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**Company:** TT Ltd | **Year of launch:** 1964

Established in 1964, TT is one of the oldest and most respected brands in the Indian apparel sector. An ISO 9001 certified and government registered trading house, TT Ltd., today covers the entire spectrum of the textile sector from cotton, yarn, fabric, to garments and accessories. Over the years, the brand has been conferred with countless awards and honors including Excellence Award in 2010 by the Indian Economic Service and the Master Brand Status by CMO Council.



#### Core focus customers

With over five decades of presence in the innerwear segment, the brand boasts of catering to more than 90 percent of the country's population spread across nook and corner of the country.

#### Product portfolio

The brand has a large and extensive portfolio, which includes innerwear range for men, women and kids using single jersey, rib and interlock fabrics alongwith spandex blends.

#### Latest collection and its theme

According to the brand, they do not have seasonal collections in innerwear category, it is only under the activewear and casualwear category that they launch new collections. However new introductions, mainly in the briefs category is an ongoing process, and the colour palette keeps evolving.

#### Most innovative products in the collection

The brand has introduced spandex blend fabrics for better comfort and has launched colours that are more bold.

#### Product range or category expansion plans

Category expansion is an ongoing process and the new developments revolve around better fabric finishes, spandex blends and new colours to suit the changing lifestyle.

#### Retail presence

The brand has presence in 60 EBOs, 50,000 MBOs and 25 large format stores across the country.



#### Plans for exploring new markets in India

According to the brand, new markets are tough to penetrate, hence it focuses on exclusive distributors with an FMCG knowledge to penetrate new markets and who work without any biases and prejudices.

#### Progress through online retail

Though the brand is a veteran in traditional marketing techniques, it is relatively new to online retail. It's progress has been slow and steady, but the business through online business is steadily growing.

#### Turnover of the last FY (16-17) and the brand's aim for in the next 2-3 years

The brand's turnover for 2016-17 was about ₹700 crores and it is looking forward to reach ₹1,000 crores in the next 3 years.

#### CAGR over the last 3 financial years and the brand's aim for in the next 2-3 years

The CAGR for its branded innerwear business has been 20 percent and it plans to increase it to 30 percent CAGR in the next 3 years.





# >> UNDERDRESSING BY PARK AVENUE <<

**Company:** Raymond Apparel Ltd. | **Year of launch:** 2012

Launched in 2012, Underdressing, the innerwear sub-brand from Park Avenue strengthens the mother brand's portfolio as an aid to offering a complete wardrobe solution to its customers. The innerwear range for men caters to the needs in the medium and premium segment which is growing at a CAGR of 22 percent.

## **Core focus customers**

Park Avenue's innerwear primarily focuses on the mother brand's customers in order to give them a full wardrobe solution. The consumers may belong to tier -I and -II cities and are majorly middle and top management personnel looking for better quality products, style conscious and brand sensitive.

## **Product portfolio**

Park Avenue offers a complete range of men's innerwear portfolio such as briefs, vests, trunks, socks, thermals, gym vests, track pants, lounge t-shirts, boxers, etc. Merino wool thermals from Park Avenue are super premium and such quality is offered by no one else in the country. Innerwear from Park Avenue is segregated in 3 categories – Core, Fashion and Sports. Core being the most premium category with offerings like seamless briefs and vests. Fashion offers the most trend right colours. And, Sports provide the best of the comfort when it is required the most in an active life.

## **Latest collection and its theme**

Park Avenue innerwear is the first brand in the country to offer mercerized briefs and trunks that provide extra softness and comfort.

## **Most innovative products in the collection**

Innovation being the core pillar of the mother brand gets reflected in the innerwear category too by offering innovative services and product offerings to both primary and secondary customers. Product innovations like health socks and seamless range of briefs and vests

with bio-wash finishes add tremendous value to the category.

## **New product range or category expansion plans**

The brand is expanding its collection of boxers shorts and no-show socks, adding 15 percent to the overall category.

## **Primary markets**

The brand's primary business comes through MBOs, which contribute around 80 percent of the total business. Its EBOs contribute around 15 percent and other channels contribute the remaining 5 percent to the business.

## **Retail presence**

Park Avenue boasts of a wide distribution network with presence in more than 700 'The Raymond Shops', over 100 EBOs and more than 1,000 MBOs. The brand also enjoys its presence in large format stores such as Central.

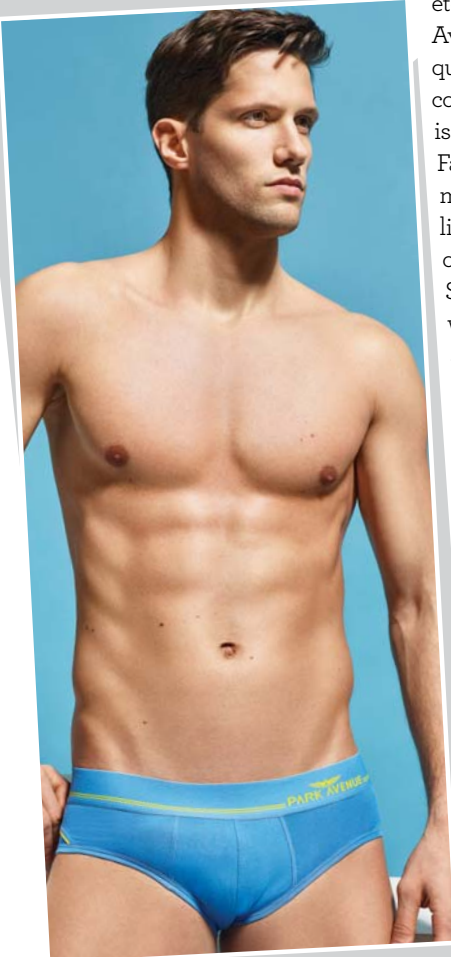
## **Plans for exploring new markets in India**

Going forward, the brand's main focus area would be MBOs and e-commerce to cater the premium segments of men's innerwear. Also, it is adding new categories in loungewear like boxers and thermals to acquire 2 percent market share by 2021.

## **Progress through online retail**

Online is, currently, contributing 6 percent to the brand's business and is likely to grow by 10 percent in the next 2 years.

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# >> V-STAR <<

**Company:** V-STAR CREATIONS PVT. LTD | **Year of launch:** 1995

Established in 1995, the innerwear and lifestyle brand, V-Star belongs to the V Guard Group. It has captured the heart of its customers with exquisite, affordable and comfortable portfolio comprising innerwear and outerwear for men, women and kids. The brand has continuously redefined the benchmark for excellence in the world of fashion. Since its inception, it has been energetically crossing major milestones of growth.

## Core strengths

The brand, V-Star boasts of the goodwill that the parent company V-Guard Group bestows. It offers comfortable quality products in line with global standards at affordable price range. It takes pride in having loyal customers over the years.

## Core focus customers

The brand targets young consumers in middle and upper-middle class segment.

## Product portfolio

V-Star showcases a superlative spread of bras, panties, comfy blouses, camisoles, leggings, t-shirts, sleepwear and shapewear that are designed to complement femininity in the most beautiful way. Crafted in trendy styles and designs with a flawless blend of lace and fabric using advanced technology, V-Star products offer superior quality and international standard. The specially crafted cups, lenient straps and individually-designed laces enhance the feminine aura of the modern woman. While, the product range for men include polo t-shirts, vests, briefs, boxers and track pants that are available in an array of shades and cuts. The kids wear showcase product ranges such as t-shirts, track pants, vests, briefs, boxers, panties, leggings, tights and bloomers.

