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11

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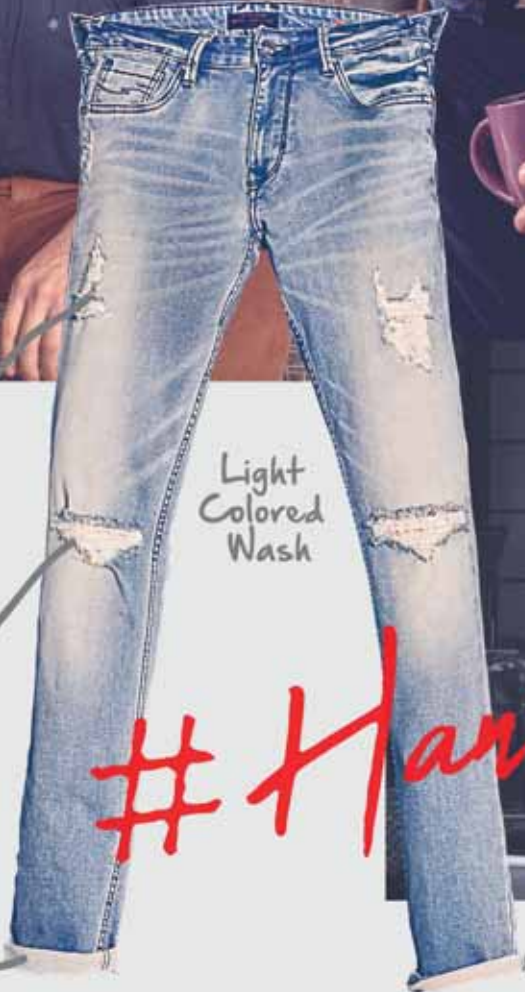
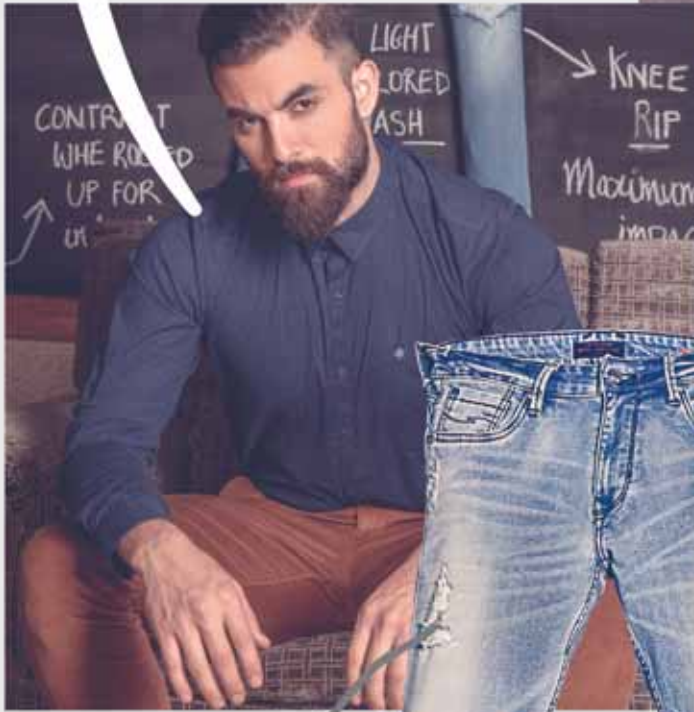


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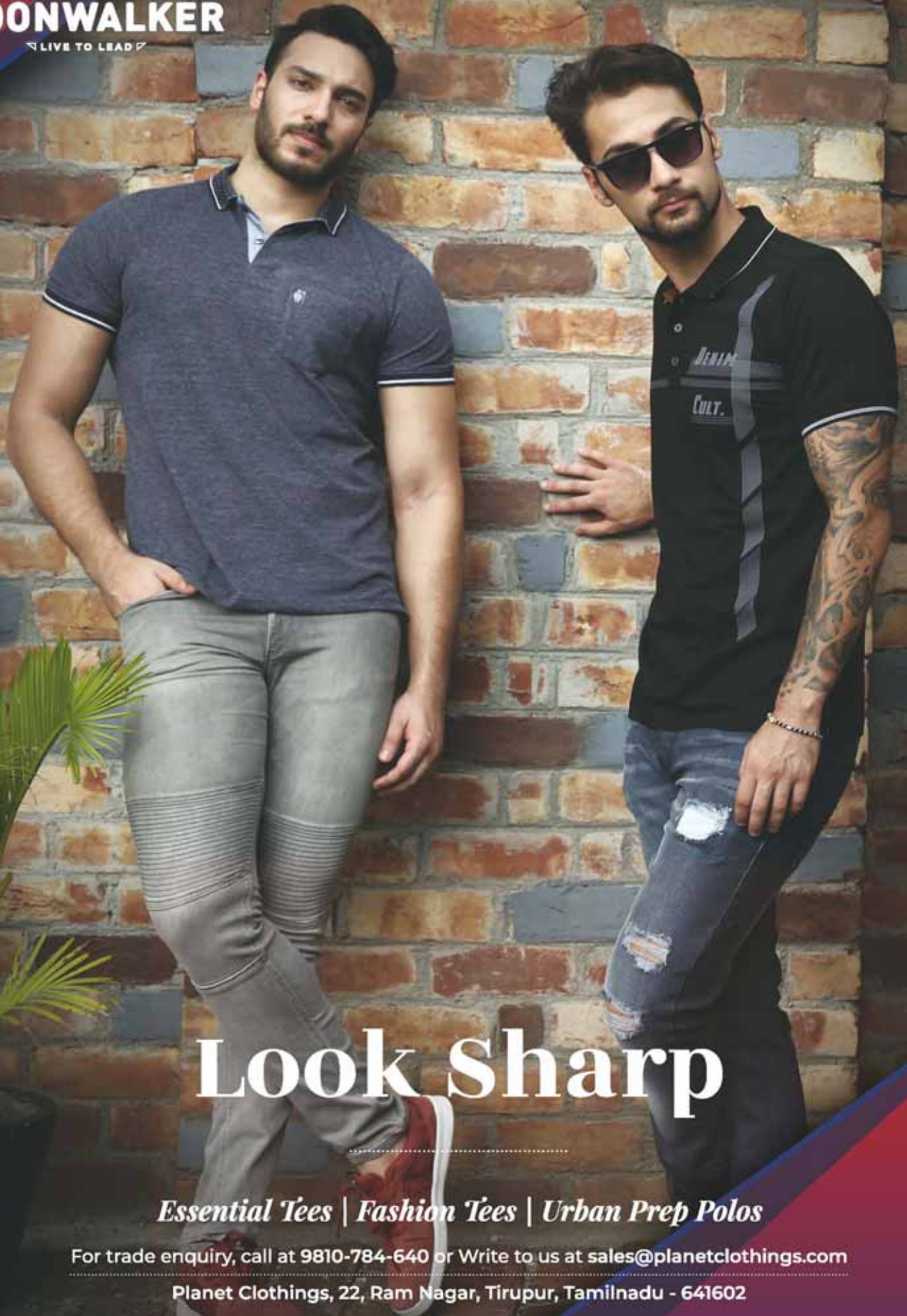


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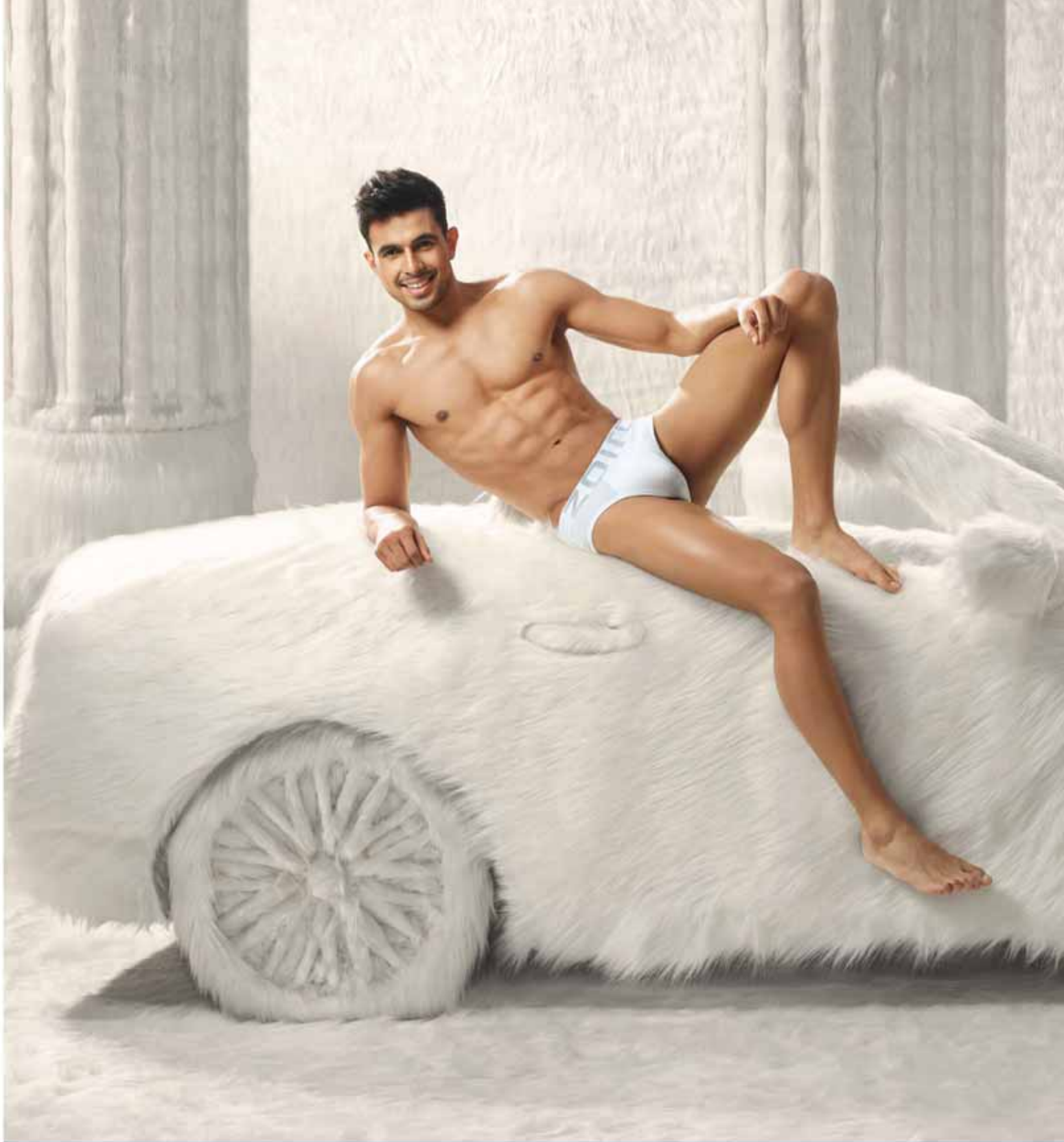
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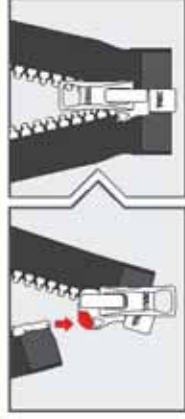
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*Pull the zipper apart above the slider.

The zipper cannot be opened by pulling the part below the slider.

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*Left hand insertion type is under development.

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* Asymmetrical plastic slider

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- Do not add an excessive load. It may cause damage to the cloth and zipper.

This zipper slider is asymmetrical. If a regular zipper is attempted to be opened in the same way, it might damage the zipper.



Dear all,

The world has become diverse, but with smaller moving parts. There are major trends, but they are being broken down into many variants. One such trend is sportswear, which is being fanning out into various parts - athleisure, activewear, gym wear, kids sportswear and much more.

The burgeoning appreciation for healthier lifestyles, across the globe and in India, 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. The challenge is to find out what the customer wants and how the retailer is going to provide it.

