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October 2018 | ₹ 100
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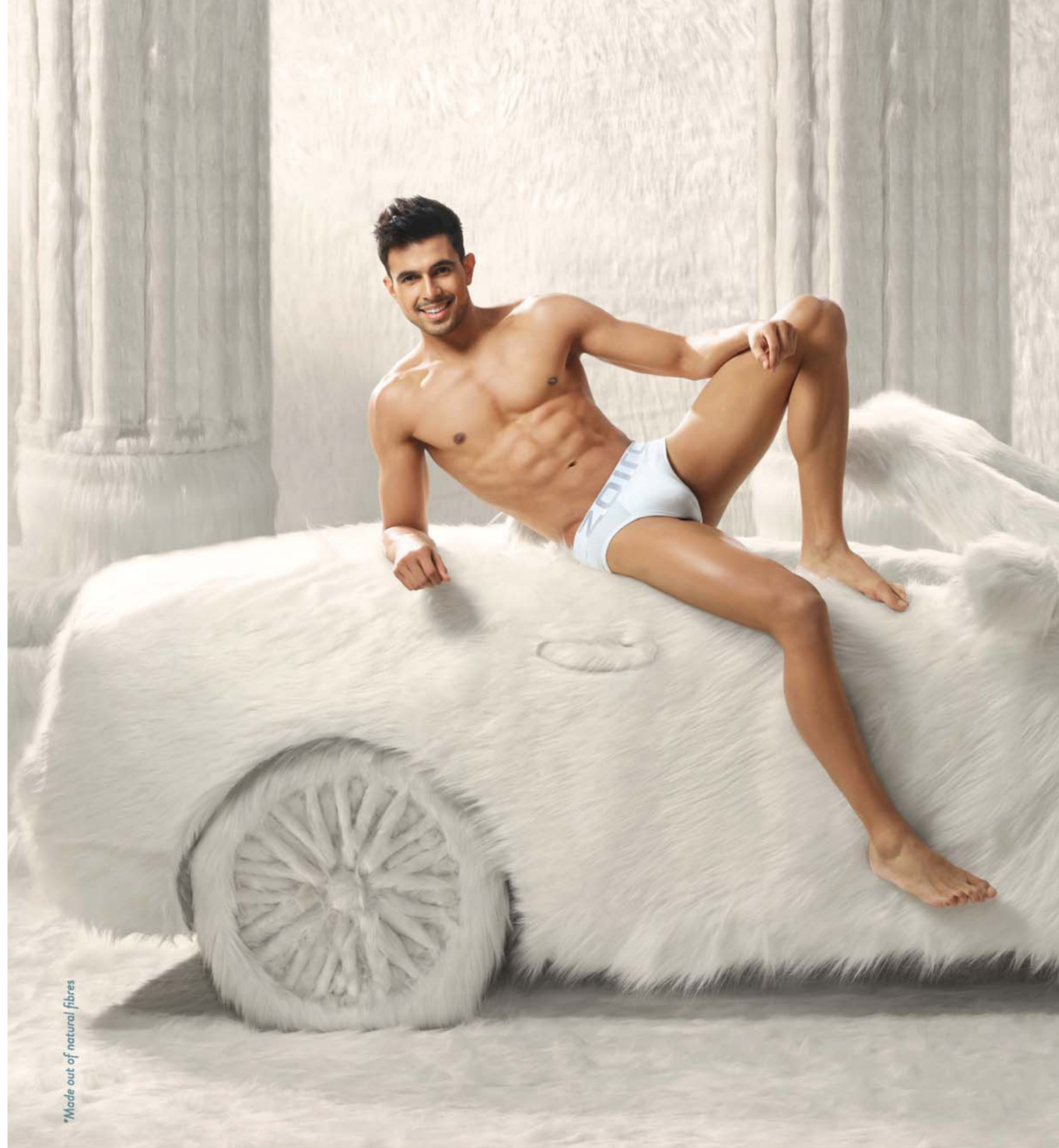
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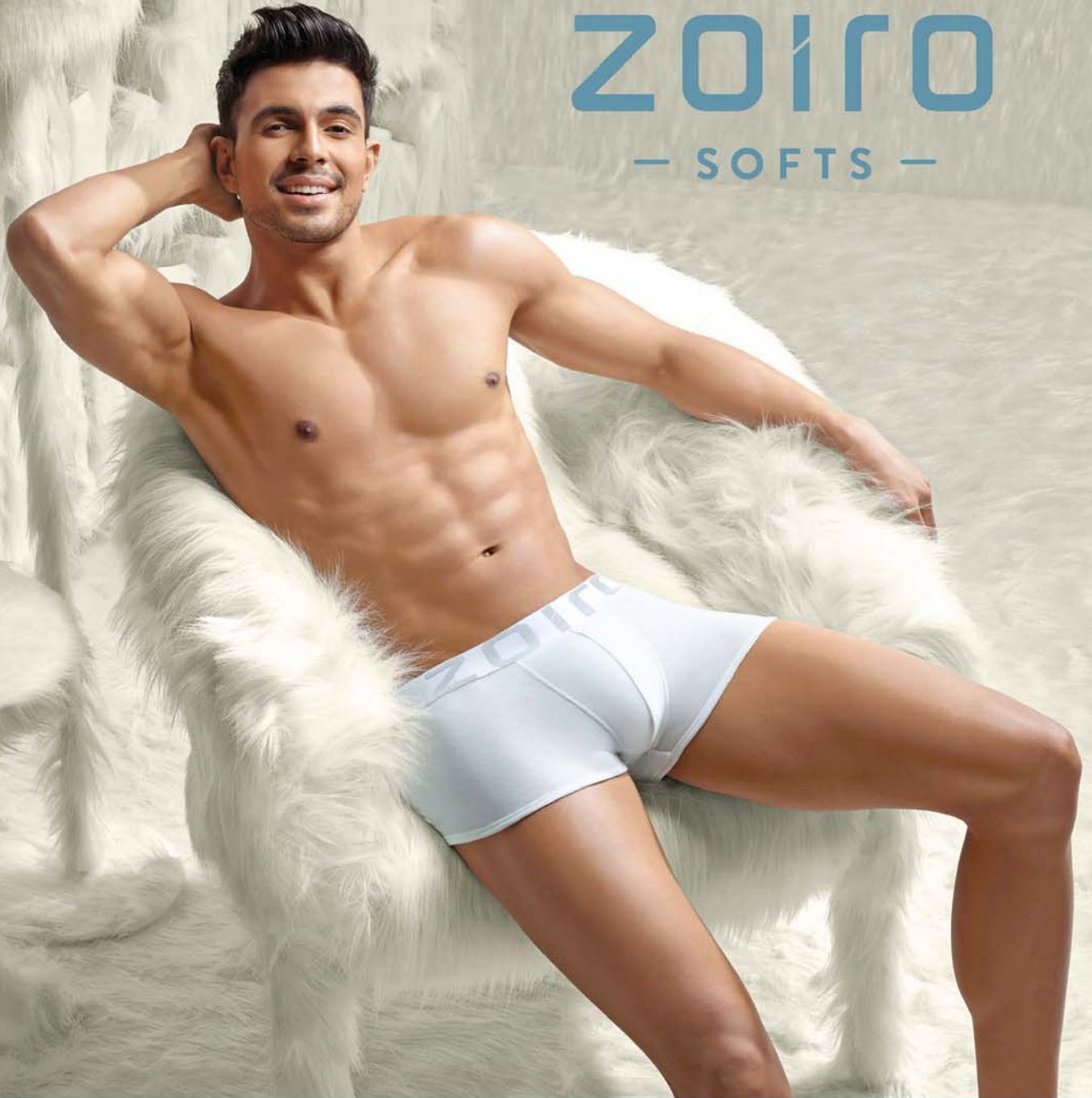
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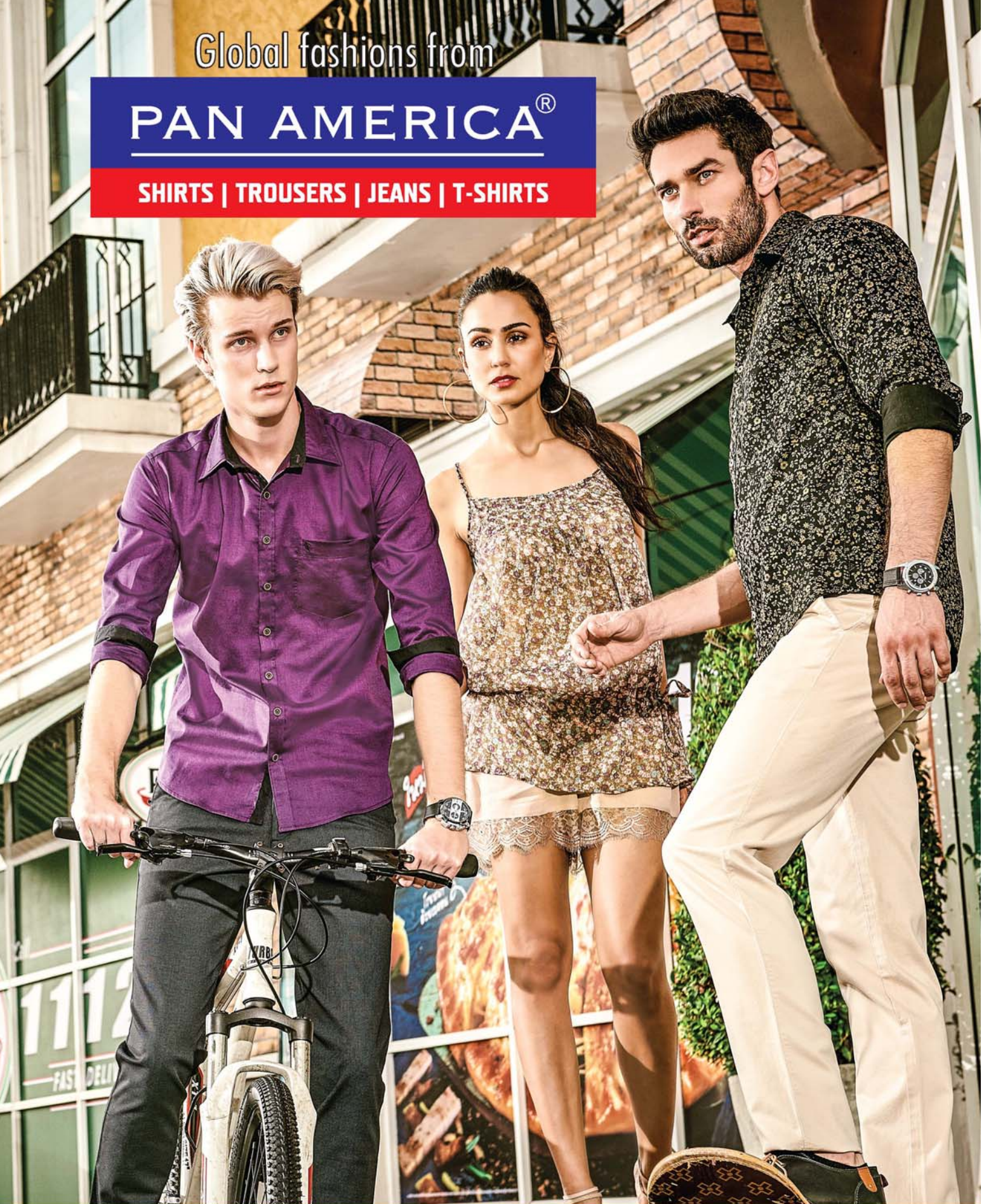
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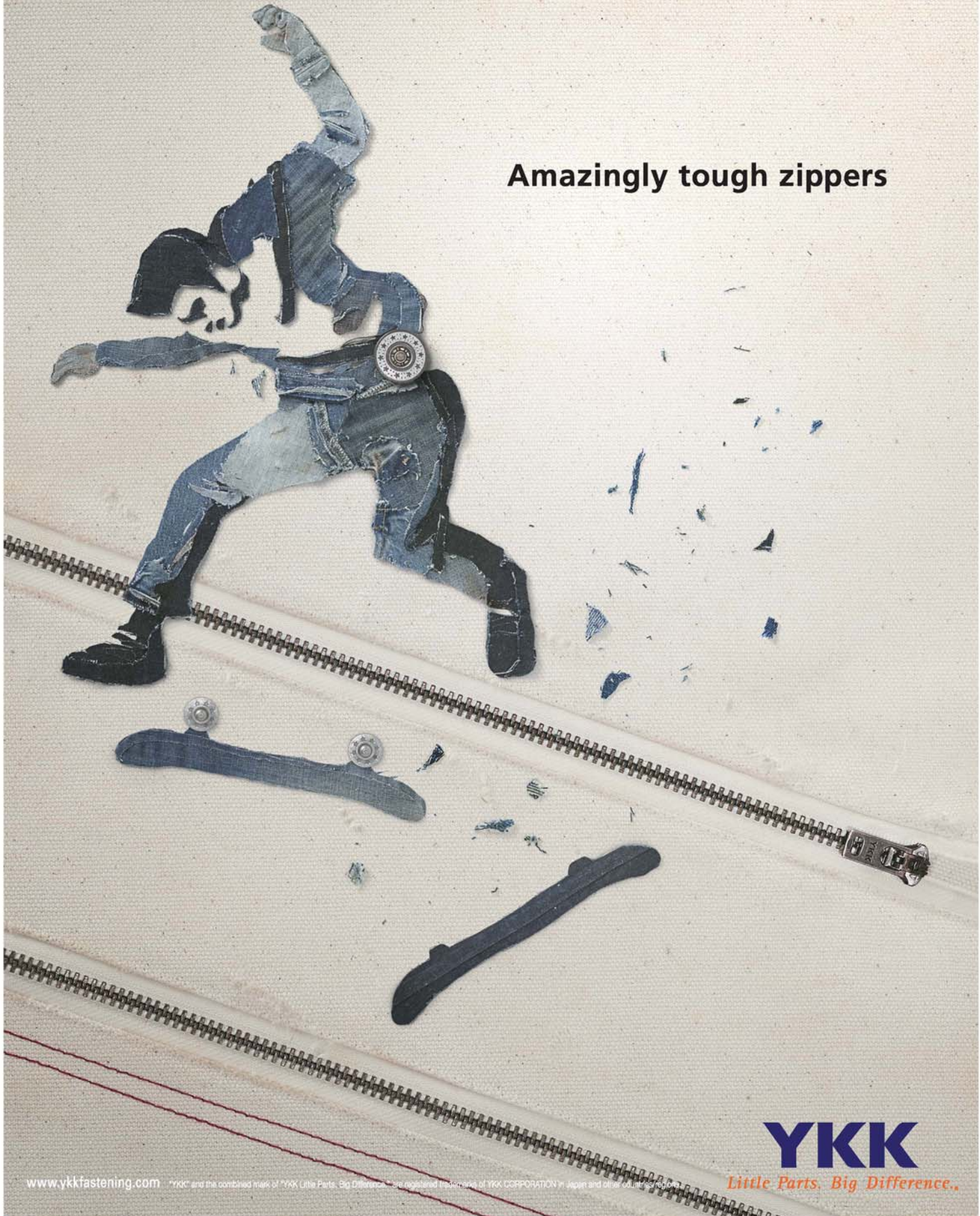
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Dear all,

Welcome to the annual women's wear special issue, a part of our ongoing attempt at showcasing fresh new thoughts and visions on women's fashion in the country.

Fashion and women are inextricable! Fashion has largely been a female dominated sphere and will remain so. Can you think of any fashion segment that's as varied, evolved or intricate as women's fashion? No, I bet, you cannot!

The Indian woman today has emerged as a powerful consumer base. Increased literacy has augmented the rate of employment and increasing financial independence, which in turn has revamped the demographic trend of women as a consumer. This snowballing phenomenon has had a huge impact on the women's wear market in India, propelling it to balloon by the day.

Market research by management consulting giants Technopak says the women's segment comprises almost 37.5 percent of the total fashion market of the country. It is estimated to be worth ₹1,20,935 crore (US\$ 18.6 billion) and is expected to grow at a CAGR of 7.6 percent to reach ₹2,52,164 crore (US\$ 38.5 billion) by 2027.

Also, as one of the fastest growing segments of fashion retail, it is all set to overtake men's wear

by 2025 as is outlined in the cover story of our women's wear special October issue, Women's Wear in India: Dynamics, Trends & The Future.

The demands of the segment has undergone massive evolution too. Today, the emphasis has shifted from being simply price conscious to demanding better designs, higher quality and trendiness. As a whole, the new Indian woman is expecting tremendous attention and with so many choices to be made, acquiescent efforts to collate and calibrate a strong culture of fashion professionalism is indispensable for all stakeholders of this segment.

All in all, I can promise you that this issue holds unmatched insight into the current dynamics of the women's wear fashion industry in India, along with detailed researches on the various subdivisions including ethnic wear, western wear, as well as the buzzing new category of fusion wear. The BoF team has reached out and talked to industry leaders across these categories to consolidate and showcase their broad opinions and beliefs of the market as well as the prevailing trends and opportunities in each.



Amitabh Taneja

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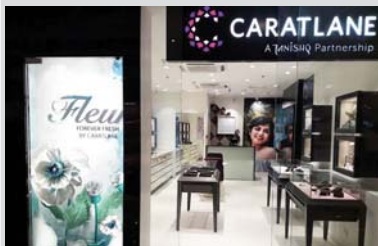
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New Store



Ayesha Accessories

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Corin highlighted on the problems involved in bra construction and took on the challenge to create the perfect bra...

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Inspired by the cosmopolitan dressing style of Austria, the collection is in sync with global trends...

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The company has announced a pan-India growth plan by introducing innerwear and athleisure range for women...

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IRA & IRTA 2018 honoured outstanding retailers and professionals who excelled in every aspect of retail - technological innovations, customer experience, and making profits - in front of an audience comprising the who's who of retail in India...

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Store Interiors: The store facade is a see through glass window. The fixtures, display stands are all wooden and are sourced from local antique shops, restored and painted in various shades of pastels and white. The walls are painted in neutral shades of grey and white and the flooring in oxidised pink to give a fresh look to the store.

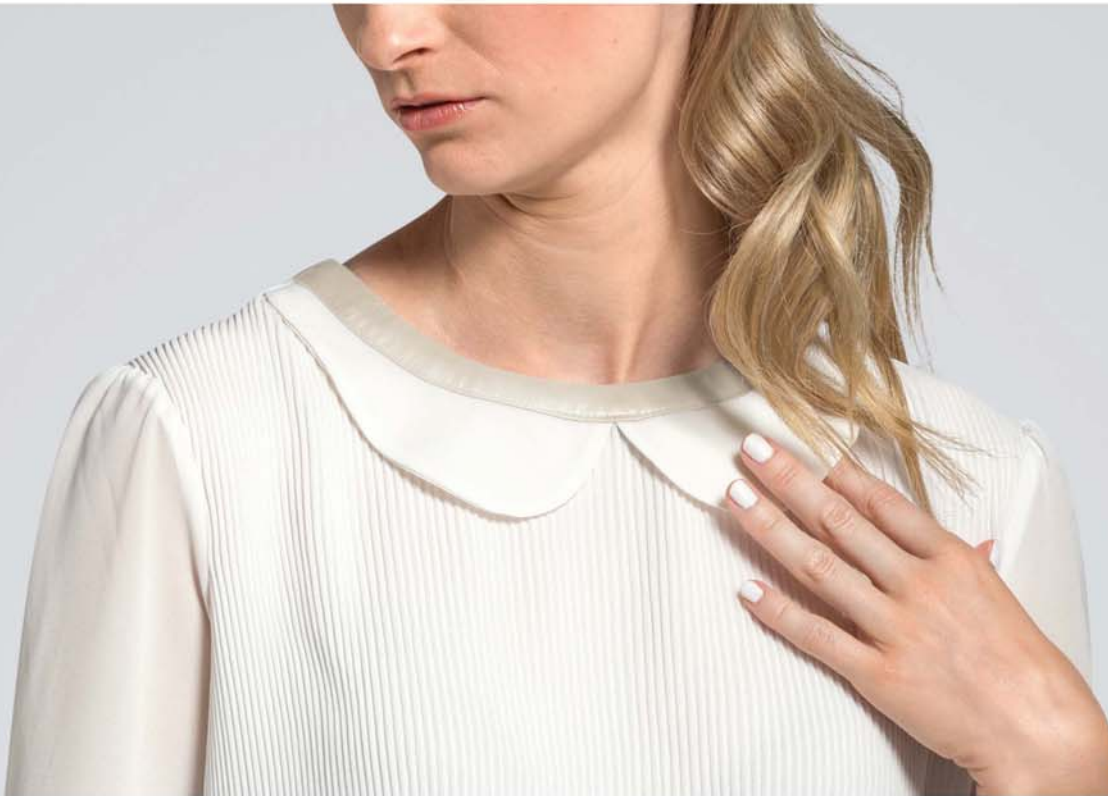
BRAND: Ayesha Accessories

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The store features an unwinding space too, PY Love Café, conceptualised by Jaqueline Kapur — a perfect spot for gathering and relaxing after an exhausting day. The café is based on the concept of “spread love, eat well and have fun.”





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Collection: The new store offers the finest range of jewellery including the brand's latest collection, 'Noor-e-Kashmir', inspired by the mesmerising colours of the Valley.

Store Theme: Situated at one of the most happening shopping destinations in Delhi, this CaratLane store is designed to bring to the consumer a uniquely smart jewellery buying experience.

Store Interiors: Carat Lane stores are very different from typical Indian jewellery stores. They are designed for a true omnichannel experience. Like all other branches, this store too has a virtual try-on 'magic mirror' for those 'just looking' moments. There is also an exclusive Solitaire Lounge to assist customers with all their queries on solitaires. Apart from this, the store houses a customisation desk helping customers turn their dream jewellery to reality.

BRAND: CaratLane

LOCATION: Delhi (Vikas Marg)

PROMOTER: CaratLane Trading Pvt. Ltd.
(A subsidiary of Titan Company Ltd.)



CELIO

BRAND: Celio

LOCATION: Bengaluru (Jayanagar)

SIZE OF THE STORE: 1600 sq.ft.

Store Theme: Through its Paris Concept Store, Celio aims to bring the best of French fashion. The concept store houses the country's first 'Celio Club' – a concept brand by the brand that was launched in 2007 and offers a line of business and formal men's wear.

Store Interiors: The ground floor of the store will offer a complete wardrobe of effortless fashion for today's active and urban men through four fashion lines – essentials, casual, denim and smart – including shoes and accessories. The first floor of the store will house the Celio Club section that will offer complete collections of contemporary urban outfits like formal shirts and trousers, blazers and formal accessories as well as tailored suits. Through the Celio Club concept, the brand now offers timeless and classic formal men's wear pieces that are modern and chic in design and available in a variety of finishes.

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





LOVE MOSCHINO

FLAGSHIP STORE LAUNCHED IN DELHI

Following a fabulous launch in Mumbai, Samar Lifestyle Pvt Ltd has recently opened Love Moschino's flagship store in Delhi. Launched in DLF Promenade in Delhi's Vasant Kunj, this exclusive Love Moschino store will be retailing handbags and accessories for women. Offering a wide range of merchandise for women; Love Moschino's store in Delhi spans over a retail space of 1,150sq ft.

This newest fashion stop boasts of a whole bunch of playful autumn winter 2018 accessories- from bags and wallets to clutches and fanny bags as well as key chains and card holders, amongst others. Currently presenting some of its bestselling products like their signature quilted bags and back packs with the wildly famous Love Moschino logo, it will also add footwear by mid October 2018 followed by eyewear in November 2018 and ready to wear by spring 2019.

Expanding its portfolio in India with the launch of the iconic Italian luxury fashion brand, Love Moschino, Samar



Lifestyle Pvt Ltd, shared that they are now looking at increasing the brand's presence in India.

Mouli Venkataraman, COO, Samar Lifestyle - Love Moschino said, "We are extremely elated to have launched Love Moschino's first ever exclusive store in Delhi. It has been on our radar for long and now it finally sees the light of the day."

"This Italian luxury label has already set major fashion standards globally and is now all set to garner the same loyalty across India. With this aim we have big plans for this brand in India and are happy to share that the next destination for Love Moschino will be Ambience Mall in Gurgaon. We wish to provide the best of fashion from the international market to our discerning Indian customers and hope to do so with the expansion of Love Moschino's presence in India," he adds.



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Pooja Chopra

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Gatta is a Polish brand owned by the Ferax Company, which is also the owner of the Wola brand, a leader in the production of hosiery in Poland. Gatta collections are available for sale in more than 130 brand stores in major cities in Poland and in renowned lingerie and tights stores. The brand has gained recognition not only on its home soil, but its products are also sold in European Union countries such as Great Britain, France as well as in Russia, USA and Australia.

A Unique Brand

Gatta has its origins in the first period of transformation, falling in the 90s of the last century. In 1993, Ferax, the owner of Gatta, appeared on the Polish market. It was a breakthrough moment for the domestic hosiery industry and was a milestone in its development. The next years of the brand's presence in the market were characterized by constant progress. The evolution was driven by the intensification of investments in modern machinery and confirmed the expansion of the brand into new foreign markets.

LEADING HOSIERY DESIGNS FROM POLAND

Gatta currently has a leading position among domestic manufacturers of tights and hosiery and also boasts of a growing range of clothing, including sports clothing, underwear and swimwear...

Aarti Kapur Singh



Currently, the brand has a leading position among domestic manufacturers of tights and hosiery. Gatta also boasts of a growing range of clothing, including sports clothing, underwear and swimwear.

History of Growth

Polish clothing major Wola formed in 1945 as a state-owned glove and thick knitwear factory. From the very beginning of its existence the plant invested in development, gradually increasing the machine park and diversifying the range. With more and more experience in knitting, in 1951 the factory started hosiery production.

By the end of the 1980s, Wola appeared on the Eastern market and gradually began to acquire the German and French market. In the beginning of the 90s, the rapid development of the market and consumer requirements prompted the company to expand its offer with new products: socks and a wider range of tights.

In the same period, computerization of production processes took place. Thanks to the new possibilities offered by the new machines, the production of cotton tights with convex patterns has



"We, at Gatta, believe in flexibly reacting to what our customers want. It is important to adapt our products to their growing and diverse needs. In addition to the classic tights and stockings, we are constantly developing slimming, cooling, circulation and anti-venation models. The assortment has been enriched with sports clothing, a wedding garter and tights collection, or a line of fashionable bathing suits."

– Dariusz Szafnenski,
Chief of Operations, Gatta

begun. A visit to the plant in the textile region of Poland, Lodz, makes evident the difference that the technologically advanced machinery, with the most modern dye-dyeing plant in Europe can make.

Currently, Gatta's production offer is hosiery for children and adults: socks, tights and underpants. All are made of high-quality natural and synthetic raw materials that are child-friendly. The certificates of 'safe for babies' and 'safe for a child' and 'Eko-tex', confirming high standards of product quality, are the confirmation of good quality products.

Wola tights and socks are durable and above all, comfortable to wear. Their additional advantage is interesting designs in line with the latest trends in fashion.





“Women’s clothing is made of a combination of knowledge about materials and developed production technology. To this we also add compliance with current trends and in this way we can offer all women’s clothing adjusted not only to their needs, but also to fashion or season.”

value classic elegance as well as training clothing for those who value physical activity. It offers solutions for demanding women who care about high quality, careful workmanship and comfort of use.

By tracking women’s needs and passion for the production process, the brand has always been associated with high quality, fashionable design and durability of products for years.

Ferax’s efforts have been appreciated by a large group of users, which is confirmed by the repeated awarding of the Gatta brand to the award of the Golden Consumer Laurel.

Their domain for many years has been tights, which are created based on modern production technologies.

“As part of several different lines, we offer both smooth tights for women, as well as those decorated with numerous patterns. The products do not lack functional tights, for example with the effect of BB cream, matting, covering imperfections, actively combating cellulite or modeling the figure. I recommend both durable, super thin tights, as well as thicker ones, perfect for cooler seasons,” says Dariusz Szafnenski, adding, “Our women’s clothing is made of a combination of knowledge about materials and developed production technology. To this we also add compliance with current trends and in this way we can offer all women’s clothing adjusted not only to their needs, but also to fashion or season.”



Committed to Advancement

The story of Gatta is the perfect example of how technology can be integrated with customer insights to create products that set benchmarks in the market. The brand owes its success to the hard work on the preparation of new technologies, both pantyhose and – in recent years – underwear and clothing. Success has also been determined by the persistent pursuit of seeking solutions that improve the comfort of use of products by women while guaranteeing a perfect appearance.

According to Chief of Operations, Dariusz Szafnenski, “We, at Gatta, believe in flexibly reacting to what our customers want. It is important to adapt our products to their growing and diverse needs. In addition to the classic tights and stockings, we are constantly developing slimming, cooling, circulation and anti-venation models. The assortment has been enriched with sports clothing, a wedding garter and tights collection, or a line of fashionable bathing suits.”