## Latest collection and its theme

V-Star has recently launched new designs in bras, panties, sleepwears, etc., under its precious purple collection for its women consumers. Similarly, the brand has launched hue rock collection for its male consumers offering stylish and vibrant innerwear.

## Most innovative products in the collection

V-Star has introduced comfy blouses in stretchable spandex fabric. The comfy blouses have close back, relaxed scoop front neck and three-quarter sleeves. This readymade top adds glamour and gives a stylish twist to traditional wear like sarees. Comfy blouses can also be paired with new-gen choices of attire such as modern jackets, fashion outfits and high waist bottoms.

## Product range or category expansion plans

V-Star is planning to add more styles to its premium range, the 'precious purple' collection. The precious purple collection has been designed for the new-gen women. The precious purple collection offers a unique blend of imported laces and top-notch fabrics. Made from superior elastic and micro-fiber fabric, the collection is designed to offer a comfy experience to all those who wear it.

## Primary markets

The brand's primary markets include the states of Kerala, Tamil Nadu, Karnataka, Andhra Pradesh in India and the Middle East.

## Retail presence

V-Star has already made its presence felt in major towns and cities in India and the Middle East. Right now, the brand has presence in Kerala, Tamil Nadu, Karnataka, Andhra Pradesh and the Middle East countries. In India, it has over 6,000 MBOs, 14 EBOs and presence in 200 large format stores.

## Plans for exploring new markets in India

A fast emerging brand in the world of fashion, V-Star has already made its presence felt in major towns and cities across the country. The brand is all set to open more EBOs and expand its presence in the South India.





**NEXT ISSUE**

# OCCASION & FESTIVE WEAR SPECIAL

**IMAGES SEPTEMBER 2018**

## BUSINESS OF FASHION

**A NOT TO BE MISSED ADVERTISING OPPORTUNITY**



As autumn colors fall, India wakes up to the festive season; a season that witnesses the entire country celebrating in its brightest and most jubilant avatar. The festive season, traditionally, has also been the time when Indians shop with unsurpassed fervour. Janamashthami, Ganesh Chaturthi, Durga Puja, Navratras, Diwali, Karva Chauth, Bhai Duj, onto Christmas, and the accompanying Wedding Season — it's indeed an apogee of retail sales.

**IMAGES BoF's September 2018 issue is the hottest edition of the year 2018. As a Pre-Festive special, the issue will focus on the four glam fashion segments- Occasion Wear, Wedding Wear, Winter Wear and the rising impact of Designer Wear on them.**

**In each of these segments we will:**

- Outline the Opportunities and Challenges
- Evaluate Prevailing Trends
- Highlight Success Mantras of Leaders
- Showcase the Top Forthcoming Launches

**Suits • Jackets • Sweaters • Sweat Shirts • Shawls • Thermals • Lehengas • Sarees • Sherwanis • Jodhpuris • Tuxedos • Western Bridal • Bridal Gowns • Designer Festive and Wedding Wear**



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# FASHION CREATION

**27TH MILANO UNICA**

**FOCUS ON  
SUSTAINABILITY**

**REPORT:**

**CURTAIN RAISER:  
CENTRESTAGE  
2018**

**>> POSTER GIRLS  
>> IIFW**



PICTURE: WENDELL





Celeb Watch

**POSTER GIRLS OF LINGERIE**

Lingerie is topping fashion trends. A few of the glamour world's most celebrated faces that have become poster girls of lingerie chic as they embrace and show us how innerwear can be couture.

Pg No. 164-167

Fashion Trends

**INNERWEAR: THE UNDERCOVER STORY (INDIA INTIMATE FASHION WEEK)**

Celebrated fashion columnist Meher Castelino reflects on the Intimate Fashion Week 2018 and outlines the trends, feminine festive colors & looks and haute couture bridal lingerie looks.

Pg No.168-172

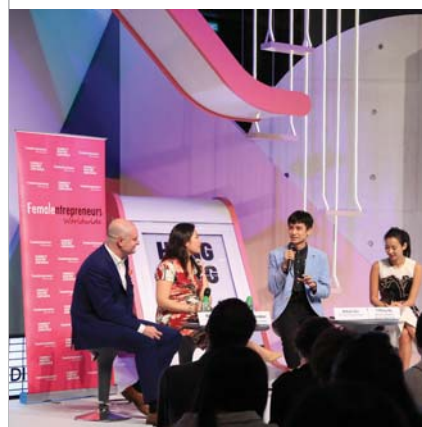


Mega Event

**27TH MILANO UNICA: THE AVANT GARDE OF SUSTAINABLE FASHION**

The 27th edition of Milano Unica, with the presentation of the collections for the A/W 2019-2020 season, recorded good results in terms of attendance and interest.

Pg No. 174-182



Mega Event

**CENTRESTAGE: THE COUNTDOWN BEGINS**

Organised by the Hong Kong Trade Development Council (HKTDC), the international fashion trade show CENTRESTAGE will take place from 5-8 September at the Hong Kong Convention and Exhibition Centre.

Pg No. 184-186

# FABRIC 2.0

## BE FRESH 24X7



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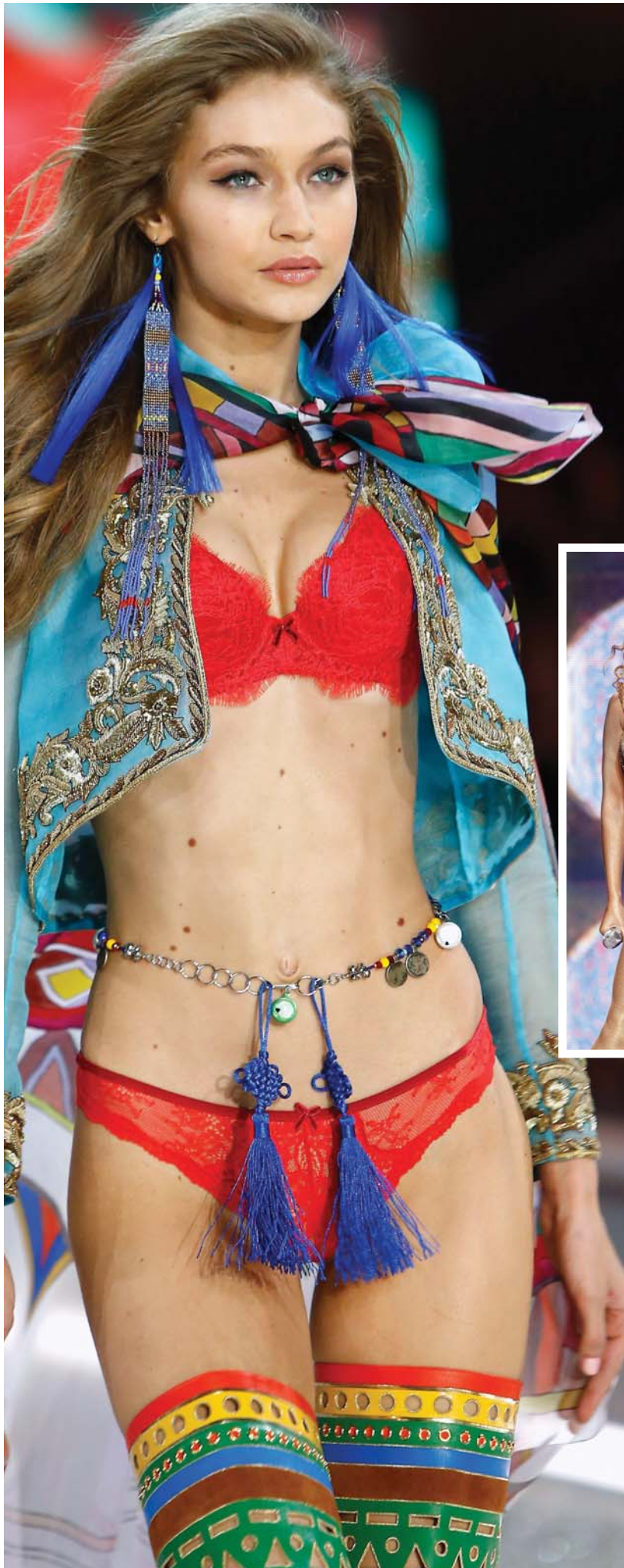
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# Poster Girls of Lingerie