In the November 2018 Sportswear Special of IMAGES Business of Fashion, we bring you a detailed look at the fact that 'Sports-leisure'

is no longer a trend, but a fundamental shift in how the world dresses today. We bring you the details of the fast-emerging categories of Sportswear and Athleisure in India.

Delving deep into the subject, the issue defines the size of the market, outlines opportunities for retailers, evaluates key trends and showcases innovations. Apart from this, we bring you market leaders in categories and deep dive into what makes the successful.

The edition also bring you studies on sportswear trends in the country from well-respected consulting giants Euromonitor International and Technopak

We hope you find our sportswear special issue - a part of our ongoing attempt at showcasing fresh new thoughts and visions on sportswear trends in India - useful and insightful, as always.



Amitabh Taneja

>

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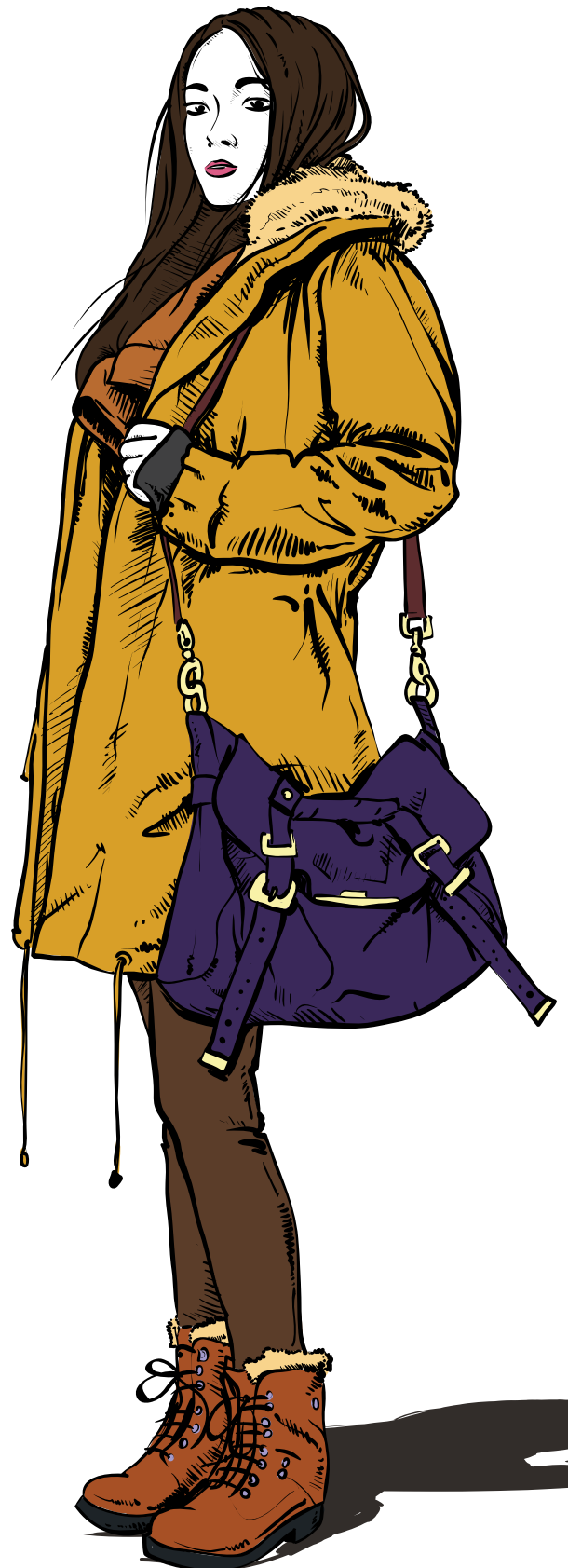
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DRESSING THE INDIAN MASSES: UNLOCKING ECONOMY AND VALUE FASHION RETAIL

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Top brands across men's, women's and kids' wear saw significant growth over normal business...

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Business & Innovation



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Following 'Tommy Now Icons' in Shanghai and the 'TommyXLewis' VIP launch party at New York Fashion Week, Tommy Hilfinger brought the latest collections to Tokyo with global brand ambassadors...

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RETAIL EXCELLENCE

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Cover Story, whose product is a blend of latest trends in the Indian context has struck the right chord with customers and has established itself as a formidable competitor in the fast fashion space to international players...

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RETAIL INNOVATION

Bonjour Introduces Diabetic & Health Socks

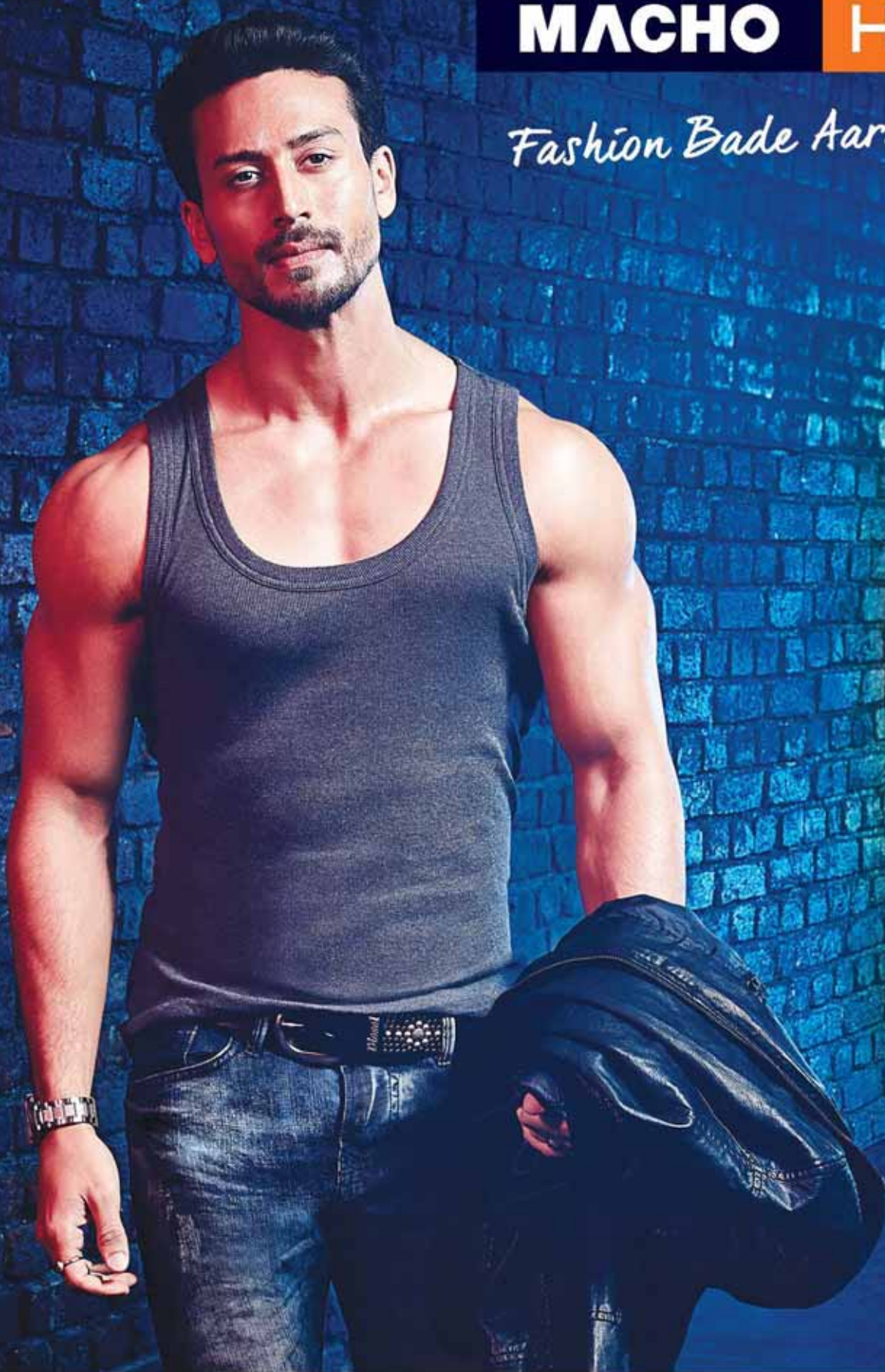
Offering unique health benefits to patients, Bonjour launched special socks for its diabetic customers under its range of wellness socks...

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and crafts. Its pricing is perfectly suited for any urban Indian pockets. It's unique collection of dresses, tops and tunics are created completely using natural fabrics, thereby offering an unmatched quality and fashion sensibilities in that price range. This is one of the key reasons why the brand's products have nearly flown off the shelves at its current stores in Delhi and Mumbai.



Manjula Tiwari, CEO, Future Style Lab said, "Ancestry provides an unparalleled, modern-day experience of old-style Indian artstries, and we're sure that the brand's offering will find much love and appreciation with our consumers in Noida. We're truly excited about launching this store and are thankful to Mall of India for providing us with an impeccable space and opportunity, right in the heart of Noida."

Ancestry's tagline #StoriesRetold, perfectly sums up its ethos, for every line of products the brand comes up with tells the story of a particular craft or tradition, but in a way that is suited to the new-age lifestyle. Any woman who's driven by her curiosity to discover India's cultural capital, and who appreciates sophistication in design and aesthetics, is sure to fall in love with Ancestry!

ANCESTRY

The newest brand from Future Style Lab, Ancestry has opened its first store in Noida, at Mall of India. The women's wear brand opened its maiden store in Delhi in May 2018.

Inspired by the evolving face of the new age Indian who is self-assured, professionally competent and curious to discover new paths, it's offerings, encompassing women's apparel and accessories, home furnishings, and other lifestyle products, is constantly evolving and is in-line with international trends, and yet interestingly rooted in Indian heritage

BRAND: Ancestry

PROMOTER: Future Style Lab

LOCATION: Noida (Mall of India)

Future Style Lab is a design studio and fashion house launched by Future Group in 2016. Incorporated in the fashion-forward Victorian neighborhood of London, the company already has a highly successful women's western wear label, Cover Story to its credit. Future Style Lab aims to set the pace for India's fashion business by integrating global fashion design and aesthetics with smart and efficient sourcing.

×



CARLTON LONDON

Collection: The new Carlton London store offers a complete range of fashion footwear along with an exclusive collection of accessories. It is spacious and offers a great collection, truly making it a shopper's paradise. It currently showcases the brand's Autumn-Winter collection and is predominantly focused on serving customers who are highly fashion-oriented.

Store Theme: The new store is a demonstration of sophistication and will set a new benchmark for luxury and glamorous stores in the Indian market.

Store Interiors: The look and feel of this store is mainly inspired by a rich British heritage. This is complemented with elegant couches and fancy mirrors. The interiors have soft lighting, giving the store an authentic British ambience.



BRAND: Carlton London
LOCATION: Delhi NCR (Ambience Mall, Gurugram)
PROMOTER: Carlton Overseas Pvt. Ltd.



JAYPORE

Store Theme: The Bengaluru store allows customers to experience their offerings across a range of design aesthetics to suit the modern Indian lifestyle. It will showcase the best of apparel, jewellery, style accessories, home decor and craft capsules from Jaypore's private label along with hand-picked designers, artisans and craft communities from across India. In addition, the store will host an array of premium offerings like Benarasi sarees, precious silver jewellery, etc.

Store Interiors: Designed by New Delhi based Headlight Studio, the store derives inspiration from various aspects of local craft and architecture.

Modular store fixtures inspired by the camping furniture of Jaisalmer and reinterpretations of the colonnades from Hamp are few of the key design elements at the store.

To enhance customer experience, the Jaypore store will integrate technology with retail experience through use of tablets and digital screen across the store. It also promises to be a place for cultural exchange, performances and conversations, thus providing a holistic overview of India's rich cultural landscape.



BRAND: Jaypore

LOCATION: Bengaluru

SIZE OF THE STORE: 2,500 sq.ft.