In accordance with its philosophy of constantly innovating its offerings, Gattais trying to take into account the needs of all women. It offers stylish tights and stockings for people who



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TAB91

About the Brand

Launched in 2013, TAB91 redefined the casual wear market by introducing an extremely trendy, young and colorful collection that became an instant hit. The core of the brand lies in its zeal to add an extra zing to its range of men's and women's western wear, making every person feel special. Built and grown around the simple philosophy of 'Three Fs' – Fabric, Fit & Finish – of the garment industry, the brand has embossed marks of unmatched excellence with its products that are crafted for perfection using high quality fabrics, in-house designers and careful machining.

Focus Customers

The brand targets youngsters between 16 – 35 years of age along with people who are young at heart. The brand is for people who desire to look smart and trendy, without burning a hole in their pockets.

Winter Wear Product Basket

TAB91's current product line in men's winter wear includes cotton men's pullovers, full sleeve t-shirts, light weight knitwear sweatshirts and fleece sweatshirts. In women's winter wear, the brand offers fancy yarn cardigans, women's sweatshirts, women's knitted coats, women's trench coats and women's accessories.

Latest Collection

The latest winter wear collection includes sweatshirt category in zippers, hoodies, cord fabric round necks, t-necks with different type of fabric such as fleece, Japery, naps, slubs, etc., in men's wear. Apart from imported fabrics, the brand has utilised a variety of knits, such as intarsia, transfers, and cables in men's sweaters. The women's collection includes knitted cardigans, coats capes and fashion shrugs.

The brand has plans to launch bomber jackets, PU jackets, 100 percent cotton washing jackets and full sleeve casual t-shirts in the near future.

Primary Markets

TAB91 is present in 1,350 MBOs along with being present across all major e-commerce channels in India including Flipkart, Myntra, Jabong, Amazon, Paytm, Shopclues, and Limeoad. The brand has its presence across 16 states in India including Punjab, Haryana, Himachal, J&K, Rajasthan, Uttar Pradesh, Gujarat, Maharashtra, Orissa, Jharkhand, Assam, Meghalya, Nagaland, Rajasthan and West Bengal.

Retail Expansion Plan

The brand is planning to launch EBOs in North India. As of now, it has plans to launch 10 EBOs in the next two years. It also wants to explore the states of North East India which holds a promising market for winter wear.





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FINDING THE PERFECT BRA

THE CORIN WAY

Before Corin took up the challenge to create the perfect bra, they undertook 18 months of research in partnership with the Technical University of Lodz and the Polish Mother Memorial Hospital to understand the problems involved in bra construction...

Aarti Kapur Singh



A bra is personal in more ways than one and Polish lingerie brand Corin understands the need and necessity of the perfect bra and a recent visit to their factory in Łódź also showed that they will go far to get the perfect fit.

Beyond Vanity: The Need for a Perfect Bra

A proper fitting bra can lift both your body and your spirit and make or break your outfit. For example, a fancy padded, or lacy bra might be great for special occasions, but will create lots of lumps and bumps in a t-shirt. Likewise, a full coverage or minimizing bra might create wardrobe complications with your favourite date night dress. The key to your lingerie drawer is versatility and having multiple pieces to pair with different occasions such as work, sport, and play. There is a lot written on the subject of badly fitting bras and the discomfort they cause.

According to Prof. Marek Zdrożny, Head of Oncological Surgery and Breast Diseases Clinic in the Polish Mother Memorial Hospital-Research

Institute, although there are no studies that would indicate the development of breast cancer caused by using an unsuitable bra, the correct choice is extremely important. “This not only prevents future complications, such as a disorder of the lymphatic system, inflammation, or swelling but also to live in greater comfort,” he adds.

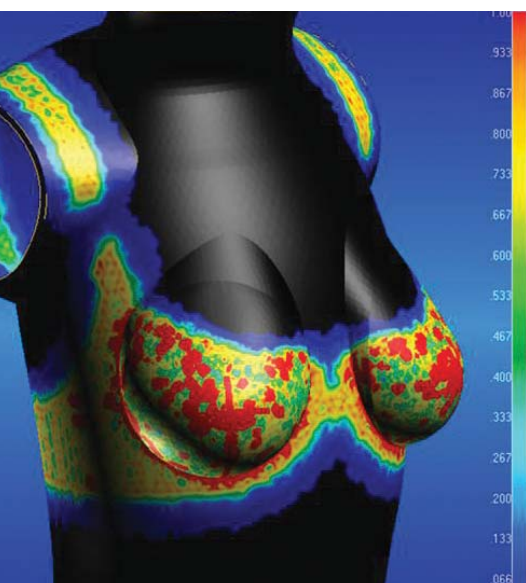
Corin has come a long way from when it took a few employees 11 hours to create their first bra. Last year, they produced a bra that meets technical and even medical standards to be awarded the “Innovative Product – Audience Award” for its Virginia Bra at the 2017 Strong In Business Economic Awards.



wearer feel and look better than ever before. “The thermovision turned out to be a useful method here to visualize changes in blood supply and thereby the changes of the temperature of the skin of the mammary gland. From our experiments we have clear evidence that wearing tight bras causes large temperature differences within the skin of the breast. A similar situation occurs with an overly loose bra- there is friction and by friction there are warmer areas and cooler areas- i.e. areas with a greater or lesser blood circulation. Naturally it all depends on the type of a breast, breast size, on the shape of the breast, as well as the body fat in women. It is important to know the technology of making suitable bras and thermographic studies appear to be very useful research. These are not merely subjective feelings of women surveyed, but in an objective manner it tells us whether the product has been manufactured correctly and whether it is adequate for the appropriate type of a female breast,” explains Prof. Zadrożny, who was overseeing the project.

The bra was acknowledged for its innovative technology that allowed the thermally moulded cups to adapt to the shape of the breasts. It features three layers of textile surfaces.

Between the layers of fabric there is a three-dimensional soft foam. The cups, made using modern technology, are permeable to liquid and allow the skin to breathe. The bra perfectly adapts to the shape of breasts, is very light, provides excellent support and is pleasant to the touch. Thanks to the smooth surface of cups, this bra is not visible under the t-shirt. And this landmark research and engineering process made Corin not only the leader in lingerie manufacture in Europe, but also earned for them recognition by the Discovery Science Channel that documented the whole process of designing the perfect bra.



How Did They Do It?

Before Corin took up the challenge to create the perfect bra, they undertook 18 months of research in partnership with the Technical University of Lodz and the Polish Mother Memorial Hospital to understand the problems involved in bra construction. This seemingly small part of women’s clothing is also the most difficult to construct. The entire production cycle requires great precision and accuracy. Engineers from Technical University of Lodz conducted series of simulations and analyzes to convey to Corin guidelines for the perfect bra production. For all tests ultrasensitive thermovision cameras were used. Bras were also tested by a group of women of various age and breast size.

The project started with specifying pressure points on a 3D model of the female chest. This was done with a high-tech professional computer program used in digital simulations. First models of the new bra based on that data helped in examination of the bra’s cup projection and in performing another 3D simulation.

The result was the Corin Perfect Bra, a bra that provides support, comfort in movement, besides making the



“Although there are no studies that would indicate the development of breast cancer caused by using an unsuitable bra, the correct choice is extremely important. This not only prevents future complications, such as a disorder of the lymphatic system, inflammation, or swelling but also to live in greater comfort.”

– Prof. Marek Zadrożny,

Head of Oncological Surgery and Breast Diseases Clinic, Polish Mother Memorial Hospital-Research Institute:

DUKE LAUNCHES AUTUMN WINTER'18-19 COLLECTION

Pick any international lifestyle apparel and footwear from the countless options served in the stylish Autumn Winter'18-19 collection by Duke and use this iconic attire to transform yourself...



Duke Fashions has recently launched its Autumn Winter'18-19 collection. Inspired by the cosmopolitan dressing style of Austria, the collection for young people has been developed in sync with global trends.

It comes in various styles and promises superb fits in international designs and a variety of patterns and fabrics - woolen tops, sweaters, sweatshirts, jackets, thermals, track suits and footwear - for men, women and kids.

Kuntal Raj Jain, Director, Duke Fashions (I) Ltd. said, "Our target audience is today's youth who is looking for a trendy and stylish range that is in sync with international designs, fashions and quality. Duke is a value for money brand and our mission is to make international designs and styles available at highly reasonable prices. We see it as our duty to provide our customers the inspiration they need to look and feel confident. Our Autumn Winter'18-19 Collection is also based on the same philosophy."

Duke has an unbeatable marketing network comprising 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.



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VAN HEUSEN

FORAYS INTO WOMEN'S INNERWEAR & ATHLEISURE

After a successful foray into premium men's innerwear category in 2016, the company has announced a pan-India growth plan for this segment by introducing innerwear and athleisure range for women...

IMAGES Business of Fashion

Aditya Birla Fashion and Retail Ltd marked a new milestone in the branded apparel sector as its Van Heusen Innerwear and Athleisure business announced its foray into the ₹16,000+ crore women's innerwear and athleisure market. The brand launched its lingerie and athleisure range today.

After a successful foray into premium men's innerwear category in 2016, the company has announced a pan-India growth plan for this segment by introducing innerwear and athleisure range for women in 3 to 4 key markets and few headquarter cities through localised distribution model and 10 exclusive men and women innerwear stores.

Commenting on the launch, Puneet Kumar Malik, CEO, Innerwear Business, Aditya Birla Fashion and Retail Ltd. said, "Since its inception in 2016, Van Heusen Innerwear has established a strong presence across the country through its premium and innovative range of Innerwear & Athleisure. Our product offerings have received phenomenal response from consumers across the country. This has propelled us to tap into the rapidly growing women's wear segment that is witnessing ~15 to 17 percent YoY growth. East is an important market for us and with the launch of Van Heusen's Women Innerwear and Athleisure range in Kolkata, we intend to deliver best-in class products that are high on innovation and style."



“Since its inception in 2016, Van Heusen Innerwear has established a strong presence across the country through its premium and innovative range of innerwear and athleisure. Our product offerings have received phenomenal response from consumers across the country. This has propelled us to tap into the rapidly growing women’s wear segment that is witnessing ~15-17% YoY growth. East is an important market for us and with the launch of Van Heusen’s women innerwear and athleisure range in Kolkata, we intend to deliver best-in class products that are high on innovation and style.”

– Puneet Kumar Malik,
CEO, Innerwear Business, Aditya Birla
Fashion and Retail Ltd.

He further added, “Our research shows that Indian women are increasingly becoming brand conscious and are looking for innerwear that offers comfort, fit and value. We are confident that our women consumers will appreciate this new offering which is crafted with sleek precision echoing trendy design and performance”.

Van Heusen Women’s Innerwear includes innovative products such as No Slip Straps, Breathable Cups, Flexi Wires and Side Smoothing styles.



With its foray into the eastern region, Van Heusen introduces the distinctive range of Lingerie and Athleisure, offering sophisticated styling with new and innovative product features for the best-in-class comfort and fit. Van Heusen’s Lingerie range comprises three collections including Cotton Sensation, Luxe and Glam. Each collection has been designed to offer a differentiated range to the various consumer segments.

After extensive consumer research, the business attended to all customer pain points which currently exist and then designed each piece with precision and perfection ensuring all-day comfort for the wearer. The fabric reflects the

fashion brilliance of Van Heusen as the collection is crafted with a mix of high quality cotton, polyamides, modal etc. The straps, laces as well as elastics are of the most premium quality offering utmost comfort to the wearer.

The themes of the lingerie collections are inspired by the everyday elements of a woman, latest trends, and most importantly comfort and fit. The collection echoes the art of premium fashion with a mix of solid colours and prints.

After the launch in Bengaluru and Kolkata, Van Heusen has plans to launch its Innerwear and Athleisure range in Delhi soon.





IRA 2018:

HONOURING LEADERS & RETAIL EXCELLENCE

IRA 2018 honoured outstanding retailers and professionals who excelled in every aspect of retail – technological innovations, customer experience, and making profits, in front of an audience comprising the who's who of retail in India...

IMAGES Business of Fashion

The 15th Annual IMAGES Retail Awards 2018 (IRA 2018), powered by Vegas Mall, celebrated some of India's most outstanding achievements in retail on September 6, 2018, at Hotel Renaissance in Mumbai. With no end in sight to the rise of online shopping, never has it been more important for retailers, shopping centre developers, city planners and communities to work together for creating a new ecosystem of lifestyle destinations.

Retail destinations are often at the very forefront of customer experience and connection. IRA 2018 honoured outstanding retailers and professionals who excelled in every aspect of retail – technological innovations, customer experience, and making profits, in front of an audience comprising the who's who of retail in India. The ceremony honoured the achievements of India's leading retailers with some high voltage entertainment.

Nomination & Jury Process

IRA nomination categories and entry details are announced through the website, magazine ads, a personalised electronic campaign and tele-calling to prospective nominees in all proposed categories. The prelim jury identified best performers among retailers. Prospective nominees submitted their nominations which were checked by the IRA audit team for eligibility, completeness and data correctness. The jury comprised distinguished personalities in the field of research and analysis with thorough insights into the retail business. **BS Nagesh**, Founder, TRRAIN was the Chairman of the Jury. The other jury members in the panel were **Abheek Singhi**, Sr. Partner & Director, BCG; **Ajay Macaden**, Executive Director, Nielsen India; **Ajay Kaul**, Senior Director, Everstone Group; **Anand Ramanathan**, Partner - Strategy & Operations Consulting, Deloitte India; **Ankur Shiv Bhandari**, Founder & CEO, Asbicon Group; **Bijou Kurien**, Board Member, L Catterton Asia; **Sreedhar Prasad**, Partner & Head - Consumer Retail & Internet, KPMG; **Harish Bijoor**, Founder, Harish Bijoor Consults; **Debashish Mukherjee**, Partner & Co Head, AT Kearney; **Harminder Sahni**, Founder & MD, Wazir Advisors; **Lara Balsara Vajifdar**, Executive Director, Madison World; **Sunil Kumar Alagh**, Founder & Chairman, SKA Advisors; **Rama Bijapurkar**, Expert Marketing Strategy & Consumer Behaviour; and **Professor Ravi Dhar**, Yale School of Management.





LIST OF IRA'2018 AWARDEES

IMAGES MOST ADMIRED RETAILER OF THE YEAR:

- ▶ Department Store: **WESTSIDE**
- ▶ Hypermarket: **BIG BAZAAR**
- ▶ Fashion & Lifestyle For Value Fashion: **FBB**
- ▶ For Premium Fashion: **TOMMY HILFINGER**
- ▶ Lifestyle Accessories: **AYESHA ACCESSORIES**
- ▶ Footwear: **BATA**
- ▶ Jewellery: **TANISHQ**
- ▶ Food & Grocery: **RATNADEEP**
- ▶ Foodservice: **HALDIRAM'S**
- ▶ Consumer Electronics: **RELIANCE DIGITAL**
- ▶ Entertainment: **CINEPOLIS**
- ▶ Beauty & Wellness: **NATURALS'**
- ▶ Turnaround Story: **CROMA**

- ▶ Kiosk/ Express Formats: **THE THICKSHAKE FACTORY** and **WOW MOMO**
- ▶ Customer Relations (Hyper/ Super Market/Convenience Chain): **SPENCER'S** and **STAR BAZAAR**
- ▶ Employee Practices: **LANDMARK GROUP** | **PUMA**
- ▶ Store Design & VM: **DILLI STREET** | **LIFESTYLE** | **NEERU'S** | **PIZZA HUT** | **SHOPPERS STOP** | **W**
- ▶ Marketing & Promotions: **KAYA CLINIC** | **MOHEY & MANYAVAR** | **PEPE JEANS** | **DANIEL WELLINGTON** | **BRAND FACTORY**

IMAGES MOST ADMIRED INNOVATIVE RETAIL CONCEPT OF THE YEAR:

- ▶ **ANANTAYA** | **CROMA** | **SHINGORA** | **SMAAASH**

IMAGES MOST ADMIRED RETAIL LAUNCH OF THE YEAR:

- ▶ **PROJECT EVE**



IMAGES RETAIL TECHNOLOGY AWARDS 2018

Categories were designed to ensure that not a single out of the box idea went unnoticed and awards were rolled out highlighting the key aspects of retail operation- customer experience, innovation and excellence in operations...



The jury panel included

Arun Gupta, Consultant, Praxis Home Retail Ltd. (a Future Group company) and Managing Partner & Director, Ingenium Advisory was the Chairman of the jury. Other members in the panel were **Amarinder Singh**, Chief Involvement Officer, CIO Association of India; **KRC Murty**, Experienced BFSI IT Professional; **Kamal Goel**, Senior Vice President - Information Technology, **Anand Rathi** Financial Services Ltd.; **Rahul Mahajan**, Group CIO, Lodha Group; **Ritu Madbhavi**, CIO, FCB Ulka; **Sabyasachi Thakur**, CIO, Parksons Packaging Ltd.; and **Suresh Iyer**, CIO, Blue Star Ltd.



★ LIST OF IRTA'2018 AWARDEES ★★★

IMAGES MOST ADMIRED RETAILER OF THE YEAR:

- ▶ Loyalty Program Implementation: **BIG BAZAAR Profit Club-FuturePay**
- ▶ Payment Project Implementation: **INOX**
- ▶ Mobile Technology Implementation: **FOOD BOX**
- ▶ Enterprise Solution Implementation: **PANTALOONS**
- ▶ Digital Marketing Campaign: **BIG BAZAAR**
- ▶ In-store Technology Deployment: **SOCH**

IMAGES MOST ADMIRED OMNICHANNEL RETAILER OF THE YEAR: **SPAR**

SPECIAL JURY AWARD FOR EXCELLENCE IN TECHNOLOGY INNOVATION: **TRAVEL FOOD SERVICES**

IMAGES MOST ADMIRED CIO OF THE YEAR POWERED BY POS SOLUTIONS **SANDEEP MISTRY**, Head IT, Pantaloons

VINGO CLOTHING INC

DEVELOPS THERMALS THAT ARE SKIN FRIENDLY, LIGHT-WEIGHT



Vingo Quilted Thermals are made from three-layer quilted fabric through sueding technology and employ extra-brushing quilted technique to give a feather-like softness to the user...

IMAGES Business of Fashion

The main purpose of any thermal is to protect the user from cold weather but generally not much importance is shown to comfort and style. As a result, many users compromise on these factors because they don't have many choices.

Vingo Clothing Inc., a garment manufacturing company is all set to change the mindset of consumers and the thermal industry. The Delhi-based company has launched Vingo Quilted Thermals. Unlike normal thermal brands, Vingo Quilted Thermals are made from three-layer quilted fabric through sueding technology. The thermals uses soft cotton-rich fabric and employ extra-brushing quilted technique to give a feather-like softness to the user. This makes the thermal skin-friendly, light-weight, stretchable and a perfect agent to give people a slim-look in extreme winters.

Available in three colours — anthra, grey and off-white for men, women and kids, the thermals' price range starts from ₹399.

Vingo Clothing Inc., was formed in 2016, since the company has been providing international quality to consumers at affordable prices. Call it arrogance or supreme confidence but the company boasts of a strong belief in their products that celebrities have not been appointed to endorse their products.

Considering the changes the market is undergoing and in anticipation to future retail trends, Vingo has strategically decided to foray into large format stores and multi branded outlets. This will enable the customers to see and choose from the large range of the brand's products.



WOMEN'S WEAR STUDY



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FASHION RETAIL



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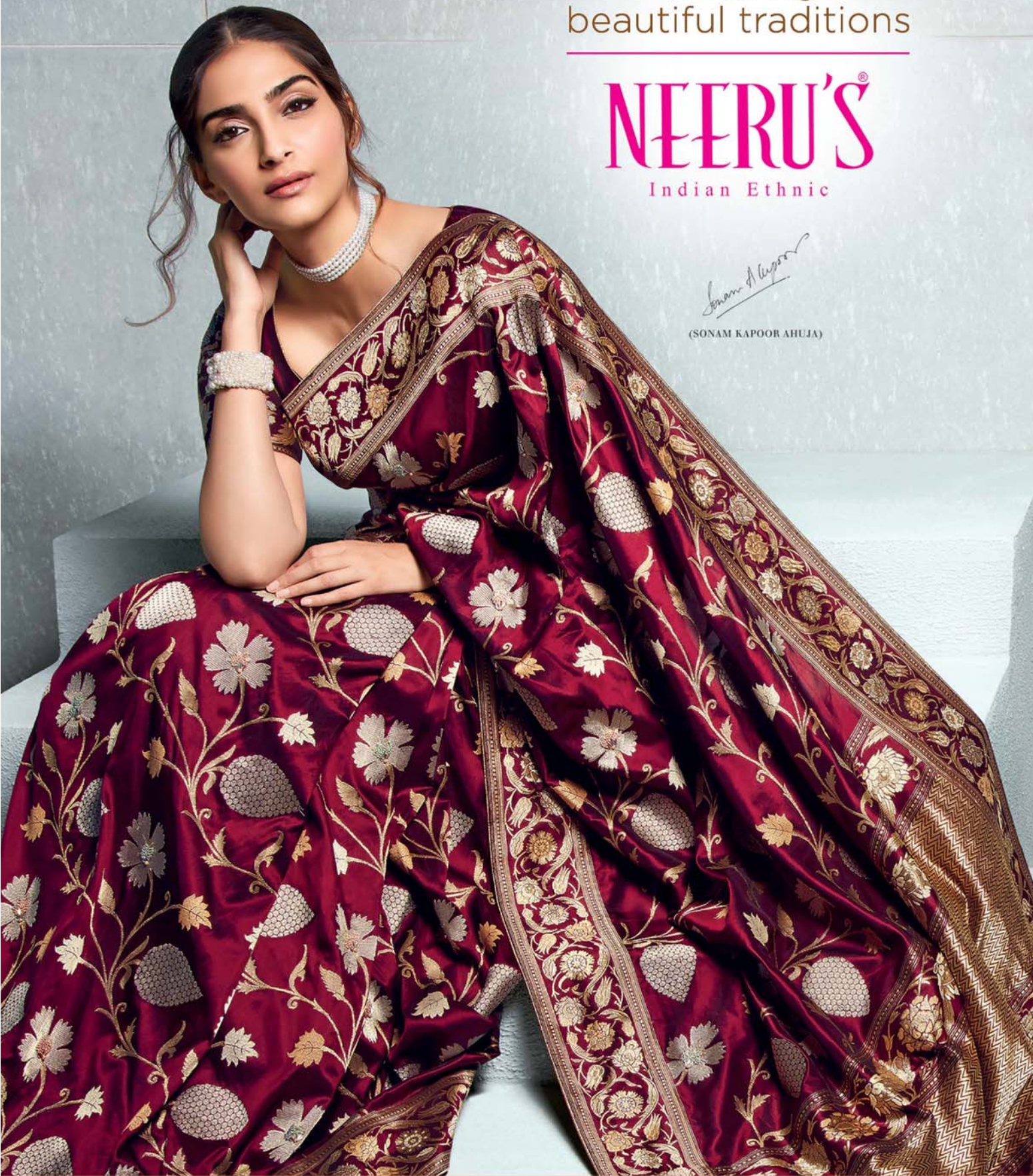
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WOMEN'S WEAR IN INDIA

A Study by Technopak

The global women's wear market has shown rapid growth as fashion trends, which are the most important aspect of women's wear, are changing rapidly. Amit Gugnani, Senior Vice President - Fashion, (Textile & Apparel) with Goutham Jain, Principal Consultant, Fashion (Textile & Apparel), and Saima Nigar, Associate Consultant, Fashion (Textile Division) throw light on how Asia Pacific is expected to be the fastest growing market for women's wear as it comprises some of the emerging economies with a very high proportion of middle class with significant disposable income...

GLOBAL WOMEN'S WEAR MARKET

The global women's wear market has shown rapid growth as fashion trends which are the most important aspect of women's wear, are changing rapidly. Europe is the largest market of women's wear followed by North America and Asia Pacific respectively. Asia Pacific is expected to be the fastest growing market for women's wear as it comprises some of the most emerging economies with a very high proportion of middle class with significant disposable income.

INDIAN APPAREL MARKET

The Indian apparel market can be broadly classified into men's wear, women's wear and kidswear. Currently menswear holds major share in the Indian apparel market accounting for 41.7 percent share of the total market. Women's wear contributes almost 37.5 percent, while kidswear contributes 20.8 percent of the market. It is estimated that in next decade kidswear will demonstrate relatively higher CAGR of 8.1 percent, resulting in market share of 21.6 percent by 2027. Men's wear and women's wear are expected to grow at a CAGR of 7.4 percent and 7.6 percent respectively.

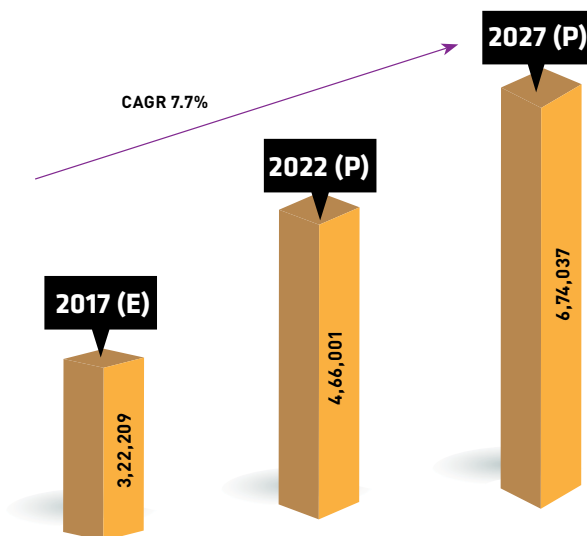
WOMEN'S WEAR IN INDIA

Women's wear segment of the market is mostly dominated by unorganised players. But, recently many organised players have started showing interest in this segment. These organised players have realised the market potential and have aggressively grown over a short span of time with help of e-commerce and other disruptive distribution channels. Increase in number of working women has resulted in increase in disposable income which in turn has fuelled this market segment.

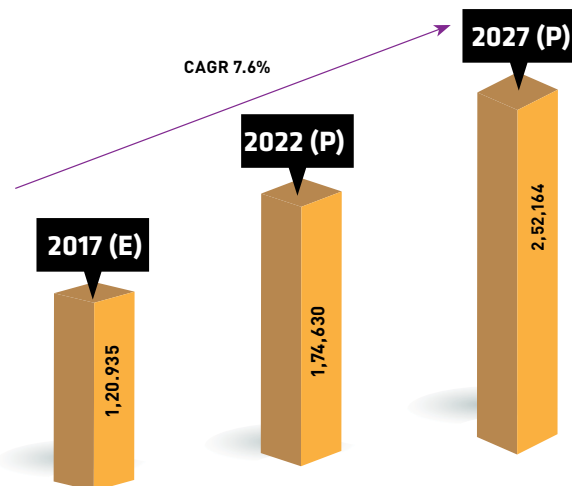
The women's wear market in India contributes to 37.5 percent of the total apparel market size. It is estimated to be worth ₹1,20,935 crore (US\$ 18.6 billion) and is expected to grow at a CAGR of 7.6 percent to reach ₹2,52,164 crore (US\$ 38.5 billion) by 2027.



INDIAN APPAREL MARKET (INR CR)



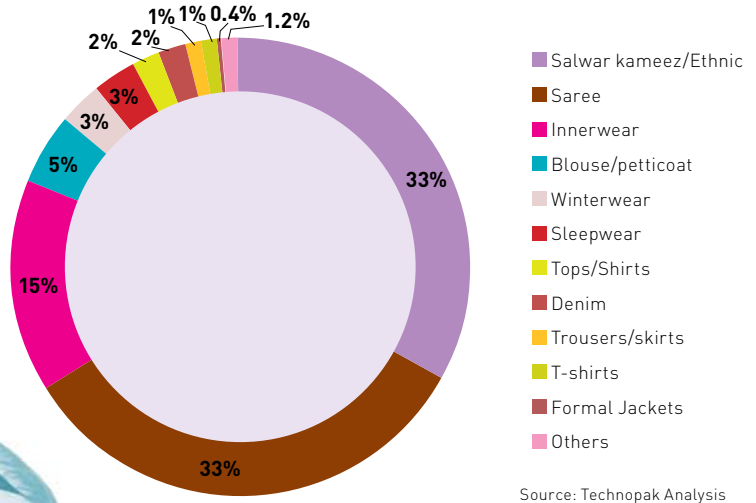
INDIAN WOMENSWEAR MARKET SIZE (INR CR)



Source: Technopak Analysis



SHARE OF INDIVIDUAL CATEGORIES WITHIN WOMENSWEAR



WOMEN ETHNIC WEAR

Women's ethnic wear can be further classified into sarees, salwar kameez and blouse/petticoat. Saree is perhaps the most common traditional Indian dress for women and has a market value of ₹39,350 crore with 33 percent share in the women's wear market. It is the most widely accepted women wear in India. It is expected to grow at a CAGR of 2.8 percent and reach ₹51,866 crore by 2027. Though a market shift is expected from saree to salwar kameez and western wear in urban and semi-urban markets, saree will still remain a predominant category among elderly and middle-aged women across urban and rural India.