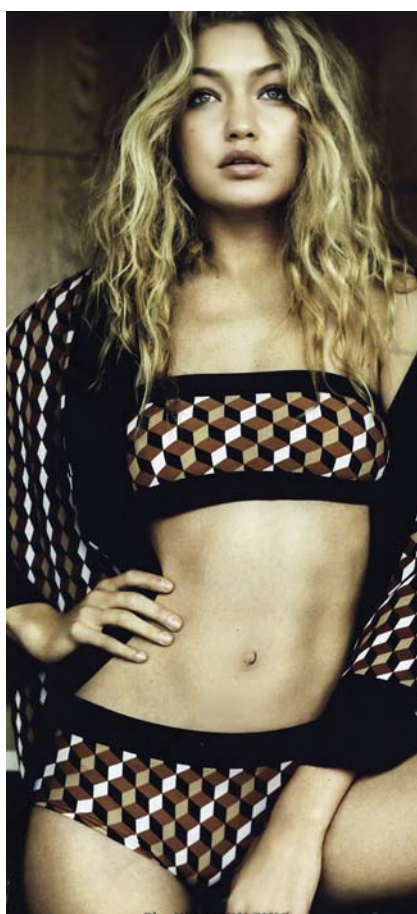


Lingerie is topping fashion trends. We all know that bras double as super sexy tops and it is noteworthy that the most popular models on Instagram wear them in place of shirts and blouses. Rules are overturned and what is usually worn underneath clothes is now exposed.

Here are a few of the glamour world's most celebrated faces that have become poster girls of lingerie chic as they embrace, and show us how innerwear can be couture - only if you are brave enough to show!

-By Aarti Kapur Singh





## *Gigi Hadid*

Gigi Hadid is one of the most recognizable models of our generation. After making her mark in the Sports Illustrated swimsuit issue, and storming runways for Victoria's Secret, the supermodel has proved time and again that she knows how to rock a sexy bra. Or corset. Or bikini. Or what have you! Whether she's wearing a black corset top to the red carpet or owning the streets of New York in a bralette, or styling a red hot two-piece with a white crop top, it seems like Gigi can convince us to test-drive ANY trend! She even wore a corset on *The Tonight Show*.







## Rihanna

If you thought Robyn “Rihanna” Fenty reached the league of top celeb entrepreneurs when Fenty Beauty launched 40 shades of foundation in its debut collection, you’d be wrong; RiRi has come to slay the lingerie industry in addition to the beauty industry. The Savage x Fenty lingerie line has the world wrapped up in skimpy strings and Rihanna is their most obvious brand ambassador.

Rihanna’s new collection includes bras in a range of sizes from 32A to 44DD and underwears ranging from XS to XXXL—and those who follow on Instagram have seen just a few of the styles—more details are coming to light. The Savage X Fenty, her direct-to-consumer lingerie line in partnership with online retail giant TechStyle launched in May this year includes t-shirt bras, underwears, and general everyday essential items along with rompers, garter belt sets, and bodysuits. More often than not, she features a lot of these pieces in her daily wardrobe. “Women should be wearing lingerie for their damn selves. I can only hope to encourage confidence and strength by showing lingerie in another light. You don’t have to stick to one personality with lingerie; it’s fun to play around. You can be cute and playful one week and a black widow next week. You can take risks with lingerie. I want people to wear Savage x Fenty and think, I’m a bad bi\*\*h. I want women to own their beauty,” declares the diva.







## Beyoncé

Queen Bey turns heads EVERY SINGLE TIME she goes out. As much a fan of couture as she is of innerwear, she has performed in lingerie, shot videos in it and even posed and strolled in it. She's no stranger to barely-there stage costumes and a sexy shoot. There's no denying it... Beyoncé can't help but look incredible when she shows off her sexy lingerie in music videos like 'Partition'. Whether it's a classy number or a more raunchy look she ALWAYS sets the bar high. She even Beyoncé-d everyone, as she took to announcing her pregnancy. She showcased her baby bump in nothing but a sheer bra, a frilly pair of panties...and a veil. And in that iconic picture, she also ended the good girl trend of matching lingerie sets.



## Kim Kardashian

It is the truth. Kim Kardashian West hates shirts. Or pants. She has forever been doubling-down on bras as going out tops. Whether it is opening of Balmain's Los Angeles store wearing a sports bra—with a heavily-embellished, extra-high-slit skirt or forgoing a top for a sheer Gucci bra? Or even the nude Yeezy signature. At Paris Fashion Week she paired a light blue bustier with an extra-large denim jacket and her beloved Saint choker. Kim wore two corsets on the same day while on vacation in Cuba—a white one for day and a black one post-sunset, of course. The star has had the passion for lingerie and shapewear all along, as her Instagram feed will show. Not only does she love chilling in her bra and underwear, but that she has the confidence to rock it for the entire world to see. If you follow Kim's street style, you'll likely see that the lingerie business is right up her alley. Kim and her sisters are known for their love of waist trainers and corsets. The star also always wears stretchy biker shorts as her "going out" pants or simply just a bra under a blazer.

Additionally, Kim has always been vocal about the importance of having good shapewear, writing about her love of Spanx on her website. She also routinely wears underwear in place of actual clothing, so it makes sense that her next venture is in this area. Kimono Intimates, as the brand is apparently named, will feature bustiers, nightgowns, breast shapers, pasties...leotards and socks among other things with Kardashian's name on them. True kimono, though, are a style of Japanese robe that feature wide sleeves and bright patterns. Both men and women wear them, and different styles are worn for dinner occasions, including formal weddings. Kim's new range of lingerie, intimates and shapewear is expected to arrive before the end of 2018, and it apparently "won't be just a limited luxury brand", but is being made for the mass market.





# INNERWEAR

## INDIA INTIMATE FASHION WEEK

Innerwear is very democratic as far as fashion is concerned. Every man, woman and child has to wear innerwear throughout their lives. Hence the market globally and in India is phenomenal. Yet talking about innerwear trends and activities especially in India seems to be a little conservative topic even though there are hundreds of Indian innerwear brands both known and unknown that have flooded the market.