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LOCATION:
Delhi (Meharchand Market)

Collection: The flagship store offers a profusion of options in apparel and accessories. Along with the women's collection of apparel and accessories, Shades of India is introducing a men's collection including shirts, kurtas, waistcoats, jackets and accessories. This has been designed in collaboration with Anupam Poddar, a collector and curator of contemporary art who has a passion for textiles. The Home store is a few steps from the apparel and accessories. They form different elements of the Shades of India shop facade that will now be a dominant feature of Meharchand Market.

Store Theme: The antique is mixed with the contemporary. Textures are contrasted by colour or by mixing masculine or feminine. The message is that a room or an interior space can be re-thought to provide the unexpected, the imaginative and the creative.

Store Interior: The interior is minimalist with an emphasis on open areas. As you enter you look across to a shoji screen in wood and fabric that slides like the shutter in an old Japanese home. The walls are white and bare to allow the colours of the clothes and accessories to find their voice. The other elements are cement, iron and glass. Textile hangings or hand crafted jewellery are treated as works of art. Ceramics - many again inspired by Japan - give an unexpected touch to a shelf or a table.

Store Designer: All the interiors have been designed by Mandeep Nagi, Design Director, Shades of India in the same spirit as the brand's collections.





TBZ-THE ORIGINAL

Collection: The store offers a wide array of innovative and attractive jewellery, designs with an added attraction of custom-made products. The showroom showcases a vast range of contemporary and modern jewellery collection and a mix of gold, diamond and Jadau jewellery for discerning customers.

Store Theme: Through the newly opened store, customers will have the same shopping experience and access to exquisite handcrafted jewellery that is available at all TBZ-The Original stores across the country.

BRAND: TBZ-The Original

PROMOTER: Tribhovandas Bhimji Zaveri Ltd.

LOCATION: Delhi-NCR (Noida)





WOODS

Woods, the international premium leather goods and accessories brand, has officially opened its first exclusive store in Bengaluru. Strategically spread over 1,000 sq. ft., and located in Mantri Square, Sampige Road, the brand is all set to woo its customers by showcasing the brand's signature collections, including women's and men's bags, small leather goods, footwear and accessories.

The store is fully furnished with fascinating interiors and striking bespoke furniture featuring latest collections. Highlighted by warm lights, proprietary carpets and fine millwork Woods London store flaunts an illuminated exterior façade frame with glass windows.

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

Harkirat Singh, Managing Director, Woodland, says, "It's extremely exciting to be opening our first exclusive store in Bengaluru. As a British brand with a global sensibility, we are looking forward to introducing the full breadth of the Woods London lifestyle offerings to new and existing brand fans in the region."

The store's staff and strategic location will ensure the ultimate shopping experience for its customers.



BRAND: Woods

PROMOTER: Aero Group

LOCATION: Bengaluru (Mantri Square)

SIZE OF THE STORE: 1,000 sq.ft.



Editorial credit: r.classen / Shutterstock.com

ZARA

Zara has opened its first ever store in East India at South City Mall in Kolkata (West Bengal). The store which is spread over 28,000 sq. ft., will offer the brand's collection for all three Zara product ranges - men, women and kids.

The essence of the new store image can be summed up in four words: beauty, clarity, functionality and sustainability. A sleek white surface spans the ceiling and walls so that the limits within the store are no longer defined. This helps to create the illusion of space and freedom while creating a backdrop which enhances the beauty of the fashion creations. The space invites the customer to enjoy as never before the experience of feeling, touching, observing and interacting with the merchandise.

Zara welcomes shoppers in 96 markets to its network of over 2,000 stores in major retail locations in the world's largest cities as well as through its website, www.zara.com/in. In India, Zara now has 22 stores. The retailer's international footprint proves that there are no borders to the shared enjoyment of fashion. A constant flow of information from stores conveys shoppers' desires and demands, inspiring its 350-person strong creative team in Spain.

Zara is owned by the Inditex Group, this is the parent company of further seven fashion brands including Pull&Bear, Massimo Dutti, Bershka, Stradivarius, Oysho, Zara Home and Uterqüe and is one of the largest fashion retailers in the world.

BRAND: Zara

PROMOTER: Inditex Group

LOCATION: Kolkata (South City Mall)

SIZE OF THE STORE: 28,000 sq. ft.





DRESSING THE INDIAN MASSES: UNLOCKING ECONOMY AND VALUE FASHION RETAIL

By **Baqar Naqvi**,
Business Director, Wazir Advisors &
Willson Anand,
Consultant, Wazir Advisors

The India's fashion consumption story has taken-off for newer heights due to demographic, cultural, psychographic and behavioural changes among Indian consumers. These changes are altering the size as well as shape of the market. Over the next 5 - 6 years, the fashion market is expected to grow nearly ~2 times with women's and kids segment growing at an accelerated pace particularly in apparel and footwear categories.

The aforementioned macro changes will also have an explicit impact on economy and value fashion segments. Over the next 5 - 6 years, both these segments will grow faster than the overall market, resulting in increasing their share to 60 - 65 percent - an increase of ~5 percent from current market share.

For retailers, this growth demands a renewed focus on their strategy. The renewed focus will help retailers in offsetting the new challenges that they are set to face. In this chapter, Wazir has identified 3 such challenges. Further, considering these future challenges, Wazir has also suggested a growth-enabler to offset each challenge.



EVER CHANGING | EVER EVOLVING | EVER CHALLENGING

These words are best suited to Indian consumers whose fashion preferences are constantly changing. The fashion preferences which were deeply rooted to immensity and richness of Indian culture are now evolved to more refined and globally on trend fashion. Contemporary Indian consumers are seeking distinct fashion for distinct occasions. From a limited wardrobe a decade back, it now includes formal, semi-formal, casual, active, sports, ethnic, seasonal, leisure, party and many other types of fashion implying Indian consumers have become more discerning in their fashion needs and hence, more challenging to understand. This shift is due to the plenteous fashion exposure of Indian consumers.

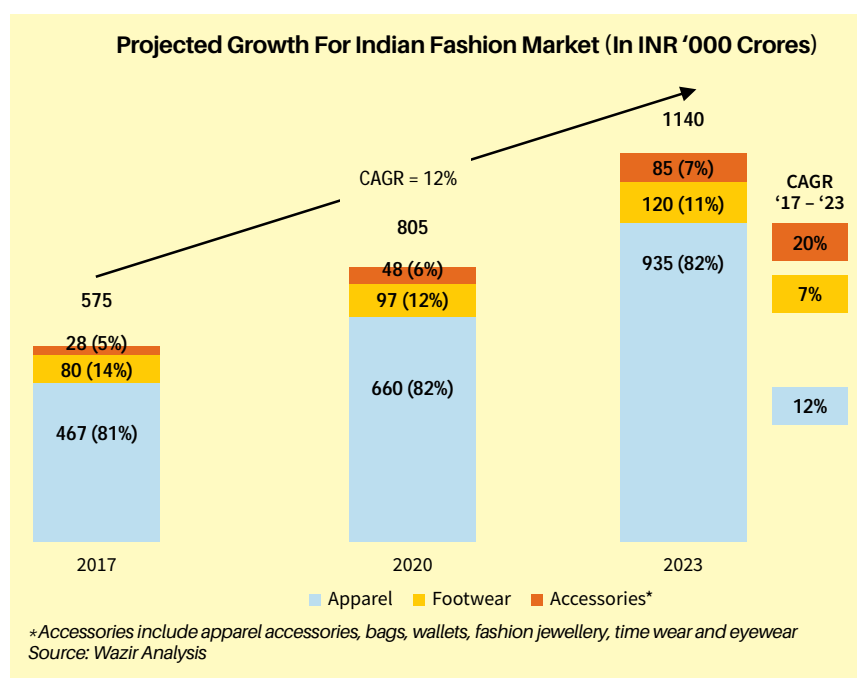
The Indian consumers which comprises of the largest Gen Y population in the world with a median age of 27 years are more experimental by nature and more inclusive and intermingling with different cultures and social structures. They are more time poor and money rich having started to earn at a much younger age and hence more inclined to spend on better and more aspirational things in life. These cultural, psychographic and behavioural changes are also reflective across

fashion product categories namely apparel, footwear and accessories.

With India's economy expected to grow at almost 7 - 8 percent CAGR over the next decade, the per capita income will also increase. Increasing wallet sizes will result in consumers with more money to spend and greater enthusiasm for fashion. The per capita expenditure on fashion is expected to reach `7,835 by 2023, rising from `4,290 in 2017. Therefore, the total Indian fashion

expenditure is expected to grow to `11.4 lakh crores by 2023, making India one of the most conspicuous spots in the global fashion market.

Further, not just the size of the market, but its construct will also change. In apparel and footwear, women and kids segment will grow at an accelerated pace. However, the dominance of women segment in accessories will continue to exist.



NEW INDIA WITH A MODERN OUTLOOK

CULTURALLY

- ▶ Less rigid and likes discovering new brands
- ▶ More aware and engaged with brands
- ▶ Seeks newness that reflects in fashion preferences

PSYCHOGRAPHICALLY

- ▶ Aspire for better brands and international fashion
- ▶ Open to spending on self – discretionary spending
- ▶ Have it and then flaunt it attitude

BEHAVIOURALLY

- ▶ Spends more, saves less
- ▶ More confident of future success
- ▶ Confidence via brands
- ▶ Urban and well-travelled
- ▶ Increased trend awareness

Projected Market Construct Shift In Apparel

Segment Share	2017	2023
Men	37%	35.5%
Women	35%	35.5%
Kids	28%	29%

Projected Market Construct Shift In Footwear

Men	60%	56%
Women	30%	33%
Kids	10%	11%

Source: Wazir Analysis



The changes in the Indian consumers are explicit and so is the impact of these changes on the Indian fashion market. The maximum tremors of this impact will be felt across economy and value fashion segments which jointly forms the 55 - 60 percent market share. For pure play value and economy fashion retailers, this means a great deal because the aforementioned macro changes will drive the economy and value fashion market as well as give rise to significant challenges.

ECONOMY FASHION

Target Consumer: Aspirer

(` 0.9 – 2 Lac Household Income)

It is based on the idea of "trading up" from the unbranded fashion.

It is targeted at consumers who are early or first time users of branded fashion.

Example: V-Mart, V2

VALUE FASHION

Target Consumer: Middle Class

(` 2 – 10 Lac Household Income)

It is based on the idea of "trading down" or "smart buys".

It is targeted at brand buyers seeking fashion and quality at affordable prices.

Example: Pantaloons, Max Fashion

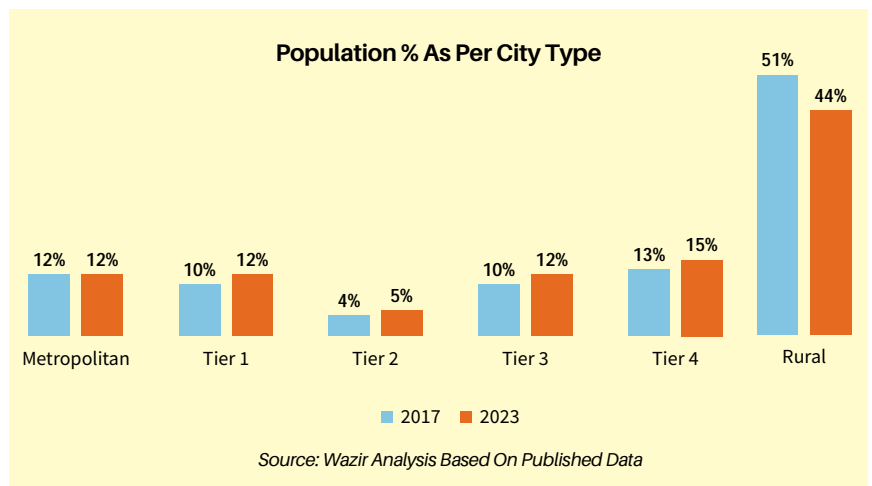
Source: Wazir Analysis



The Present Case For Economy And Value Fashion

The story of urbanisation in India is different from rest of the world. The migration to urban centers in India, is not happening as fast as it happened in China and is not limited to a few large cities as it happened in South Asian countries like Thailand or Indonesia. In India, it is the tier 3 and tier 4 cities that are expected to see maximum population growth over the next decade. As a result, the working population is rapidly increasing across Tier III and IV cities. The working population has increasing income with a need as well as willingness to dress better.