Salwar kameez is another dominating category in ethnic wear. The comfort level provided by salwar kameez, numerous ways of stitching and styling, wide range of variety in terms of fabric, designs, price and occasion are the factors making it popular among the working women. With an estimated market share of ₹39,922 crore, it is expected to grow at a CAGR of 9.2 percent to reach ₹96,148 crore by 2027. Due to increasing number of working women in the country, western

Globalisation coupled with fast fashion and media exposure has resulted in awareness on fashion trends and designs. In addition, the increase in number of working women has fuelled the corporatised women's wear market. This growth will not only be limited to market size but will also witness a paradigm shift from non-branded to branded and ethnic wear to western wear as well.

KEY CATEGORIES IN WOMEN'S WEAR IN INDIA

Women's wear in India comprises of ethnic wear, western wear, Indo-western, innerwear, denim etc. Ethnic wear is the single biggest category in women's wear segment with a share of 71 percent of women's wear market.



areas of the country. Brands have realised that a mix of both western and ethnic is accepted by today's women and hence most modern players have come with unique designs which are a perfect mix of ethnic and western. The growing publicity of Indian fashion in the western nations, the integration of women's clothing designs has become inevitable. Comfort comes first while selecting attires. Sarees being formal wear is time consuming to drape. Indo-western attire are so comfortable that women love to wear them. Basically, these attires come in full stitched or semi stitched.

formal and western casual segments are giving competition for ethnic wear in urban areas.

The comfort level provided by salwar kameez has made it popular among the working women. But, it has started facing stiff competition from the western wear. The increasing number of working women in the country and their shift from ethnic to western formal or western casual has led to an increase in the competition for ethnic wear in urban areas. In rural India, salwar kameez is still most preferred choice of young women.

INDO WESTERN WEAR

The increased competition from western wear has resulted in a new category - Indo-western. It is a blend of both ethnic and western. This category has gained popularity in the urban

The clothing of Indo-western ensemble is the trouser suit, which is a short kurta with straight pants with or without dupatta. Newer designs often feature sleeveless tops, short dupattas and pants with slits.

Additional examples of the fusion that Indo-western clothing represents include wearing jeans with a kurta, adding a dupatta to a western-style outfit and wearing a lehenga (long skirt) with a tank top or halter top.

INNERWEAR

Innerwear is another promising category in the women's wear market. The innerwear market is growing at a CAGR of 11.8 percent and is expected to reach ₹56,364 crore by 2027 from the current market size of ₹18,454 crore. Brassieres, panties and camisoles



The increasing number of working women in the country and their shift from ethnic to western formal or western casual has led to an increase in the competition for ethnic wear in urban areas.

Another promising segment in western wear is formal wear. Ranging from business formals to smart casuals to Friday dressing, women are concerned how they look at their workplace.

etc., are the key sub-categories of women's inner wear category. Branded innerwear contributes to 35-40 percent of the total women's innerwear market and it is expected that branded share will increase in near future.

WOMEN WESTERN WEAR

Women's western wear can be further classified into casual western wear and formal western wear. Denims are the most popular casual wear product among women. They have demonstrated a promising growth at a CAGR of 13.1 percent. Initially, the denim brands used to focus primarily on the men consumers, but with the change in the demand and preferences of women, they started catering to women consumers as well. Of late, stretch denims have seen a huge demand among women.

Denim is a high growth category as it is fashionable and comfortable and enhances style quotient.

The value growth within the denim wear owes to increased demand for stretch and light weight fabric, varying colours, styling and detailing. Women's t-shirts and tops categories are also gaining demand owing to advantage of ready to wear and generic

inclination towards western wear categories. Women's tops and shirts market is estimated at ₹3,600 crore and expected to grow at a CAGR of 11.6 percent to reach ₹10,824 crore by 2027.

Another promising segment in western wear is formal wear. The increasing number of working women has led to the demand of formal attire. The companies have started realising the need of the hour and have shifted their focus on tapping this segment. Today's working woman is very much concerned with her image. She is ready to experiment and does not want to lag behind in this fashion era. Ranging from business formals to smart casuals to Friday dressing, women are concerned how they look at their workplace. This has provided sufficient market space to companies to explore several options in this segment. Western formal attire is one of the fastest growing segments.

The emergence of e-commerce has given a boost to the fashion retail market. This market platform has provided an easy and less time-consuming option in the hustle bustle of today's world. The increasing number of working women, with less time to shop has found an easy mode of purchasing.

CONCLUSION

The women's wear market in India is emerging as high growth potential market. International players are showing interest and it is becoming more organised. It is also estimated that it will grow at higher rate than the men's wear in the country.

The increasing penetration of internet, the increasing purchasing power of women, high brand consciousness and fashion sense has made e-commerce an important medium of shopping. The online market is one of the major reasons in the growth of branded and premium inner wear in semi urban and rural market.

Women are ready to experiment with the fashion. They are exploring options based not only on the value but also on the brand. E-tailing is also gaining popularity amongst women, which is seeing a high future prospect. Many online platforms are coming with idea of providing customisation to Indian women, when it comes to western formal wear. Therefore, it will not be incorrect to say that Indian women wear market will see some major changes in near future.



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WOMEN'S WEAR IN INDIA:

DYNAMICS, TRENDS & THE FUTURE

The women's wear market in India has evolved rapidly over the past few years and is now among the biggest segments in the Indian fashion industry. Are brands and retailers of this sphere ready to step up to the challenges and tap into the opportunity?

Shivam Gautam

The Indian woman's social positioning has witnessed unprecedented changes over the last millennia. From being passive, submissive, marginal, always confined and restricted, to emerging as a growing and powerful consumer group in the country, her evolution has indeed been eventful. With increasing literacy and employment, rising incomes and the proliferation of media and the internet, the behaviour and landscape of the Indian woman as a consumer group underwent high metamorphosis. Today, Indian women have transcended to become the prime decision makers in every purchase and are regarded by the retail community as the newest consumer force of modern times with the most potential.

Within this retail community, fashion has always been a female-dominated sphere. Despite this, in recent years, brands, retailers and all stake holders of the Indian fashion retail industry are being compelled to make an effort to keep pace with the evolving demands of this new breed of consumers, whose emphasis has shifted from being simply price conscious to demanding better designs, higher quality and trendiness. The result has been monumental – the women's wear industry is evolving by the day and trends seem to change faster than seasons.

Impulsive buying, online and digital shopping, availability of a plethora of niche brands and the influence of the selfie culture are further changing the women's apparel landscape at a rapid pace in India.

Changing Retail Landscape

Not just in India, but globally too, the women's wear industry is booming. As per a survey conducted by the Hong Kong Trade Development Council (HK-TDC), the global fashion market in 2018 will be dominated by women's wear. During the 2018 edition of HKTDC's CENTRESTAGE, that was attended by 22 countries and regions and attracted 8,700 buyers from 80 countries and regions, women's wear attracted the highest level of endorsement from both buyers and exhibitors (66% and 82%).

Domestically, the rise of the Indian middle class has been touted as the biggest game changer for the women's wear industry. "The entire mindset has changed - from savings-oriented joint families to nuclear families with high disposable incomes, opting to move to cities. The second driver is the burgeoning number of women moving into workplaces, especially in urban areas," says Lavanya Nalli, Chairperson, Nalli.

Apart from the financial independence of the modern Indian woman, a slew of other growth factors such as the entry of branded players including foreign labels, ease of retail trade, shift to ready-to-wear and aspiration-based shopping has culminated to boost the growth of women's wear in India. "Influx of organised players with Omnichannel distribution models in a heavily unorganized sector have contributed to the growth of the women's wear market in India. Global exposure due to penetration of smartphones, affordable internet access and social media inclusion has also led to increasing awareness of international fashion trends, styling and fast fashion consumption," explains Tanvi Malik, Co-Founder, FabAlley.

Market Dynamics

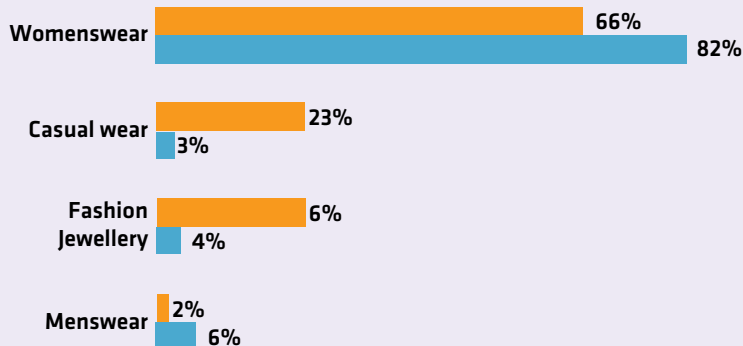
According to retail consultancy giant Technopak, the women's wear market in India is estimated to be around ₹1,20,935 crore (US\$ 18.6 billion) and is poised to grow at a CAGR of 7.6 percent to reach ₹2,52,164 crore (US\$ 38.5 billion) by 2027. It contributes to 37.5 percent of the total apparel market size and is predicted to outgrow the men's wear segment by 2025 in the country.

"The Indian apparel industry has seen a dominance of the men's wear category this far. However, the women's apparel category has been growing faster than other categories. In the next 5 to 7 years, women's wear will soon be the largest segment. We see this prevalent in our own stores where women's categories are growing faster, and women also dominate the decision making for men's categories," says Rajiv Suri, CCA, MD and CEO, Shoppers Stop Limited.

The women's wear segment of the market is still dominated by unorganised players but a recent shift interest of organised players have also been registered. In line with this, the target group is also increasingly opting for modern retail helping boost sales for brands in this segment. "The market is becoming more organised, with the introduction of international brands, disruptive distribution channels and larger capital overlays. While offline continues to remain dominant, online retail is making its presence felt with the increasing penetration of the internet, better financial inclusion, smoother forward and reverse logistics enabling convenience and global exposure," says Tanvi Malik.



GLOBAL MOST POPULAR FASHION CATEGORY



Images Courtesy: hkttdc.com



Traditionally, about 70 percent of the women's apparel market was concentrated in the top 10 cities of India. But, eventually with the rise of the aspiring class of the country, Tier I and II cities are also registering higher discretionary spending in this sector.

Women's Wear Product Categories

The women's fashion market in India can be divided into three broad categories - ethnic wear, western wear and Indo-western/fusion wear.

Ethnic Wear: Traditional Indian ethnic wear such as sarees, salwar kameez and churidars account for more than half of all women's wear sold in India.

"Ethnic wear (including traditional suits and fusion wear) accounts for a dominant 74 percent share of the women's apparel market in India. Currently, it is the highest selling category even within Shoppers Stop," says Rajiv Suri.

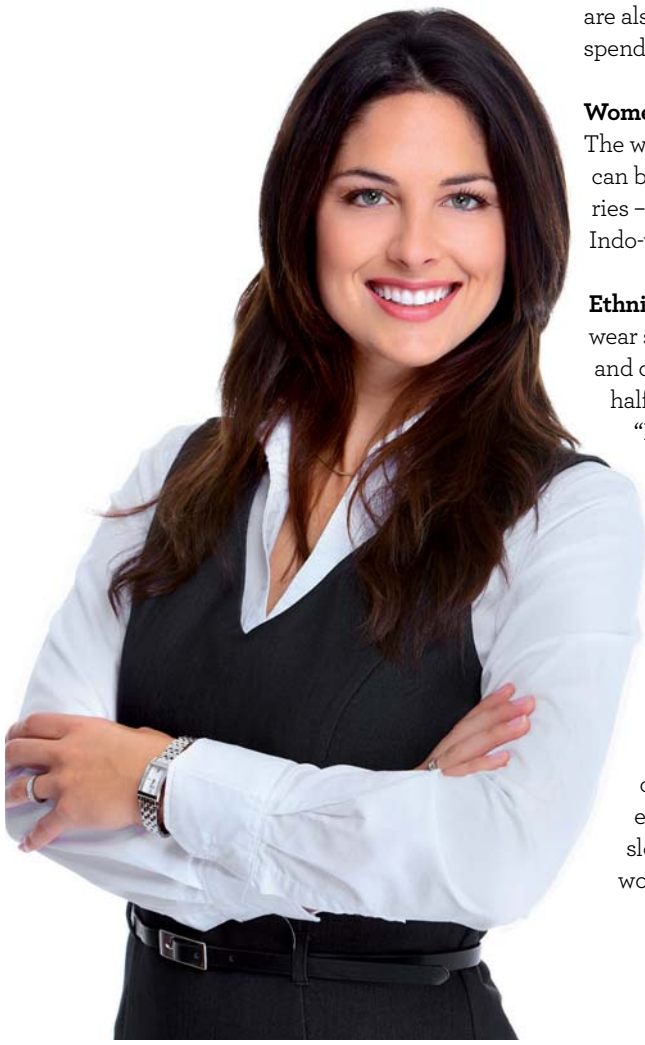
In ethnic, saris still occupy the lion's share of the category, with over 40 percent share on the total ethnic category. However, this is a slow growing sub-category, as more women are shifting to salwar kameez

due to ease, comfort and mobility, especially in urban and semi-urban areas.

"Sarees are the dominant product category within ethnic wear clocking the most sales for any brand or retailer followed by salwar kameez. I think these two will remain the highest selling categories in the foreseeable future," says Lalit Agarwal, CMD, V-Mart Retail Ltd.

A large unbranded market, the ethnic wear market is witnessing a revival in recent years. The 'Ethnic Chic' phenomenon has bolstered the demand for traditional Indian designs with different regional variations resulting in a slew of brands concentrating in this space. With an interesting interplay of woven and knits, these brands have completely redefined ethnic wear for the younger consumers.

Western Wear: While traditional outfits and fashion are still at large across the country, urban India is changing rapidly with international fashion trends getting adopted by the young and the glamorous in cosmopolitan metros of India. Demand for both casual and formal



western apparels like denims, shirts, trousers, formal, et al, are steadily rising along with the propagation of western ideas fueled by globalisation.

“Owing to an increase in education and working women, the women’s western wear segment has also witnessed tremendous demand, growing at a CAGR of 17 percent. More and more women are consciously shopping for work wear outfits both in the western and ethnic category. With rising urbanization, the western wear segment will grow further and is likely to become one of the top segments by market share in the near future,” reveals Rajiv Suri.

Denim is the most popular casual wear product among women in India today, followed by women’s tops and t-shirts categories. “Denims are the largest sell-



Nila Newsom / Shutterstock.com



ing sub-category within western wear, especially with the infusion of lycra-based stretch jeans. Tops, comprising of shirts, blouses and t-shirts are a very fast-growing category due to the shift of Indian women towards western-wear,” says Tanvi Malik.

Indo-Western/Fusion Wear: The modern Indian woman likes to experiment and fuse western wear with India designer clothing, adapt western trends and Indianize them as per local trends. This has a large influence on the woman’s fashion accessories market in India. It is transforming into an Indo-Western design concept giving rise to fast fashion with an ethnic taste. Bright colours, unique and bold designs with a

blend of heritage, embroidery, block patterns, faux fur and prints are things to watch out for in forthcoming seasons.

“Indo-Western is an emerging category in women’s wear, which bridges the gap between Indian traditional and western wear. Fuss-free western silhouettes coupled with indigenous fabrics, embroideries and prints are gaining popularity across the country. Kurtis with both wide-legged and fitted pants, without dupattas are rapidly gaining traction over staid SKDs in urban centres. Maxi skirts, tunic tops and flared pants are gaining widespread acceptance,” Tanvi Malik further states.

>



Plus Size Fashion: Plus Size, a fashion segment that has long been under served, has now emerged as the latest buzz-word in the Indian women's wear industry. In the recent years, a well-deserved concoction of sociological concerns like the body positive movement, criticism of the fashion industries' obsession with size 0, etc., contributed a long awaited shift in perspectives that ultimately fueled the growth of this fashion segment. Plus-size fashion already has a 10th of the overall womenswear market and is growing at a CAGR of 12 to 15 percent. Brands that service only regular sizes are missing a growing opportunity, one that beside commercial viability also sends positive re-enforcement and acceptance messages to women," says Tanvi Malik.

The Future

In this globalised era, the women's wear segment in India like many other traditional product segment is undergoing an astounding change of perception as well as evolution. Consumers have moved beyond the basic survival needs and non-basic needs have captured the momentum especially in the urban and emerging cities.

"Womenswear is one of the fastest growing categories in the retail industry that attracts consumer across demographics. With ease of availability of international trends across multiple platforms and a burgeoning aspiring class, the future for this category looks bright and positive," says Vasanth Kumar, MD, Lifestyle International Pvt. Ltd.

With the women's apparel market all set to overtake men's wear by 2025 in the country, the competition is steep and arduous and marketing as a tool to drive loyalty is still in its infancy. The consumer is expecting lot of attention and with so many choices to be made, the fight for the market share has perhaps just begun.



WOMEN'S WEAR TRENDS 2018

"In sarees, an interplay between lot of techniques and lot of different weaving patterns are trending. For example Kanjivaram weavers, who earlier stuck south Indian patterns, are now seen experimenting with banarasi trends and different fabrics like linen. The other technique which is popular is bandhini which is more of a tie and die technique, now being recreated as designs on the loom. Overall we tend to see a lot of such cross techniques in the saree market today"

Lavanya Nalli, Chairperson, Nalli.



"In ethnic wear, embroidery, layered kurtas, floral prints, rich jewel tones, and intricate gold foil details are some of the key trends for the season. In western wear, polka dots, laces, tape detailing in denim, graphic and statement tees and trending colours such as olive and mustard are some of the key trends for the season. Additionally, palazzos, crop pants and slim pants are expected to enjoy demand"

Vasanth Kumar, MD, Lifestyle International Pvt. Ltd.



"With changing times, the women's wear market in India is witnessing massive changes in the preferences of the consumer. Today, we are noticing a growing preference for fusion wear, a very creative blend of both western and Indian styles. Silhouettes are basically from Western influence and are blended with Indian textiles and styling, combining Indian and western wear"

Lalit Agarwal, CMD, V-Mart Retail Ltd.



"Today, trends in women's wear are moving towards sub-sets such as Indo-fusion and contemporary, occasion wear, leisure to athleisure or street wear. Right from palazzo sarees, pairing ruffle blouses or crop tops with dhoti pants, skirts or wearing a traditional kurta with culottes, along with long jackets and shrugs have gained preference in ethnic/occasion wear. Western wear has moved to more smart casuals, semi-formals and denim in work wear. Women today prefer a desk to dinner attire which can work for them from 9am to 9pm. Additionally, current trends reflect bold colours, checkered patterns and high waist flared denim wear"

Rajiv Suri, CCA, MD & CEO - Shoppers Stop Limited.



"Fuss-free western silhouettes coupled with indigenous fabrics, embroideries and prints are gaining popularity across the country. Kurtis with both wide-legged and fitted pants, without dupattas are rapidly gaining traction over staid SKDs in urban centres. Maxi skirts, tunic tops and flared pants are gaining widespread acceptance"

Tanvi Malik, Co-Founder, FabAlley.





WHAT'S MAKING THE WOMEN'S WESTERN WEAR MARKET IN INDIA TICK

Be it fashion sensibilities or wardrobes of the modern India women, western wear has entrenched its stronghold as a staple today. IMAGES Business of Fashion takes a detailed look at the growth drivers, changing dynamics and the opportunities in this segment...

Shivam Gautom





Fable Street

With evolving mindsets and rapid urbanisation, western wear is dominating shelves across Indian metros and small towns alike. The women's western wear segment is a lucrative and evolving market today and is often attributed to have changed the 'price sensitive' Indians into brand-conscious and brand loyal customers.

"Western wear has over the years very unconsciously become an essential part of every woman's wardrobe. With the influx of global high street brands into the country, consumers today consistently have a variety of options to choose from. This exposure has significantly contributed to the western wear category, evolving into a lucrative market in India," says a spokesperson for Vero Moda and Only in India.

The Market

The women's wear market has witnessed enormous evolution in the recent years. While it is still dominated by the ethnic segment, the western wear segment is growing at a faster rate fueled by a welcoming increase in the number of women opting to work, higher disposable income and a desire to dress smart, befitting the occasion. According to a 2017 research titled Women's Apparel Landscape in India by Avendus, western wear in the women's segment is growing at a CAGR of 17 percent in contrast to the ethnic wear segment that is growing at a CAGR 11 percent.

"The western wear segment in India has grown exponentially in the last two decades. Globalisation and an increase in disposable income have encouraged leading international brands to penetrate the Indian market and create an exposure and affinity towards western way of dressing over traditional wear.



"Fast fashion led to quicker purchases which has helped the overall market grow. The category that has been the biggest beneficiary for this is western wear as these are usually not as pricy and can be bought more often"

-Vidhi Dalal,
Founder & Creative Director, B:Kind

Most urban Indian women find western wear comparatively more comfortable and less cumbersome than ethnic dressing, especially in work spaces," says Ayushi Gudwani, Founder and CEO, Fable Street.

Growth Drivers

Following the proliferation of the internet and smartphone usage, more women are now able to stay au courant of latest fashion trends and have become smart consumers who know what they want when it comes to fashion. "Social media is a one of the core growth factors that can be attributed to the exposure and knowledge that customers have about international fashion trends today. Especially in the fashion sphere, Instagram has been a game changer, to the extent that fashion has become a global conversation - whatever may be trending in London, is also being spoken about in India, whether it be an event a celebrity or a sensation," says Manjula Tiwari, CEO, Cover Story.





“India remains quite unique with regard to preferences of colour, fabrics and fits as compared to the external world. So all knowhow has to be calibrated for our markets, even in the case of women’s western wear and that is harder than it seems”

–Jaydeep Shetty,
Founder & CEO, Mineral

Exposure to international fashion has created awareness amongst Indians on the ongoing trends and quality preferences of the international market. It has also led to a cultivation of consciousness when it comes to curating products that are timeless and can be worn in multiple ways. “The marketing dynamics have therefore changed substantially and now focus on appeasing a more intelligent and aware customer unlike before. Secondly, exposure to international fashion has made social media and digital as a critical marketing channel,” says Ayushi Gudwani.

And exposure works both ways. “For brand owners, we keep learning from the best practices of the west and have bolstered our ability to generate more stock turns, reduce time to market, and execute dynamic pricing models. The flip side of all this is that India remains quite unique with regard to preferences of colour, fabrics and fits as compared to the external world. So all knowhow has to be calibrated for our markets, even in the case of women’s western wear and that is harder than it seems,” says Jaydeep Shetty, Founder and CEO, Mineral.

E-commerce has also dramatically boosted the growth of women’s western wear in the country, especially in the organised category. The access to brands and discounts has opened up a new arena in itself. “It has added to the frequency of purchase and also a demand for more variety at competitive prices. It allows for a lot more product to be showcased gives brands also the opportunity to grow their businesses, through the right partners,” says Manjula Tiwari.

Considering the sheer size of the nation, e-commerce has also been instrumental in providing brands with a robust platform that promises both exposure and penetration to remote locations. “It reaches a customer where





“The marketing dynamics have changed substantially and now focus on appeasing a more intelligent and aware customer unlike before. Secondly, exposure to international fashion has made social media and digital as a critical marketing channel”

—Ayushi Gudwani,
Founder & CEO, Fable Street



“Whether we look at the macro picture - wherein the premium brands have their offline stores lined up in Tier-II and -III cities, or at micro level, where about 20% growth of women's apparel is coming from online sales - geographical boundaries are becoming hazier”-

—Ena Bansal,
Chief Digital Strategist, Vajor



“Social media is a one of the core growth factors that can be attributed to the exposure and knowledge that customers have about international fashion trends today. Whatever may be trending in London, is also being spoken about in India, whether it be an event a celebrity or a sensation”

—Manjula Tiwari,
CEO, Cover Story

a brand does not have direct access, for one. Also, with e-commerce we can forecast where fashion is moving and what will be in demand in the coming season. The best part is that, the youth of today, who has emerged as one of the main consumer forces in the recent years, banks heavily on e-commerce. It is but only natural, as it not only saves time but also provides more options and promises easy doorstep delivery,” asserts Mehul Shanghvi, Director, Toyo.

The Foreign Invasion

India's promising consumer ecosystem, over the past few years, has opened its gate to some of the biggest brands in the women's wear world and their success has continually enticed others to explore the opportunities in the calmer Indian waters. Especially in a country like India that harbours an innate propensity towards 'foreign goods', this phenomenon has definitely changed the market dynamics and has compelled domestic brands to ante up their standards.

“India has seen a hoard of global brands that provide superior quality products which attract buyers. Indian brands are forced to stand up to the international trends, exceptional quality, and reasonable pricing structure. This has led to innovation in style, technological advances and improved quality management of the home grown brands,” says Ayushi Gudwani.

“In last few years, global fashion brands are on an expansion spree in India - both online and offline. This increases the competition for domestic brands but also offers the similar opportunity to the brand to make its headway in other geographies. Ultimately it depends upon the product, how it stands out and how its serving its purpose in overall need gap,” adds Ena Bansal, Chief Digital Strategist, Vajor.

The Advent of Fast Fashion

The traditional model of four fashion seasons in a year is now a passé; fast >



Fable Street



Vajor store



Only store



Minera

fashion is the new fad, especially in the women's western wear segment in India. While this trending business practice has benefited consumers, it has dramatically changed the dynamics of the fashion industry by focusing on simplicity, convenience, accessibility and affordability.

"Fast fashion has made global fashion more accessible to the youth. Let's just say fast fashion has made us more conscious of global trends in fashion and there is a considerable increase in people purchasing trendy clothes, driving in footfall which wasn't there say five years ago. This has heavily impacted how brands approach designing," believe the founders of Zink London, Malini Singhal and Vivek Goyal.

In India, a fair section of brands and retailers consider fast fashion to be a boon, especially when it comes to women's western wear.

"Fast fashion is a concept which was not highly prevalent in India. Indian consumers bought clothes on occasions and preserved them, to be honest. But with the advent of fast fashion, this has changed and led to quicker purchases which has helped the overall market grow. The category that has been the biggest beneficiary for this



"Celebrities always have fans and followers. People look up to them and desire to become what they are. Brand by celebrities therefore become an easy hit at initial stages"

-Akhil Jain,
Executive Director, Madame



"Fast fashion has made us more conscious of global trends in fashion and this has heavily impacted how fashion brands in India approach designing now"

-Malini Singhal,
Founder, Zink London



Cover Story store



Cover Story



“E-commerce reaches to customer where brand does not have direct access along with helping brands decipher probable trends for upcoming seasons. The best part is that, the youth of today, who has emerged as one of the main consumer forces in the recent years, banks heavily on e-commerce. It is but only natural, as it not only saves time but also provides more options and promises easy doorstep delivery”

—Mehul Shanghvi,
Director, Toyo

is western wear as these are usually not as pricy and can be bought more often,” says Vidhi Dalal, Founder and Creative Director, B:Kind.

Celebrity Fashion Brands

The flourishing film industry in India – led by Bollywood – has played a key

role in transforming the way Indian women dress. From bell bottoms in the 70s to halter necks in the late 90s, Indian celebrities have been one of the chief proponents women’s western wear in India.

While celebrity endorsements have always been a norm in the Indian fashion sphere, a recent trend of select A-listers trumping beyond to launch their own fashion brands or lines is on the rise.

“Celebrities always have fans and followers. People look up to them and desire to become what they are. Brand by celebrities therefore become an easy hit at initial stages,” says Akhil Jain, Executive Director, Madame.

But are these brands, and the phenomenon in general, disrupting home grown players who seldom can match the prodigal influence of these Goliaths from tinsel town?

“There have been many in the past two years – we seem to see an initial hype around it, and of course the marketing is strong given the background, however at the end, product is king and whoever is delivering best product to consumer will sustain,” states Manjula Tiwari.

Opportunities in Smaller Towns and Cities

It’s no news that India’s retail revolution is gaining momentum in the country’s smaller cities. A huge base of aspirational consumers, lower estate cost, and plethora of other factors have culminated in compelling fashion retailers to make a beeline for tier-II





Fable Street

Fable Street



Mineral store

and III towns. Thanks to the deep penetration of the smartphones, western wear enjoys a healthy demand in these smaller towns of India as well.

“Whether we look at the macro picture – wherein the premium brands have their offline stores lined up in tier -II and -III cities – or at the micro level, where about 20 percent growth of women’s apparel is coming from online sales, geographical boundaries are becoming hazier. It’s a well-known fact that next spurt of growth will come from these cities and as a brand, we of course want that share of the pie,” says Ena Bansal.

“Apart from growth in the international market and Tier I cities, we have noticed a radical shift in demand for premium workwear from tier -II and -III cities. Smaller cities are burgeoning speedily and splurging beyond just the necessities,” adds Ayushi Gudwani.

The Future

Women’s western wear is one of the fastest growing fashion segments in the country today. With the increase in the number of working women and the penetration of mass media, this segment is estimated to go through massive evolution in the years to come.

“A tremendous growth is definitely on the horizon for this market. We are seeing better retail environments and better infrastructure coming up which is all setting the stage for this growth. Another major factor is the growing power of women moving into the working sector and scaling the ladders with better disposable income,” expresses Manjula Tiwari.





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•• B:KIND ••

B:kind is a lifestyle brand that deals in lifestyle clothing for women of all ages and sizes. Founded by Vidhi Dalal in 2010, the brand's vision is to marry the modern Indian woman's consumer needs with international trends and world-class quality. Today, the brand aspires to create more than just a functional bond with its customer – a deeper connect that spurts from the compassion and kindness the brand stands for.