### INNERWEAR SHOWS

While in the West it is mandatory at most fashion fairs to have a lingerie and swimwear fashion show – the Dusseldorf Fashion Fair had a Body and Beach show biannually – in India this has not been done till now, to show the latest trends in the undercover garments. Trying to break this taboo with intimate wear as well as the launch of a special plus size label will help the Indian women and men to feel very confident inside out.

Two innerwear fashion weeks were held in India in 2017 and 2018 by Niraj Jawanjal Founder and Ideator of the India Intimate Fashion Week. While many may define innerwear as just vests, bras, panties and briefs, the innerwear category also includes many other sections like loungewear, beachwear, resortwear, sleepwear and many more.

“An unlikely new thought is coursing through the stereotypically superficial fashion industry. Through India Intimate Fashion Week (IIFW) we aimed to celebrate the senses and intimate positivity that translates to a carefully curated selection of lingerie. The wide array of collections included lingerie, loungewear, sleepwear, legwear, lingerie



La Intimo

# The Undercover Story

-By Meher Castelino

accessories, sportswear, swimwear, beachwear, shapewear for both the sexes. This year India Intimate Fashion Week also focused on the segment of inviting veteran industry experts in the jury to honour the proponents in the field of intimate wear, beachwear and bridal lingerie business. International business icons, trade honchos, e-commerce experts, famous names from the Indian fashion industry and Bollywood eminent personalities graced the event with their presence,” said Jawanjal.

Further explaining about India Intimate Fashion Week, Amit Pandey, Media Head and Associate Partner, India Intimate Fashion Week, said, “We had a very successful first edition and were excited to be back with the second edition of the fashion week that was larger, grandiose and entertaining. Our endeavour was to continue to grow the intimate wear and lingerie fashion industry in the country. Still, in its nascent stage, the industry is poised for significant growth and India Intimate Fashion Week being a pioneer in the category is set to lead the transformational journey. This year also saw the fashion week go global with patronage by international brands and was set to provide high engagement and ideas exchanged with opportunity for all stakeholders - brands, customers, designers etc.” On the social media strategy for the premium venture, Pandey further said, “Our social media campaign ‘boo the taboo’, ‘the right cup’, celebrating India Inner Confidence Day on 27th August 2017 on the International Lingerie Day was a huge success. India Intimate Fashion Week launched India’s hottest calendar Black Magic



La Intimo





Jef Albea



La Intimo



Melons India



La Intimo

**“INDIAN WOMEN ARE NOT VERY KNOWLEDGEABLE ABOUT WHICH LINGERIE TO BUY. THEY ARE UNABLE TO SELECT THE CORRECT SIZE OR STYLE. MANY BRANDS HAVE STARTED EDUCATING WOMEN BY PROVIDING RELEVANT INFORMATION.”**

successfully in Mumbai. We continue to stay focused on “booming the taboo”, building scale and driving conversations around the dynamic intimate wear category in India. This year we geared up to explore a glistening starry night dazzle as one sashays down the red carpet.”

**BIG IS BEAUTIFUL**

While innerwear normally concentrates on shapely, sexy, silhouettes for women who are slim and trim, the new brand launched in India called Melons India in 2017 is aimed only at the curvy voluptuous goddess. The trio Varnika Sharma, Kapil Sharma and Niraj Jawanjal who are also involved with the India Intimate Fashion Week felt it was time to intro-

duce the exclusive plus size lingerie and beach brand called Melons India to the Indian women who are amply endowed.

“We started conceptualizing sometime in August 2017 and post that we started working on designs, sampling, etc. While we have been keenly observing and studying the Indian intimate fashion market since quite sometime; we realised that the exclusive plus size lingerie beach brand was a category that was needed to fill the gap. This is a 100 percent Indian brand without any JV and we launched the same at India Intimate Fashion Week season 2.0 that was step one to create awareness about it. When it comes to marketing mainly,





portant information about side effects of wearing wrong lingerie, how to choose right lingerie, life cycle of a lingerie and much more, to educate and connect with our customers. They are not able to select the correct size and style. But many brands in this sector along with few women centric portals and blogs have started educating women about it by releasing related information. But still, the penetration in the semi-metros and rural areas about right lingerie is almost none.”

Competition in the lingerie business is very keen and hence the new brands have to make an impact. “But mostly it’s a price (affordability) and class (status) that separates the crowd. Our price range is ₹750 to ₹2,000 for bras and panties would be priced between ₹500 to ₹1,000,” says Varnika.

Publicity and fashion shows are very popular abroad and held every season to reveal the latest collections along with the trends for outer wear, however it is not so in India. “Yes, it’s really important we feel. But we also feel that both cater to two separate mind-sets and markets. India is more a value market going overboard on both price as well as presentation, which may create non-acceptance among the Indian customers,” feels the trio who had their first show in 2018.

**INNERWEAR TRENDS**

Innerwear trends are as important as outerwear. The La Intimo brand featured briefs and trunks in striped knits for men as well as shorts with suspenders for added style in black and white at their fashion show for India Intimate Fashion Week 2018. Colour plays an important part for men as shades of mustard, blue, turquoise, abstract



in the first year we would have our presence in e-commerce platforms as well SIS (shop-in-shop) mode across noted departmental stores and other organized retail outlets. Primarily our focus is on plus size lingerie but gradually we have plans to also introduce plus size leggings, nightwear, sports/activewear, (bras) and beachwear. As a part of our strategy, in the first year of our operations, we would like to focus on plus size only, post studying brand’s performance in the first year we would surely like to add on regular sizes too,” informs the trio.

Keeping in mind the trends for lingerie around the world, Melons India offers a variety of colours and fabrics along with sizes. “We have used black, coral blush, rose violet, fiery red and turtle green. Plus size bras are being made in more and more styles – we offer the plunge neckline, underwire bra, full fit bra, curvy t-shirt bra and full figure wire free. The fabrics that we use are nylon, cotton polyester, polyester, spandex and pretty lace fabrics.”

When it comes to underwire or wireless styles Varnika states, “Both are popular categories but it depends on customer comfort.” However she adds that Indian women are not very knowledgeable when it comes to lingerie and what they should buy and wear.

“Indian women do not know much about lingerie. So our strategy also prominently includes sharing im-







stripes, black and beige are favoured along with of course white. For women's inner wear it's the deep purple hue, red and prints along with white with criss-crossed straps that are popular for the latest look. When it comes to his and her bridal innerwear combo it comes in red for her and black lace shorts for him.

### FEMININE FESTIVE COLOURS & STYLES

Jewellery designer Mona Shroff presented her jewellery collection called "Rio Carnival" with just the perfect line of innerwear. The white body suits with hints of glitter were an ideal accessory. Her flame red two-piece innerwear set was the colour option for the season. The all-black bikini and panty duo was ideal for the colourful beaded belt and necklace and the neon, fluorescent body suits in yellow and shades of pale and hot pink were perfect for festive resortwear, while at a destination wedding.

### FAVOURER FABRICS, COLOURS & STYLES

From VIP Clothing Ltd., the company that created the branded innerwear VIP story in 1971 its "Feelings" line for women's innerwear launched in 1992 has been a consistent favourite with the ladies because of its simple but practical styling.