Furthermore, the rural population is also transitioning up in income levels due to availability of manufacturing based jobs, expansion of agriculture into value added farm activities and government's rural employment schemes. As a result, urban lifestyles and services are increasingly being adopted with a combination of affordability in rural areas. This process of rural urbanisation or rurbanisation is converging rural consumption towards urban consumption pattern and NSSO rural consumption surveys are testimony to same.

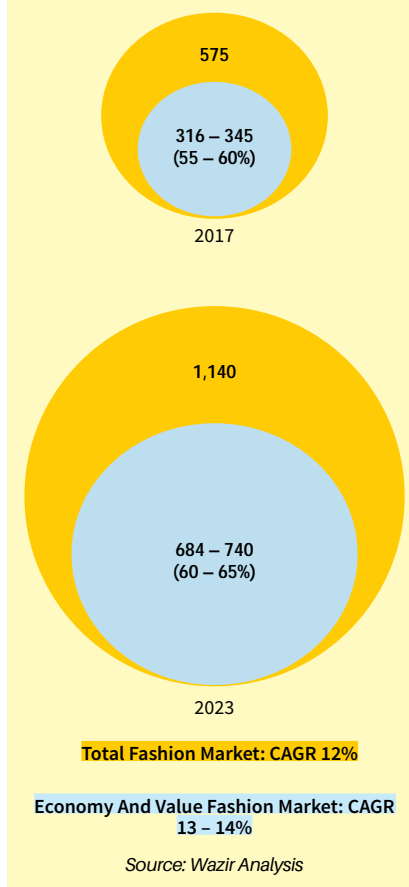


Due to urbanisation, the tier 3 and tier 4 cities will begin to emerge as new growth engines for fashion retailers. These cities are currently in process of reaching a threshold level where they become suitable for the entry of these retailers. Further, ruralisation has already changed the dynamics of ready-to-stitch vs ready-to-wear in rural areas. The rural fashion consumption which was ready-to-stitch dominated, need-based and lower price points skewed has changed to more ready-to-wear centric and aspiration driven. Though price sensitivity is still existing, but it has so far benefited the ready-to-wear segment only as ready-to-wear is cheaper than ready-to-stitch and rural consumer is

well aware of the same. It is this relative cost gap between ready-to-stitch and ready-to-wear that has been fuelling the rural fashion expectations. Adding to these expectations is the convenience of trying out before purchase.

Together urbanisation and ruralisation are creating a scenario where economy and value fashion market of ` 3.2 - 3.5 lac crores in 2017 will grow to ` 6.8 - 7.4 lac crores by 2023 at a CAGR of 13 - 14 percent. This growth will be attributed to many facets of urbanisation and ruralisation, key amongst them being population movement, increased spend and RTS to RTW conversion.

Projected Shift In Indian Fashion Market (In INR '000 Crores)



Rural Fashion Cost Economics

Shirts	Ready-To-Stitch					% Savings For RTS
	Ex-Mill Fabric Price	Fabric MRP	Price (2.2 M)	Tailoring Cost	Final Price	
	225	450	990	250	1,240	+9%
	100	200	440	150	590	-23%
	50	100	220	125	325	-16%

Ready-To-Wear	Ex-Mill Fabric Price	Price (1.8M)	CMT	Garment Price	Retail Multiple	MRP
		225	405	80	445	2.8
	100	180	60	240	2	480
	50	90	50	140	2	280

Source: Wazir Analysis

Trousers	Ready-To-Stitch					% Savings For RTS
	Ex-Mill Fabric Price	Fabric MRP	Price (2.2 M)	Tailoring Cost	Final Price	
	275	550	688	300	988	+18%
	150	300	375	175	550	-8%
	100	200	250	150	400	-18%

Ready-To-Wear	Ex-Mill Fabric Price	Price (1.8M)	CMT	Garment Price	Retail Multiple	MRP
		275	330	100	430	2.8
	150	180	75	225	2	510
	100	120	50	170	2	340

Source: Wazir Analysis

At present, there are few sizeable retailers that are serving the economy and value fashion market. Given the market size, this is the largest opportunity that is presenting itself for existing and new fashion retailers that can dare to think "Large Scale". The success of fashion retailers like Pantaloons, Max Fashions, V-Mart, V2 and few others is witness to this phenomenon and what has been realised is just the tip of an iceberg.

Challenges And Growth-Enablers For Economy And Value Fashion Retailers

While the rise of economy and value fashion segment is inevitable, the emergence of new challenges is also unpreventable. For new as well as existing economy and value fashion retailers, the situation demands a

>

Be seen at Lulu Mall, be seen above the rest.

In the 5 short years since its inception, Lulu Mall - Kochi has established itself as one of India's top shopping destination. With over 250 international and national brands, the largest food court, a 9 screen multiplex and a 55,000 sq feet family entertainment centre, Lulu Mall is where Kerala comes to shop and relax. And the Group is soon to make its presence felt in Lucknow, Thiruvananthapuram, Bengaluru, Hyderabad, Visakhapatnam, and 12 other cities across India. So be a part of Lulu Group's rapid expansion in India and fast-track your brand's growth.

TO KNOW MORE,

For Bengaluru, Abhijith R: 907 257 9077

For Thiruvananthapuram, Vinay Kailath: 999 580 7225

For Lucknow, Vishal Rana: 731 800 2555

For Kochi, Aravind Chandran: 759 381 2192





renewed focus on their growth strategy. This renewed focus will help retailers in establishing truly differentiating core capabilities to create sustainable growth in the future.

Wazir has identified 3 key challenges that retailers are set to face. Further, considering these future challenges, Wazir has also suggested a growth-enabler subsequent to each challenge. The identified challenges and growth-enablers are as follows:

CHALLENGE 1:

Competition And Fashion Heterogeneities

While value fashion remains the playfield of select pan India retailers, the economy fashion is largely regional and unorganised retailers' play, as of now.

All pan India value fashion retailers have so far managed to grow faster than the market itself. This growth was primarily being driven on the basis of targeted private labels, robust shopping

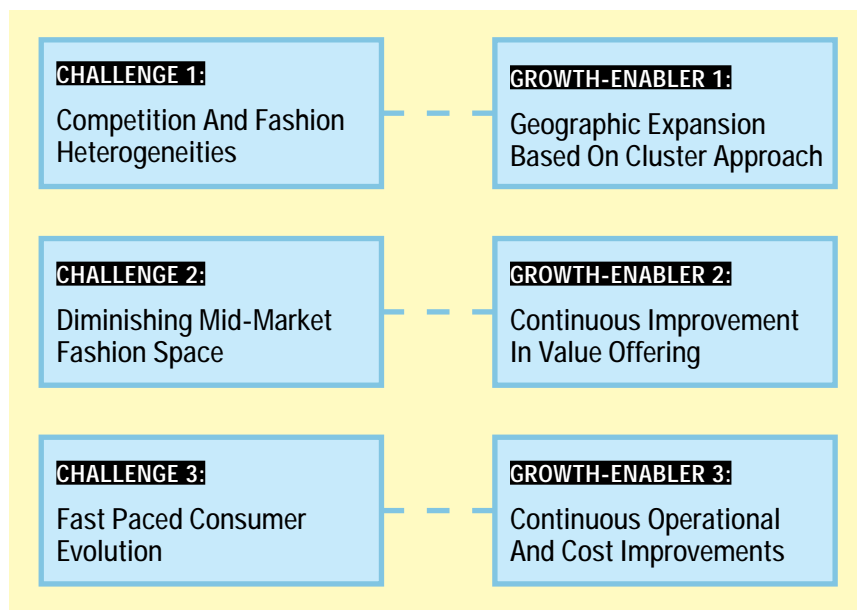
Pan India Value Fashion Retailers

Retailer Name	Store Count (FY17)	Store Size (In '000 Sq.Ft.)	Revenue (FY17) (In INR)
Reliance Trends	330	8 - 24	5000*
Pantaloon's	209	10 - 15	2552
Max Fashions	190	10 - 12	2048
Westside	107	17 - 18	1785
FBB	54	12 - 15	NA

Source: Wazir Analysis Based On Published Data
*Estimated

experience, deep customer engagement, regular fashion freshness as well as continuous supply chain improvement without cost increase. However, all of them have now established stores in similar metro, tier 1 or tier 2 cities.

On the other hand, in economy fashion, regional retailers have established their strong foothold across different geographic pockets. These pockets are either high density areas in north and east regions or severely fashion underserved areas in north-east and other regions. These retailers have managed to hold the ground due to their in-depth understanding of local fashion preferences and relation based customer retention resulting in high customer traction and vast coverage. However, majority of these retailers have also undergone geographic expansion in similar regions like value fashion retailers in similar cities.



Regional Economy Fashion Retailers				
Retailer Name	Store Count (FY17)	Store Size (In '000 Sq.Ft.)	Revenue (FY17) (In INR)	Coverage
V-Mart	141	8 - 10	932	North to East
CityLife	74	NA	350*	North to East
Bazaar Kolkata	51	5 - 6	500*	East to North East
M - Bazaar	45	NA	345	East to North East
Bazaar India	44	10 - 12	NA	North to North East
1-India Family Mart	38	NA	148	North
V2	37	12 - 15	470	North to East
V - Bazaar	24	4 - 5	45	North to East
City Kart	23	8 - 10	150	North to North East
Citi Style	14	7 - 8	NA	North to East

Source: Wazir Analysis Based On Published Data

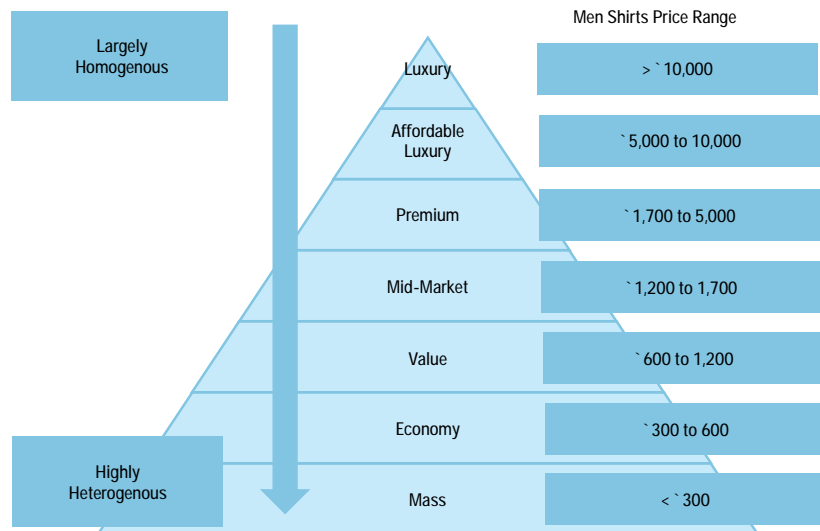
*Estimated



The next level of growth can be either achieved via geographic expansion into new Tier III and IV cities or increasing the same store sales in existing cities. In both cases, it is important for retailers to understand that fashion consumption in India does not vary only on the basis of price and subsequent quality and fashion quotient attached. It also varies within fashion segments. The fashion consumption shifts from largely homogeneous to highly heterogeneous as we go down the price ladder.

At higher price points, fashion consumption is largely based on latest trends and target consumer segment is also more homogeneous in their fashion palate. However, as we go down, the fashion consumption become more skewed towards regional preferences and fashion palate becomes more heterogeneous. As an example, super premium fashion players will have lesser SKUs and more standardised range across the country than a value fashion player. Further, the heterogeneities can exist in terms of size, fit, fabric or style preferences across regions. Therefore, economy and value fashion retailers will have to carefully manage fashion consumption heterogeneity to avoid reaching a stage of over expansion leading to merchandising and operational inefficiencies.