Currently the company has two production factories with 55 and 35 machines and a production capacity of 15,000 units and 8,000 units per month respectively which can be scaled up as per demand indicators from the market. At present these units are running at 75 percent capacity utilization.

Product Range

The brand offers tops, tunics, dresses, pants, skirts, tee shirts and mostly all lifestyle pieces of clothing. All products are tailored specifically for Indian women's structure and requirements. In addition, the brand also offers regional catering ensuring that all offerings are unchallenged in terms of quality and trends. Also, the brand's pricing strategy exhibits its keen sensitivity towards price, in line with Indian customer's requirements.

Retail Presence

B:kind is in the process of foraying into large format stores in India. The brand is currently supplying to over 1,200 MBO's including 31 Globus stores, Lulu Cochin and Untitled stores in India.

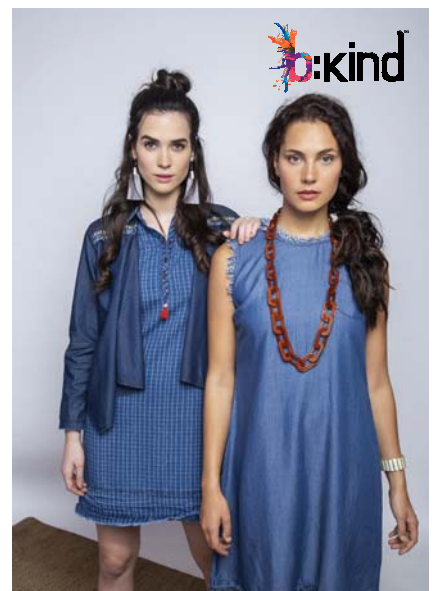


Online Presence

The brand has a strong online presence. It is currently, available in 14 online retails including Jabong, Amazon, Flipkart and Limeroad. It also is registering a good response to its online space www.bkind.in.

Future Plans

In terms of brand identity, B:kind hopes to reach out to more and more women. It also aims to scale up its business through LFSS, EBOs and e-commerce portals within the next five years.



●● COVER STORY ●●



Cover Story is a fast fashion women's brand under the umbrella of Future Style Lab (FSL), which is a subsidiary of Future Group. FSL was conceptualized in 2015 with Cover Story launching its first counter in April 2016. Now the brand is present across more than 80 doors with 21 EBOs and several MBOs and online channels.

Target Audience

Cover Story is for the fashion loving and value conscious Indian woman. The brand delivers the latest trends created out of its London design studio, capturing the best of all fashion capitals, while it is still the latest. The brand focuses on being fashionable, feminine and premium. The brand is moving towards becoming a fashion authority for its consumers while focusing on enhanced customer experiences in store.

Product Range

The brand offers all major women's wear categories from dresses, tops, tees, denims and bottoms along with a small range of bags and shoes in accessories. As of now the brand covers casual, premium, party and work wear.

Product Expansion Plans

The brand is working on introducing 3X the current range with focus on fabric and detailing, and a greater focus on accessories range.

Retail Presence

The brand is present across more than 80 doors, with 21 EBOs and across all major names like Central, Shopper Stop, Iconic, Kapsons and Sohumi. Cover Story is also present across all major online platforms like Myntra, Jabong, Koovs and Amazon, apart from its own online portal www.coverstory.co.in, that was in September 2017. The brand has noted a phenomenal response and steady growth across all channels.



●●MADAME●●



Madame is a fashion-forward brand designed and created for all fashion lovers. Since its inception, the brand has been steadily marching ahead to meet the challenges of the fashion-conscious woman. Madame's first flagship store was opened in the year 2002 in Mumbai and by 2004 a total 25 stores were opened across India. Since then Madame never looked back and by 2006, completed 50 stores. Year 2011 was a landmark in the history of Madame as it completed its 100th store in India and also set foot in the international market by opening a store in Saudi Arabia (KSA).

Madame's secret of success lies in its dedicated and diligent work force, led by a progressive management. The major focus remains on quality and design which has earned them the repute and appreciation of the customer.

Product Range

The brand offers a wide range of options in clothing, accessories, handbags, glasses and footwear. All products offered by Madame are unmatched in terms of quality and style and is in line with the latest fashion trends.

Retail Presence

Madame has a robust retail presence pan India. The brand's EBO count has clocked 150+ today. It also is present in about 400+ MBOs and 125 LFSs. The company is registering a good volume growth in tier -II cities whereas metros are performing at regular pace.

Online Presence

Madame is present online at Glamly.com which is housing its other companion brands namely Camla, Aritzya, OPT & MSecret. Since the website is launched a couple of months ago, therefore the response we are getting are pretty good.

●● MINERAL ●●

Mineral was founded in 2012 by Jaydeep Shetty and his wife Priyadarshini Rao. In a world moving fast, Mineral believes that there is a need for fashion that must be reflective of individual style and consumed at one's leisure. In line with this, Mineral focuses on enduring fashion that's constantly updated and lasts beyond a season. The brand's strength lies in not replicating the most visible fads on the ramp or cheap knock offs of high-end clothing but in its products that are stylishly designed using plush fabrics and are unique.

Target Audience

The brand targets women between the ages of 24-32, who are urban and educated. This spectrum has an innate taste of fashion and a desire to be unique that propels them to opt for fashion that gives them the liberty to flaunt an individual style statement.

Product Range

Mineral's range consists of a wide range of options in tops, trousers, dresses, and jackets. The collection is divided into everyday updated casuals, evening wear (launching shortly) and premium day wear.

New Product Line

The brand has just launched a more economical line of women's wear called 'TheMineralLife' which is sold exclusively in Brand Factory outlets. Mineral is all set to launch an evening wear line called 'Insomnia by Mineral' this November.

Retail Presence

As of now, the brand is present in 3 EBOS, one MBO and in 178 LFS stores across 38 cities in India. The brand has a robust online presence through its own website www.themineralife.com. It is in the process of re-evaluating its strategy with the other ecommerce -giants.

Turnover & Growth

Presently, Mineral is clocking over ₹ 4 crore in retail sales a month and growing at 38 percent year-on-year with a like to like growth of 15 percent. The brand plans to end with a 45 percent growth for the entire financial year.



●● VAJOR ●●

Vajor, a women's fashion and lifestyle brand, came into being in 2014 to bridge the gap between off-the-rack and luxury couture. With a wide range in fashion and lifestyle products, Vajor launched its home decor category after two years of its inception, in the year 2016. With an aim to come out with something new and fresh in the market, Vajor opened three stores in Delhi, Pune, Bangalore. A store in Chennai is on the cards as well.

Product Range

As a women's wear fashion and lifestyle brand, Vajor deals in clothing, footwear, bags, jewelry and other accessories. Vajor also has a home decor line which offers a range of kitchen and dining, garden, lighting, storage accessories, bath and room and decor merchandise as well.

The majority of Vajor products are made in India. The brand launches a new collection almost every month, in keeping with the fast pace of this industry and eliminating the barriers of seasonal fashion.

Expansion Plans

Vajor will be expanding both vertically and horizontally. The brand has plans to launch a few new verticals, which will be announced soon.

Retail Presence

Currently, Vajor has 4 EBOs – Delhi (Ambience mall, Vasant Kunj), Pune (Pavilion Mall), Chennai (The Palladium), Bangalore (100 ft road, Indiranagar).

Online Presence

The brand launched its own site, Vajor.com, more than three years ago as an apparel and accessories portal. Since then, new categories of Décor and Workwear have been added. So far, the brand has registered a positive response.



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●● TOYO ●●

Toyo is one of the most prominent names of the Indian fashion industry now. A part of Atlas Multitrade Pvt Ltd., the brand started off in 2015, and owing to its super quality and appealing designs, it has been able to etch a special reputation in its domain. Today, the brand enjoys a healthy legion of loyal customers owing to its trendy everyday collections for the young generation of India with a flare of international fashion and fabrics.

Brand's USP

Garments made from imported fabrics and priced 30 to 40 percent cheaper than its competitors.

Target Consumer

Toyo's target customers include value retail chain stores like V-Mart, D Mart, V2, etc., and large format stores like Sartha Stores, Pothy's, etc., along with wholesalers and exporters.

Product Range

Toyo is a one stop shop for all requirements pertaining to women's wear. The brand offers a complete line of women's wear right from winter to summer, and top to bottom wear, including leggings, jeggings, denims, kurtis, tops, t-shirts, tunics, fancy tops, palazzos and capris.

Retail Presence

Toyo enjoys a healthy retail presence across the country owing to the superb quality of its products. As of now, the brand has been catering to the states of Delhi NCR, Punjab, Uttar Pradesh, Odisha, Maharashtra, Madhya Pradesh, Kerala, Tamil Nadu, West Bengal, Uttarakhand, Bihar, Gujarat, Chhattisgarh, Rajasthan, Jharkhand



and Assam. The brand also has a healthy international demand in the markets of UAE, Africa, Malaysia and United Kingdom.

Product Expansion Plans

As an ambitious brand, Toyo has aggressive plans of product expansion. The brand plans to expand into men's wear and kidswear in the near future. They are numerous.

Online Presence

Toyo has a strong online presence especially in Facebook. The brand plans to start retailing with the leading e-commerce sites of India soon.





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Parvati Fabrics Ltd., are well-known as leaders in manufacturing and trading across India as well as exporting high quality fabrics and designer women's wear to various countries all over the world. After operating successfully for over 30 years, the company decided to veer away from the beaten path and launched Raisin in August 2018 – an innovative, contemporary clothing line for the modern Indian woman.

Brothers Vikash and Vishal Parcheriwal are the Co-Founders of Raisin and Managing Directors of Parvati Fabrics Ltd. They grew up in a business household and learned the tricks of the trade at a very young age. From working hard in the manufacturing unit to making successful deals as Managing Directors, they have come a long way. With 30 years of business experience in manufacturing a wide range of premium fabric qualities under their belt, they are all set to conquer the retail market with their ready to wear brand Raisin.

One of the main objectives of the brand is connecting the consumer with the manufacturer. This will not only ensure greater transparency in the garment making process but also will provide greater quality and pricing.

RAISIN

MUCH MORE THAN JUST A WOMEN'S WEAR BRAND

After operating successfully for over 30 years, Parvati Fabrics Ltd. decided to veer away from the beaten path and launched Raisin in August 2018 – an innovative, contemporary clothing line for the modern Indian woman...

Gurbir Singh Gulati





In an exclusive interview with IMAGES Business of Fashion, Vikash and Vishal Parcheriwal outlined their plans for Raisin and talked about how the women's ethnic market is scoring on the fashion retail charts in India.

"We wanted to create brand that sustains for decades and is known to provide comfortable fashion to today's modern women. The main challenge was to create products that were affordable for our target audiences without compromising on quality and comfort. We've carefully created products that are not only affordable, but also high in quality and comfort and we're hoping the market will embrace it."

– **Vikash and Vishal Parcheriwal,**
Co-Founders of Raisin

Tell us about Raisin and its launch journey?

Raisin was clearly launched to keep up with trends and create a range of apparel that successfully reflects the essence of a modern woman. Keeping this in mind, our overarching objective is to give the consumer a chance to connect with the manufacturer. With Parvati Fabrics Ltd., providing a strong backbone, Raisin fearlessly ventured into the fashion retail space, representing a perfect blend of Indian culture and modern influences. One of Raisin's visions is also to position itself as a brand that provides modern women contemporary fusion wear that is not only exceptionally comfortable, but also stylish! The clothing line comes in a variety of styles including dresses, kurtas, tunics and more - making Raisin an ideal choice for the women of today.

Tell us about your retail spread. What are your expansion plans?

Most brands are available through the mediums of MBOs and EBOs only; Raisin wants to reach a larger audience through its SIS retail model.

The brand is available in cities like Ahmedabad, Mumbai, Delhi, Kolkata, Surat, Lucknow, Chandigarh, Rajkot, Ghaziabad, Meerut, Muzaffarnagar, Muradabad, Dehradun, Saharanpur, Bareilly, Anand, Nadiad, Gurugram, Jalandhar, Ludhiana and Jammu. Eventually, Raisin wants to launch a minimum of 150 EBOs within a span of 3 years.

Raisin is actively available on the brand's official e-commerce website, www.raisinglobal.com and is also available on e-commerce giant, Amazon. The brand has an active digital presence through its social media channels on Facebook, Instagram, Pinterest, Google+, Twitter and Youtube.

How would you define your customer?

We want to be a relevant force in the women's retail market. We wish to understand the fashion needs of today's women in terms of accessibility to the latest trends and giving extreme



comfort. The brand's target audience comprises women aged from 18 to 45 years; thus the wide range in our collection, gives different personalities and styles an array of choices to express their individual sense of fashion.

Tell us about your complete product portfolio?

The maiden collection, the Autumn/Winter '18 line consists of 4 styles - songs of the breeze, the blush of blue, shades of fall and the staple dewes. Entire collection is made in keeping with the season's colours, styles, and trends. The product line consists of kurtis, dresses, tunics and maxis. The price range starts from ₹749 and goes up to ₹4,999.

Any plans of category / product expansion?

Raisin offers comfortable contemporary fusion fashion for women of all ages and preferences and will expand in the same category exploring various styles, in keeping with the latest trends with products like capes, skirts, bottoms, etc.

How crucial are tier -II and -III cities for your brand?

There has been a tremendous increase in the purchasing power for tier -II and -III cities. A large amount of Indian population resides in these cities and hence women from these markets accept new trends with a wide assortment of choices offered to them. One more factor which has made these markets an important one is the increase in population of working women. With increase in their purchasing power and with

Raisin is actively available on the brand's official e-commerce website, www.raisinglobal.com and is also available on the e-commerce giant, Amazon. The brand has an active digital presence through its social media channels on Facebook, Instagram, Pinterest, Google+, Twitter and Youtube.

the availability of brands around them these markets are extremely important for any brand today.

Is your brand capitalizing on providing great fashion at affordable prices? How?

Raisin not only provide great fashion at affordable prices, but we also emphasize a lot on offering premium quality, comfort with latest fashion. We all know that clothing is a necessity but paying more for special clothing is a luxury. Everyone can't afford and thus, to tap into the market, Raisin's goal is to give the right price without compromising on quality.

Market Conversations

Tell us about the women's ethnic wear segment in India? What has been the ratio of unorganized to organized players in the country?

In the overall women's wear segment, the ethnic holds the largest share of 75 percent. This segment is expected to grow at the rate of 9.3 percent annually.

India is a traditional nation with lot of cultural events and festivities. This factor will always push the ethnic wear sales all the year round amongst its consumers.





Many parts of India which are culturally rooted prefer only wearing ethnics. So generally seen sarees, salwar kameez, kurtis etc are always in high-demand for festivities and the sale of lehengas picks up during the wedding season.

The women's wear market is dominated largely by the unorganized sector which is highly fragmented. It has various players in the market offering products in their respective areas mostly through offline channels. Whereas on the other hand the organized sector has a strong set of players in the market which offers products under brand names in a more sophisticated manner both online and offline.

How has fusion wear modernized pure ethnics in the category? Please give details.

The times have changed and so are the customer's preferences. More and more consumers are opting for modern approach in everything, including their clothing. Majority of women in tier -I and -II cities have an appetite for western and fusion wear clothing. So fusion wear has been widely accepted due to its nature of offering a blend of modern styles with a touch of ethnicity. Without having to choose between the two, the fusion wear clothing brings both ethnic and modern styles together.

How are product categories like sarees and salwar kameez performing? Has the growing popularity of western wear impacted their sale?

Modernization has definitely hit the everyday wear segment in ethnics. Demand of ethnic clothing is always high but fusion wear has bridged the gap and is being preferred by a lot of women across the country.

How has e-commerce changed the game of selling women's ethnic wear?

Digitalization has had a huge and positive impact on all aspects of our lives, including the shopping experience. Retail e-commerce giants have taken over fashion shopping with offering quick and easy ways for consumers to order products from different parts of the country. Now, consumers living in remote areas can go online and can shop without the presence of a brand's brick & mortar store. Online sales have grown in numbers and have taken over huge market revenue in comparison to offline shopping. Online carries ease and time saving attributes which also has pushed sales for the women's ethnic wear segment.

What is the future outlook of the women's wear ethnic's category and what will be its major drivers?

Due to the heavy influence of acceptance of contemporary fashion in ethnic wear and expansion in e-commerce activities, the ethnic wear segment is expected to increase in numbers in the coming years. The key drivers of the category are influencer marketing, media exposure and changes in consumer preferences with time.





MAX Q'S: GIVING AN EDGE TO WESTERN WEAR



Max Q's is entirely process driven and has a complete in-house manufacturing control that boasts of quality and best innovation standards, good fits and affordable price range. Its best selling product comprises of PQ matic and gymwear t-shirts which are in demand throughout the year.

Upcoming Products

With an aim to maintain consistency in its production and quality, the brand is planning to launch a limited edition knitted ladies t-shirt in its collection.

Retail Mapping and Expansion Plans

Max Q's is present in a250 major MBOs and departmental stores. It's retail spread caters to Chennai, Patna and in the cities of Jharkhand, Haryana, Punjab, Gujarat, Maharashtra and western Uttar Pradesh. The brand is planning to increase footprint in Kolkata. Max Q's is also looking at sources in Uttar Pradesh. They are also looking at distribution contact in Andhra Pradesh, Kerala and Rajasthan.

Max Q's, a women's western wear brand from the house of Sai Enterprise, was launched in the year 2000. The brand specialises in producing knitted garments. It is one of the few brands which started using bio and silicon finishes on garments. The brand is known for using the best practices in terms of finishes and ensures that there is no shrinkage or bleeding of colours in their garments. It offers tops, t-shirts, kurtis, two-piece sets, jacket sets and tunics.

The brand widely caters to the age group that starts from 25 years and goes upto 50 years.



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INDIA'S EVOLVING WOMEN'S ETHNIC WEAR MARKET TO GROW TO ₹1,26,210 CRORE BY 2019

According to Technopak, ethnic wear is the single biggest category in the women's apparel market in India, with a share of 71 percent. IMAGES Business of Fashion talks to the key brands and retailers to understand how the category is evolving and transforming itself to sustain in today's competitive environment...

By Rosy N Sharma
with inputs from Gurbir Singh Gulati

India may be modernizing, and a global revolution may be gripping the country, but as people, Indians are still traditionalists at heart, preferring to don ethnic wear on occasions, festivals and weddings.

The growth in the Indian ethnic wear market has been subtle, yet steady. Changing lifestyles, rapid urbanisation and increasing fashion awareness have all led to an incremental growth of the ethnic wear segment over the past few years, with experts reporting a significant rise in demand for ethnic clothing for both men and women.

According to a study by Technopak, India's ethnic wear industry is currently pegged at over ₹82,200 crore and is expected to grow to ₹1,26,210 crore by 2019, according to consultancy firm Technopak. This market is dominated by the women's ethnic wear segment, at 83 percent.

The evolution of the women's ethnic wear category can be attributed to many growth drivers, the most prominent among them being the rising female population in India and the increase in the female workforce. These factors have translated into a huge opportunity for players in the industry to tap the increasing demand for women's ethnic wear.

Women's Ethnic Wear Market

According to Technopak, ethnic wear is the single biggest category in women's wear segment with a share of 71 percent. Within the ethnic wear segment, the saree is perhaps the most popular with an estimated market value of ₹39,350 crore – a 33 percent share in the women's wear market – and is expected to grow at a CAGR of 2.8 percent to reach ₹51,866 crore by 2027.

“Women's wear today attributes 37.5 percent of the total apparel market size.



“Women's wear today attributes 37.5% of the total apparel market size. Out of this, ethnic wear is one of the biggest categories in women's apparel with a substantial share of 71%”

—Anita Dongre,
Chief Creative Officer, AND & Global Desi



Zola



Biba



Ethnicity



Be Indi

Out of this, ethnic wear is one of the biggest categories in women's apparel with a substantial share of 71 percent. The huge demand in ethnic wear is not only attributed to festivals but also to the rising trend of pairing traditional pieces with western wear – bringing the Indo-Western trend to both casual and formal wear. Moreover, the surge in demand has led entrepreneurs to invest in the Indian ethnic wear market. As young Indians embrace traditional wear, it transforms into fusion styles. It's lovely that we as a brand can offer the best of both – heritage designs moulded into new-age silhouettes," says Anita

Dongre, Chief Creative Officer, The House of Anita Dongre, which promotes brands, AND and Global Desi.

"Women's fashion in India has come a long way and in the recent times ethnic fashion has become one the biggest drivers. The women's wear segment accounts for 87 percent of the current ethnic wear market. The unorganised segment consists of local tailors to small boutique stores that cater to the ethnic wear industry and has demonstrated steady growth over the past years and is set to grow further by 8.4 percent over the next decade. Retail expansion plans



"The rising female population in India and the increase in the female workforce have translated into a huge opportunity for players in the industry to tap the increasing demand for women's ethnic wear"

—Deepa Sureka,
CEO, Taanz Fashion (Be Indi)

across metros tier -I and -II cities will contribute significantly to the growth of the Indian ethnic wear market. It is the growth of this segment that will continue to drive the overall sector," states Ajay Kulkarni, COO, Ethnicity.

Ethno-Fusion Trend

Fashion is an ever-evolving industry. Today the perception of ethnic wear has undergone a sea of change. Young women are more open to experimenting and no longer consider ethnic wear either dull or boring.

"Globalisation has heralded new industries and increase in number of working women has resulted in increased disposable income which in turn has fueled this market segment. The Internet has exposed women to fast fashion and has resulted in awareness on fashion trends and styling. As a result women are also experimenting with fusion looks. Dresses with traditional prints, short kurtis with straight pants are making inroads in everyday fashion. These combinations make the ladies stand out be it at the workplace or at social outings," says Ajay Kulkarni.





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“A large number of customers are based in tier -II and -III cities, so these towns are very crucial for us and we are getting more than 65 percent business from these cities”

–Anil Singh Shekhawat,
Director, Pretty Woman



“Ethnic wear is not just limited to traditional occasions and festive seasons anymore. People are sporting these looks at the airport, for meetings and in parties”

–Avnish Kumar,
Managing Director, Neeru's



“Over the past decade there have been very few players who have joined the organised women's ethnic wear market. The difference between organised and unorganised players is vast”

–Kirti L Shah,
Managing Director, Zola

“Ethnic wear is not just limited to traditional occasions and festive seasons anymore. People are sporting these looks at the airport, for meetings and in parties,” says Avnish Kumar, Director, Neeru's.

Siddharth Bindra, Managing Director, Biba says that with the modernisation of consumer lifestyles and changing preferences, women's ethnic wear like the salwar kameez have transformed from their truly ethnic form to a more evolved avatar with different cuts and drapes.

“The salwars have transformed to pants, palazzos and skirts whereas kurtis have transformed to long floor length dresses, anarkalis and asymmetric flare kurtis. Today, fusion wear serves as a comfortable yet a stylish option for daily office wear, casual outing and even evening wear,” he says. With this trend in mind, Biba has changed its designs over the years, culminating in the recent launch of a modernised ‘saree kurta’, gowns and casual wear section.

The origin of fusion wear has revolutionised the industry in more ways than one. As opposed to pure ethnic wear, fusion styles are the quintessential blend

of tradition-meets-modern silhouettes – making them a perfect ensemble for almost every occasion.

“When I was in college, I used to do what is today called fusion wear. I would come back from Jaipur (Rajasthan) with big mirror-work skirts, leheriyas and bandhanis and pair them with ganjis or jeans and wear lots of silver anklets and bangles,” says Anita Dongre.

Anil Singh Shekhawat, Director, Pretty Woman adds, “Fusion wear has changed the mindset of customers drastically. Customers want to dress up in a different manner and are adopting fashion with a touch of ethnic wear and in modern styles, cuts and silhouettes.”

Kirti L Shah, Managing Director, Zola adds to this, saying, “Fusion has given a new spice to the ethnic wear collection. It gives a good option to the youth so that they can be trendy and look ethnic at the same time.”

E-Commerce: The Game Changer

Growth in the number of working women and increased disposable income has propelled the rise of online retail and



Global Desi



“Discounts, easy buying, friendly payment structures and return policies have been the chief reasons for women to shop online in India, apart from being saved from the hassle of driving and braving crowds in malls”

—Siddharth Bindra,
Managing Director, Biba

e-shopping. The increase in e-commerce shopping has given a whole lot of advantage to brands and manufacturers operating in the women’s wear market.

“The increasing percentage of working women and their demand for fashionable work wear along with time constraints have made them more loyal to online shopping. Also, reasonable prices offered by e-commerce sites attract them to keep changing their wardrobes for all occasions,” explains Deepa Sureka, CEO, Taanz Fashions.

Siddharth Bindra explains this saying that with the sudden expansion that can be observed in India’s e-commerce market, most women prefer to shop online since it saves them time and all the hassle of travelling in traffic and braving crowds in shopping malls. Also, through e-commerce, women get to compare, view and choose from a large variety of competitors, designs and styles. Discounts, easy buying, friendly payment structures and return policies have been the chief drivers for this growth in the online women’s wear segment.

“Today’s customer is digitally savvy and has a range of options to choose from, which can be accessed from anywhere in the world. Customers are up to date with latest trends and fashions. In the 90s, fashion took months to reach small cities from metros, but today, everything is online,” says Anil Singh Shekhawat.

Anita Dongre says, “The Internet has revolutionised the fashion industry in more ways than one. Retailing internationally isn’t as challenging as it used to be. E-commerce websites have been a God send, helping designers design for a wider international audience. That is also why every designer tries to create an innovative product which, while appealing to the audience, remains true to its traditional roots.”

She says that about 7 percent of the sales of The House of Anita Dongre takes place online.

“The Indian ethnic wear is slowly taking on a global colour,” says Avnish Kumar. The global market has a huge demand for women’s ethnic wear. Deepa Sureka agrees, saying that this is mostly thanks to tourists and expatriate Indians carrying ethnic Indian outfits back to their countries with them and generating awareness.



Neeru’s store



“With the entry of many international brands in the market, it is not possible to stay only in metros and away from tier -II & -III cities. We have already set foot in these markets and are looking to open EBOs here as well”

—Chaitali Giri,
Designer, Chic By ChaitaliBiplab

She explains that the global opportunity comprises two major customers—NRIs and the non-Indians. For those exploring global markets, from an e-commerce perspective, sites selling Indian ethnic wear have projected the international market at US\$ 2 billion in size.

Fashion in Tier II & III Cities

Anil Singh Shekhawat believes that since more than 65 percent customers are based in tier -II and -III cities, these towns are very crucial for any brand to succeed in the women’s ethnic wear category. “These customers are spending more and saving less, and the major buying is done for lifestyle products such as apparels, footwear and fashion products,” he explains.

Siddharth Bindra feels that their target audience has been evolving with time



Global Desi

but the audience in tier -II and -III cities is not as evolved as in the metros. “Biba gives importance to not just metro cities, but tier -II and -III cities as well. The purchase in these smaller cities is largely during festive time.”

According to market research conducted by Biba, ethnic wear is a preferred outfit for women aged between 16 to 50 years in these cities. And understanding the increased demand due to these factors, Biba has plans to further expand in these cities.

Similarly, the women’s wear brand, Be Indi by Taanz Fashions has plans to expand its presence in tier -II and -III towns and cities through Reliance stores.

“With the entry of many International brands in the market, it is not possible to stay only in metros and away from tier -II and -III cities. We have already set foot in these markets and are looking to open EBOs here as well,” says Chaitali Giri, Designer, Chic By ChaitaliBiplab. “Women from tier -I and -II cities



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THE CHANGING FACE OF WOMEN'S ETHNIC WEAR IN INDIA

- The Indian ethnic wear market has grown rapidly over the past few years with wider acceptance owing to the increase in disposable income and more women joining the workforce.
- Additionally, the religious and cultural diversity of India, where a wide range of occasions are celebrated, is among the considerable drivers of women ethnic wear market.
- The transformation of traditional clothing to modern design represents a fusion of ethnic wear with western wear to associate with young population.
- The rising female population and increasing female workforce cites a huge opportunity for players in the industry to tap the increasing demand of the ethnic wear in the country.

are aspirational as well as willing to experiment when it comes to ethnic wear including with the styles, cut and fabrics used. As the Internet penetration grows in these cities more and more women customers are following the latest trends in the market and as a result there will be a natural demand for branded fashion garments of good quality. We already have stores in cities like Bareilly, Siliguri, Durgapur, Coimbatore etc which have great business potential to cater to this growing demand,” says Ajay Kulkarni. His brand, Ethnicity – which started in Ahmedabad – is currently present in 20 cities through 31 EBOs and 63 shop-in-shops. “Fashion in tier -II and -III cities is understated, minimalistic and rates high on comfort,” says Anita Dongre. She explains that it has also been her brands’ ideology since she started designing two decades ago. Right from the onset of her career, she



Biba



AND

has believed that fashion should be accessible to all and it has been her vision to democratise fashion in India. “In the future, the plan is to take both AND and Global Desi brands to more tier -II and -III markets as well as to penetrate deeper in the metro markets,” she says.