Informing about the colours, fabrics and styles Kapil Pathare, Director, VIP

**“LINGERIE FOR BRIDAL WEAR IS ONE OF THE MOST IMPORTANT SEGMENTS OF THE CATEGORY AND DESIGNERS ARE INSPIRED TO CREATE SOME STUNNING, SEXY, LUXURIOUS, VERSIONS.”**

Clothing Ltd., says, "There are different colour choices as per economical and geographical backgrounds in the country. For high-end customers it is the bold and bright colours that are required, while for the economical customers it is normally dark shades. In the North and metro cities it is the pastels that are selling well, while in the South the very earthy colours are what the customers want. On an average the shades of pink, red and blue are great sellers. This season orange has given us higher numbers in sales. But when it comes to the most popular fabric it is still cotton but focus has also shifted to cotton blends. Lycra is overall accepted and Modal is an emerging premium fabric. The styles that are hot sellers for us are the wireless or with underwire but in bras it is more wireless; while in panties it is hipster and bikini styles that are in fashion and the boy-shorts are seen more regularly in the outlets. Sets are normally purchased for occasions; while for everyday use it is single pieces that are preferred by the ladies."

Since innerwear is a daily use item, something all women have to wear everyday, it is the price that seems to make a difference when it comes to driving the selection. Pathare observes, "It all depends on single pieces or sets and the economical status of the buyers. Bras cost from ₹150 to ₹2,500 per piece. The look and styles of innerwear too have changed quite a bit in the past decade. In the past decades, knits were introduced but now it is in the process of shifting from comfort to fashion. There is stiff competition from Indian and foreign brands but the category of innerwear is very aspirational and preference totally depends on the socio-economic status of the consumer. Elite consumers definitely prefer foreign brands over Indian ones."

### HAUTE COUTURE BRIDAL LINGERIE LOOKS

Haute couture bridal wear lingerie is coveted by the rich and famous and they pay as much attention to what they wear under their couture creations as they do also on what will be worn on their memorable honeymoon nights. Lingerie for bridal wear is one of the most important segments of the category and designers are inspired to create some stunning, sexy, luxurious, versions. Internationally well-known Filipino, haute couture, designer, Jef Albea who had a resort bridal lingerie show in Mumbai in 2018, has a line of all-white pieces, which is a dream collection that women love. Using gorgeous tulle and lace his body suits, slinky lace styles and some very glamorous offerings with long peignoirs and trains added, are truly visions of beauty. Adding a hint of sparkle on the lace with crystals and sequins, the designer completes the pieces with 3D tonal floral motifs.

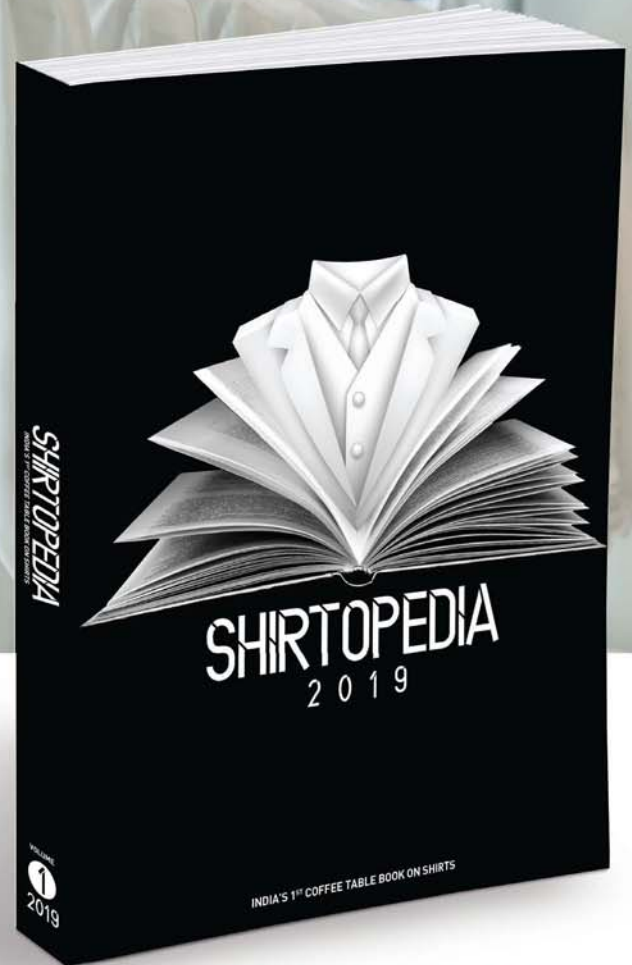


SPECIAL  
FESTIVE SEASON  
LAUNCH

वृद्धिहरा

OCTOBER 2018

# INDIA'S 1<sup>st</sup> 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](mailto: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
- Feature the most creative and innovative launches of AW18-19
- Project the top trends for shirting in 2019-20

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## 27TH MILANO UNICA

# THE AVANT GARDE OF SUSTAINABLE FASHION

The 27th edition of Milano Unica, with the presentation of the collections for the A/W 2019-2020 season, recorded good results in terms of attendance and interest. Three days of exhibition, crammed with meetings, initiatives and activities were attended by exhibitors, buyers, journalists and fashion students from all over the world. Every part underlined the sign of quality and Made-in-Italy style.

-By Rajan Varma

The 27th edition of Milano Unica, the Italian Textiles and Accessories Trade Show, held from July 10 to July 12, 2018, recorded approximately 6,000 visitors that visited the trade show to view the high-end collections for the 2019/2020 A/W season. The result was in line with that of the past July 2017 edition, despite a slight reduction of Italian businesses, but with a more interesting specific commercial weight, confirmed by the general satisfaction expressed by exhibitors. The show witnessed a significant increase in the participation of international businesses. There was an increased number of foreign businesses in attendance, from the Netherlands (20 percent), United States (+9 percent), Japan (+6 percent), China (+5 percent), France (+3 percent) and Germany (+3 percent). The 27th edition of Milano Unica saw the participation of 475 exhibitors (+4 percent compared to July 2017), plus 132 businesses from the Japan and Korea Observatories and the 'Origin Passion and Beliefs' section, the platform dedicated to the suppliers of Made-in-Italy, top quality artisanal semi-finished products, promoted by IEG, which brought the total number of exhibitors up to 607.

The exhibitors expressed their satisfaction on the presence of numerous international buyers from strategic markets and for their interest in women's wear textiles and accessories. This proved to be a growing trend in the last editions, contributing to defining a new balance in the offering of the trade show.





(L to R: Maria Silvia Sacchi, Journalist; Ercole Botto Poala, President of Milano Unica; Andrea Crespi, Chairman of the Sustainability Committee; Carlo Capasa, President of the Italian National Chamber of Fashion; Marino Vago, President of Sistema Moda Italia).

***“The slight decrease in the number of Italian businesses is certainly due to the more stringent invitation criteria that we have adopted to protect the quality of our interlocutors. The satisfying participation of international buyers along with the increased number of exhibitors finally consolidated the wisdom of the decision to anticipate the date of the trade show to July. Let me first of all underscore that the satisfaction of our women’s wear textiles and accessories exhibitors in the last edition contributed to creating a new balance in the offering of our trade show,”***

—ERCOLE BOTTO POALA,  
President of Milano Unica.

### Round Table at the Opening Ceremony

The edition opened with a round table that focused on the commitment of the different players of the textiles-fashion industry to an increasingly strategic issue - sustainability. A priority and a challenge involving all players of the textiles/apparel supply chain, towards which Italian manufacturers are making important steps.