Fashion Market - Price Segmentation And Consumption Heterogeneity Level



Source: Wazir Analysis

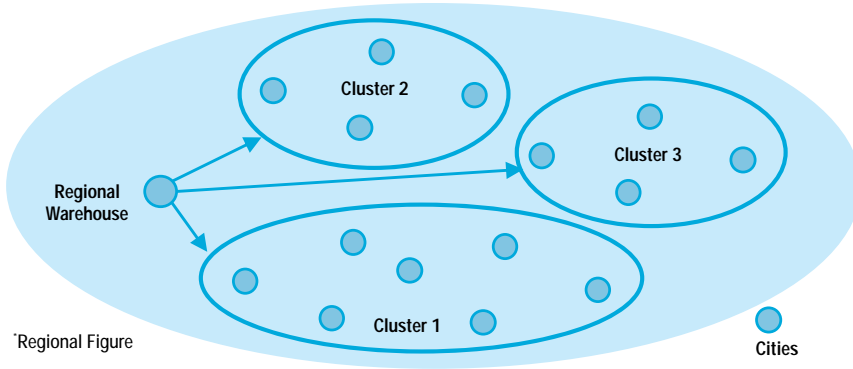
Growth-Enabler 1: Geographic Expansion Based On Cluster Approach

For calibrated geographic expansion in new Tier III and IV cities and higher same store sales growth across existing cities, economy and value fashion retailers require micro rather than macro perspective because these cities are scattered across regions. Further, having a one-dimensional viewpoint in that micro-perspective will not be sufficient to manage the fashion heterogeneities. The scenario demands the adoption of cluster approach, in which retailers will have to identify how one city cluster is different from the other cluster in a region.

Retailers will have to segregate cities on the basis of commonalities like size, colour, fit or fabric preferences. Hence, the retailers will have to constantly monitor store sales data and in-store customer behaviour to strategize and customise merchandise supply as per city clusters. At the same time, the retailers also have to ensure that the cluster formation is only to manage the local fashion palate, there will be share of merchandise which will remain constant across stores along with uniform store look and shopping experience.

>

Cluster Approach*



CHALLENGE 2:

Diminishing Mid-Market Fashion Space

While fashion market is expected to grow at 12 percent CAGR over the next 5 - 6 years, the growth across different fashion segments will vary significantly. This is due to the changing size of the target consumer segments. Also, not all consumer segments will strictly adhere to their fashion segments because the market is becoming increasingly polarised. This polarisation exists either in terms of being brand or price oriented. As a result, for players operating in premium or higher price segments, differentiating proposition will be distinct “brand promise and experience”. On the other hand, players operating in value or below segments, differentiating proposition will be the distinct “fashion, quality and price balance”.

It is the mid-market that will be left squeezed with the unique selling proposition of discounting. Due to discounting, these players are expected to miss on both “brand promise and experience” as well as “fashion, quality

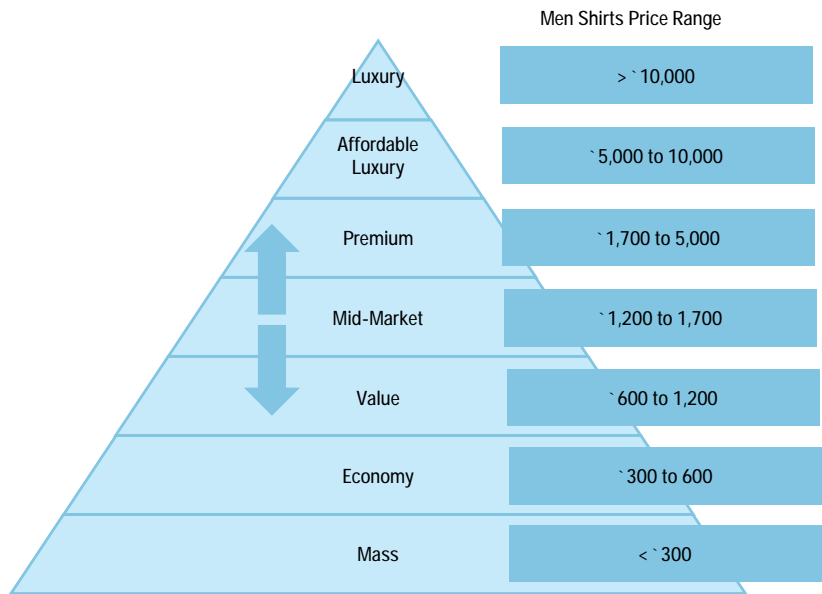
and price balance”. Further, the value and premium fashion players will also try to recruit mid-market consumers with marginal shifts in their pricing. The recent launch of shirts priced less than ₹ 1700 for MBO channel by many premium menswear brands and increasing range of shirts priced higher

than ₹ 5000 in their EBOs is a testimony to same. However, the economy and value fashion retailers will have to continuously improve their value offer to offset any disruption from mid-market players in either economy or value segments.

Growth-Enabler 2: Continuous Improvement In Value Offering

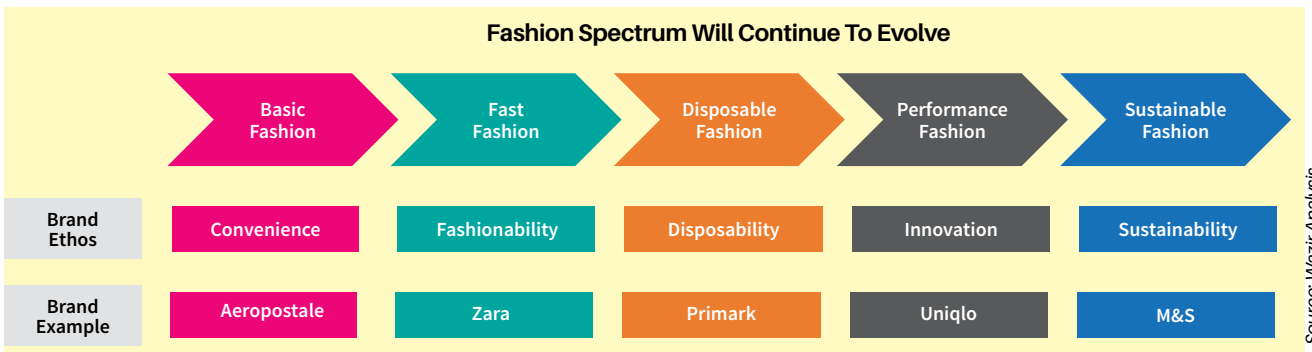
While the success of economy and value fashion retailers is based on their ability to plug the relative gap between aspirations and income of “Aspirer” and “Middle Class” consumers, it is also important for them to create new differentiations for offering better value proposition to consumers. With time, retailers will have to delink fashion and price to integrate fashion with aspects like convenience, fashionability,

Fashion Market - Price Segmentation And Consumption Pattern



Source: Wazir Analysis

Fashion Spectrum Will Continue To Evolve



Source: Wazir Analysis

disposability, innovation, sustainability etc. This will help retailers not only in improving usability and perception value but also carving out new niches for themselves within economy and value fashion segment.

CHALLENGE 3:

Fast Paced Consumer Evolution

The economy and value fashion retailers



Parameters Type	Parameters	Economy Fashion	Value Fashion
Front-End	Merchandise	Market + Private Labels	Majority Private Labels
	Sales Per Sq.Ft. (Annual)	6,000 - 10,000	8,000 - 12,000
Back-End	Gross Margin	30 - 35%	50 - 55%
	Rentals (% of Revenue)	4 - 6%	8 - 10%

Source: Wazir Analysis Based On Published Data

have fundamental back-end and front-end differences. These differences span across various operational parameters such as:

Despite all these differences, there is one common thing for both types of retailers and that is fast paced consumer evolution. With each passing day, the target consumers for economy and value fashion retailers are becoming more informed, connected, conscious and demanding. Retailers will have to constantly evolve as their target consumers are evolving. This evolution will span across upgrading the supply chain as per demand to control gross margins, to upgrading stores while tightly managing store costs, to upgrading the merchandise as per changing consumer needs to control sales per sq.ft.. Hence, continuous operational and costs improvements lie at the epicentre of retailers' evolution.

Growth-Enabler 3: Continuous Operational And Cost Improvements

The winners in the economy and value fashion retail will be the ones that have better control over the retail value chain including sourcing, supply chain, merchandising, store operations and customer management. Such retailers will have deeper insights to undertake actionable steps on driving reduced

Operational And Cost Improvement Drivers

- Continuously Improve private label offerings (colour, size, fit, style)
- Synchronised in-store and out-store customer engagement
- Maintain overall margin breakup as per share and space across categories
- Align store visual merchandising / space allocation as per category relevance
- Optimise overall product offering as per market construct shifts
- Align store design and staff behaviour as per brand promise
- Develop long term relations with supplier for better price negotiations
- Create supply space by investing in suppliers for best cost and delivery
- Invest in warehousing capabilities for priority based inventory allocation
- Automate the back-end processes like sorting, packaging etc.
- Invest in digital capacities for cluster based merchandise allocation
- Invest in front-end technologies for realizing customers full profit potential

human dependence, predicting sourcing quantities, inventory management, cluster based merchandise allocation, store operations management and much more. Retailers can drive these operational and costs improvements via:

Wazir believes that economy and value fashion retailers looking to scale-up

their business could learn from these challenges and subsequently leverage the identified growth-enablers. The market growth will support all ventures with clear growth strategy based on category, consumer, competition, channel, and cost structure analysis.



Amazon's Great Indian Festival 2018

A New Apparel Retail Revolution

Top brands across men's, women's and kids' wear saw significant growth over normal business, and these brands included W for Woman with a growth of 9X, Pepe Jeans by 13X, Allen Solly by 6X and Mothercare 4X...

Shivam Gautam



It has been more than a decade since Flipkart flagged off India's e-commerce industry by selling its first book (October 22nd, 2007), yet the country's e-commerce market continues to surge. Currently pegged at US\$35 billion, the market can potentially grow more than 4X to US\$150 billion by 2022, documented a research by Nasscom and consulting firm PwC India. The report further noted that three out of four online customers are expected to come from Tier II and III markets, as the middle class will form the biggest chunk of Indian population and, in the next few years, is likely to consume just as much as their Chinese counterparts do today.

At the helm of this success is what the e-commerce industry has been synonymous with since its inception in India - predatory pricing and deep discounting. Discount has been the sole material force propelling e-commerce and has, over the years, heralded a thorough transformation in India's consumer landscape altogether. Every

e-commerce player is now in a proverbial race to offer the lowest price possible and the feeding frenzy that deals, sales coupons, app discounts, et al has become today stands as a testimony to the behemoth influence of discounting as a selling strategy in India.

Such is the Indian consumer's response to discounts that, today, annual online selloffs have emerged as a retail tradition. Major annual 'Festivals' like Flipkart's Big Billion Days and Amazon's Great Indian festival are now important calendar dates throughout the country and are crucial for customers and businesses, both big and small, alike. So, are these shopping festivals with their deep discounts a harbinger of a new retail revolution in India?

US online major Amazon, which has committed an investment of \$5 billion in its Indian operations, kicked off the



"Apparel has been a forerunner, it has been the largest category on Amazon Fashion with more than double the sale of previous year's Great Indian Festival on Day 1 and continued the trend till the end"

—Arun Sirdeshmukh,
Business Head, Amazon Fashion

first leg of its Great Indian Festival 2018 from October 10 - October 15. The sale featured jaw dropping discounts and offers across smartphones, large appliances and TVs, home and kitchen products, fashion, consumables such as grocery and beauty, consumer electronics and more.

Amazon registered a phenomenal response from Indian consumers, as expected, on the very first day itself. The smartphone category led the entire festival, with about 3 out of 4 phones sold in India in a single day being on Amazon. The day ended with the company selling more phones in a single day than are usually sold in 15 days in India. Large appliances saw record sales with a massive 30X growth over average business day. More than 300 crore worth of credit (EMI) was used by customers in little over 24 hours of the sale opening.