Delivering Affordable Fashion

Biba has always been the symbol of fusion and classic design with modern silhouettes. Siddharth Bindra maintains that his brand always brings new collections, having varied modern cuts and drapes in vibrant hues and comfortable fabrics like poly cotton and classic linen. The collections are rich in design having unique and intricate beautiful prints and details. With great quality in fabric and wide variety of designs, Biba succeeds in offering the best of quality and range.

Through Be Indi, Deepa Sureka focuses on fashion oriented products that are price conscious. “We are focused on innovating style by rendering variety



Global Desi store



Chic By ChaitaliBiplab

of silhouettes in various prints and textured fabrics. These rich fabrics and prints are designed by our in-house textile designers and we get these fabrics manufactured. The cost is also controlled by our in-house fabrication," she says. All these measures are closely monitored under strict quality checks and as a result they are able to present high fashion garments in an affordable range.

"Chic By Chaitalibiplab is a ready to wear label for working women with active lifestyles, between the ages of 20 and 40. The brand prides itself on providing great everyday designs which reflect with intricate craftsmanship and Indian heritage, but are light on the pocket at the same time," says Chaitali Giri.

With an in-house state-of-art manufacturing unit, Pretty Woman too offers fashion products affordable prices. "We are going to invest in latest machineries to get production as per market demand," says Anil Singh Shekhawat.

Meanwhile, Anita Dongre asserts that her brands have always been a reflection of the woman of today and what she seeks. Her idea was to take high fashion to the doorsteps of the common Indian woman, just like Giorgio Armani ensured his premium brand was made available across Europe and the US by opening large number of stores. AND was created to fill a void in affordable everyday western wear that otherwise had only global brands which were not available in India at the time. The garments lend comfort and confidence with



Ethnicity store

"Women's fashion in India has come a long way and in the recent times ethnic fashion has become one the biggest drivers. Retail expansion plans across metros tier -I & -II cities will contribute significantly to the growth of the Indian ethnic wear market"

—Ajay Kulkarni,
COO, Ethnicity

international trends to help customers create their own personal style. Global Desi, on the other hand is predominantly India-inspired and delves deep into its rich heritage of colours, textures and prints to combine them to create international appeal.

"Both my brands AND and Global Desi are incredibly affordable, where a kurta easily retails between ₹1,000 to ₹1,500. So, even though AND and Global Desi are designer brands that are priced sharply, more people can access them. Everywhere I go, I meet women who love either one or both brands and speak about how they have a lot of them in their wardrobes, and I like that," she shares.



Global Desi

The Road Ahead

Shekhawat feels that the women's ethnic wear category will remain the fastest growing category in the next 5 to 10 years. The trend will be more towards fashion consciousness and there will be greater demand for high quality, fashionable and affordable fashion.

"As far as women's ethnic wear category is concerned, it has the potential for further growth. With the spotlight back on embracing our beautiful heritage crafts and designs, the ethnic wear segment will certainly move in the right direction," concludes Anita Dongre.



●● CHIC BY CHAITALI BIPLAB ●●



Launched in 2016, Chic By ChaitaliBiplab was formed to revive the forgotten needle craft of the Indian culture by employing rural women and housewives. The brand offers an urban pret collection in resort, casual and festive-wear for women.

Focus Customers

The brand focuses on working or highly active women in the age group of 20 to 40 years. After studying their consumer base, they realised that they need to offer Indian clothes which are not heavy or overdone with designs but, still give a heritage feel, in an affordable price range.

Product Range

The brand offers tops, kurtas, shirts, jackets, dresses, maxi-dresses, skirts, pants, palazzos, scarves, salwars, lehengas, sarees, etc. The collection showcases a balance between natural and manmade fibre with intricate craftsmanship and a high quality finish.

Category/Product Expansion

At present, the brand is only offering separates. It has plans to introduce coordinates and a new range soon.

Retail presence

Chic By ChaitaliBiplab is the second brand to be launched by its promoters in 2016 and is being retailed through 600+ multi-brand stores. The promoters have plans to open exclusive brand outlets soon.

Expected Growth

The designer label is expecting to gain 10 percent growth this fiscal year.



●● NEERU'S ●●



Renowned ethnic wear brand, Neeru's was launched with an aim to take the traditional Indian ethnic wear to a new level. The brand offers exquisite bridal finery, formal wear, office outfits, daily cottons and much more. It focuses at reaching out to a wide age group of men, women and children and believes in having something ethnic for everyone.

Product Range

Neeru's offers a huge variety in ethnic wear for men, women and kids. Under its women's range, the brand offers lehengas, ghagras, sarees, half-sarees, tunics, blouses, ready-to-wear, unstitched, and mix-and-match. The men's wear range comprises kurta pyjamas, indo-western, sherwanis, suits, kotis, shirts and trousers.

Latest Collection

Neeru's has launched a festive collection in association with actor and style diva Sonam Kapoor. The collection focus on 'the perfect marriage wear', which encompasses all

functions during a wedding – sangeet, mehandi, pheras, etc.

Retail Presence

Currently, Neeru's has 99 EBOs including one store in Dubai. The brand holds approximately 3.7 lakh sq. ft., of retail space. It is also available with large format retailers like Central, Lifestyle and Project Eve. The brand has recently launched a 1,000 sq. ft. Signature Studio in Mumbai. It has also opened new outlets in Pune and Chennai.

Online Presence

Online shopping is a game changer and Neeru's understands that well. Hence, the brand is investing heavily on its webstore, online advertisements and is even leaning towards Omnichannel retail.

Expected Growth

With its Omnichannel implemented this year, the brand is expecting 15 to 20 percent growth in sales.



•• PRETTY WOMAN ••



Women's wear brand, Pretty Woman is a chic, contemporary and smart casual line. The brand was introduced by the House of Bhavya Sales that was formed in 1989 by brothers Anil and Jitendra Shekhawat. With a widespread reach that extends to 450 cities and a dealer network of more than 1,500 across the country in, House of Bhavya Sales is one of the leading fashion houses in the country.

Product Range

The brand offers kurtis, tunics, tops, dresses, pants, palazzos, as well as coordinated and mix n' match ranges.

Category / Product Expansion

Pretty Woman is introducing shirts and bottoms among its coordinated products range.

Retail Presence

At present, the brand has a network comprising of 1,500 leading MBOs in all major cities of the country. It boasts of having the biggest network of dealers pan India. Further, it has plans to start retailing through EBOs, large format stores as well through partnership with online portals in the next two to three years.

Growth Target

The company is currently manufacturing 5 lakh units per annum and is expecting to reach 15 lakh units per annum in the next 5 years. It is also expecting growth of 35 percent from the previous year.

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●● ZOLA ●●

Established in 1990 by Pragati Fashions Pvt. Ltd., Zola started its operations as a wholesale fashion module and has now transformed into a renowned fashion brand. The women's ethnic wear brand caters to the fashion sensibilities of Tier I, II & III cities, providing them with a variety of wardrobe options at affordable prices. With awards like CMAI Apex in 2016 and 2017, Zola has now become the 'go-to' brand for the 'always-in-trend' millennials.

Product Range

'Fashion has to reflect who you are' - this is exactly what Zola aims to achieve with its array of ethnic wear and western wear (including casual and formal). Zola's ethnic range provides perfect a blend of fast fashion with traditional sensibilities without burning a hole in your pocket. The product categories comprises kurtis, skirts, tunics, tops, tees, shirts, shrugs, denims, shorts, jackets, jeggings, leggings, midies, western gowns, ethnic gowns, salwar suits, palazzo suits and skirts sets. What makes the brand even more interesting is Zola's belief that kids have every right to be fashionable. Hence, it provides a variety of ethnic and western wear for kids as well. The brand also makes sure that women and kids both have a night of comfortable sleep with their stylish nightwear variety.

Retail Presence

Zola has just forayed in to the exclusive outlets concept and already have 5 stores running in two months' time. Zola is available pan India.





SOCH TO EXPLORE 35 NEW CITIES; OPEN 100 OUTLETS IN TWO YEARS

A new classicism has been created, where, through its innovative use of traditional crafts, Soch celebrates the global Indian woman with a contemporary lifestyle – who flaunts her ethnicity as she sets trends and breaks barriers, every day...

Charu Lamba

IMAGES Business of Fashion

Leading ethnic wear brand Soch, which started its retail journey as a regional retailer by opening its first store at Bengaluru’s Forum Mall, has come a long way. Today, the brand has established itself as a key player in the women’s ethnic wear category with 120 stores spread across India.

Every Soch store reflects the ancient traditions of Indian craftsmanship in a contemporary vocabulary. A new classicism has been created, where, through its innovative use of traditional crafts, Soch celebrates the global Indian woman with a contemporary lifestyle – who flaunts her ethnicity as she sets trends and breaks barriers, every day.

Talking about the location strategy of the brand, MD and CEO, Soch, Manohar Chatlani says, “We prefer to open Soch stores on high streets, but unfortunately in every city there are only three or four streets which are workable. The advantages of being in a high street are that retailers more or less know how much business they are going to do. When you sign up for a mall, which hasn’t even been launched, you are taking a little bit of risk for you don’t know how soon they are going to be open to public, whether their cinemas, FEC zones and food courts will be good enough to attract crowds. A lot depends on these elements.”

“However, if we want to grow more, the only way is to go to malls. In India, around 100 malls are coming up in another two years. Out of these 100, there are 25 to 30 that are brilliant, and we would like to be in all of these. At the moment, we have 60 high-street stores and are present in 60 malls,” he adds.



“Apart from this, we have a regular training team for all employees, including those at franchise stores. We prefer to pick partners who are well versed in the field of retail, who know the industry well”

—Manohar Chatlani,
MD & CEO, Soch

Operating Model

In bigger cities, where the brand has a warehouse, an area manager or strong staff presence, it prefers to open company-owned stores. However, in Tier II and III cities where it has just one or two stores and which are difficult to reach, it prefers to work on a franchise model.

“Since we supply goods, quality control is done by us. As far as service quality is concerned, we have an audit team, outside agencies who conduct mystery audits. Only when we are satisfied that everything is running smoothly, we hand over the reins of running a store to a franchise partner. If we are not satisfied, we appoint our own store managers – even for franchise stores – to ensure that service standards are maintained,” explains Chatlani.

“Apart from this, we have a regular training team for all employees, including those at franchise stores. We prefer to pick partners who are well versed in the field of retail, who know the industry well,” he adds.

At present, the brand has 90 company-owned stores and 30 franchise-owned stores.

Production & Design Capabilities

The production is done both in-house as well as with select factories who work exclusively with Soch. The brand has a few in-house designers and it also draws upon the designers of partner factories for inspiration and range planning.

According to Chatlani, “We manufacture only about 3 to 4 percent of our product. We buy the product, but we buy in bulk. We buy in bulk

and pay on time and hence we are able to get the best of goods. We source goods from the best of manufacturers from across the country. One reason that we don’t get into manufacturing is that it limits our taste and variety. If we employ an in-house design team, our breadth, taste and concepts would become very limited. In this way we get an opportunity to pick the best from in the country – specialised embroidery from Lucknow, prints from Jaipur, etc. It also widens the spectrum of goods that we deal in.”

“Currently we offer bespoke tailoring only in select stores for select products like dress materials, saree blouses and ghagra choli. The bespoke market does have a huge potential for special occasion garments such as ghagra cholis, gowns, bridal saree blouse designing and stitching. However, our service is offered more as a convenience factor of the customer,” he states.

Pricing Strategy

The brand, which targets the modern Indian woman largely between the ages of 22 to 35, is competitively priced as compared to others in the same space while providing quality which is as good as the competition, if not better.



Innovation to Enhance Consumer Experience

Soch is a pioneer in bringing innovation to enhance consumer experience. The brand was one of the first retailers in India to digitise store experience, helping consumers visualise products better through video catalogues.

“Especially in ethnic wear, touch and feel becomes even better if you see the product come alive on video. To create an experience, we believe in taking our store to where the consumer is. In an increasingly digital world, we have achieved that objective by complementing our retail stores with the Soch website and our omnichannel app to enable our consumers to buy what they want, when they want. Shortly, we will be available to our consumers internationally on our global website,” states Chatlani.

Soch also bagged the IMAGES Most Admired Retailer of the year: In-Store Technology 2018. “Our stores are very different as compared to other ethnic players. The brand has installed LED catalogues at each store. These catalogues displays the designs available at the store and if any design goes out of stock, it stops displaying that,” says Chatlani.



IMAGES Business of Fashion



Soch stores are very different as compared to other ethnic players. The brand has installed LED catalogues at each store. These catalogues displays the designs available at the store and if any design goes out of stock, it stops displaying.

“The next step would be that if a customer has bought a particular product, when a similar product is made by us, he/she will get a mail or a message with that particular image. We will be targeting customers according to their taste and preferences,” he adds.

Omnichannel Strategy

Soch started e-commerce four years ago and since then, the brand has grown 100 percent year-on-year.

“There is an increase in the reach of internet in Tier II and III cities and they are proving to be a key player in our growth. There has been a massive increase in sales to non-metro cities from when we started,” says Chatlani.

“Initially, kurtis with low price points were a major contributor to our online sales, but now with customers gaining confidence in the online market, our higher priced points categories such as sarees are among the top contributors. We expect this trend to continue,” he says.

For the next few months, the brand will be concentrating on increasing inventory visibility by adding

non-catalogue products on the platform, enabling their website soch.in, investing in marketplace order fulfilment by stores, exploring endless aisles and self-checkout kiosks at malls and high-traffic stores, launching a front-facing omni-app to give customers one view across the channels, enabling geo-tagging to promote cross-channel sales and mapping the customer’s journey across physical and digital channels to deliver a true Omnichannel experience.

Future Plans

The brand, which made ₹352 crore in sales last year and is targeting ₹400 crore this fiscal, is planning to strengthen its presence in the South, West and East markets. It intends to enter another 35 cities over and above the 42 it is currently present in.

“Traditionally, metro cities have always contributed more towards sales but with the flow of information and easy access to a wide range of brands, we are seeing great momentum coming in from non-metro towns as well,” says Chatlani.

“In the next two years, we will be adding another 100 stores and we will be spending ₹60-₹70 crore to aid our expansion plans – most of which will come from internal accruals,” he concludes.





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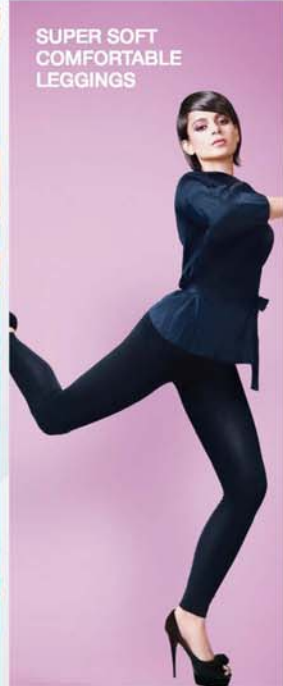
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WOMEN'S ACCESSORIES ARE A WHOLE NEW MARKET OF OPPORTUNITY FOR RETAILERS

From a bag for work to a bag to be carried for parties and may be one for a casual evening out, the collection of handbags in a women's wardrobe has expanded beyond imagination. The same is the case for a number of women's accessories - including scarves and belts, fashion jewellery. IMAGES Business of Fashion puts together a detailed analysis of the market dynamics and industry expert opinions on India's burgeoning accessories market...

Zainab S Kazi



Radhika Mishra is spoiled for choice. Literally. She has a tough time deciding which bag would go well with her outfit each time she opens her wardrobe as her collection includes more than 25 handbags in a variety of colours, prints and styles. Once a bag has been decided upon, she faces the dilemma of pairing a scarf with her plain white shirt, to help with a little glamour for a dinner party post work. She adds a funky neckpiece and a chunky bracelet for good measure.

Such is the life of a woman today whose wardrobe is filled with excessive accessories – from fashion jewellery and bags, to belts and scarves. Whether it is demand that has led to supply or supply that has given way to such intense demand is a question akin to solving the chicken and egg mystery. But whatever the case, the increasing demand for accessories has all brands scrambling to provide women with what they want – anything from belts that come with crystals studded on them to scarves that reflect modern art.

A few years ago, accessories were something which were reserved only for a wealthy, but today, walk into any department store and the accessory section is filled to the brim with outfit add-ons that appeal to those with jazzy tastes, to those who are looking at something subtle, and of course at a price that is pocket friendly.

Bagging the Accessory Crown

Setting the context of the story, Dilip Kapur, the founder of India's most coveted brand for leather bags and accessories – Hidesign says, "Women's accessories retail has undergone a sea change in terms of format and consumer-buying behaviour. Along with the increase in disposable income, brand awareness, development and modernisation of infrastructure has played a major role in defining the changing dynamics of retail spaces."

Dilip Kapur attributes the growth to the emergence of Tier I and II cities, women seeking financial independence which invariably has an impact on her spending potential, growth in retail spaces across high streets, penetration and acceptance of online shopping and most importantly, greater access to affordable fashion across different price points. Keeping these factors in mind, it shouldn't be surprising to note that Hidesign's leather goods business is around ₹160 crore.

On the brand's current reach across the country, Dilip Kapur says, "75-80 percent of our customer base comprises of Indians and we have 84 stores in India; we are getting another 16 stores up soon."

Hidesign has an extremely strong presence online as well. Highlighting an interesting observation on regional differences affecting shopping patterns, Dilip Kapur states, "Delhi region is the largest and accounts for higher sales and the south cities tend to have higher sales of work bags."

Vicky Ahuja, Director Sales, Baggit points out that the requirement for accessories is driven alongside the apparel industry. "Accessories are no longer viewed as optional wear. Women are naturally intuitive about what they wear, but now they are more mindful about how they pair accessories with their entire ensemble," he explains.

Baggit, started with one store in Mumbai and currently retails in 100+ cities through 50+ exclusive Baggit stores and is present in 1,000+ counters pan India. The current turnover of the brand stands at ₹150 crore+.

Talking numbers, Rajat Asawa, Chief Executive Officer, Shaka says, "The accessories market in India is sized at approximately ₹25,000 crore and has



"75-80 per cent of our customer base comprises of Indians and we have 84 stores in India; we are getting another 16 stores up soon"

–Dilip Kapur,
Founder, Hidesign



Red Riding



“Accessories are no longer viewed as optional wear. Women are naturally intuitive about what they wear, but now they are more mindful about how they pair accessories with their entire ensemble”

—Vicky Ahuja,
Director Sales, Baggit

been growing steadily at a rate of 20 percent per annum. India is still at a very nascent stage as far as branded accessories are concerned, and a majority of the stakes are still held by unbranded products coming out of the unorganised retail sector.”

Shaka offers an impressive collection of luxury handbags with the USP being that of minimalist designs and highly organised interiors.

Talking specifically of jewellery, Jacqueline Kapur, Founder and CEO, Ayesha Fashion Pvt. Ltd. – which has been wowing customers with its brand Ayesha – says, “When we entered the scene in 2009, the urban Indian woman was not really accessorising her everyday outfit.

If she wore jewellery at all, it was traditional gold jewellery. The last 10 years have brought a dramatic change with globalisation of entertainment through television shows, online video content, and social media.”

Today, in spite of a decade gone by, Ayesha is still the only homegrown brand which covers the whole spectrum of fashion accessories for girls, boys and kids with a very strong online and offline presence. This Pondicherry-based brand has managed to spread its footprint across the country with more than 20 EBOs and over 70 MBOs. They wrapped up the last financial year with approximately ₹12 crore and this year they estimate a further growth of 20 percent.

Sharing an interesting perspective on the growth of the accessories market across different cities and towns within India, Parimal Mehhta, Co-Founder, Horra says, “I see significant growth in both Tier I and II cities. Tier I cities, though competition is tough, will see an influx of international brands. Tier II cities, on the other hand, will witness growth because of the consumer shift from unbranded to branded accessories, mainly because of the increase of women’s disposable income.”



Shingora



Starting its journey in 2016 with watches, Horra today has expanded to include bags and other accessories as part of its portfolio. With a presence across India through their online and offline channels, the brand is working towards being a one-stop-shop for lifestyle shopping, carrying products like club wear and even bespoke shoes.

Stealing The Show: Shawls & Stoles

Another accessories which have become a staple in women's wardrobes are shawls and scarves. Paras Mahajan, CEO, Red Riding – a brand that specialises in shawls and scarves – says that the market for shawls has grown from necessity to being an important fashion accessory. He states, "We are trying to revamp our product according to the demand of our customers which comprises youth. Not long ago, shawls were associated with a piece of cloth that helped keep the body warm but now the perspective has undergone a sea of change. We have shawls that come as wraps, poncho, button-up and tubes. Each has a different feature and can be worn to enhance to overall look of the apparel worn with it."

An experimentation with fabrics has contributed to the growth of shawls. Explaining the how of it, he says, "Majorly we prefer wool but to make the product cheaper, we also use acrylic (which is fake wool). We use wool spun, wool blends, cashmere, modal, fur and jacquard as well."

Priyanka Ahuja, Fashion Consultant, Ahujasons adds, "Regardless of latest trends, shawls are always in fashion. This luxurious fashion piece is always at the top of the accessory list as it shows the roots of Indian culture and tradition. If we talk about metro cities, then high fashion stoles have always been the favorable choice whereas in non-metro cities people are more appreciative of traditional handwork and fine embroidery. Lucknow and Kanpur remain untapped market for shawls. I believe Pashmina shawls are well-suited for the elegant styles of these two cities, but they haven't as yet received the right exposure here."

Amit Jain, Managing Director, Shingora points out on how shawls have always occupied the place of an intricate wedding wear accessory. He says, "Various stylised, trendy and fashionable shawls, weaved with traditional concepts of art and history – Madhubani paintings or Kullu embroidery – hold on to the ethnic value of shawls but when a contemporary touch is thrown in in the form of colours or designs or patterns, they become extremely stylish as well as an exclusive fashion product."

Shingora is all set to expand to offer dupattas with zari borders, silk blends, a touch of Swarovski, embroideries and even the ombre-dye technique.



"With economic liberalisation several global brands have set base in India with multiple outlets across cities and Indians are now privy to global fashion trends"

–Priyanka Ahuja with Bhuvan Ahuja,
Fashion Consultant, Ahujasons



Horra



Horra



Horra



“Shawls have always occupied the place of an intricate wedding wear accessory. Various stylised, trendy and fashionable shawls, weaved with traditional concepts of art and history hold on to the ethnic value but when a contemporary touch is thrown in in the form of colours or designs or patterns, they become extremely stylish as well as an exclusive fashion product”

–Amit Jain,
Managing Director, Singora

Demand Drivers

A rise in the population of working women, who are confident as well as financially independent is one of the main factors of growth in women’s fashion accessories. Apart from this, a tremendous exposure to international trends in India has furthered this trend of styling clothes with accessories.

Priyanka Ahuja says, “With economic liberalisation several global brands have set base in India with multiple outlets across cities and Indians are now privy to global fashion trends. This increased exposure has consequently led to an increase in demand for these products - whether through the global brands or domestic brands. This is supported by the fact that India is one of the most rapidly developing economies in the world.”

Highlighting the growth drivers on the supply side, she further points out the contribution of corporatisation in retail, “With the entry of several foreign

brands and large chains in the fashion accessory industry has made the market more organised, leading to higher standards of distribution and marketing and improved levels of quality, product designs and services offered. And it’s not just international brands. With a growth in demand, several domestic brands have been able to gain a strong share in the market, with their ability to offer high-quality good as at reasonable prices viz a viz international brands.”

On the growth drivers for fashion jewellery, Jacqueline Kapur highlights an interesting observation. “Women are consuming a wider variety of media from all parts of the world today. There are putting together outfits from Pinterest boards, taking inspiration from international pop artists or fashion bloggers and shopping these looks online,” she explains.

The E-Commerce Revolution

The rise in demand for accessories can also be credited to the efforts being put in via the online channels both by the brands and e-commerce portals like Amazon, Flipkart, Myntra etc. Accentuating their role, Priyanka Ahuja says, “Big brands and retailers operate through multi-channel or Omnichannel structures, making the products



“Statement earrings and layered necklaces are adding flavor to ethnic wear along with waist-cinching belts with buckles. Tiny 90s-style sunglasses are the new sensation”

—Apeksha Patel,
Founder, E2O Fashion

much more standardised and easily available. Also, the emergence of new fashion websites has led to a massive expansion and diversification in the accessories market. Accessories such as bags, wallets, belts, scarves, hats, glasses etc. are heavily promoted on such online channels and come with the enhanced advantage for ease of purchase.”

According to her, the online channel is going to lead the way for further growth of this segment. “The real push and growth will come from the online world. The accessories market is growing in double digits and this is creating space for multiple brands. We are witnessing intense competition. With the ease and more and more acceptance of online shopping and payments along with the availability of the products in more and more cities, the industry will gain a substantial push in the coming years.”

Abhinav Kumar, CEO and Director, Sugarush, adds, “E-commerce platforms play a major role in pushing forward the women accessories market in India. This is mainly because, online shopping is convenient and often leads to impulsive buys.”

Reiterating on the push being received from the online channel, Indranath Sengupta, Head of Retail, Kompanero says, “Online retail plays a major role in giving a push to women accessories in India. Higher disposable incomes and increased exposure due to various e-commerce platforms have led to the increase in demand for more and more accessories.”

Tracking Trends & Top Performers

Citing the top three performers from the brand portfolio, Dilip Kapur points out that work bags occupy the top slot followed by wallets, evening bags, sunglasses, belts and then shoes. “Bum bags or fanny bags, convertible travel bags and backpacks are accessories that are trending,” he says.

Unlike in apparels, the culture of following seasons for accessories is not very strong. Where fashion bags would have prints that depict the hues of summer and winter and also have some special range during monsoons, there is no dedicated effort to launch ‘season’ wise collection.

Dilip Kapur aptly explains this saying, “Seasons make sense for apparel. You don’t see seasons affecting accessories overall. We feel the customer wants to see something new every month.”

Sharing his views on whether or not launching collection per season makes sense for accessories, Rajat Asawa says, “A customer today is spoiled by choices given and has a very short memory.

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Red Riding



Kompanero

Since there are so many options available, she/he tends to get bored quickly. Brands therefore need to be on their toes to keep offering exciting new designs to the customer. I believe this trend of collections based on seasons is slowly catching up in the accessories market as well."

On the styles that are in trend, Parimal Mehhta reveals, "This year, we have seen bags in all shapes (oversized totes to micro bags) and sizes (circular and irregularly shaped). There was also heavy experimentation with materials (transparent material) and textures (lots of furs and over the top fringes). It was also good to see prints, prints, prints!"

Jacqueline Kapur sees a good movement for the Boho-look when it comes to jewellery. This look has an amalgamation of Indian and Western elements. She says, "Tassel earrings are an important piece of the Boho puzzle, and they are selling like hotcakes. In the pure Western segment, multi-layered necklaces with small pendants are doing well and in earrings hoops in all sizes are their go-to picks. The predominant trend in the western segment goes to minimalist designs. Thin chains with tiny pendants have emerged as top sellers this season for the daywear fashion. The party look of autumn-winter 2018 is dominated by chunky metal earrings, which are more oversized than ever. Even in the ethnic section, the bigger the jhumkis, the better they sell."

Keeping in mind the onset of festive season, the demand for all that is bling is on a rise.

Reiterating this, Apeksha Patel, Founder, E2o Fashion says, "Statement earrings and layered necklaces are adding flavor to ethnic wear along with waist-cinching belts with buckles. Tiny 90s-style sunglasses are the new sensation. Silk scarves are being featured heavily as an accentuator on flowing dresses, bag straps, headwear, belts and even



"I see significant growth in both Tier I and II cities. Tier I cities, though competition is tough, will see an influx of international brands. Tier II cities, on the other hand, will witness growth because of the consumer shift from unbranded to branded accessories"

—Parimal Mehhta,
Co-Founder, Horra

as unconventional ways to tie shoes. Chunkier cuff bracelets and big bangles with striking and sculptural designs are stacking up the arm and making a statement this season. Designs featuring autumnal leaves in brooches, necklaces & earring are adding a contemporary feel to the traditional attires."

On the shoes and caps, she further adds, "Transparent shoes and bags are making a true fashion essential. Dramatic hats and sailor caps are something to watch out for as well. Round accessories are making a lasting impression be it sling bags, hoop or round earrings and chain neckpieces with bigger and bolder look giving an enigmatic appeal in sleek and elegant form."

Highlighting on the trends that customers can expect to see in terms of shawls and scarves, Paras Mahajan says,



and come at an economical price tend to sell well.”

Her shall be launching shrugs and launch jewellery scarves to offer a wider range to their customers.

Shopping Patterns, Growth & Sales

Where premium accessory brands meet loyal customers perhaps twice or thrice in a year, the pocket friendly and high on fashion accessory brands experience repeat purchases much more often. Elaborating on the shopping patterns of a typical Hidesign customer, Dilip Kapur says, “Hidesign loyal customers repeat purchase every 4 to 6 months. Some of the purchases are for gifting especially at airports. Also there are a wide range of products that keep customers returning to Hidesign such as briefcases, city bags, back packs, wallets, belts, sunglasses, shoes, travel bags etc.”