Moderated by journalist Maria Silvia Sacchi, the speakers at the round table were Ercole Botto Poala, President of Milano Unica, Andrea Crespi, Chairman of the Sustainability Committee, Carlo Capasa, President of the Italian National Chamber of Fashion and Marino Vago, President of Sistema Moda Italia.

Italy has a competitive advantage in this respect, as it is the only country

with a complete supply chain and can therefore put sustainability into practice through all the links of the supply chain. In order to maximize this advantage, it is necessary to team up and follow a common path to compete in a continuously evolving and growing market.

Underlining the crucial importance of a sustainable approach to manufacturing Ercole Botto Poala, President of Milano Unica said, “Sustainability is a key step for our supply chain and an irremissible opportunity”. Sustainability is increasingly demanded in the market today and, consequently, it must also become a priority on the supply side.

All participants shared the position expressed by the President of Milano Unica. Marino Vago underscored that several Italian textile manufacturers







**Andrea Crespi,**  
Chairman of the Sustainability Committee



(L to R: **Carlo Capasa**, President of the Italian National Chamber of Fashion; **Marino Vago**, President of Sistema Moda Italia)



**Maria Silvia Sacchi,** Journalist

***“The general satisfaction expressed by exhibitors and buyers regarding the quality of the proposals on display and of the services provided, tells us that our special positioning in the offering of the international textiles trade shows is now consolidated, even if it should never be taken for granted. I was lucky to rely on a time-tested team that is not afraid of challenges or changes”.***

- **MASSIMO MOSIELLO, GENERAL**  
Director of Milano Unica

also benefit from another advantage, i.e. having committed to sustainability ahead of time compared to the international competition. Therefore, Italian textiles are recognized and appreciated today at the global level not only for their creativity, quality and the typical Made-in-Italy workmanship, but also for their huge intrinsic value in terms of sustainability.

In order to ensure leadership in this segment, it is necessary to continuously promote teamwork. Carlo Capasa illustrated the important results obtained by the Sustainability Table that the Italian Chamber of Fashion launched in partnership with the main brands and sector associations. A challenging yet fundamental process that hinges on the key aspects of the raw materials, manufacturing processes, traceability and social sustainability, with the ultimate goal of providing businesses with precise, shared parameters on sustainable manufacturing.

Andrea Crespi added, “Teamwork also means a commitment to sharing activated sustainability processes and procedures. If sustainability means - also and above all - information transparency, businesses have an obligation to seize this opportunity as a value without being afraid of showing efforts made, both upstream and downstream, because teamwork certainly is the best response that we can give to the market”.

President Botto Poala concluded the round table with a renewed appeal for unity and teamwork, which, together with investments, innovation and unflagging pursuit of excellence, are fundamental resources to win the challenge of sustainability and competitiveness in the international market.

The Sustainability Showcase at the July 2018 edition, recorded extraordinary success, with the number of businesses nearly tripled (from 53 in February 2018 to 123 businesses) presenting over 750 product samples of differently sustainable fabrics and accessories. This result confirmed the commitment and sensitivity of the most prominent Italian and European producers to product and process sustainability.

Milano Unica with the unfailing support of the Italian Ministry for Economic Development, ICE Agency and the participation of sector’s prominent representatives, like the Italian National Chamber of Fashion, Sistema Moda Italia, the Municipality of Milan, Banca Sella - is a trade show of reference for the industry of Made-in-Italy and international high end textiles and accessories and as a key venue to meet and discuss trends and the most important challenges for the future of the sector.

#### **ON Tour Event**

The opening ceremony concluded with an ON Tour event, a gala evening dedicated to Italian creativity, textile



that enabled the visitors to dive deep into the excellence of textiles and accessories. Milano Unica showcased a complete range of products and confirmed its focal points while adding new proposals every season.

### *The Trend Village*

The trend village contained valuable information and inspirations in addition to offering a selection of the industry's most important magazines. The Trend Area offered exclusive displays designed by Stefano Fadda and his team.

### *Sustainability Area*

The Sustainability Area was dedicated to eco-sustainable products, featuring more than 750 samples of textiles and accessories. The Sustainability Project was based on a painstaking process of research and analysis, in addition to an effort to engage and promote all the companies that have made concrete decisions in favor of the environment. A commitment that Milano Unica shares with the institutional representatives, designed to provide a high quality service to companies in the textiles/apparel sector. All the samples were classified based on 9 categories that represented the main areas of sustainability innovation. The tags on each sample included the categories of sustainable innovation the product belonged to, the product ID code and the producer's data. For those who wanted to know more details about products, a team of assistants was available in the Sustainability Area, wearing an easily recognizable "Ask me" uniform. One had to simply give them the product codes one was interested in and they were to email the corresponding product cards.

The Catalogue of the Sustainability Project was also made available to all visitors, which included additional



***In these pages we carry a report on key segments and highlights of the 27th Milano Unica edition***

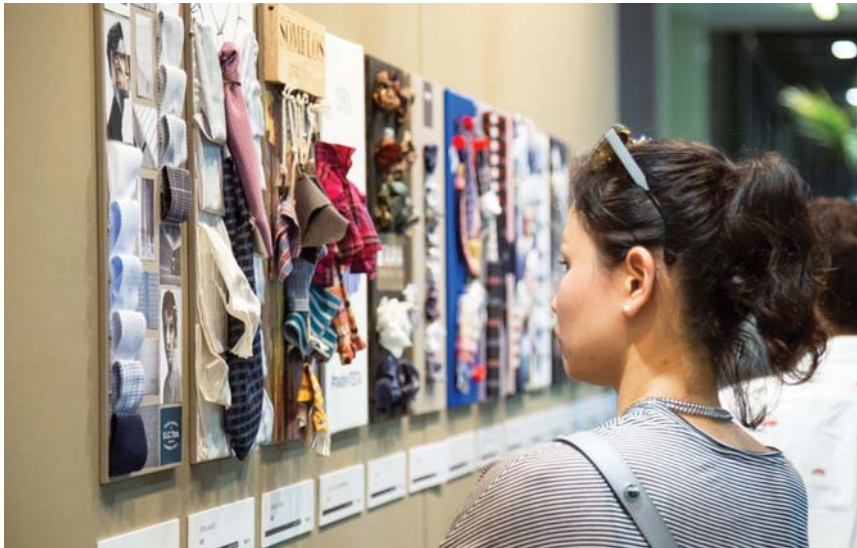
Images Business of Fashion thanks Milano Unica and Italian Trade Agency for their sponsorship of travel and hospitality towards the coverage. Also the entire management, General Manager, Massimo Mosiello, Daniela Scardi, Mariabarbara Masi, and the team of Milano Unica, the management, Ferdinando Fore, Consumer Goods Office, Italian Trade Agency-ICE and the team of Italian Trade Agency for all the help and courtesies. Pictures courtesy : Andrea Erdna Barletta ("Erdna").

expertise, style and sartorial tailoring. It presented Italy as it was famous worldwide, loved by many, through a new experience and new flavors. This edition was dedicated to the Piedmont region and to the 40th anniversary of Ideabiella.