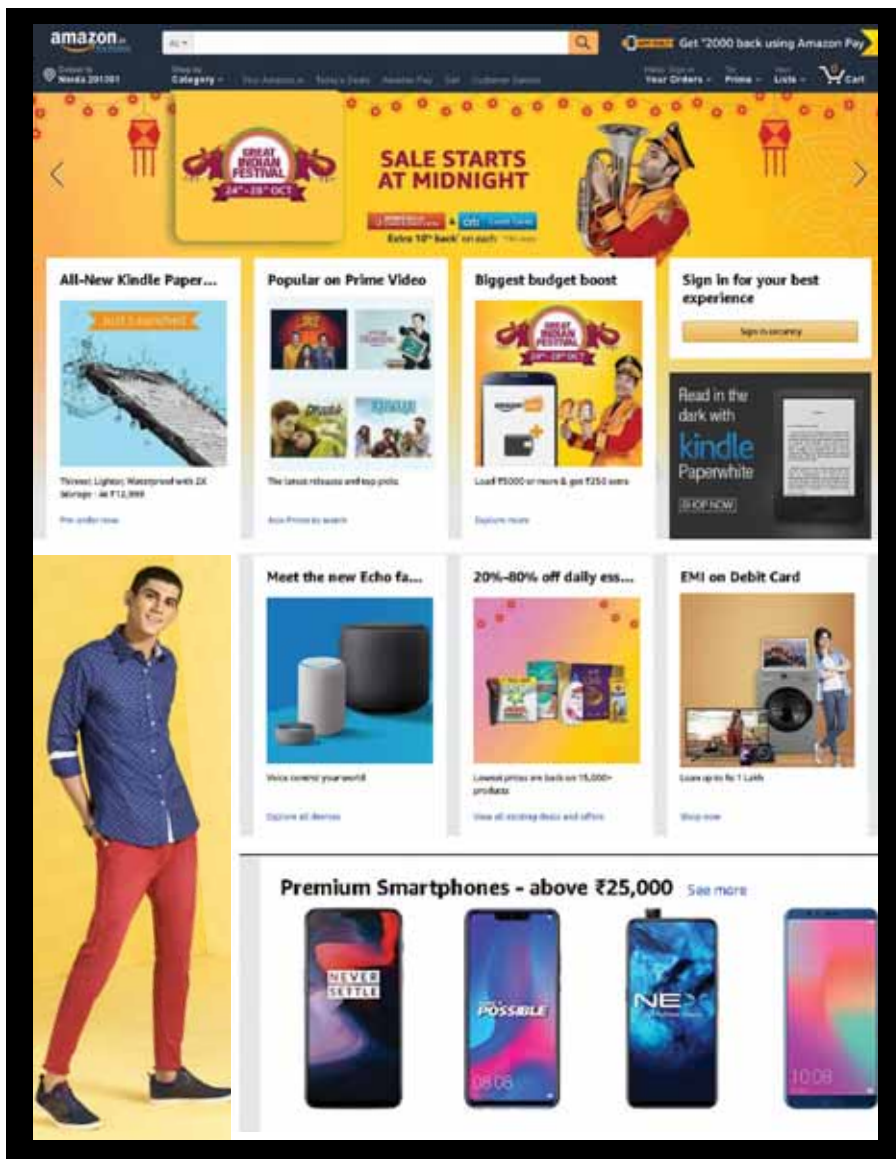
A new phenomenon of customers showing keen interest for intelligent products was also noted with high pre-booking and sales of Echo products, high sales of Alexa-enabled smart bulbs, headphones (40X over an average day), speakers (18X over an average day), etc. FireTV was the second largest selling product on Amazon.in with 12 hours of Prime Early Access selling 3X more devices than all of last year's first day of the Great Indian Festival.

FASHION AT THE GREAT INDIAN FESTIVAL

The Preparation

Apparel fashion tops the priority list for most e-commerce players as it is one of the fastest moving categories in e-tail. Amazon itself has earlier documented that 'one out of every three new to Amazon customers comes through fashion'. So naturally, Amazon Fashion was overflowing with a healthy stock of apparel for the sale period.





Amazon Fashion was armed with 21,000 brands across 10 lakh styles and a total inventory of nearly 40 million units for the Great Indian Festival 2018. The e-tailer additionally launched nearly 3,000 more brands since Diwali last year and has grown close to 2X for this Diwali as compared to the previous year.

India, with over 4 lakh styles from 100+ precious brands like Joyalukkas, PC Jeweller, Malabar, Senco, Mia by Tanishq, Candere by Kalyan. Brands like Stylori, Orra are exclusively available on the site. Customers took to festive shopping with jewelry doing 3X of sales compared to last year.

The Response

Amazon Fashion opened to unprecedented rush on Day 1 of Great Indian Festival with well over 100 percent growth in sales over last year. Apparel was the largest category on the site with more than double the sale of Great Indian festival last year. Top brands on Amazon Fashion including American Tourister, UCB, Puma, Biba, Shoppers Stop, Casio and Fastrack saw a sales growth of 10-15X over an average business day.

“Overall, the apparel category witnessed a growth of almost 5X this festive season. Apparel contribution to growth of Amazon Fashion during the Great Indian Festival has been 50 percent. Top brands across men’s, women’s and kids’ wear saw significant growth over normal business, these brands include W for Woman experiencing a growth of 9X, Pepe Jeans grew 13X, Allen Solly grew 6X and Mothercare 4X,” said Arun Sirdeshmukh.

Amazon’s own brands in the fashion category saw a 400 percent growth, with brand Symbol being the highest performer. “Symbol had over 3,000

“Apparel has been a forerunner, it has been the largest category on Amazon Fashion with more than double the sale of previous year’s Great Indian Festival on Day 1 and continued the trend till the end,” said Arun Sirdeshmukh, Business Head, Amazon Fashion.

Amazon Fashion was armed with 21,000 brands across 10 lakh styles and a total inventory of nearly 40 million units for the Great Indian Festival 2018. The e-tailer additionally launched nearly 3,000 more brands since Diwali last year and has grown close to 2X for this Diwali as compared to the previous year.

The ethnic wear store offered a selection of 2 lakh styles from over 3,000 brands which includes brands

like Manyawar, BIBA, Rangriti and W for woman at affordable points. The store offers nearly 4X more selection than any other online ethnic wear store. With over 1,500 weavers and craftsmen across India, authentically sourced, Amazon featured 5,000+ styles on the Handicraft and Handloom Store on Amazon Fashion.

Amazon Fashion had also scaled up its celebrity brand portfolio with exciting brands launched exclusively such as Just F (Jacqueline Fernandes), Prowl (Tiger Shroff), D:FY (Hardik Pandya), Rheson (Sonam Kapoor) as well as exclusive partnerships with brands like New Balance, Under Armor for the festival.

It also had the largest precious jewellery selection to offer across

styles, MYX over 500 styles, Arthur Harvey close to 100 styles and House & Shields over 100 styles. The selection has grown close to 75 percent YoY in 2018 with 7,500 styles added for the festive season,” said Arun Sirdeshmukh about Amazon’s in house brands.

The shoes category saw in excess of 150 percent growth in sales over last year. Specifically, women shoppers in shoes registered a 350 percent growth in sales over last year. Customers took to festive shopping with jewelry doing 3X of sales compared to last year.

AMAZON GREAT INDIAN FESTIVAL CONSUMPTION TRENDS

- 25 percent of women on the platform bought Kurtis for the festive season-
- Blue, Grey and Red were the colors of choice for Kurtis
- Tops and dresses were the most preferred choice in women’s western wear
- 1 out of every 3 clothing customers shopped t-shirts

GREAT INDIAN FESTIVAL 2018 V/S 2017

- 2.7X new customers acquired over 2017
- 100% pin codes serviced
- No. of sellers added: 2,500+
- No. of new brands added: 3,000
- No. of designers added to Designer Boutique Amazon: 100+
- Fashion demonstrated 100% growth in sales
- Luggage and travel registered 130% growth in sales
- Jewelry registered 3X sales `300 crore worth of credit (EMI) in 24 hours
- Large Appliances saw 2.5X growth
- 5.8X more customers loaded their Amazon Pay Balance

Response from Smaller Towns

According to Arun Sirdeshmukh, Bangalore was the numero uno city in terms of fashion apparel consumption during the Great Indian Festival. But, the e-commerce giant has witnessed a tremendous response from smaller towns and cities as well. “We also have experienced a great response from Tier II and III towns considering we have serviced 100 percent pin codes this year. The total contribution of Tier II and III towns have been 60 percent with most orders coming in from Thane, Jaipur Patna and Lucknow,” he adds.

Conclusion

India is known for its multitude of occasions and e-commerce festivals, fueled by deep discounting, are the new additions to this list. It is clear from the statistics behind Amazon’s Great Indian Festival that this new phenomenon had already caught the Indian consumers’ fancy and is slated to be a landmark retail episode in the coming future.

Shopping has its own festival now! The ambit of this rising trend can be tremendous – it can potentially overhaul the existing retail template of the country itself and change retail consumption in India forever. Perhaps that is why the GOI was compelled to set up a new panel to probe e-commerce firms’ big discounts in October 2018, at the behest of the conventional old school retailers. The 10-member panel set up by the Ministry of Corporate Affairs will examine the trends in digital economy, including steep discounts in online retailing.

To pinpoint if this these e-commerce bigwigs are at the vanguard of a retail revolution is something that only time can tell. But, as of now, it definitely is a riot—for the price-conscious consumers to keep getting the benefits of heavy discounts.





TOMMY HILFIGER'S FALL 2018 COLLECTION

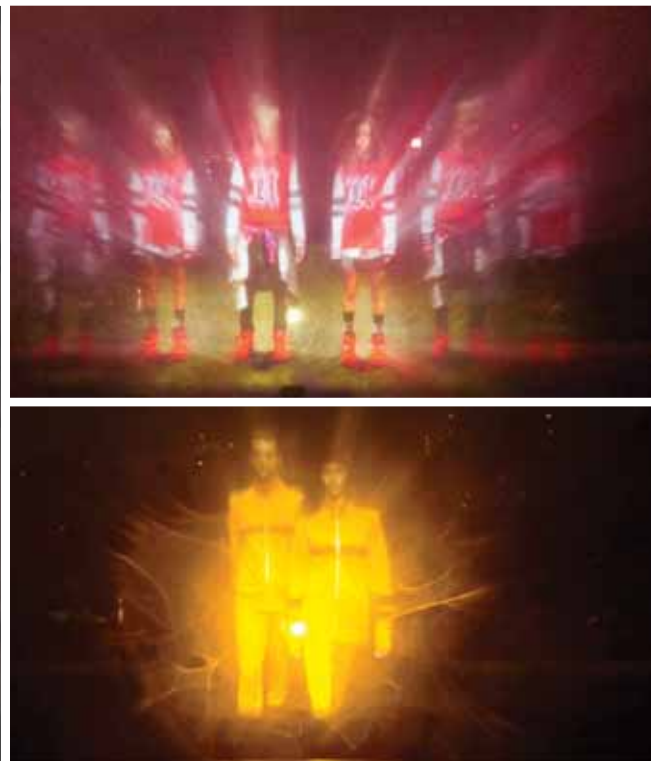
Presented Through Holographic Water Projection in Tokyo

Following 'Tommy Now Icons' in Shanghai and the 'TommyXLewis' VIP launch party at New York Fashion Week, Tommy Hilfiger brought the latest collections to Tokyo with global brand ambassadors Lewis Hamilton, Hailey Baldwin and Winnie Harlow...

IMAGES Business of Fashion

Tommy Hilfiger, owned by PVH Corp. [NYSE: PVH], presented the 'Tokyo Icons', an event that fused fashion with an innovative twist on the traditional runway show. The event built on the Tommy Hilfiger brand's Fall 2018 global campaign that celebrates the belief that the leaders of now are the icons of tomorrow – individuals who inspire others with their optimistic energy and extraordinary drive to create positive change.

'Tokyo Icons' took place on October 8, 2018, showcasing the Fall 2018 Tommy Hilfiger collections at the outdoors pool deck of the Tokyo Prince Hotel. The location of the event



reflects Tommy Hilfiger’s focus on Asia Pacific, its highest growth potential market, and commitment to bring the brand to new cities and audiences around the world.