“Last year we introduced a collection with fur as our focal point. This year plan to launch wool with decoration of sequence and stars and we are also making some style so that the customer can relate those with the accessories as well.”

Priyanka Ahuja adds, “Though traditional embroideries are breathtaking they might not always complement today’s outfits. We have taken ancient ideas and portrayed them with a modern twist. We have introduced a kind of Renaissance to shawls by combining techniques like hand painting, hand cut jaali and tanjore to pashmina which never go out of fashion, suiting all age groups.”

“With the largest segment of Hidesign customer is from 25-35 and second largest below 25, the main space for us to reach out to them has been digital. All our stores are fitted with TVs that play videos on the brand and new collections. Hidesign as a brand is full of stories because we make our own products and communication through videos helps us in connecting to our customers. It is often these stories and unique design and product philosophy that brings our customers back,” he adds.

According to him, an online presence invariably does give a push to offline sales too. “Online sales tend to be price sensitive and often allow first time customers to experience Hidesign.”

Sharing Hidesign’s sale from online channels, he says, “At present online contributes about 20 percent of our revenue. We ensure all collection launches are available in our physical as well as online stores, and in case a product is sold out online, we procure it from

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“Plain dye stoles are quite popular as they match with the maximum outfits. We have noticed that stoles that are good in quality and come at an economical price tend to sell well”

—Deep Agarwal,
Director, Knot Me

On the choice for fabrics, she adds, “We use high-end fabrics such as Pashmina and blends, Merino wool and blends. Blends are of mainly silk or cotton (all organic fibres). Pashmina’s are one of the most popular fabrics that been used in the high- end shawls and also popular among the customers. In pashminas, Ikat and moonlight shawls and stoles are very popular among customers. These enhance the overall look of outfits making them more royal and elegant.”

Talking further on trends, Deep Agarwal, Director, Knot Me says, “Plain dye stoles are quite popular as they match with the maximum outfits. We have noticed that stoles that are good in quality



“The space share allotted to accessories in the women’s apparel section in MBOs is dominated by bags; probably around 15-20 percent of the women’s section. 8-10 percent of the space is dedicated to accessories like fashion jewelry, sunglasses, and watches. Scarves, hats, headbands, bows, socks are relegated to even lesser space”

—Jacqueline Kapur,
Founder & CEO, Ayesha Accessories

Picking up on the Potentials

According to Dilip Kapur, travel and crossover products are interesting trends to watch out for.

“We recently launched a new collection called ‘Pondicherry Paris Collection for Hidesign’, which has a range of chic products that make travel a pleasure like soft shawls, big sunglasses and range of pouches to organise travel needs. Most of these products are unisex, with clean refined lines and details.”

He further adds, “We also launched a collection ‘HidesignxKalki’ in collaboration with Kalki Koechlin recently which comprises of fun everyday backpacks to chic party bags. In terms of shapes, the collection has a wide range from day to night bags, which highlight Kalki’s sometimes relaxed, thoughtful lifestyle to statement pieces for her dazzling nights out.”

Sharing his take on the trends, Vicky Ahuja shares, “Fashion accessories have become an expression of the attitude.



stores. Overall, we grew a little slower last year than expected both due to demonetisation and GST. We grew about 15 to 16 percent. This year we hope to grow above 20 percent. This year, Hidesign will be entering new airports that are now privatized for retail. Internationally, we are exploring new spaces such as Sarajevo, Indonesia and solidifying our presence in Kenya and Portugal and Spain. We are present in 24 countries and our products are available in over 2,000 stores worldwide.”



EZO Fashion

DOS & DON'TS FOR DESIGNING ACCESSORY STORES

DOS

- Marketing can bring a customer to the store. A good VM will bring the customer in.
- A strong focal display is important.
- Your store is the best brand experience you can offer your customer – design your store accordingly.
- Place merchandise on your end caps that will generate the highest gross profit
- Do your very best to keep impulse items close to checkout areas
- Take advantage of beautiful walls which might include brick or windows

DON'TS

- Don't keep your shelving and displays messy and dirty
- Lack of inventory
- Don't allow your retail displays to get stale

Courtesy: Dilip Kapur, Hidesign

Recent trends include clutches, both for formal wear and a casual event, from glitzy, box style, metal-framed envelope style clutches to a handy range for carrying important belongings such as phones and cards. Then we have seen sleek cuts and textured saddle bags, functional and official backpacks, belt bags and handbags: whether in transit at the airport, shopping, office or at a party. The wide range of patterns along with vibrant hues of colours, both solid and metallic variations are the key trends being followed currently.”

Moving away from talking about colours and styles, Indranath Sengupta talks about how the ‘sustainability’ feature is driving demand. He explains, “Right now, the new entrants in the market are all about sustainability. Even the established brands are branching out to offer customers products that are sustainable, vegan, made from natural/organic products, which do not harm the environment etc. We believe in this principle and our bags are made from naturally tanned leather.”

Positioning at Stores

The accessory category has grown to have a special section for itself in any department store though as compared to apparels, the space is still relatively less. Perhaps in years to follow, we shall see a dedicated floor for accessories keeping in mind the increase in demand for them.

Sharing his point of view on the current dynamics with regards to space, Vicky Ahuja says, “While the space for women’s clothing has now become segregated across floors into western and Indian at multi-retail outlets, the accessories placed around are mostly complimentary to the style portrayed on the floor. The space has increased from just a shelf shared by multiple brands to an entire wall. The store layout, placement and shelf design along with the visual

look and feel of it, play a huge impact on the sale of accessories. Most of the larger retailers have gotten this down to a science and they understand the influence a well-placed accessory can have on a consumer’s buying impulses.”

Where fashion jewellery, belts and scarves are making a way into occupying the shopping spend of a woman, bags still hold the number one position hence it implies that the shelf space in MBOs is partial towards bags.

Jacqueline Kapur says, “The space share allotted to accessories in the women’s apparel section in MBOs is dominated by bags; probably around 15-20 per cent of the women’s section. 8-10 per cent of the space is dedicated to accessories like fashion jewelry, sunglasses, and watches. Scarves, hats, headbands, bows, socks are relegated to even lesser space.”

Conclusion

Citing a roadblock that if one can overcome would invariably boost the market, Rajat Asawa says, “One challenge that I think we currently face is the differentiation in the availability of finance, just like consumer finance has picked up on the consumer durables sector, the accessories finance segment needs a whole lot of improvement, zero cost financing on credit cards will go a long distance in increasing consumption. Aspiration is not the problem we face, accessibility is.”

Dilip Kapur concludes, “I would say that future looks extremely positive with the largest population between 15-35 years we are going to have more women entering the work industry. With more women getting to work and getting professional degrees, smart accessories at work and travel are only going to increase.”



●● BAGGIT ●●

From a single store in Mumbai, Baggit has become one of the largest selling brands with a strong presence in India and the UK. In India, the brand currently has presence in 101 cities including metros and Tier II cities with 50+ exclusive outlets and 1,000+ counters pan India. Internationally, it has made foray into the UK market and is looking forward to venture into the Middle East.

As a fashion-conscious brand, Baggit has always believed in offering cruelty-free, eco-friendly products to the consumers. The brand's strong belief in 'fashion without cruelty' and has won a PETA Progy award in 2013. Also, it has received awards from Myntra, Shoppers Stop, Inorbit and Central for being the most admired fashion brand in the accessory category.

Product Range

Baggit offers handbags, sling bags, wallets, multipurpose pouches, belts and caps. The products price range starts from ₹1,000 to ₹4,000 and onwards.

Category / Product Expansion

Baggit has always focused on providing optimum product mix to cater to all customer segments. The brand is aiming at developing its value line of merchandise for addressing the needs of the price conscious customers who does not want to compromise on basic quality.

Retail Presence

The brand started with one store in Mumbai, at present it is being retailed in 100+ cities through 50+ exclusive brand stores and 1,000+ counters pan India. The company counts each store as an accomplishment, as each store presents a different challenge and growth prospect.

Growth Targets

Baggit had a turnover of ₹150 crore-plus with an estimate of double digit growth this year. The brand expects to grow exponentially over the next few years.



Online Presence

Baggit is present across all popular marketplaces including Amazon, Flipkart, Myntra, Tatacliq, etc. The brand also has its own e-commerce website www.baggit.com, which contributes to the overall business topline and is growing tremendously.

Turnover

The brand is expecting a double digit growth this fiscal.





•• E2O FASHION ••

Contemporary accessories brand, E2O Fashion delivers an eclectic creation that spills elegance with a modish approach. E2O Fashion introduced its first handbag in 2013, today celebrates a remarkable growth in the market. With an immense likeliness towards the handbag category, it launched its contemporary jewellery line this year. Through its range of jewellery collection, E2O Fashion intends to fill the void this segment lacks in the Indian market.

Product Range

E2O Fashion offers a contemporary range in handbags from hobo bags, totes, satchel, sling bags, clutches, fanny packs, wallets, laptop bags, bag-in-bag to backpacks and trendy range of stud earrings, drop earrings, hoop earrings, dangler earrings, huggie earrings and tassel earrings.

Category / Product Expansion

With the brand building its presence in the accessories market, E2O Fashion shall expand its product offerings by launching belts and shoes thereby extending its portfolio in near future.

Retail Presence

E2O Fashion has a pan India presence through various distribution channels. The brand has presence in more than 150 large format stores. It has its own 8 exclusive kiosks and 100 SIS formats. It is also available in 18 Deal standalone stores.

Online Presence

E2O Fashion outreaches its customers on online space through Myntra, Jabong, Ajio, Flipkart, Amazon, Paytm and Shoppersstop.com. With e-shopping, online presence has helped the brand to establish much faster visibility and availability to the doorstep of potential customers. It has witness a growth of 100 percent this year as compared to the last financial year. It foresees a huge potential in revenue through online space. Moreover, it is soon launching its e-commerce site to cater the target audience.

Estimated Growth

E2O Fashion is expecting a growth of 60 percent as compared to the last financial year.



•• HORRA ••



Launched in 2016, Horra is an accessories brand that sells affordable watches. Later the brand also introduced handbags, which picked up quickly. This encouraged the brand to increase its range of products, not just in variety but also in price. Therefore, apart from Horra, which comprises its core products, there is Horra Luxury, which offers a premium range of bags, watches and accessories.

Product Range

Horra offers watches, bags and accessories for men and women. The brand echoes the aspirations of the millennials who are ambitious and progressive.

Category / Product Expansion

Horra aims to be a complete lifestyle brand, carrying products like club wear and even bespoke shoes.

Retail Presence

In a short span, Horra has been successful in making its presence felt. The brand has 4 SIS format store and 3 Horra standalone counters in renowned malls. It is also available in 27 gifts-watches-luggage-and-stationery shops. It has partnered with 46 retailers/MBOs in Mumbai and Pune to retail its brand.

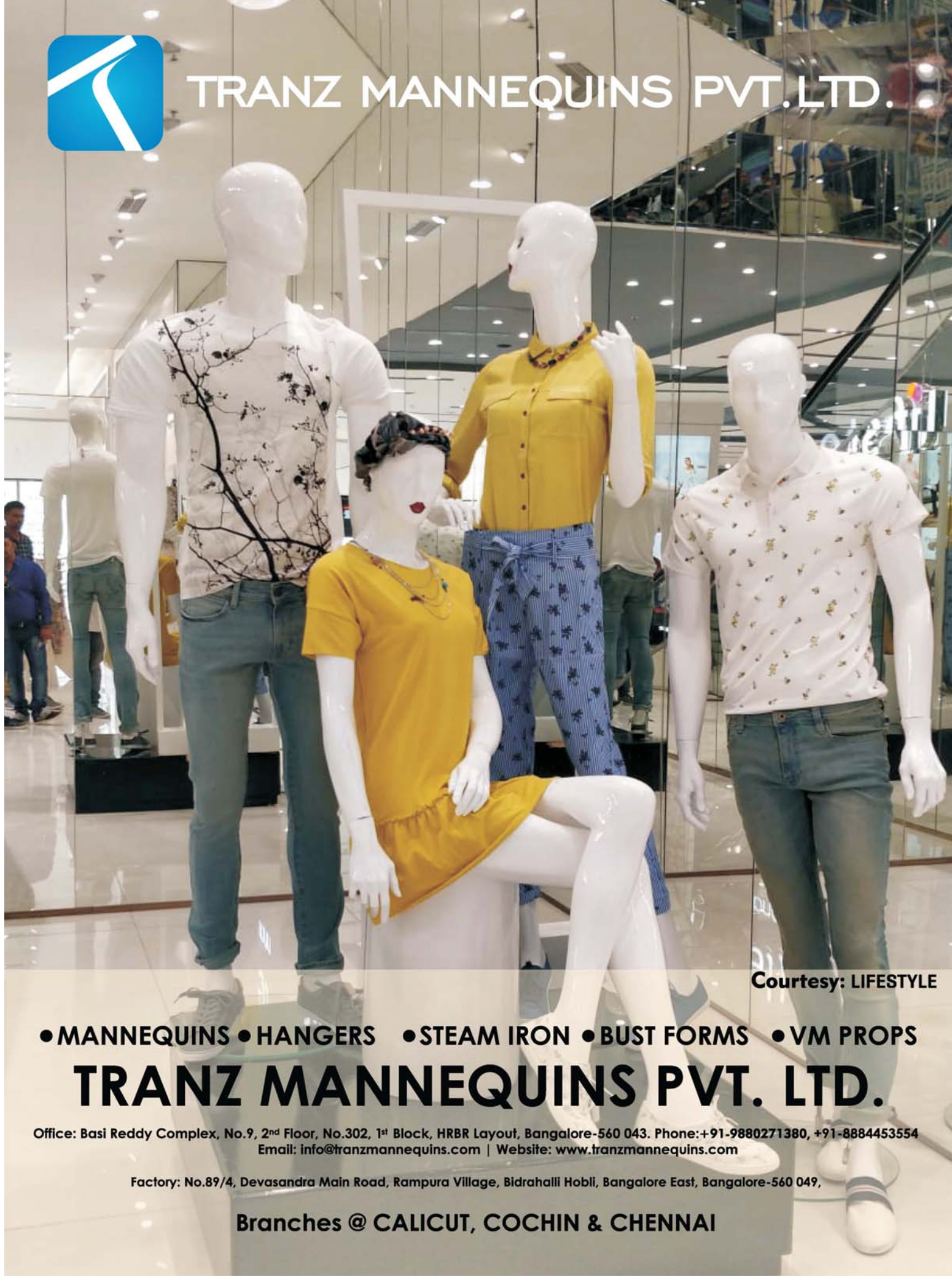
The brand will open its exclusive brand store in Chandigarh soon. In the next six months, it plans to launch 4 exclusive brand stores and take its retailers/MBOs count to 200.

Online Presence

The accessories brand is available on all major shopping portals like Jabong, Myntra, Amazon, Flipkart and Shoppersstop.com. It also has its own e-commerce website, www.horraluxury.com. Acceptance to its product range on online business is overwhelming and it has given them an understanding as how to take the business ahead.



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Courtesy: LIFESTYLE

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IT'S ALL IN THE JEANS!

WOMEN WILL MAKE UP LARGEST DENIM CUSTOMER BASE IN INDIA BY 2027

A pair of jeans is a wardrobe staple, a timeless style statement for any woman fashionista. Over the years, the women's denim market has gained prominence due to the fact that jeans are comfortable, functional and easy to maintain, which is crucial for a price-sensitive buyers in a price-sensitive country like India. IMAGES Business of Fashion maps the women's denim market size and highlights its challenges and opportunities.

Rosy N Sharma

Denim is becoming increasingly acceptable amongst the Indian consumer ever since Indian women have become more and more willing to adopt western fashion. Over the last decade, the denim wear segment for women has witnessed profound growth, owing to westernisation and urbanisation. Various other economic factors such as an increase in disposable income and the number of working women have indirectly contributed to women consumers spending more. This in turn has favourably impacted the fashion retail industry in India.

“The organised or branded market is not just favoured in the urban areas but also in the rural towns. As more international brands launch in the country and move to Tier II and III cities, a growing preference is seen among consumers to acquire branded apparel and its aspirational value. In women's wear and exclusively pertaining to denim, India is a big market and continues to grow year-on-year at an increasing rate,” says Neha Shah, Head-Marketing, Pepe Jeans.

“In recent years, India has seen an influx of a large number of MNCs in the retail market. This has led to awareness and an increasing sense of global fashion. Denim is considered as one of the most versatile fabrics, whether it's casual wear or an everyday use; denims are also accepted as work wear on Fridays in many corporates today,” adds Manjula Gandhi, Chief Product Officer, Numero Uno.

India is a big market with a lot of untapped potential for women's denim, with the market growing robustly over the past few years. For a majority of Indian women, denim is not just a casual wear any more and more of a fashion statement.

Denim is on a high growth path as consumers find it to be versatile, fashionable and comfortable, with vast choices available to them in terms of fabrics, finishes, looks, fits, colours and functions. The introduction of stretch fabric into women's denims has largely taken care of the fit and comfort aspect which is an inherent necessity of women's apparel.



Numero Uno

Market Size

According to research body Technopak, the denim apparel segment accounts for a significant share of the casual wear market. The market size of the Indian denim segment was estimated at ₹23,076 crore in 2017 and this was projected to grow at a robust CAGR of 12.7 percent to reach ₹41,947 crore by 2022 and ₹76,258 crore by 2027. Out of this, the men's denim segment contributes about 84 percent of the market while the women's and kids segments contribute 10 percent and 6 percent respectively.

Denim is considered the most versatile fabric for men with multiple applications over casual wear, work wear and everyday wear.

Among Indian women, jeans or denim trousers are the most popular articles. Women across different age brackets and spanning all shapes and sizes like to wear denim as it is comfortable, functional and durable. Denim is also gaining popularity in athleisure form among women owing to the comfort provided by stretch denims and women who are not at ease with western wear have taken to pairing jeans with Indian ethnic wear like kurtis. This mix-n-match style is gradually picking up – particularly among women in small



“In recent years, India has seen an influx of a large number of MNCs in the retail market. This has led to awareness and an increasing sense of global fashion. Denim is considered as one of the most versatile fabrics, whether it's casual wear or an everyday use; denims are also accepted as work wear on Fridays in many corporates today”

–Manjula Gandhi,
Chief Product Officer, Numero Uno

towns – who come from a traditional background and it is likely to fuel the growth of the segment.

Despite having the smaller share of 10 percent, the women's denim category is expected to witness higher growth rate of 13.1 percent during the period 2017-27. The Indian women's wear market, which thrives on fashion trends, is catered to by brands' constant innovation in denim fabrics such as stretch, washes, designs, new colours and feel.

Denim Consumption & Challenges

The average number of denim items owned by an Indian consumer is much lower in comparison to the US and Europe. The number is even lower than countries like Brazil and China.



Deal Jeans store



Deal Jeans store

clusters across the country has opened a plethora of opportunities for regional brands and retailers, especially since most unbranded players operate on the lower price segment where awareness towards quality, finishes, washes, designs and fits are relatively low.

Nonetheless – even with fashion trends changing in the blink of an eye and women being more style-conscious than ever before – adapting to changing fashion trends and the ability to innovate has been a concern for branded players in the denim category in India.

The industry is fragmented with only 20 to 30 percent of denim apparel being manufactured in organised units, with the rest being dominated by unorganised units.



“Large organised garment manufacturers are missing in the country, making us weak in innovations and we have limited vertically-integrated units, which is the need of the hour for many large buyers. Compared to global standards, our human skills have not grown the way they should have. Also, the cost of production is not so competitive that it alarms us into focusing on efficiency to reduce costs”

–Sameer Patel,
Founder & Director, Deal Jeans

DRIVING FACTORS FOR DENIM MARKET

Some of the key driving factors for the denim market in India are:

- An aspirational youth (15 to 29 year-old) with higher spending power than previous generations, which makes up 26 percent of the consuming population
- A wide range of consumer segment that considers denim as an apparel of choice owing to its comfort and style
- Favoured preference for denim amongst youth owing to its versatile association
- Increasing usage of denim products by women and youth in smaller cities and rural India

Source: Technopak

“This difference in the number demonstrates the huge potential that exists for the growth of denim in the domestic market,” says Manjula Gandhi.

Demand is organically increasing in the category. A lot of new brands are foraying into the market, even though in India, unbranded denim products dominate the market with around 60 percent market share, while, the share of branded denim market stands at 40 percent. The emergence of semi-urban

“Large organised garment manufacturers are missing in the country, making us weak in innovations and we have limited vertically-integrated units, which is the need of the hour for many large buyers. Compared to global standards, our human skills have not grown the way they should have. Also, the cost of production is not so competitive that it alarms us into focusing on efficiency to reduce costs,” says Sameer Patel, Founder & Director, Deal Jeans. According to Manjula Gandhi, there is a need to develop a larger portfolio of denim garments and accessories, including shorts, shirts, bags, dresses and accessories as the Indian market is unevenly skewed in favour of jeans.

It is entirely possible, according to a Technopak study, to broaden the scope of denim application by playing with the weight of the denim fabric, and there is a lot of scope of improvement in processing and value addition in denim through fashion-led processes and finishes.

Growth Projection

The denim wear market in India is expected to witness impressive

growth over the next decade. With India's expanding economy, booming consumption, a population that's increasing going urban and growing middle class income, denim wear has a huge opportunity to grow in the country.

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

A two-prong strategy, according to Technopak, that in one hand addresses the needs of consumers encourages them to consume more of denim and on the other hand ensures improvement in existing gaps in supply chain can work to make India's denim market more dynamic and consumer centric with better opportunities.

The denim market indeed holds much potential for brands and retailers, however to capitalise on this growth potential, retailers need to focus on factors such as pricing, quality, consumer preferences, key trends, innovations, etc. Retailers

can also leverage the available growth opportunities in denims by expanding into online channels and Omnichannels of retailing.

Technology, Customisation & Personalisation

The emergence of designer denim is perfect for fashion-conscious youth. Distressed / ripped / embellished denims are not just restricted to jeans but are also being used in jackets, shorts, skirts, etc., leading to the growth of this segment with assortment in products, styles and trends.

"With the influx of decorated denim in the last two seasons, it's no surprise that the trend has made its way into the domestic fashion scene and shows no signs of fading away. Internationally, denim customisation has turned out to be the biggest trend amongst all denim brands, in the form of monograms, embroidered patches, eye-catching pins, etc. Putting your own personal spin on your jeans and jackets is more fashionable than ever," says Manjula Gandhi.

For a customer, customised denim means creativity and personalisation. For a brand, it's all about giving the customer a unique and one-of-a-kind experience. According to Pepe Jeans, 'adding a personal touch to an otherwise ordinary piece of denim makes it uniquely your own'. This trend is particularly popular among women's denim wear.

"The personalisation and customisation trend of embellishing on denims in various forms is on the rise and is expected to stay popular in the coming seasons as well," adds Gandhi.

"The future is certainly promising with space being given to innovations and technology in enhancing the offerings by this segment," concludes Patel.



Numero Uno



●● DEAL JEANS ●●

Deal Jeans believes in bringing fresh fashion from every fashion-forward corner of the world to the trend seekers out here. Launched as a designer denim brand in the year 2000, the brand today offers 20 exclusive product categories, in around 2,500 artistic styles, crafted every year. A retail venture of Deal Global Fashions Pvt. Ltd., Deal Jeans believes in empowering every girl or woman's personality with its clothing and making her stand out in the crowd.

Target Audience

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

Product Portfolio

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

Category Expansion

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

Retail Presence

Since its inception in 2000, Deal Jeans has grown tremendously and today has

a strong pan India presence. Operating through MBOs, LFS, exports, EBOs and online distribution channels, Deal Jeans has set its benchmark in the Indian apparel market. Presently it is focusing on tier -II and -III cities since it foresees immense potential here. The brand is also exploring international markets for expansion, after catering to the Middle-East region.

Top Retailers

Deal Jeans is retailed through Shoppers Stop, Central and Kapsons. Exploring New Markets. Deal Jeans foresees itself as a leading fashion apparel brand with an exclusive positioning in the high fashion market. The brand has so far launched 21 exclusive brand outlets in India and plans to open 20 stores in the year 2018-19. It has an international presence as well, with one outlet in Lebanon and plans to add 4 more international standalone stores in 2018 -19. The brand is envisaging a 70 percent growth by 2019 and plans to create a global presence in the coming years.

Online Presence

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



KEY INFOGRAPHICS

> Country & city of brand origin:
India, Mumbai

> Year of brand launch: **2000**

> Total Sales Turnover in India as in FY17-18: **₹115 crore**

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

- EBOs: **24**
- SISs: **100**
- MBOs: **1,200+**
- LFS: **150**

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

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

> Total retail space across EBOs & SISs (in sq. ft): **33,779 sq.ft.**

●● FOCUS JEANS ●●

The brand Focus Jeans – present in more than 3,000 outlets across multiple states – is one of the most contemporary and stylish brands, at par with any international brand, in India today. The brand promises to deliver better value for money. Each style created by the brand is a reflection of the wearer's attitude, personality and class.

Target Audience

Focus Jeans aspires to dress up today's women – both young and the young at heart. The target audience falls largely in the age group of 18 to 36 years but the brand concentrates more on women aged 22 to 32 years. They are both brand image and quality conscious, are in tune with the latest trends and seek good value for money.

Product Portfolio

The brand's product basket comprises more than 150 different styles, shades and fits, catering to each and every need and taste of a woman. The product range is classified into six different categories as per style and price segments: Classics, TrueBlues, Premium, Jeggings, Cottons and Hotties (capris). The product line consists of basic jeans, trendy jeans, ankle lengths, capris, shorts, jeggings and cottons.

New Collection

Apart from its entire range of Classic Jeans – probably one of the largest ranges available in the market – Focus Jeans launches a new collection every season that captures the flavour of the season and the rising new trends. The brand's experienced stylists indulge and play with amazing shades, washes and fabrics to create some of the best pair of jeans every season, well-known for their style, fit, feel, finish and effect.

Category Expansion

Like every year, Focus Jeans will keep on offering new product line ups, introduce new seasonal styles and finish and increase the width of its price segment on the top as well as the bottom wear.

Retail Presence

Focus Jeans retails through more than 2,500 retail outlets and also is present in a good mix of MBOs and LFS in mini metros, large and small towns.



LEE JEANS

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

Target Audience

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

Top Selling Denim Collections

Body Optix in women are the brand's key collections. The Body Optix collection offers a 360 degree body shaping through a patented technique that uses laser technology to make the wearer appear slimmer and shapelier, creating a 3D transformation.



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

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

Technology deployment/upgradation: Since 2017, Lee has had a laser-focus on the women's category with its Body Optix collection. Body Optix™ is a denim line with styling essentials that combine the science of optics, the study of sight and the behavior of light, with geodesic shaping, anatomy shading and anatomy warping - a patented technique that uses laser technology to make the wearer appear slimmer and shapelier, creating a 3D transformation. Since it is a patented technique, it cannot be copied by other denim brands, and makes their collection unique.



KEY INFOGRAPHICS

> Country & city of brand origin: **USA, Kansas.**

> Year of brand launch: **1889**



LEE COOPER

Authentic British denim brand, Lee Cooper was founded in 1908 by Morris Cooper. The brand established itself as a leading maker of workwear, providing uniforms for the British Troops in WW1 and WW2. Soon it emerged as the preferred denim brand in the UK where, out of every 10 denims sold, 8 were from Lee Cooper. Creating specialist cuts and innovative new styles has always been at the core of the brand thereby generating a great fan base in more than 100 countries across the globe. Lee Cooper entered India through a license agreement with Future Lifestyle Fashion Ltd., in 2007.

Target Audience

Being the original British denim brand, Lee Cooper considers the young and the youthful, who exuberate attitude and confidence at all times as its core target customers. Looking cool without trying too hard is the mindset the brand's customers live with and hence being on-trend is what matters the most to them.

Product Portfolio

Lee Cooper, being an on-trend brand, invests a lot of time in understanding the emerging trends and identifying cuts and washes that will excite the customers. The effort in design creation, washes, cuts and fits have started yielding results helping the brand to be one of the most acceptable brands across men's, ladies' and kids' portfolios. Denim is the clear forerunner across all product ranges in men's, ladies' and kids' portfolios contributing to nearly 90 percent business in bottom wear and around 50 percent in top wear.

Top Selling Collections

The brand's Hemotion range of denims and lazer washes received a great

response from Lee Cooper's women customers.

Category expansion

Lee Cooper is planning to launch a complete range of classic fashion, on-trend fashion and high fashion denims to ensure that its customers—both men and women find their favourite pick as per the occasion of usage. Last year, Lee Cooper introduced more than 10 silhouettes in denim tops.

Retail Presence

Lee Cooper boasts of an extensive presence in more than 100 countries. In India, the denim brand has a very strong presence in more than 150 cities with its primary markets in Mumbai, Bengaluru, Kolkata, Hyderabad, Pune, Delhi and Chennai.

Top Retailers

National department chains like Lifestyle, Central, Reliance Trends, FBB, Shoppers Stop, are the brand's key retail partners. The brand has a SIS presence of more than 1,200 doors.

Exploring New Markets

Lee Cooper had initiated pilot of EBOs in smaller towns over past 1 year and now, the brand plans to rapidly grow its presence of EBOs across select markets.