### **Special Areas Of The Trade Show**

As a privileged observatory on the world of textiles, Milano Unica presented important initiatives in the service of the supply chain, along with special projects focusing on young talents and promoting a sustainable future. A creative journey of discovery,





***“With more than 46 thousand businesses and over euro 54 million sales, the textiles-apparel industry gains strategic economic relevance in Italy. In fact, we are the world’s second largest exporter of clothing items. Milano Unica is an excellent showcase for Made-in-Italy products both for Italian and foreign operators and this is why we have supported it since 2005, both by promoting its visibility globally and by developing an intense plan of activities ranging from communication actions to incoming organization”***

**MICHELE SCANNAVINI,**  
President of ICE Agency.

details about exhibitors and the sample products presented, along with an analysis and insights on the main trends in the industry, in order to promote an increasingly sustainable production.

#### **Filo Trend Area**

The Filo Trend area illustrated trends upstream of textile production, highlighting the indelible bond between high-end yarns and precious textiles.

#### **The Infostile Area & the Trade Press Area**

These areas were dedicated to information on trends and international fashion, with models, books and the leading sector magazines.

#### **Synthesis Area**

The synthesis area showcased the most representative samples from each participating business. The area provided visitors with an opportunity to learn more about businesses through their suggestive mood boards. Visual

displays, true pieces of art were crafted by the exhibitors, along with touch screens.

#### **Vintage Area**

The Vintage Area offered a special journey into the historic and cultural legacy of vintage fashion with clothing items, costume jewelry and accessories specially selected by exhibitors. It showcased outstanding outfits, accessories, bijoux and other vanity complements.

#### **Designers Area**

Five of Italy’s most prominent fashion fabric design studios (Anteprima Disegni, Blue Studio/Nice Collection, G.Disegni, Studio 33 and Linea studio) presented their creations in the Designers Area. Two important collaborations were targeted to young talents: common, was a creative incubator collecting the ideas of students attending senior high schools/ vocational schools and Italian fashion uni- versities. Also showcased was a brand new initiative of Milano Unica’s



July edition, 'The city Runner', an exhibition-track that was the result of the work accomplished by the professors of the Milan Polytechnic, who challenged their students to interpret the cultural and social heritage of sportswear through the knowledge of the materials made available by DF Sport Specialist, Eurojersey, FTR, Faitplast, Limonta, Zipzipper and Thermore.

### *Linen Dream Lab*

The Linen Dream Lab showcased European 'green' fibers, with its Master of Linen and European Flax brands. The Linen Dream Lab is the showroom of expression dedicated to creativity and all aspects of textile innovation, from fashion through lifestyle and design, along with composite development. It offers by-appointment services supporting creation and sourcing materials, yarn and fabric libraries along with training and education.



### *Woolmark*

The Woolmark area was entirely dedicated to the new Merino wool trends unveiled through the Autumn/Winter 2019/20 wool lab. Created in collaboration with the most innovative and quality-oriented spinners and weavers from across the world, The Wool Lab is an inspirational sourcing guide available for designers and brands to view



### *Banca Sella*

Banca Sella contributes to Milano Unica with its innovative and successful financial, banking and insurance solutions.

### *Japan Observatory*

The area organized by the Japan Association in collaboration with Milano Unica was dedicated to the top-end Japanese productions. The







***“I am firmly convinced that sustainability is strategic also for our industry, in addition to relating to the future of our planet in which we live and the future generations will live., I don't think that we are just following a trend. We are instead preparing to better compete in a global market, facing new emerging demands that emerge and consolidate into consumer choices”.***

**—ERCOLE BOTTO POALA,**  
President of Milano Unica.

observatory showcased premium quality textiles of 27 exhibitors that represented the excellence of the land of the rising sun with innovative fabrics and ideas dedicated to sportswear.

#### ***The Korean Observatory***

presented 18 selected Korean exhibitors in association with the Korea Textile Trade Association (KTTA) and Korea Trade-Investment Promotion Agency (KOTRA). The area was dedicated to high-end Korean products and featured businesses that ensure the high quality of the offering.

#### ***Origin Passion and Beliefs***

The 27th edition of Milano Unica further enhanced the role of ‘Origin Passion and Beliefs’ as an integrated platform for the promotion of top level Italian fashion products.

#### ***Italia a Tavola***

This area featured the excellence of Italian food and accueil. Milano Unica welcomed its clients to three food courts with starred chefs Enrico and Roberto Cerea of the Da Vittorio restaurant.

#### ***Autumn/Winter 2019-2020 Trends***

For the Autumn/Winter 2019-2020 season, the developments revolved around three themes: Organic Grunge, featuring soft and warm tones with

some energizing accents; Handcrafted Essentialism, creating a balance between an industry-based inspiration, Swedish interior design and softer hues that evoke an Oriental atmosphere; and Techno Romantic, playing on lively and up to the minute color palette, with an ethnic vision that ranges from the old masters to the color accents of Indonesia and Azerbaijan. The Trends Area presented the textiles and accessories, proposed by the exhibitors and was inspired by the “Nations to Nations” theme. Showcasing creative values of different people and traditions together on the three proposed concepts, the presentations were enhanced by light shows, music and theme-based videos.

During the selection process for the Autumn-Winter 2019/2020 edition of Milano Unica, a lively interest in all three themes emerged, along with strong proactivity. Most of the companies followed the proposed color charts, adding a touch of personality to the samples, and analyzed the style indications, reinterpreting the general conceptual guidelines.

#### ***Organic Grunge***

Organic Grunge featured warm and natural tones with some energizing accents: the “rural life” aspect was rendered by overlays between classic





rust and magnesium blue, with touches of herbal hues like mineral green and detox, all perked up by Scottish and Ottoman-inspired blueberry.

The materials reflected a careful selection of natural fibers and were processed with sophisticated techniques and workmanship. Among the more voluminous yarns there were wool and cotton with fluffy, extra-soft weaves, reversible eco-shearling and eco-furs in mineral tones, waterproof appliqués combining function and ornamentation, Ottoman-inspired folk

jacquards, multicolor boucles with 3D effects and tufted, felted and gauzed fabrics for outerwear in pale tones.

Shirting fabrics included Scottish checks and tartans, with new patterns and compositions: floral camouflage with off-tint effects, solid colors embellished by micro-fraying and fringed selvages, woody prints and tone-on-tone micro motifs.

Ribbons and trims featured checks and tartans in rustic colors, embellished by new combinations of materials, with fringed effects and gatherings on fuzzy or weathered felt bases. Button producers sent items in natural fibers, with an opaque look and mineral hues, also proposed in printed and off tinted versions reminiscent of rocks, moss and lichens. The appliqués featured 3D effects with loose yarns and floral embroidery, while the trim was in leather. Zipper producers proposed pullers and teeth in contrasting colors, with frayed tabs, or in natural materials. Labels and tags looked eco-friendly and rural and were made of denim, leather and recycled paper.



### Handcrafted Essentialism

The Handcrafted Essentialism theme featured liquid yellow and silver tones, emphasizing a black, industry inspired base. Designer pink enlivened the sartorial blue, reminiscent of Swedish interiors, like the wood and mahogany, brightened by aquamarine crystal hues, that evoked an Oriental atmosphere. This theme was built on clean lines and artisanal workmanship. It featured clinical materials, precious, impalpably fine yarns, fabrics for outerwear with a cashmere or merino feel, as well as geometric jacquards and wool patchwork. Classic patterns were in the spotlight: herringbone, pied de poule, regimentals and geometric patterns on wool bases, expanded to macro dimensions. Many producers proposed







ribbons. Labels and tags were coated and featured laser printing, with simple lines.