“Tokyo Icons marks the final stop of what has been an incredible journey celebrating our Fall 2018 collections, while putting the spotlight on the optimistic spirit and determination of future generations,” said Tommy Hilfiger. “Through authentic collaborations and our passion for innovation, we continued to disrupt the traditional runway rules to immerse and engage consumers in the Tommy Hilfiger world.”

Innovative Runway

The first ‘TommyXLewis’ collaborative collection, as well as the ‘Tommy Icons’ women’s capsule and Hilfiger collection for women, were showcased at the event with an innovative twist on the traditional runway show.

A three-storey high holographic water projection showcased the Fall 2018 collections worn by a diverse cast of models that included Nandy Nicodeme, Anniek Verfaillie, Simon Martyn, Simon Bornhall and Marga Esquivel. A unique digital installation featured photos

of guests taken by renowned fashion photographer Leslie Kee and framed in “The Icons of Tomorrow Are the Leaders of Today” seasonal graphics, which provided the background to the runway projection. Throughout the evening, attendees were invited to personalise their denim tote bag at the TommyXYou laser customisation station. The event was attended by 400 guests, including press, VIPs, industry influencers and Japanese consumers.

The Collection

Featuring unisex styling on the virtual runway, the ‘TommyXLewis’ men’s collection embraces the brand’s sportswear roots, revisiting iconic American styles. The collection celebrates bold colours, sporty influences, heritage pieces and versatile shapes that speak to the confident and modern fan of the brand. Lewis’ personal twist to every design takes inspiration from his array of tattoos, luxury street style wardrobe and his lucky number 44.

The ‘Tommy Icons’ capsule collection for women, whose global campaign is fronted by global brand ambassadors for Tommy Hilfiger women’s, model Hailey Baldwin, model and activist Winnie Harlow, and actress Maggie Jiang, was also showcased at the event.

Brand Engagement

This innovative format provided an inspiring platform to further generate excitement around the global launch of Fall 2018 ‘TommyXLewis’, the first collaborative collection designed in partnership with British racing legend and global brand ambassador for Tommy Hilfiger men’s — Lewis Hamilton.

Tommy Hilfiger partners with the world’s top companies to drive cross-industry collaboration that create inspiring activations. The brand partner with Japanese social messaging giant, Line, to stream the ‘Tokyo Icons’ holographic water projection via the dedicated Tommy Hilfiger Line account on October 15, 2018.

Tommy Hilfiger is also collaborated with Zozotown, Japan’s largest fashion retail platform, and its street style app-Wear to launch an influencer-led shoppable experience. Ten influencers attending “Tokyo Icons’ would share their Fall 2018 Tommy Hilfiger styling ideas via their personal Wear account and each look would be immediately shoppable on zozo.jp.





COVER STORY TO LAUNCH ACCESSORIES LINE SOON ; EYES 100 DOORS BY END 2018

Cover Story, whose product is a blend of latest trends in the Indian context has struck the right chord with customers and has established itself as a formidable competitor in the fast fashion space to international players...

Charu Lamba

Kishore Biyani-led Future Retail launched fast fashion brand Cover Story almost two-and-half years back with an aim to take international brands like Zara and H&M head on.

The company then proceeded to set up a design house based out of London to develop cutting edge fast fashion. This design house was dubbed Future Style Lab, a wholly-owned subsidiary of Future Group, which developed and procured styles for Cover Story. And since then there has been no looking back.

According to Manjula Tiwari, CEO, Future Style Lab, a fantastic growth has been seen for the brand, in terms of its popularity with customers and retailers alike. "Being just a 2.5 year old brand, Cover Story has established itself as a formidable competitor in the fast fashion space to international players. The brand is among one of the very few Indian brands to be present on ground floor locations across the leading malls in India, a great indication of the journey so far."

"We place customers in the centre of all that we do. Our product is a blend of latest trends and suitability in the Indian context and that has struck the right chord with our customers," she adds.

Target Audience

The target audience of the fast-fashion brand is the 23 to 40 year old, financially independent woman with a rising disposable income which she loves to splurge on frequent shopping trips.

“She thrives on social media, is a traveller in spirit and embraces new experiences. She frequently seeks to refresh her wardrobe. Feminine and eclectic, she switches effortlessly between Indian and western wear. Dressing up for her is a form of self-expression. She is modern but rooted,” says Tiwari.

Store Design

All Cover Story outlets are designed to recreate the intimate boutique and provide a comfortable shopping experience. The layout is layers of transparency with opacity, which encourages a sense of discovery while shopping.

“A warm and neutral palette has been chosen for the store as well as all the equipment in it. Colours such as Rose Gold have been opted for, to give the place a feminine touch, to help women identify with the store,” states Tiwari.

The display panels in the store are designed to look like magazine editorials. Exclusive fashion clusters display merchandise as if they were stories, luring women into reading them.

Visual merchandising is done by and premium in-store windows are designed by London stylists on the lines of international luxury brands.

The cash counter mimics a woman’s vanity bag, while changing rooms have seating for the comfort of waiting friends and family.

“Customers can browse tablets with fashion content and styling tips. Cover Story’s in-store ‘selfie booths’ are bound to create brand excitement.



“We ensure our campaign imagery is of high quality and for that we shoot internationally to bring forth the true image of the brand, being designed in London. Locally, we rely on heavy mall activations and branding to steer the customer to our stores. We also turn to Instagram as a great tool to highlight our fashion authority in the market along with a lot of support from celebs and influencers.”

—Manjula Tiwari,
CEO, Future Style Lab,

Consumers can browse through stores and merchandise, share their personal information, and then have their shopping home delivered,” asserts Tiwari.

Shoppers can even make a request for sizes not currently available at the store. A personal shopper then locates the size from other outlets and delivers it to consumer.

Product Category

The brand offers around 450 SKUs per season under the categories like dresses, tops, tees, trousers, skirts, shorts, jackets and sweaters.

“We also do footwear and bags and are planning to launch a jewellery and accessories line,” reveals Tiwari.

“Dresses and tops are our fastest moving categories because we provide a wide variety in both categories for all occasions. Also these categories are generally the most sought after categories by women in general,” she adds.

Marketing Strategy

The marketing strategy of the brand is a healthy mix of generating brand awareness and driving traffic to the stores to convert to sales.

According to Tiwari, “We ensure our campaign imagery is of high quality and for that we shoot internationally to bring forth the true image of the brand, being designed in London. Locally, we rely on heavy mall activations and branding to steer the customer to our stores. We also turn to Instagram as a great tool to highlight our fashion authority in the market along with a lot of support from celebs and influencers.”

“We believe the future of consumer engagement is to get personal – create a connect with the consumer through great experiences. We intend to bring our customers a connect to our London designers with regular events and interaction, and to create constant content around international fashion and style to establish Cover Story as a go to fashion authority for the Indian consumer,” she adds.

Future Plans

The brand, which has 23 EBOs, 61 SIS across the country and presence on 5 online channels, will cross 100 doors by the end of this year.

“We have been more than doubling the turnover every year and same store sales growth has been in the health double digits. Currently online contributes 5 percent to the overall revenue and we see it growing significantly in the times to come,” concludes Tiwari.





BONJOUR INTRODUCES DIABETIC & HEALTH SOCKS

The soft padding in these socks offer special finish that inhibits fungal and bacterial growth on socks, as diabetic patients are prone to fungal and bacterial infection of the calf muscles. The socks also helpful in early stage of varicose veins...

IMAGES Business of Fashion

Renowned socks brand, Bonjour has launched special socks for its diabetic customers under its range of wellness socks. These socks offer unique health benefits to patients and ensure proper blood circulation in the legs.

These diabetic and health socks are designed for people who experience neuropathy (decreased nerve sensation) caused by diabetes or arthropathy (foot pain from arthritis) which is caused by diabetes or hypertension. The wellness socks also offer benefits like gradient compression along with comfort and protection from allergies.

Why These Socks?

India is known as the world's capital of diabetes. According to various reports, around 61.3 million people between aged 20 to 79 years live with diabetes in India, which is expected to increase to 101.2 million by the year 2030. The reports also indicate that apart from heredity, majority of people suffer from diabetes due to unhealthy lifestyle and improper food habits.

In 2012, International Diabetic Federation (IDF) had conducted a survey in India on the rising number of



“The situation is dangerous for the country when India falls under top ten youngest nation in the world. India’s economic development has brought higher incomes and a large number of diabetics. Diabetes became the country’s fastest growing disease burden over 16 years.”

-Raj Kumar Jain,
MD, Bonjour Group

diabetic patients in the country. The data collected from different parts of the country showed alarming situation. The surveyors found that 1 out of every 4 people is suffering from diabetes. The higher volume of patients were from urban areas of the country. During the survey, it was recorded that 77.2 million people have diabetes which was later confirmed in 72 million cases in a survey conducted by another agency in 2017. The report also revealed that India represents 49 percent of the world’s diabetes burden.

Raj Kumar Jain, MD, Bonjour Group says, “The above situation is dangerous for the country when India falls under top ten youngest nation in the world. India’s economic development has brought higher incomes and a large number of diabetics. Diabetes became the country’s fastest growing disease burden over 16 years.”

Product Highlights

- Loose top for healthy blood circulation
- Super soft top to not compress the circulation in legs
- Anti-bacterial finish
- Special finish that inhibits fungal and bacterial growth

Wide and Extra Long for Additional Calf Support

The soft padding in these socks range offer special finish that inhibits fungal and bacterial growth on socks, as diabetic patients are prone to fungal and bacterial infection of the calf muscles. The socks also helpful in early stage of varicose veins (prominent veins).

Made of 100 percent Cotton Fluffies and Natural Micro Modal

Featuring the benefits of pure cotton, these socks are made from 100 percent pure super softened cotton fibre. Suitably blended with micro modal, these cotton fluffies socks are specially recommended for those with sensitive skin and suffering from itchy foot.

Air-Ventilator Construction

Made with technology advanced construction facilitates, the socks help to supply air all the way down to the sole of the foot. The integrated ventilation channels along the sole and instep allow air to circulate in the shoe. It help the feet to breathe all day long along with keeping it soft and supple.

Fine Hand-Lined Toe With Invisible Soft Steam

These socks fits properly without bunching as these are made with re-enforced heel and toe with soft seams. The soft toe assures a comfortable fit.



...with inputs shared by Rohit Babbar,
Senior Brand Manager, Bonjour Group

DIABETIC SOCKS





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- ▶ **IMAGES Most Admired Retailer of the Year (North India): Foodservice:** QSR Indian Origin/ QSR Foreign Origin / Cafes & Juice Bars/ Ice-cream & Dessert Parlours/ Pubs & Bars/ Dine-in
- ▶ **IMAGES Most Admired Retailer of the Year (North India):** Food & Grocery
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- ▶ **IMAGES Most Admired Startup of the Year:** (North India)
- ▶ **IMAGES Most Admired Retailer of the Year:** Innovative Retail Concept (North India)
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SPORTSWEAR STUDY



Picture courtesy: black panther

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SPORTSWEAR- IS IT REALLY WORTH THE SWEAT FOR APPAREL PLAYERS?



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Sportswear continues to grow strongly due to the rise in healthy living and increased popularity amongst women who work out. The acceptance and introduction of casual wear at work contributed positively to sales. Influenced from the upcoming international sport events and professional leagues that are drawing crowds are further contributing growth. Athletes and celebrities are also drawn to this trend as they partner and start their own athleisure clothing lines. Riding on this growth, companies such as Adidas, Puma and Nike have continued to maintain their dominance in the Indian market, however, low barriers to entry has resulted in new players entering the market thus, further intensifying competition.

Sportswear benefits due to the ongoing healthy living trend

As the day-to-day lives of people continue gaining pace followed by lifestyle changes, there is a strong realisation about its side effects on the health. The prevalence of diabetes amongst population aged between 20-79 increased from 9.8 percent in 2016 to 10.4 percent in 2017 making it amongst the biggest health problem in India. There has also been an increase in the overweight and obese population because of this. To overcome these, people are looking for options to balance work and health so that they could lead a fit life. This has resulted in increased number of people enrolling at fitness centres. Also, more individuals have started scheduling regular walks and jogs which has pushed the demand for sportswear. As this trend grows, people have also started consuming more sports nutrition products to maintain health and vitamins and dietary supplements to achieve overall wellbeing.