Online Presence

Lee Cooper understands that the fashion aspiration in tier-II and -III towns is continuously growing and to cater to their needs, the brand has recently strengthened its presence on various online portals like Jabong, Myntra, Amazon and Flipkart.



KEY INFOGRAPHICS

> Country & city of brand origin:
United Kingdom, London

> Year of brand launch: **1908**
(2007, India entry)

> Total Sales Turnover in India as in FY16-17: **₹500 crore**

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

● EBOs: **12**
● SISs: **1,200+**

> Number of states present in: **20+**

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

> Total retail space across EBOs & SISs (in sq. ft): **3,00,000 sq.ft. (approx.)**

•• NUMERO UNO ••

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

Core Audience

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

Product Portfolio

The brand offers a complete wardrobe collection of denims and casualwear for both male and female customers, based on the latest international trends, customised to the client's needs and preferences. Denim contributes 40 percent of the entire business.

Unique Selling Point

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

Collections for the Forthcoming Season

The AW18 range has a pre-winter collection of T-shirts, shirts and over shirts, sleeveless jackets, waistcoats and light weight jackets. Further there are sweatshirts, hoodies, knit jackets, sweaters, puffer jackets and cotton quilted parkas for high winters.

Category Expansion

Numero Uno has recently extended its boundaries to venture into the active and athleisure space and has launched its sub brand N1 Active to cater to the active lifestyle needs of its younger clientele. The clothing in this range is a perfect blend of form and function, aesthetics and comfort, offering style, utility and affordability to the millennial to perform their day to day activities with ease.

Retail Presence & Expansion Plans

Numero Uno has about 250+ EBOs and 500+ MBOs, concentrated mostly in North and East India. However, it is expanding its footprints into the South and West parts India by gradually opening retail stores. In large format stores, it is present in Shoppers Stop and Central.



KEY INFOGRAPHICS

> Country of brand origin: **India**

Year of brand launch: **1987**

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

● EBOs: **250+**

● MBOs: **500**

●● PEPE JEANS ●●

Founded in 1973, Pepe Jeans is a brainchild of the Shah brothers from Kenya - Nitin, Arun and Milan Shah who revolutionized London's fashion scenario by creating stylish and trendy jeans unlike the customary ordinary looking denim available in those days. In 1989, Pepe entered India and quickly captured the imagination of the consumers across the country. Pepe Jeans India manufactures a wide array of chic casual wear for men, women and kids. Jeans is their core product and they are committed to reinventing denim fashion, using new washes and innovations season after season.

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

Target Audience

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

Product Portfolio

Pepe Jeans India manufactures a vast range of chic, casual wear for men, women and kids. Jeans being their core product, come in a variety of fabrics, washes, fits and colours. The brand's product portfolio also includes t-shirts,



KEY INFOGRAPHICS

> Country & city of brand origin:

UK, London

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

● **EBOs: 234**

● **MBOs: 1350**

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

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

flat knits, sweaters, sweat shirts, jackets as well as woven merchandise. The accessories range consists of bags, wallets, caps, socks and footwear.

New Denim Collections

New collections of the brand's denim wear consist of interesting washes with stylish fits, apart from classic denim pieces that can be worn daily. In terms of colours, deep dark blues with blue tones, greys and camel tones

are the key highlights. Pepe Jeans has introduced a new range of denims called 'Wiser Wash' in a bid of being conscious towards the environment. These eco-friendly denims minimize water consumption and do not compromise on the overall look and feel of denim.

Category Expansion

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

Retail Presence

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

Exploring New Markets

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

Online Presence

Pepe Jeans believe that e-retail and brick-and-mortar stores are not competing ideas and is thus making a constant endeavor to understand its customers and leverage technology to evolve customer experience. Currently Pepe Jeans e-retails through partners like Myntra, Jabong, Amazon, Flipkart, Cilory and Ajio. The brand's objective is to ensure that consumers get that 'wow' experience every time they shop at Pepe Jeans - be it through the stores or via e-retail.



COMFORT WEAR: INDIA'S LEGGINGS BUSINESS GROWING BY 50 PERCENT EVERY YEAR

With continuous quality enhancement and product development, Lyra has established itself as one of the most preferred legging brands in the country...

IMAGES Business of Fashion

Indian women are evolving – they're stepping out of the house, working, earning as much as their male counterparts and partying as hard as men. In keeping with their changing role, their wardrobe is also changing. Gone are the plain clothes which they would wear at home. Instead, women are demanding different and better clothes for every role in life and the fashion retail industry is rising to the challenge.

One category which has taken upon itself to provide women with both comfort and fashion is the leggings category. The category is growing by 50 percent every year. Leggings which can be worn on all occasions as ethnic wear, western wear or even as casual wear are very easily available in the market making it one of the most popular items in the women's wear category.

And one brand which is making waves in the category is Lyra. With continuous quality enhancement and product development, Lyra has established itself as one of the most preferred legging brands in the country.

"The leggings market in India has shown phenomenal success over the last few years. With modernization

and changes in consumer preferences, the demand for leggings for every age group has grown tremendously, representing the excellence performance of the category in the women wear segment in India," says Udit Todi, Senior Vice President, Lyra.

Todi feels that the availability of leggings in a variety of colours, its stretchable features and the wide usage among women of almost every age group are the main factors that led to the growth of leggings market in the country.

"All our legging ranges are very popular among the consumers and but our Indian churidar range, ankle length range and capris are our bestsellers, their demand very high throughout the year," he says.

Leggings: A Lifestyle Category

Due to the advent of premium and international brands, more aggressive advertisement and ensuing demand, retailers are now willing to give more and more space share to leggings in their collections.

Todi explains that according to researches and studies conducted on the category, there are basically three price points in the legging market:





“The leggings market in India has shown phenomenal success over the last few years. With modernization and changes in consumer preferences, the demand for leggings for every age group has grown tremendously, representing the excellence performance of the category in the women wear segment in India”

– Udit Todi,
Senior Vice President, Lyra.



- The basic range – which comprises of products between ₹100 to ₹200
- The middle range – which includes products priced above ₹200
- The premium range – which embraces products costing more than ₹450

“We believe the segmentation in this field is principally due to positioning of unorganised brands and their prices. However, quality does play a major role here, because there has been a gradual increase in the demand of premium range of products in the leggings category,” says Todi.

Buzzword: Technology

Leggings – which are a perfect blend of cotton and spandex fabrics – have been well accepted in the women’s wear segment in the Indian market.

“There is more and more atomization in cutting and stitching, which helps in producing strong yet comfortable products. Advanced machines with various features have really changed the pattern of production in recent times,” explains Todi.

E-commerce sites too have changed the game of selling leggings in the recent past. Lyra rules the online market with its presence on almost every online portal including Flipkart, Amazon, Snapdeal, Paytm and Gofynd to name just a few. Alongside this, the brand is also planning to sell its products through its own website, www.mylyra.com.

“As the world is becoming more techno-savvy with each passing day, online selling has changed people’s preferences of shopping specially in cities as they get whatever they want in just a click. Hence, e-commerce is definitely a smart solution to boost up the sales and mark your presence among the consumer’s mind,” says Todi.



ABOUT LYRA

- Lyra is a complete women’s wear brand manufactured by Ebell Fashion Pvt. Ltd., a Lux group company. Launched in the year 2012, Lyra was the first legging brand in the country targeting women from 18-40 years.
- Their product range comprises of beautiful collections of Indian churidaar, ankle length leggings, capri, winter leggings, printed leggings and western leggings for women of all age groups.
- The brand has also has on offer, plain and printed leggings for kids between the ages of 5-14.
- Their products are available in more than 150 colours.
- Apart from leggings. Lyra also offers a collection of lingerie and a fashion range comprising of palazzos, track pants, kurty pants, jeggings, and loungers.
- The brand has recently expanded its casual range by introducing the soft and comfortable Relax Pyjamas and stylish t-shirts for young women and girls.
- Currently Lyra is operating through a number of stores throughout India. With a troupe of dedicated dealers and distributors, the brand is present even in the remote corners of the country.



DE MOZA

TAKING THE LEGGINGS CATEGORY FROM MINIMAL TO MUST HAVE

De Moza - which has a strong presence across all regions of India - has crafted a new collection which consists of active wear leggings made with super fine bio wash cotton stretch with modern cuts and sharp pricing...

IMAGES Business of Fashion

De Moza, launched in the year 2013 by Audaz Brands Retail India Pvt Ltd as a leggings brand, has today grown in to complete bottom wear brand for women for all occasions - casual, ethnic, active and fashion wear.

“Leggings have become a staple product in women’s wardrobe across the world today. In India, the growth has been exponential, mainly due to leggings becoming an alternative for churidars. This category has been growing by over 40 percent in the last eight years,” says Agnes Raja G, Managing Director, De Moza.

Despite there being a significant change in trend which is moving towards pants, palazzos, leggings hold about 30 percent across all major ethnic brands. In addition to this, in the last couple of seasons, there has been significant growth in active wear and fashion legging segment which is growing by 60 percent annually.

Capitalising on the opportunity, De Moza - which has a strong presence across all regions of India - has crafted a new collection which consists of active wear leggings made with super fine bio wash cotton stretch with modern cuts and sharp pricing.

“Prices for our leggings can vary from as low as ₹399 to as high as ₹1,999. Our highest selling price point bracket is around ₹449,” says Agnes.

He states that cotton stretch is most preferred selling fabric, adding that new-age fabric viscose stretch is also gaining good traction due to its longevity. “Other new-age fabrics - apart from viscose - like ponte and scuba are also getting a good response among customers,” he says.

IMAGES Business of Fashion





segment contributes significantly to our sales," says Agnes.

"The online market has been quite stable for us with strong demand for good quality basic leggings and we have been growing at 30 percent year-on-year in this segment with marketplace formats across all leading portals," he adds.

Future Plans

De Moza – which had a retail turnover of ₹12.5 crore with 100 percent growth over the previous year and is looking to close FY19 at ₹20 crore – has plans to stick to providing bottom wear solutions for women, while looking to cash in on the active wear segment with innovative fabrics. The brand is looking at 80 percent growth this fiscal.

Agnes is confident that the leggings category is here to stay. "Leggings have become a staple in every woman's wardrobe. The demand of colors and fabric will see a swing based on latest fashion trends, but the basic requirement of leggings shall stay the same for the next decade or so," he concludes.



"Leggings have become a staple product in women's wardrobe across the world today. In India, the growth has been exponential, mainly due to leggings becoming an alternative for churidars. This category has been growing by over 40 percent in the last eight years"

– Agnes Raja G,
Managing Director, De Moza.

Retail Presence

De Moza, which is spread across all regions of India has 12 EBOs and can be found in 120 large format stores in shop-in-shop formats, 20 MBOs. He says the brand and its complete product range of leggings, pants, palazzo, skirts, active wear, jeggings, treggings, jeans, basic tops and innerwear has already been accepted well in tier-I cities, while gaining popularity in tier-II cities and towns.

The brand has even been well received at online marketplaces too.

"E-commerce has been instrumental in introducing new fashion in the leggings category to the right market and targeted audience, and this



DEEPEE TWISTER & PINK 'N' PURPLE

With a vision to change day-to-day bottom wear, Deepeejay Textiles (P) Ltd., which started operations in 1986 with DeePee vests and briefs, launched its leggings' brands Deepee Twister and Pink 'n' Purple in 2009 and 2011 respectively. The product range is made from cotton-based fabric and is highly applauded in the Indian market for comfort and durability.

Core Consumers

The company targets females between 15 to 45 years belonging to upper middle income segment.

Product Range

The brands offer churidar leggings, ankle-length leggings, shimmer leggings, printed leggings, ankle net leggings, knit pants, kurta pants, straight pants, palazzos, capris to name

a few. Similarly, it offers leggings and capris for young girls under its kids wear segment. It also provides top wear such as printed tees, plain tees and slub tees.

Category Expansion

The company constantly focuses on expanding its category and product line. This year, it has added a range of pants to its leggings category. It has also recently entered into the kids wear segment with leggings and capris for girls. In the tops segment, it has introduced a range of basic printed and plain tees. Last year, it has launched a range of innerwear last year with camisoles, racerback and spaghetti.

Online Presence

The brands - Deepee Twister and Pink 'n' Purple - are available online on the company-owned portal, www.deepeeonlinestore.com as well as on Amazon. Launched in 2016, the responses online has been satisfactory in terms of sales and consumer connect. The feedback from the

customers has helped the company to improve upon its brands.

The Indian Leggings Market

According to Naveen Kumar Agarwal, Chairman of Deepeejay Textiles Pvt. Ltd., leggings is emerging as more of a daily wear and its uses is increasing in every household. With the increase in ethnic wear the demand for leggings is growing owing to the concept of mix-and-match. The Tier I & II towns and cities are the largest consumers of this apparel segment.

Leggings as a category will continue to register growth. In women's apparel, since trends changes quite fast, leggings brands will need to add different products to it in order to survive.



FASHION

CREATION





RETAIL REVOLUTION
**NEW-AGE FABRIC LIVA IS
DEFINING THE FUTURE OF
FASHION**

IMAGES BoF talks to Manohar Samuel, President - Marketing & Business Development, Birla Cellulose, Grasim Industries Limited, to understand their vision for LIVA and how the fabric will create more value for the company...

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SPOTLIGHT
**THE REVIVAL OF INDIAN
HANDLOOMS IN THE
DIGITAL ERA**

Jawahar Singh, Co-Founder, Avishya pens his views and thoughts on the least capital-intensive sector, handloom. He shares his opinions with IMAGES BoF how the handloom sector adaptable to market requirements and is always open to new innovations and latest trends...

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GEN-NEXT FASHION
**TOP 10 TRENDS FROM LAKMÉ
FASHION WEEK**

A report... Celebrated fashion columnist Meher Castelino writes on the 10 disruptive trends from Lakmé Fashion Week Winter/Festive 2018 with an emphasis on new fabrics, occasion wear innovations and gender-neutral fashion...

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Fashion Creation



INNOVATION
**ANKUR TEXTILES LAUNCHES
WIDEST RANGE OF MULTI-
FIBRE FABRICS FOR FESTIVE
SEASON**

For more than five decades, Ankur Textiles has been designing high-quality voiles ranging from 100 percent cotton to all fancy blends that are available throughout India...

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CONFERENCE
**GFI 2018: DISPLAYING
SUSTAINABLE FASHION BY
INDIAN & INTERNATIONAL
DESIGNERS**

The 2-day event showcased Indian and international designers and their amazing sustainable collections with Indian crafts, organic and recycled fabrics...

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FABRIC 2.0 FASHION FOR THE ECO-CONSCIOUS

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NEW-AGE FABRIC LIVA IS DEFINING THE FUTURE OF FASHION

When Aditya Birla created Liva, they went with a vision – to create an aspirational brand that will provide consumers the freedom to move effortlessly, confidently and naturally through garments that celebrate natural fluid fashion with Liva fabrics. Also in the process create more value for the company as well as the whole Liva eco-system.

Gurbir Singh Gulati

Liva, the new age fabric brand from the Aditya Birla Group's Birla Cellulose, is a soft, fluid fabric which falls and drapes well, unlike other fabrics, that are boxy or synthetic. The new-age naturally sourced fiber made into fabric in pure or blended form, transforms not just the garment but also the person wearing it. It is comfortable, soft, natural, and eco-friendly.

The fabric aims to create a 'distinct value' for consumers by giving them clothing that is fashionable as well as comfortable, a rare combination, as well as an ultimate in consumer experience.

When Aditya Birla created Liva, they went with a vision – to create an aspirational brand that will provide consumers the freedom to move effortlessly, confidently and naturally through garments that celebrate natural fluid fashion with Liva fabrics. Also in the process create more value for the company as well as the whole Liva eco-system.





*The IMAGES BOF team spoke to **Manohar Samuel, President – Marketing & Business Development, Birla Cellulose, Grasim Industries Limited**, to discuss what's new and trending with this uber flamboyant brand. In this freewheeling chat, Samuel talked about Liva's journey so far, the key challenges faced, its partnerships, investments as well as future expansion plans. Excerpts from the interview...*

Tell us about Liva and its journey till date. What are the key growth factors achieved by the brand?

Liva's journey started with consumer insights. This study depicted there was certain need for a brand which is fashionable and can enthuse the customers to look at the attributes of fluidity.

Liva comes from a nature based fiber progressed with its further journey with co-branding partnerships with almost 37 brands which are working with us now. These ready to wear brands have played a very important role in the brand building for Liva. These brands have been able to develop some of the most fabulous collections with their designers by leveraging the attributes of Liva. It's very important for us that Liva reaches the consumers through their innovation, their visual merchandise as much as their designing.

If you look at the other partnership which is the Liva Accredited Partner Forum (LAPF), this is where the heart of Liva is: the fabric. The LAPF member partnership has really elevated the scale of innovations. This has helped Liva with its wide spectrum of presentation not only in India but International markets also at a wide scale with its branding. Liva in return has played a role wherein it has formed a platform

and created LAPF's entire eco-system for them to get to the consumer and help them to what they deliver.

The brand track research done for Liva, is an end consumer testimonial to the growth that brand Liva has achieved. The research (Survey conducted amongst 500 18+ y.o. women recruited across malls in top 4 metros and interviewed after Liva garment has been washed at least thrice) shows that 94 percent women recommend the Liva fabric and 95 percent women were happy with the fabric's after wash quality.

What are the key challenges faced in the market and by partners using Liva?

Every brand is unique in itself but there is a common customer which they address. We need to recognise this and see that each brand is working in their own brand profile. We need to ensure their space and try to help them to get the consumers linked to their products, merchandise and the unique solutions they offer.

The most important part in this process was to understand what these consumers segments were, and how they behave. On the basis of that we shared our research findings and insights of the consumers with the brands. On the other hand, brands too brought in their differentiation and uniqueness of their product in the market. They also had styles and themes for each season and this collaboration helped us immensely in aligning with the consumers. To get this right was not easy as Liva is a strong promise to the consumers having natural fluid fashion. We had to really come out with the customise solutions for brand which could help them and still protect their unique properties. This is one of the major achievements where we have been able to work together and get a positive outcome out for all.



If you look at the retail counter level also you have the consumers coming and asking for Liva. We understood what all our partner brands were manufacturing and advertising and how we can be a partner to cater the same. Sometimes we faced challenges which we overcome partly with working the brands and keeping some numbers intact with our insights and measurements of the moments tabulated and shared. This is done in way where we do not register any loss in business at that stage.

How well has Liva scored in terms of categories in apparel business i.e. men, women and kids? What is the ratio of supplies?

Women's wear is one of the fastest growing segments. We feel we have much more to do and have many more offerings, special campaigns coming up for this. Having said that we also see a heavy potential in kids wear with the

girl's category in which we are already present.

Our consumer insight study with some leading shirting and trousering brands have revealed that there is an alignment of being able to work together. Looking at this the functionality of product may vary with menswear. Consumers like to wear fashionable clothing and if companies like us are being able to give solutions to their fashion needs in a reasonable and stylish form there is certainly a play for it.



Drape is what the consumer's talks about as an important asset in their fashion jargon and Liva provides that.

We have a way to go ahead but we surely see an opportunity with other apparel categories and home textiles segment. Globally we are present in bed linens, carpets, towels where we have our research and studies being conducted on it.

Any key technical innovations that give Liva an edge over competition?

Globally sustainability is the major area of importance to the consumers and we see that coming in India. We have recently launched a fabric called LIVA ECO which is mostly for global brands and that's quite an important venture for us.

On the fabric front we have presented a lot of innovations along with our partners particularly in area of knitting of what we call as jacquards and weaves. Earlier plain weaves played a dominant role with around 50-80 percent in the ratio. Today we have 50-60 percent of plain weaves and the other ratio goes to the innovations that are to do with jacquards and dobbies. This feedback is received from the brand and consumers to which our LAPF's have been aligned to the next stage of innovation at the fabric level.

Further consumers have asked for products like active wear and we have launched yoga wear for few of the customers. We have launched jeggings collections for college going students. These are the innovation which have come out at the fabric stage but absolutely driven by the consumer requirements.

Ethnic, fusions, western are broad categories which have been addressed earlier by us. We are also developing fabrics for occasion wear which are being driven by the consumers and we see development of products at the fabric stage.

What has been Liva's market spread? How are you controlling the manufacturing and distribution of this special fabric? Explain in detail?

Liva is a fabric that is nature based, has fluidity as a promise and is fashionable made from our fibers from the house of Aditya Birla Group. We are going digital to see that we can combine the entire value chain to one entity. Leveraging this we have launched the LAPP connect which is one area where we established connect with the value chain. We have three very important studios which have connected us that are New York, Delhi and Tirupur. These are all joining the value chain and also following important research and service centre for our development.



Which other countries are part of your distribution network?

We do have plans to go internationally. Today we have a strong presence in some countries which are important in terms of global value chain as well. We are present in China, Indonesia, Turkey and Bangladesh. We have global teams which are working on speciality products like spun dyed, Birla Modal and Excel products. These regions are very adaptive in taking on to innovations and also getting themselves linked with brands.

What is your expansion plan for both India and abroad?

We have to build capacities as the Indian consumer is growing. Also, with the ambitious targets shared by the industry and by the government which is around 250 billion dollars in the next 2 years, which we see as happening. Our capacities are being augmented to get that. Our next goal is building a continuous pipeline of innovation in line with the fast fashion scenario evident in the industry which is still being addressed as a challenge. We are also working on reducing the turnaround time for our production from 75 days to 50 days. This is important for the country and for us to realize the potential that we carry.

Who are your key national clients?

From the last two years we have been able to get very young brands. I will give you an example of Prisma, from Tirupur in leggings which is only doing Liva leggings. This brand today is manufacturing close to 2.5 lakh legging in a month. These are the brands which have caught on the consumer's attention and have worked intensively on all the aspects of Liva eco system.

We already are working with big lifestyle brands like Biba, W, Aurelia and big format brands like Fbb, Reliance Retail, Pantaloon, Lifestyle, Max etc which are always there with us.

Any more product expansion or new innovations are you planning to introduce in the market?

Product for me as fiber, we are having 'Spunshades By Liva' getting deeper into brands. We have got lot of knitting tractions which are going on. Uniform by 'Spunshades By Liva' is a campaign from the past which was done along with four of our partners i.e. Valji, Sangam, Mafatlal, SKumars. Spunshades By Liva saves around 45 liters of water per kilo plus its affluent and energy saving. This is one step of getting our eco-friendly footprint in India.



We have some products in the home linen segment which are bed linen and carpets which are not yet Liva but have functionally differentiated benefits to the user.

What are the investments the company is planning to grow the prospects of Liva in coming 5 years?

Our investments are planned at three levels. One is our own investments at the fiber level to cater to the segment. The second will be on innovation which we will saddle up from forest to fashion. There is lot of work which goes on with clusters like Tirupur, Surat, Ichalkaranji, Bhilwara etc. which is yet another investment that we make for building the product capability and bringing experts to the field. The



third investment will be with the Liva Eco system in campaign with the consumer. You will shortly see this very innovative way in our campaigns.

Tell us about the need for technological collaborations by Indian Textile Industry with partners like you?

Technology is a key focus for us as a subject. For example in the spinning sector we are working very closely with the technology partners to provide compact yarns which is very important for Liva's greater look and feel. We are working on air-jet spinning wherein we are getting our development center ready in collaboration with Reiter which can give different blends and fabric possibilities in spinning. We have recently started with warp knitting with our spun yarns. Wet processing is very important to give the right look and feel and getting rid of certain challenges which can crop up in other areas of the value chain. For wet processing we have collaborations with few technology providers which are mostly global. We have recently worked with one of such partners from China which has developed an excellent control on shrinkage of viscose knitted fabric without spandex. Such collaborations are practical for the entire value chain.



“We are working on air-jet spinning wherein we are getting our development center ready in collaboration with Reiter which can give different blends and fabric possibilities in spinning”

We also have some back end collaborations for our own fibers; where we are working on newer technologies on eco friendly solutions.

What will be the status of the Textile industry by 2020?

We are looking for some exciting time ahead. The consumer is well informed and is looking for some more information. It's critical for companies like us to understand what the consumer's needs which a big gamechanger for companies like us.

I see that industry growing from current levels of 120 billion dollars to 250 billion dollars in the coming few years. One major advantage which I see in this industry is the ability to do exports. We should be working closely with the brands. There is a gap between us and countries like China with their labour cost and intention to do such labour intensive work of garments. So we can get into this territory on a larger scale and increase our position.

What has been the turnover for the company? And how much growth in turnovers is the brand expecting, from this fiscal?

30-35 percent of our products are Liva certified fabrics which show equal in our Liva fiber production. Our aim is to grow this by 60 to 65 percent by adding new partners. Having said this one thing which, we will not compromise is on Liva's strict standards to quality and service driven by innovation and a disciplined turnaround time for production. Liva will be an aspirational brand in our portfolio.

How is digitalisation of the retail industry going to help in the future?

I would like to link what has been



asked earlier on the future to the kind of changes happening in retail today. There is digitalisation happening in the entire value chain. There is 3D printing coming in and most of the sampling is happening on the computer in a digital way. We need to learn this and understand that digitalisation of the value chain is critical. Digitalisation in e-commerce is what we have already witnessed. Brands have also invested in opening their own e-commerce sites which will help them to grow faster. On the second aspect sustainability is a major aspect for global brands. Fast fashion may be very good at the consumer level but there are concerns on sustainability raised by the circular economic industry. For example, 15 years to now people are buying twice the number of clothes but not all are worn. It's good for the business but in the long run things have to be more circular.



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THE REVIVAL OF INDIAN HANDLOOMS IN THE DIGITAL ERA

The Handloom Sector in India is one of the least capital-intensive sectors, uses minimal power and is extremely eco-friendly, and because every product is made by hand, it has the flexibility of creating products in very small lots. Consequently, it is very adaptable to market requirements and is always open to new innovations and latest trends...

Jawahar Singh, Co-Founder, Avishya

The handloom sector in India is the largest unorganised economic activity after agriculture and is closely intertwined with day to day rural and semi-rural livelihood. Handloom weaving constitutes one of the richest and most vibrant aspects of Indian cultural heritage. It is one of the least capital-intensive sectors, uses minimal power and is extremely eco-friendly. Because every product is made by hand, it has the flexibility of creating products in very small lots. Consequently, it is very adaptable to market requirements and is always open to new innovations and latest trends.



Being part of India's legacy and age-old tradition, handloom weaving has sustained and grown over the years by transfer of skills from one generation to another. Handloom weaving is largely decentralised, and weaving families are mainly from the vulnerable and weaker sections of society, who weave for their household needs and also contribute to the production in the textile sector. These weaving families are keeping alive the legacy of traditional Indian craft of different regions. The level of artistry and intricacy achieved in handloom fabrics is unparalleled and certain weaves/designs are still beyond the scope of modern machines.

The handloom sector can meet every need ranging from exquisite fabrics, which take months to weave, to popular items for daily use. As per the 3rd Handloom Census, carried out in 2009-10, more than 43 lakh people* are engaged in weaving and allied activities. Remarkably around 77 percent of adult weavers are women

awareness and buying behaviour rapidly. Facebook crossed the 2.2 billion active users mark recently in 2018. Twitter has 335 million monthly users. Pinterest has over 150 million active users. There are more 6 million mobile phone applications. Given this scenario, there are countless ways by which Indian handloom products can be showcased worldwide to billions of customers.

On the supply side, there are over 30-35 important weaving clusters

customers/markets across India and all over the world.

Higher Price Realisations

Weaving a fine handloom saree or lengths of material for kurtas/salwars/lehengas is a time consuming process. Depending on the intricacy/complexity of the design, a handloom saree may take anywhere from 4 days to 4 weeks to weave. Also in most cases the weaver is dependent on a master weaver or weaving society to provide him the working capital for the raw material needed (yarn, dyes, and sometimes



and only 23 percent are men. Around 23.77 lakhs looms* of varied designs and construction are used by these weavers. A total of 7200 million sq.mtrs* of handloom textiles were produced in India during 2014-15 and ₹2246 crores* of handlooms were exported.

The rapid changes in digital technology and skyrocketing pace of mobile phone penetration are transforming almost every single industry in India today. Digital media like mobile web, mobile apps and social media are changing consumer

located all over India with thousands of villages actively engaged in handloom weaving. These villages are mainly concentrated in the following states/zones: Andhra Pradesh, Telangana, Assam, Bihar, Chhattisgarh, Gujarat, Himachal Pradesh, Jammu & Kashmir, Jharkhand, Karnataka, Kerala, Madhya Pradesh, Maharashtra, Manipur, Odisha, Rajasthan, Tamilnadu, Uttar Pradesh and West Bengal. Given the fragmented nature of the weaving clusters, a single window platform that can showcase and sell handloom products will give a huge push to the marketing effort of reaching out to

even designs). All this makes a handloom saree/kurta much more expensive to produce.