### Techno Romantic

The colors of the Techno Romantic theme were lively and up to the minute. An ethnic palette that ranged from the yellows and antique bronzes of the old masters to the lacquered purples and violets of Indonesia and the burgundy of Azerbaijan. Hyper-décor was evident in both the micro and macro patterns of romantic inspiration. The collections featured damasks, brocades and lampas in silk, with contrasting glossy and opaque yarns, as well as arrases with melancholy designs. The velvets were embroidered, decorated and printed, while the solid colored materials played with fuzzy yarns and tightly woven ones.

Shirting featured fluid, ultra-light bases with batik patterns and poplin bases with typical tie motifs. There were also hyper-light fabrics, like tulle and organza in languid colors. Hi-tech accents were a must, like stretch and comfort high performance materials, laser cutting and iridescent appliqué.

outerwear cloth in precious fibers, or crisply woven.

Shirting fabrics featured micro motifs and sartorial prints, with glossy and opaque effects. Producers had worked on quilting, in both laminated and opaque versions, as well as glossy filled, coated materials and textiles with a plastic, iridescent look. Reversible fabrics were coated and had futuristic patterns.

Button manufacturers experimented with block color and two-tone effects in plastic, as well as metals, with silver hardware. Appliqués were luminous and in plastic. Ribbons and trims featured lacquered coatings or graphic designs. Zippers were in glacial galvanized tones and featured iron-on

The furs, both eco and natural, stood out for their vibrant colors and 3D structure. The ribbons were designed on jacquard backings with a velvet or chenille feel. The trims were decorated with pleats, lurex yarns and ethnic motifs. Buttons and jeweled clasps were adorned with iridescent stones and collets. Appliqués were embellished by metallic decorations, but above all developed as maxi-décolletages, in a contemporary take on ruffs. The accessories' producers created lace and macramé in cream hues with an artisanal look. Zippers and labels turned out into ornaments, due to their luminous detailing.

×



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# CENTRESTAGE: THE COUNTDOWN BEGINS

Organised by the Hong Kong Trade Development Council (HKTDC), the international fashion trade show CENTRESTAGE will take place from 5-8 September at the Hong Kong Convention and Exhibition Centre. Last year, the show was the talk of the town attracting exceptional fashion brands, designers, buyers, media and fashion enthusiasts.

The HKTDC organises CENTRESTAGE with an aim to reinforce Hong Kong's position as a vanguard for fashion. With Hong Kong's role as a two-way investment and business hub for Asia, CENTRESTAGE is an ideal platform for fashion brands to tap into Chinese and global markets. Setting as a fashion promotion and launch platform in the region, the event will continue to turn the wheels of Asia's fashion industry with over 220 sought-after international and fashion brands this year. Under the theme of "Tomorrow Lab", exhibiting brands will be housed under three thematic zones: Iconic, Allure and Metro, revealing upcoming season's wardrobe must-haves. An array of spectacular events will be arranged, including some 20 captivating runway shows, designer sharing sessions, trend forecasting seminars, networking events during the show period.

Exhibiting Hong Kong's brands include 112 mountainyam, Angus Tsui, Anveglosa, DEMO., DorisKath, Harrison Wong, House of V, Loom Loop, Maison Vermillion, YLYstudio and more. The event will also witness footfall from a line of fashion brands come from various countries and regions such as the Chinese mainland, France, India, Italy, Japan, Taiwan, Thailand, Vietnam and so on.







### **CENTRESTAGE ELITES: Spotlights Asia's Talented Designers**

On 5 September, the glamorous opening gala show CENTRESTAGE ELITES will present SS19 collections from three celebrated designers in Asia, namely Hiromichi Ochiai of FACETASM (Japan), Cyrus Wong and Julio Ng of IDISM (Hong Kong) and Min Liu of Ms MIN (Chinese mainland).

Hiromichi Ochiai, designer for hot Japanese fashion label FACETASM, will present its SS 2019 collection at Hong Kong's runway. The name FACETASM comes from the word "facet", implying that each piece has different sides or different meanings. The brand believes in discovering new perspectives and embracing new challenges while not sticking to the rules. Ochiai was elected for the finalist at LVMH Prize in 2016 and finalist at ANDAM Prize in 2018.

Representing the cream of the crop of local design talent, Hong Kong-based Cyrus Wong and Julio Ng co-founded IDISM in 2016. With a hint of surprise juxtaposing the label's elegantly minimal aesthetic, IDISM was created for the spontaneous lifestyle of the contemporary city woman. The label was selected as one of Vogue's Talents in 2017, while also being named "The future of Asia" by China's youthful media powerhouse, YOHO!, during the same year.

Representative from the Chinese mainland is Ms Min by Min Liu, who is one of the brightest stars in China's flourishing fashion scene. The word "Ms" combines "Mrs" and "Miss", a modern salutation representing an independent woman. "Simplicity







with a twist, romanticism with an edge, modernity with classicism” are the brand’s DNA. Ms Liu was shortlisted for the prestigious LVMH Prize in 2016, and Ms MIN has become a highly sought-after label with top-tier retailers such as Lane Crawford, Opening Ceremony and Saks Fifth Avenue stocking its collections.

### YDC 2018 Uncovers Latest Hong Kong Fashion Talent

The Hong Kong Young Fashion Designers’ Contest 2018 (YDC), which has been a cradle for local design talents, will be held on 8 September as the finale of CENTRESTAGE. Sixteen shortlisted designers will compete for the top three awards, as well as the New Talent Award and Best Footwear Design Award. International fashion designer Martine Rose will be the VIP judge. She will also offer insight into her creative journey at a sharing session.

### Line-up of Exciting Events

Across the four-day schedule, multiple networking events and trend seminars



will be organised, enabling global buyers to get a hold of the latest fashion trends. On 6-7 September, Fashion Summit will be held under the theme “Circular Economy”. It is the first large-scale summit in Asia on sustainability in fashion. A panel of leading academics, key players from fashion industry, NGOs, media, decision makers and leaders from across discipline and geographical boundaries will be invited to exchange insights.

During event period, experts from renowned global authorities including WGSN (5 Sept) and Euromonitor (6 Sept) will unveil the latest fashion trends.

In addition, the fashion environmental NGO Redress will stage Redress Design Award (6 Sept), which is the world’s largest sustainable fashion design competition, while the Knitwear Innovation and Design Society will



organise the Knitwear Symphony 2018 and the 8th Hong Kong Young Knitwear Designers’ Contest (7 Sept).

### Hong Kong in Fashion

To extend the fashion buzz to the wider community, the HKTDC will launch the Hong Kong in Fashion citywide campaign from 15 August to 30 September. More than 90 fashionable activities organised in collaboration with more than 100 partners, including high-end hotels, shopping malls, fashion boutiques, restaurants and design institutes, will be staged around town, spreading the glamour of CENTRESTAGE across the city.

On 8 September, CENTRESTAGE will become OPENSTAGE and welcome public visitors aged 12 and above free of charge. The event will allow members of the public the chance to experience this major international fashion event and to check out the latest designs from leading brands.





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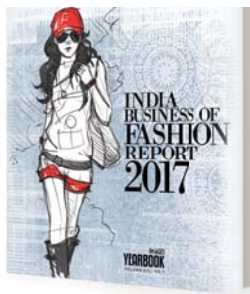
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