In order to upsell and market authentic handloom products, creative packaging and showcasing becomes absolutely essential. Online digital platforms can use the advantage of beautiful digital pictures to highlight every intricate element of a typical handloom product like a saree, kurta or lehenga. Partnerships can be forged with various digital mediums and India's

>

leading e-commerce platforms to help empower self-help groups and micro enterprises across diverse weaving clusters. The objective would be to provide traditional skilled workers and artisans across the country with a common digital platform that can enlist them, showcase their products and provide a means to improve their income by reducing the number of middlemen.

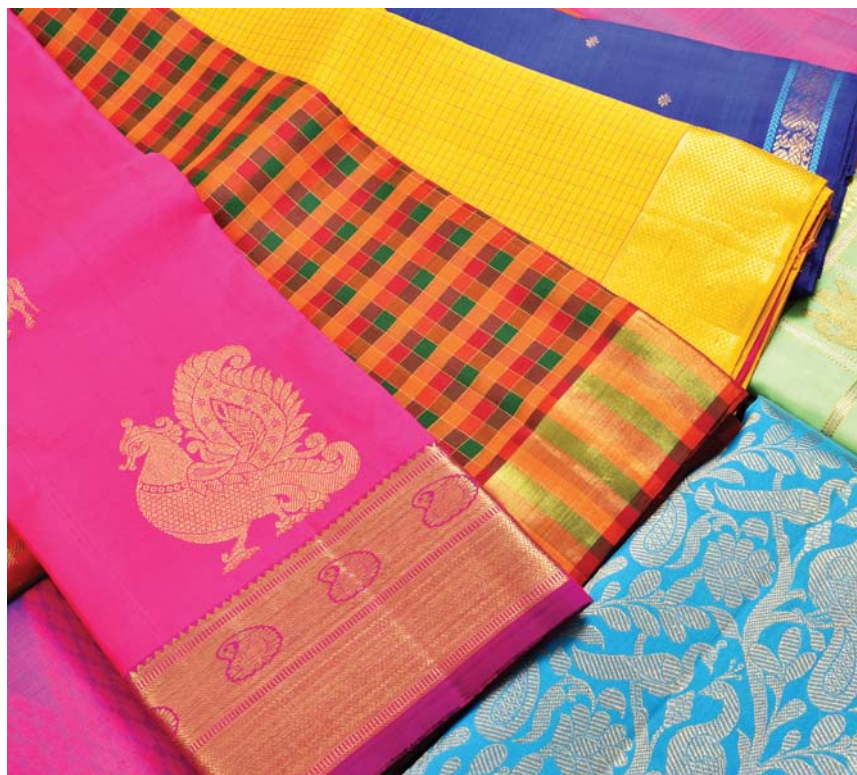
Though many artisans and weavers may not know the nuts and bolts of harnessing technology for their livelihood, they are quite aware of current market and fashion trends thanks to social media. Online platforms that are marketing savvy, technologically competent, socially conscious and committed to long term partnerships could make a huge difference in improving the economic well being of weavers.

Building Scale & Sustainability thru Greater Market Access – in India & Worldwide

The market for beautiful Indian handloom products is spread across the length and breadth of India – metros, mini metros, Tier I and II towns. With growing consciousness of well-made apparel and access to the internet on the palms of their hands through their mobiles, Indian women find it much easier to search and buy the products they want on their favourite websites.

While handloom products have been well received and appreciated by a selected group of elite customers/handloom aficionados who have been exposed to the beauty of handloom thanks to their affluent backgrounds and social circles, there is a crying need to expand the customer base beyond these limited circles and scale up sales volumes of handloom.

The internet/worldwide web provides a platform that makes it possible to reach all segments of customers in large numbers. It is estimated that in



India alone over 500 million people will access the internet by end 2018. Well-run websites offering a wide range of handlooms with friendly, non-judgmental service offer customers the opportunity to browse at leisure, ask questions and buy the product of their choice, at a convenient time... from the comfort of their homes or offices without navigating ever increasing traffic to visit a showroom.

Conclusion

Indian handloom products have immense opportunities both in the domestic and international markets. It has huge potential as it holds the key to providing large scale employment to over 4 million weavers spread all over the country in rural & semi-rural areas. In addition to handloom, many handicraft products like Pashmina shawls, woodwork, pottery, leather, jute, shell, brass handicrafts, bamboo handicraft, phulkari, zardozi and carpet weaving constitute a significant segment of the decentralised unorganised sector of the economy.

In spite of a lot of positives, the handloom industry in India is faced with several challenges. Being in the

unorganised sector, middlemen and marketers tend to exploit the financially vulnerable condition of Indian weavers. Being labour intensive and requiring high level of traditional skills, unless handloom weaving as a profession provides a sustainable and profitable livelihood, many of these beautiful traditional techniques may not be embraced by the younger generation and could disappear along with the older generation of weavers.

The Government, NGO's and some private sector organisations have together played an important role in supporting and developing the handloom industry so far. However, a lot more can be done to a) create awareness about the beauty and diversity of Indian handlooms b) improve their market reach/retail sales availability c) develop supply chain for fair and equitable trade for the weaving community. Efforts in these key areas will create a stable and sustainable livelihood for weaving families.

Digital platforms could be the 'x-factor' that can catalyze the widespread usage and growth of handlooms and help in weaving an alternate story for the Indian weaver.



*Source: Office of Development Commissioner (Handlooms), Ministry of Textiles, India Single Window Digital Platform

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IMAGES BUSINESS OF FASHION

Sportswear & Athleisure

SPECIAL

There is huge impact of people's lifestyle on fashion. The burgeoning appreciation for healthier lifestyles has paved way for what has been touted as one of the most profound cultural changes of the 20th century - staying fit. Fitness is no longer a buzzword, but an expected standard! The era of self awareness, spearheaded by the millennial generation is now apparent in the wardrobes of the consumers across all age groups. 'Sports-leisure' is no longer a trend, it's a fundamental shift in how the world dresses today.

Keeping pace with this change is the fashion retail sector, churning out segments for all fitness trends - Sportswear, Athleisure & Activewear.

The November issue of IMAGES Business of Fashion will cover in details the fast emerging categories of Sportswear and Athleisure.

Within each we will:

- >> Define and Size the Market
- >> Outline the Opportunities
- >> Evaluate Key Trends
- >> Showcase Innovations
- >> Underline the Leaders and their Success Mantra

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Saaksha and Kinni



WINTER/ FESTIVE 2018

TOP 10 TRENDS FROM

LAKMÉ FASHION WEEK

Celebrated fashion columnist Meher Castelino writes on the 10 disruptive trends from Lakmé Fashion Week Winter/Festive 2018 with an emphasis on new fabrics, occasion wear innovations and gender-neutral fashion

By Meher Castelino

Interesting fabrics, detailing and style trends emerged from the latest edition of Lakmé Fashion Week Winter/Festive 2018, which was held in Mumbai from August 22 to 26, 2018.

Designers not only created some innovative silhouettes but also experimented with traditional fabrics by giving them a contemporary treatment with weaves as well as styles. Accessories like scarves came to centrestage, while new categories in fashion, unconventional wedding wear, style directions and the concept of oversized and layering of clothes took on a more intense profile.

Indian textiles came to the forefront in a more aggressive form, as the weavers turned contemporary in their techniques, along with high-tech digital directions to assist them.

We bring you the 10 trends from Lakmé Fashion Week Winter/Festive 2018 that will be seen on the fashion charts soon and will make for an interesting fashion season.



Kamika Sachdev





Shweta Gupta

Yadvi Agarwal

Crowning the Head

The designers whose collections graced the ramp this year ensured that the crowning glory of next season's fashion would no doubt be with the bandana, scarf, shawl and even the elegant turban.

British designer Lars Andersson's 'Khadi and Malkha' mixed collection in all-white was accessorised with the bandana that matched the very androgynous line of separates. Gen-Next designer Yadvi Agarwal brought the turban into sharp focus to match her abstract printed collection of separates and dresses in her 'Yavi' label.

Label Ritu Kumar's very colourful 'Native Spirit' collection inspired by the Wild West, Native American

Gender Bender

Gender-neutrality has been knocking on the doors of the Indian fashion industry for a couple of seasons and at Lakmé Fashion Week Winter/Festive 2018, a full blown show was devoted to this genre. Nearly seven designers presented couture for 'him, her and everybody else'. Gender-neutral collections got designers some great applause, with this new option having many takers.

From the Chola label, it was a hard sell gender bender line with makeup and hair to match. One of the pioneers in the category, Kallol Datta, hit the spot perfectly with his shroud-like clothes complete with a marked Hijab inspiration appealing to both men and women. Bobo Calcutta's intensely multi-coloured, heavily embellished



Chola



Anaam

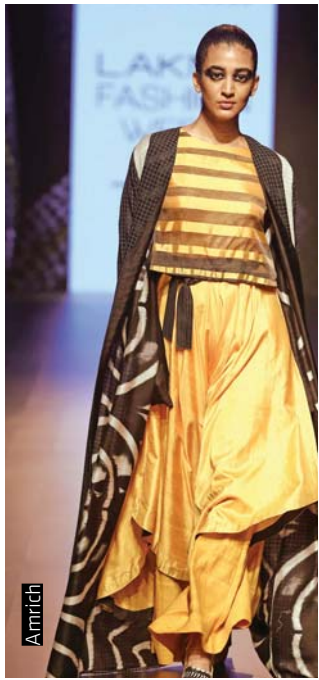


Pot Plant

life and the Inca civilization, gave the headscarf tied gypsy style, pride of place. Meanwhile, Shweta Gupta felt when it's a bad hair day for the fashionista then covering the head with a trendy piece of cloth helps to make a great fashion statement, using the shawl as an ideal cowl muffler for the head to match her outfits.

clothes were displayed on men and women with neutral silhouettes to please both sexes.

The Anaam label showed clothes with no boundaries, while Bloni's white kurtas, shirts, jackets and pants looked good on him and her. Antar Agni has been offering gender-neutral fashion for several fashion weeks and this season too, the somber collection was favoured by one and all.



Amrich



Saaksha and Kinni



AM:PM



Abraham and Thakore



Armaan Randhawa



Shweta Gupta



Tahweave



Two Point Two



Chola

Soft, Long & Covered

Wear them over short or long skirts. Wear them over mini, midi or maxi dresses. Wear them over slinky gowns. Wear them over trousers and shirts. Wear them over lehenga and cholis. The soft, long, floor-length covers are going to rule the charts in the coming winter / festive season, at times teamed with jeans and T-shirts.

The Amrich label coupled covers with asymmetric skirts and boxy tops; and sharply cut pants and tops. Designers Saaksha and Kinni presented printed covers in colourful patterns that can be mixed and matched as per the wearer's whims and fancies. The AM:PM label too showcased soft covers worn with dhoti style pants or skirts.

Anti-Fit & Oversized

Unlike what the name of the trend suggests, this trend has nothing to do with plus-size fashion. It is, however, all about clothes that are 2 or 3 sizes bigger than the wearer's measurements. This totally deconstructed and anti-fit was favoured by both designers and buyers alike at the fashion week. Not only was the silhouette immensely big and wide but the length of the sleeves and trousers would sometimes even reach the ground and beyond.

Chola has always had an exaggerated anti-fit oversized collection from the first Gen-Next showing and this season too, the label stayed true to oversized shapes. The brand, Two Point Two, also worked with oversized clothes that were too wide and big for the buyers - the brand's trademark since the last season.

Designers Abraham and Thakore had some wide kimono style creations, minus seams but with more roomy silhouettes. Ashish N Soni's blouses, skirts and jackets, which could have fitted generous-sized women, appeared on slim model figures. Armaan Randhawa's boxy, baggy, pants, tunics, kurtas and jackets gave a new fashion direction to shapeless fashion. Sunita Shanker's wide boxy kimono inspired jacket with a giant collar was one of the best examples for the anti-fit, oversized shape when worn with a crushed long tunic and pants, while Shweta Gupta's anti-fit oversized version was a bias cut asymmetric soft jacket that added volume to the look.





Rmkv Silks with Sunita Shanker



Buna



Naushad Ali



Indigene



The Third Floor Clothing

Traditional Weaves

Traditional weaves have been part of the Indian fashion scene for centuries but over the last few years they have been making waves with designers realising the importance of Indian textiles and weaves being of utmost importance, if the Indian fashion industry wants to compete in the international garment arena. For the next season there will be a lot of Indian weaves from around India that will be the new trendsetters.

Indigene's experiments with ikat were present in silk as well as silk and cotton for interesting western silhouettes with a marked influence of the Chappan, kurtas and khats from Central Asia. Naushad Ali worked with the weavers of Musiri and brought in the rustic checks, stripes and ikat with abstract and colour blocked patterns. The label, Three, by Pallavi Dhyani worked around 100 percent handloom cotton woven by the Barabanki weavers for a relaxed easy line of separates.

Khadi fabric, considered high fashion, was given an even more fashionable twist by labels Buna, The Third Floor Clothing and Lars Andersson using it for styling women's wear in feminine – and at times androgynous – silhouettes. Jewellyn Alvares too worked with natural Khadi in its slub effect and raw state for the launch of his unconventional men's wear line.

Karishma Shahani Khan's label Ka-Sha gave a new meaning to the Kota Doriya fabric by collaborating with Craftmark. Karishma's look turned the sheer checked fabric from Kota into western wear with appliques and 3D embellishments for the dresses, tunics and skirts.

The RmKV Silks brand, creators of the famed Kanjeevaram silks with the help of designer Sunita Shanker displayed garments and saris in a variety of weaves like the lino light silk sari, the 50,000 colours sari and the exciting reversible sari.



Nupur Kanoi



Vineet Rahul



AM:PM



Rmkv Silks with Sunita Shanker

The Multi-Print Story

Nothing is more exciting than seeing a great multi-print story on one garment that is cleverly put together. Prints have always been favourites of Indian designers, especially since India is known for its varied print techniques.

For Vrisa's 'Bukhara' collection, patterns came together seamlessly, as strong colours and multiple abstract and floral designs were merged perfectly with embroidery.

The designing duo Saaksha and Kinni brought a riot of colours on the ramp for their collection 'Raas' which was inspired by the popular Gujarati dance. A mix of Bandhani, Patola and Ikat designs were turned into digital prints for the very fusion layered silhouettes. Brand AM:PM was inspired by the global gypsy for its 'Gypset' line, with specially created abstract prints appearing regularly on dupattas, long coats and garments.

Designer Yogesh Chaudhary's 'Surendri' label showcased the 'Rangoli' collection, with a vibrant display of rangoli colours on ethnic

wear. Designer Vineet Rahul's look was replete with celestial prints in black and white for his 'Chandni' collection, while Yadvi Agarwal and Kanika Sachdev mixed a variety of prints that fell into place rather well. Nupur Kanoi's 'Protea' offering had the flowers of Cape Town in all its multi coloured and design forms on dresses, skirts and blouses.

Fabric Innovations

Styles and trends were displayed not only for garments but also fabrics. The latest trend directions for textiles at Lakmé Fashion Week Winter/Festive 2018 were as interesting as the silhouettes and cuts of the ensembles.

Rajesh Pratap Singh's experiments with Tencel™ for his collection called 'Welcome to the Jungle' combined the ecological Tencel™ with Indian crafts like Chanderi, Banarasi, Jamdaani, hand block prints and artisanal textiles onto the ramp. The fiber was spun into fabrics with low-tech hand spinning, as well as at hi-tech mills with gold and silver accents for Indian-inspired silhouettes from Rajasthan.





Pankaj and Nidhi

Nachiket Barve worked with the R|Elan™ FreeFlow fabric which ensured the garment does not weigh you down, in addition to an extraordinary drape, which flows and falls with perfection. R|Elan™ FreeFlow was touted as a fabric of the future, since it feels like second skin and drapes luxuriously. This next generation fabric has been specially engineered to provide the dual benefits of high fashion and enhanced comfort.

Amit Aggarwal worked with polymer strips, metallic laces and brought in Phulkari inspired metallic embroidery with the help of recycled plastic and metal surfaces for his futuristic styles for men and women.

The New Age Bride

The new age bride is straying away from the traditional red lehenga, choli and dupatta trio, or the beautifully woven sari for the most important day in her life. She is not going for the brocade, Banarasi or Kanjeevaram looks either. She is now looking for a totally different fashion statement that is glamorous, experimental and very Avant Garde. Payal Singhal's show stopping bridal collection called 'Mu'asir' was a line of differently-draped saris over embroidered skirts, worn with tiny strappy bralettes. There were also low crotch pants with attached sari pallavs and sexy cholis.



Amit Aggarwal



Lakmé Salon and Payal Singhal

RmKV Silks with Sunita Shanker presented fabrics with sustainable materials using natural colours like turmeric and indigo, which was worked on the MPHL modernised pneumatic handloom that created an industrial first for the Kanjeevaram fabrics and designers Pankaj and Nidhi - who are known to experiment with their textiles - presented both hand and machine made technology in their engineered fabrics including faux leather and metallic-type twist yarns for their 'After Dark' line.



Nachiket Barve

Nachiket Barve's 'Millennial Maharanis' bridal wear included sari gowns with ornate blazers or slinky figure hugging gowns with a thigh high slit and a fully embellished floor-kissing coat. The look was neither totally ethnic nor western, but with a great fusion angle that promises to appeal to Millennial bride, whose wedding could take place at international venues.

21st Century Men's Wear

Men's wear in the 21st century does not revolve around the basic shirt,



Amit Aggarwal

trouser and jacket trio any more. It is, in fact, very adventurous giving stiff competition to the design directions that women's wear is known for.

Siddhesh Chauhan's 'Samurai' collection was a battle-ready line with intense detailing that featured origami, pleating, gathering and topstitching. There was geometric rouching and asymmetric construction in blends of silk, wool, polyester/wool, organza and cotton. The colours were dark and somber with innovative construction.

Jewellyn Alvares brought Khadi to the forefront in its raw slubby state in offbeat colours like green, purple, mustard, beige and off-white. Bias cut stripes and asymmetric lengths were used for tunics, shirts, jackets and coats that at times featured round or 'V' necklines. A trench coat was the inspiration for the sherwani and bundgala, while sleeveless tunic/pant sets had a causal vibe.

Kunal Rawal offered stylish men's fusion wear with the new look Sherwanis, bundgalas, waistcoats,



Jewellyn Alvares

jackets, kurtas and bundies with extreme detailing like French knots, appliqués, pleating and metallic work in vibrant colours. Laser cut fabrics; mock suede and linen formed the base of the collection.

Amit Aggarwal launched his much awaited men's wear line. He gave his Sherwanis, bundgalas, jackets, capes and coats dramatic construction, which featured panels and bias cuts. Floor skimming coats were worn with the intricately embellished shirts and trousers - all in very toned down grey shades.

Layer It On

Layering has been part of the Indian fashion scene for several years. In the



Eka

coming months, it is expected to stay firmly at the top of the fashion charts, with its soft fabrics being ideal for a multi-garment layered look.

Eka's fabrics for the range called 'Lived In' were just perfect for the layered look as sheers and opaque textiles with prints were put together for pants, dresses and covers.

Indigene brought the 3-layered silhouettes into focus; while Karishma Shahani Khan's drapes were ideal for the fusion look of blouse, skirt, cape and cover. Anurag Gupta and Kanika Sachdev kept the cooler climes in mind and layered several garments together, while Ajay Kumar Singh did it with lighter fabrics.

The Tahweave label for its "Uncharted" collection brought layering with the help of four garments that featured a variety of crafts like cut work with Kantha stitches. Checks, stripes and solids were all merged into one garment that comprised three to four different styles.



ANKUR TEXTILES

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OF MULTI-FIBRE
FABRICS FOR
FESTIVE SEASON**

For more than five decades, Ankur has been designing high-quality voiles ranging from 100 percent cotton to all fancy blends that are available throughout India...

IMAGES Business of Fashion



Ankur Textiles, part of the US\$ 1.7 billion textile-to-technology conglomerate Arvind Limited, has launched its exclusive range of colorful multi-fibre fabrics for the upcoming festive season. Designed to keep up with the fashion aspirations of women, the latest collection of colourful fabrics from Ankur is contemporary in its outlook yet rooted in tradition.

The festive collection includes fabrics like Lily, Livia, Coral, Silk Sophie and Incredible to name a few that can be tailored into western and ethnic women's wear such as dresses, blouses, kurtis and tunics. Available in a wide range of colours, textures, and prints, these fabrics will be available at all women's wear MBOs (Multi Brand Outlets) in the price range of ₹300 to ₹800 per meter. Speaking at the event, Brijesh Bhati, CEO, Ankur Textiles, (A Division of Arvind Limited) said, "We are happy to have introduced a sustainable alternative to cotton with our multi-fibre fabrics. Today, we have added choices for our audience which will offer a wide array of textures and features to suit the evolving fashion taste of India. Our blends are specially designed to marry style and comfort and make heads turn."

"As one of the most prominent player in the B2C segment in women's wear, we are happy to present women with the widest range of colours to style their wardrobe. In line with our strategy



to provide end-to-end solutions to our customers, we are entering into high-end prints in multi fibre and premium cotton substrates for dress materials,” he further stated.

Some of the fabrics that were launched included:

- **Lily:** Look phenomenal in this shiny and highly lustrous fabric. Its strength and shrinkage resistance properties make it a long-lasting fabric.
- **Livia:** Embrace your simplicity in this shiny Viscose-Cotton flax blended fabrics. Prized for its lightweight, cool feel and high

fabric that looks good, feels great and is natural as well

For more than five decades, Ankur has been designing high-quality voiles ranging from 100 percent cotton to all fancy blends that are available throughout India and exported to Switzerland, Middle East, China, Thailand and Africa. A heritage brand, Ankur develops high-quality fabrics for women’s wear and men’s wear.

Arvind is a US \$1.7 billion conglomerate with interests in textiles, branded apparel and retail, real estate, engineering, advanced materials, environmental solutions, omni-channel commerce and telecom. Arvind Limited



strength, it tends to give a crisp and professional look to the wearer.

- **Sophie:** Dress yourself in this versatile fabric which is a fine blend of the eco-friendly fibre Tencel, and the uber comfort, cotton. This fabric is soft, absorbent, and is great for sensitive skin, as it keeps skin dry and is soft and supple to the touch
- **Blossom:** Fabricate your own style as you drape yourself in this textile having a smooth and lustrous feel. A

is an integrated solutions provider in textiles with strong fibre to fashion capabilities for a global customer base. It is also a design powerhouse churning innovative concepts and generating intellectual property. It ranks amongst the top suppliers of fabric worldwide. Its denim, woven, knit and voile products are known for being innovative and sustainable. The company strives every day to create opportunities beyond conventional boundaries and believes that possibilities are endless.





DISPLAYING SUSTAINABLE FASHION

BY INDIAN & INTERNATIONAL DESIGNERS

The 6th Green Fashion India (GFI) Conference 2018 was held on the sprawling grounds of The Kala Academy, Goa on October 5 - 6, 2018. The GFI Conference is an initiative of the MKSSSS's School of Fashion Technology, Pune which holds conferences, competitions, exhibitions and workshops to sensitise the young fashion fraternity to follow and practice responsible and ethical fashion.

The GFI 2018 showcased Indian and international designers whose amazing sustainable collections with Indian crafts, organic and recycled fabrics were the highlight of the 2-day event.

GFI 2018 was the ideal platform where experts and brands discussed the way forward to make sustainable fashion a way of life. The many interactive panel discussions and contests ensured that the conference theme 'Green Connect for Social Design' was firmly projected so that designers as well as the many students from Indian fashion institutes, who participated in the 2-day conference, would follow the message of GFI 2018. Recycle, upcycle, reuse were the words that encouraged designers to project more slow fashion.

Inspired by India's crafts and traditional weaves the students cleverly wove them in their collections during the Students' Showcase for Sustainable Fashion Design Contest whose theme was 'My Own Way' The beauty of Paithani, crafts of Kullu Valley, art from Uttarakhand, cutwork of Rajasthan, fabric weaves of the Toda community, block prints, ikat, Pattachitra of Orissa and the Kasavu fabric of Kerala were given creative touches by the students.

On the designer front it was New York based Swati Argade who brought her "Bhoomki" collection comprising easy stylish black dresses, jumpsuit, blouses, skirts and minis with hints of glitter.



Philippe Werhahn, founder of Ting Ding and Kollateralschaden labels from Berlin showcased both his brands along with top German sustainable collections by Aluc, Flowmance, Format, Linda Sofia, Tauko, Coccon and Schmidt Takahashi that followed the recycle and upcycle mantra.

Indian designers showcased their sustainable fashion when Hemang Agrawal displayed his “Un-Revive” collection of glittering metallic silver/gold yarns with organically dyed cotton in tartan, houndstooth, polka dots and uneven stripe weaves.

Pune’s Karishma Shahani Khan for her Ka-Sha label experimented with Kota Doriya weaves and turned them into reversible creations that were layered with multiple textures and splashed with 3D fabric flowers and geometric surface ornamentation.

Uma Prajapati from Auroville presented her ‘Upasana’ label in organic Khadi for a relaxed black, white and red youthful collection. Ninoshka Alvares, Goa’s popular designer brought her indigo dyed denim line with Shibori and ikat weaves that had a marked oriental vibe. Pin tucked tunics; reversible jackets and origami detailing were the high points.

Sujata Tokey’s ‘Riwayaat’ collection in earthy brown, rust and blue brought traditional Pipli work of Orissa on Munga Tussar fabrics by Pracheen with vegetable dyes and prints to centre stage.

Grand finale designer Rajesh Pratap Singh’s all-white Tencel™ collection was a creative vision of innovative ethnic wear that was a perfect end to the Green Fashion India 2018 extravaganza.



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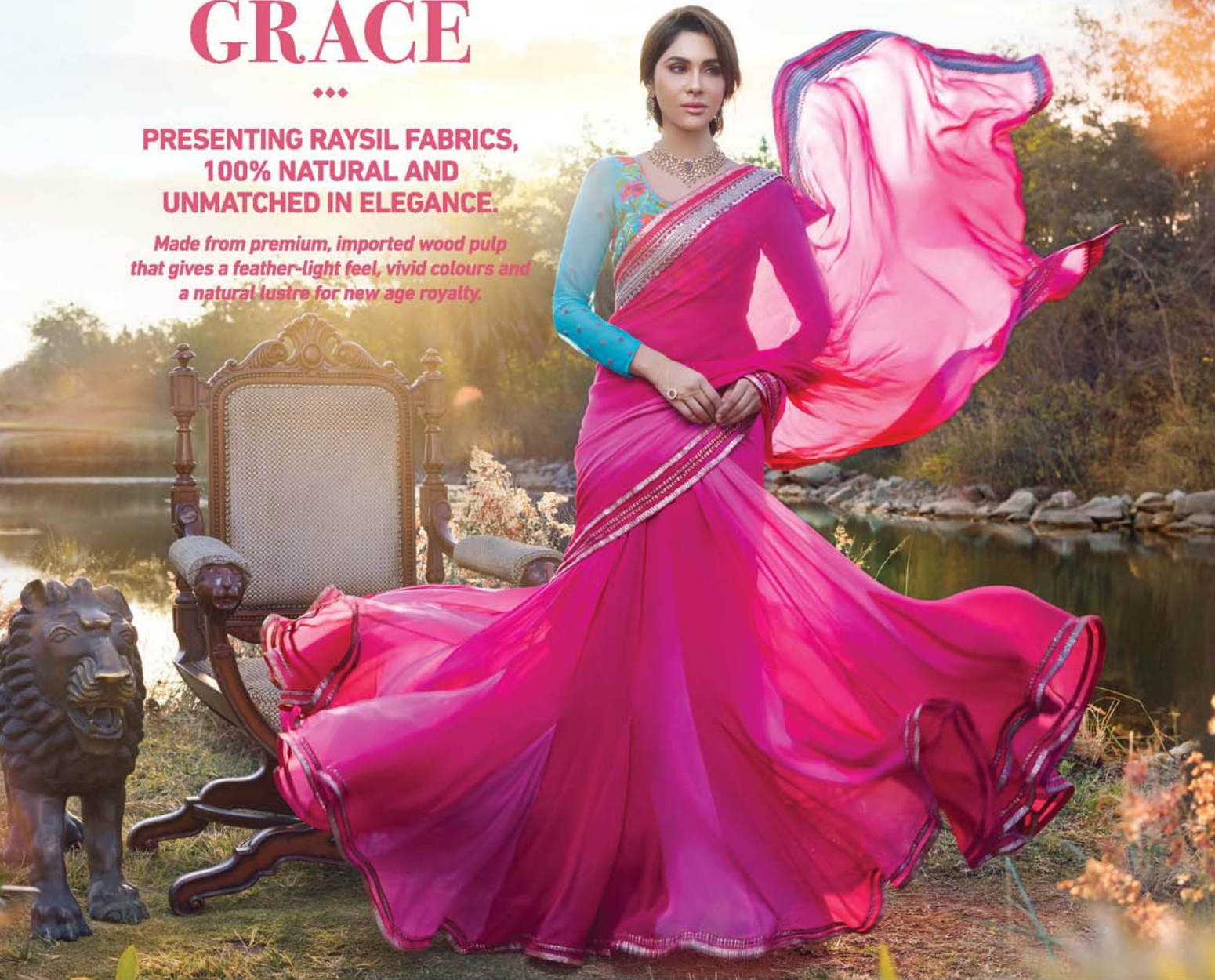
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