Women's focus shift from only beauty to holistic wellbeing

Traditionally, women were not actively involved in sports or any other physical activity due to their singular role of being a homemaker to support the family. However, this has been changed as more women are stepping outside their house for work and education. This has resulted in more women thinking about maintaining holistic wellbeing and scheduling workouts to take care of their health. Earlier women were not very keen to join fitness centres due to the notion that working out with weights could make a woman muscular. However, with social media and increased awareness created by fitness centres there has been a decline in this thought, resulting in increased enrolment from women.



The sportswear segment is projected to grow exponentially over the next five years. A slew of trends and influencing factors backed by a young consumer base, omnichannel distribution networks and increased disposable incomes are going to propel the growth further in the next five years. However, as the competition intensifies, brands would have to work harder on their promotion strategies and digital presence to maintain sustained levels of brand recognition.

**SPORTSWEAR VALUE
SIZE**

5.4

INR BILLION (2018)

**SPORTSWEAR
GROWTH**

16

%VALUE SALES (2018)

GEOGRAPHY	CATEGORY	DATA TYPE	UNIT	CURRENT CONSTANT	2015	2016	2017	2018
India	Sportswear	Retail Value RSP	INR million	Current Prices	300,947.70	363,203.60	440,089.00	540,544.10
GEOGRAPHY	CATEGORY	DATA TYPE	UNIT	CURRENT CONSTANT		2015 - 2016	2016 - 2017	2017 - 2018
India	Sportswear	Retail Value RSP	INR million	Current Prices		20.7	21.2	22.8

FEMALE POPULATION

637

MILLION (2018)

**%WORKING FEMALE
POPULATION**

13

OF THE TOTAL FEMALES

Also, additional group classes such as aerobics, dance and zumba organised by these centres have created further interest amongst women. Taking a note of this, companies are now offering sportswear targeted specifically towards women which was earlier non-existent in the country. Now women want to look fashionable yet comfortable in their workout attire resulting in more options and stronger sales.

Casual wear is becoming a norm even in workplaces

Earlier, the office attire in India was restricted to formals. However, with changing times, as the stress levels at work increase and employees spend more time at offices, the HR departments of companies are playing a more active role to improve work places. Part of it has been the realisation that relaxing restrictions on the attire and working hours could go a long way to improve productivity and employee satisfaction. Also, the younger workforce does not like being told about what they should wear at a workplace. As these factors result in relaxation of rules, the demand for comfortable clothing possessing attributes such as being stretchable, breathable yet casual has gone up.



This resulted in a strong demand for athleisure clothing. As this fashion trend continues to kick in, people wearing fashionable sport clothing at work such as hoodies and t-shirts has gone up. The top sportswear companies such as Adidas, Puma and Nike are already present in this space. However, several other players such as Jockey are looking to expand in this segment.



Actors Hrithik Roshan and Tiger Shroff introduced brands such as HRX and Prowl. Also, cricketers MS Dhoni and Yuvraj Singh partnered and launched brands such as Seven and YouWeCan (YWC).

Bollywood actors and sports leagues endorse and promote sportswear

Athletes and celebrities starting their own sportswear clothing lines

As the demand for sportswear grows, several actors and athletes have partnered and started their own sportswear brands. For example, actors Hrithik Roshan and Tiger Shroff introduced brands such as HRX and Prowl. Also, cricketers MS Dhoni and Yuvraj Singh partnered and launched brands such as Seven and YouWeCan (YWC). As these celebrities have a strong following amongst the masses, they have managed to build a demand for sportswear. Also, as these products are competitively priced, they could easily penetrate the Indian market propelling growth.

Increasing popularity of sports professional leagues benefitting sportswear sales

The number of professional leagues started in the country in the last 5 years have benefitted the sportswear

industry. For example, Pro-Kabaddi League, Hockey India League, Premier Badminton League and Indian Super League that were started during this period followed by the already famous Indian Premier League for cricket are drawing strong crowds to the stadiums who are donning their favourite team jerseys and pushing sales. Also, there are many social hangouts coming up in the country that telecast live sport events, both domestic and international, where supporters throng wearing jerseys or sportswear.

Though sportswear is small, competition between brands is intense

New domestic and international players intensifying competition

Looking at the market opportunity, many companies have entered the segment thus, intensifying competition. Decathlon with its unique model of offering sportswear spanning across several sports under one roof has

>





proved to be a success in India. It has also built its digital platform to offer online purchases. Brands such as HRX and YWC are a few domestic brands that are creating waves due to their affordable offerings. This has also been the case with major retailers such as Future Group and Reliance Trends that are now offering their own private labels. Innerwear company Jockey is also looking to expand its offerings to the sportswear portfolio and offer athleisure wear. A big international player that is gradually building its presence in the country through internet retailing has been Under Armour. All these players continue to compete making the Indian

competitive landscape for sportswear fragmented.

International brands continue their dominance

The sportswear market in India continues to be led by Adidas, Puma and Nike. These companies continue to account for a strong market share backed by their strong global brand recognition as they continue to endorse top athletes globally. Their strong sourcing strategies backed by an omnichannel distribution network continues to benefit them. However, looking at the market opportunity, many other apparel companies are entering the segment, thus intensifying competition.

Conclusion

The sportswear segment is projected to grow exponentially over the next five years. The above trends and influencing factors backed by a young consumer base, omnichannel distribution networks and increased disposable incomes are only going to further propel the growth in the next five years. However, as the competition intensifies, brands would have to work harder on their promotion strategies and digital presence to maintain sustained levels of brand recognition. Also, affordability of sportswear would impact market share as international sportswear brands continue to be expensive giving opportunity to domestic brands.



ABOUT THE AUTHOR:

Anul Sareen, Senior Research Analyst, Euromonitor International

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FILA

The FILA logo is displayed in a bold, dark blue, stylized font. The letter 'F' is unique, featuring a red horizontal bar at its top. The letters 'I', 'L', and 'A' are also stylized with rounded, blocky forms. The background is a soft-focus, light blue sky with wispy white clouds. On the right side, the partial view of a person's head and shoulder is visible, wearing a white garment.

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HERITAGE**

1911





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HYDERABAD COMING SOON



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South India Retail Awards will honour business legends, professionals and innovators in the business of retail from South India for Excellence in retail and customer service. **THE 3RD EDITION OF IMAGES SOUTH INDIA RETAIL AWARDS** will see top business visionaries, great Consumer Brands, Retail Concepts and Shopping & Leisure Spaces from South India being felicitated on 17 December 2018 at JW Marriott Hotel Bengaluru.

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SOUTH INDIA RETAIL AWARDS CATEGORIES

- ▶ **IMAGES Most Admired Fashion Retailer of the Year (South India):** Mens Westernwear/Womens Westernwear/Men's Indianwear/ Women's Indianwear/Fashion Accessories/Footwear/Jewellery/ Kidswear/Timewear/Eyewear
- ▶ **IMAGES Most Admired Retailer of the Year (South India): Beauty & Wellness:** Beauty & wellness Services / Beauty & wellness Products
- ▶ **IMAGES Most Admired Regional Fashion Retailer of the Year (South India):** Independent Fashion MBO / Regional Fashion MBO Chain
- ▶ **IMAGES Most Admired Retailer of the Year (South India):** Consumer Electronics
- ▶ **IMAGES Most Admired Retailer of the Year (South India): Foodservice:** QSR Indian Origin/ QSR Foreign Origin / Cafes & Juice Bars/ Ice-cream & Dessert Parlours/ Pubs & Bars/ Dine-in
- ▶ **IMAGES Most Admired Retailer of the Year (South India):** Food & Grocery
- ▶ **IMAGES Most Admired Department Store of the Year (South India)**
- ▶ **IMAGES Most Admired Hypermarket of the Year (South India)**
- ▶ **IMAGES Most Admired Retailer of the Year:** Entertainment (South India)
- ▶ **IMAGES Most Admired Retailer of the Year:** Kiosk/ Express Formats (South India)
- ▶ **IMAGES Most Admired Retail Launch of the Year:** (South India)
- ▶ **IMAGES Most Admired Startup of the Year:** (South India)
- ▶ **IMAGES Most Admired Retailer of the Year:** Innovative Retail Concept (South India)
 Marketing & Promotions (South India)
 Store Design & VM (South India)
 Customer Relations (South India)
 Employee Practices (South India)
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Puma

INSIDE THE INDIAN SPORTSWEAR INDUSTRY

As the newfound penchant for fitness sweeps the nation and beauty ideals begins morphing fast, sportswear is gaining traction, gaining in popularity among Millennials. Here's a look at the market dynamics and how players are gearing up for the sportswear boom in India...

Shivam Gautam

India today is at par with wider global fitness trends. The booming economy and changing lifestyle preferences have compelled Indian consumers to be more health conscious and add new health and wellness routines to their hectic lifestyles. This trend has largely benefited the sportswear industry in India, which now is among the top in demand fashion segments of the country.

According to a research report published by Global Industry Analysts Inc., the global market for Sports and Fitness Clothing is projected to reach US \$231.7 billion by 2024. The research also indicates that technological developments designed to improve comfort and performance has also led to the growth in sales of sports apparel. The report points out that the Asia-Pacific region is expected to be fastest growing region, with a CAGR of 6.9 percent over the forecast

period. Sales came from emerging markets, such as India and Thailand, as well as the US, the world's largest sportswear market.

THE INDIAN MARKET

According to reports from various internet sources, the Indian sportswear market grew 22 percent from 2015 to 2016, outpacing the segment's global increase of 7 percent.

As documented by a Euromonitor research, the sportswear market in India has grown from `24,000 crore in 2014 to `37,000 crore in 2016 at more than 50 percent over the past two years. A same study has shown a 23.7 percent CAGR for the 2011-16 period with a forecast of 11.3 percent for the 2016-2021 period.

Men's wear comprises the biggest share of the Indian sportswear market followed by the women's and kids' segments. In the recent past, the women's market is progressively showing positive signs of accelerated growth. "Women's wear is the fastest growing segment in the sportswear industry in India now – both for the industry and for us. Earlier, it was highly underpenetrated, but now it's a booming segment. The men's segment continues to grow at a steady pace of 40 percent," says Sandeep Mukim, Managing Director, Proline.

"While the men's segment in sportswear is growing fast as numbers of sale, it is the women's segment that is registering a higher growth percentage. This is due to the growing awareness of women for individual sports category like running, marathon, and other fitness activities. The kid's segment is highly influenced by team sports – and the segment is growing fast along with the increasing popularity of cricket, football, etc." says Mohit Prabhakar, GM, Nivia.



"Through the internet and via international trends the consumer is updated with the latest in sportswear technology. To keep up with the evolving consumer, sportswear brands now launch products and technology at the same time as their global counterparts"

-Vishal Gupta,
Director - Retail, Puma India.

"For our brand, as also for the category as a whole, the growth is largely driven by the men's category. The women's and kids market has not grown at the same pace, largely for the need to be fashion-oriented and/or more colourful as opposed to the fact of being more functional and performance-driven. Also, given the same budget, women are likely to purchase more garments to match element of their wardrobe and hence are more likely to buy, say, 2 pieces of stretch leggings rather than 1 track bottom," says Sakshi Juneja, Key Accounts Manager of Black Panther, a unit of Juneja Global.

"It is very difficult, almost impossible to accurately estimate the market size for sportswear, considering the fragmented nature of this particular industry and the overlapping categories such as lounge wear, athleisure and even sleepwear and



Proline



Black Panther



Black Panther



“Black Panther has integrated facilities for yarns, elastics, fabric manufacturing and garmenting. So we are able to leverage these qualities to provide a more affordable offering to the Indian customer. In short, Black Panther is about international quality and Indian pricing”

-Sakshi Juneja,
Key Accounts Head, Black Panther,
A unit of Juneja Global.

undergarment brands vying for a slice of the activewear pie by styling themselves as sportswear brands. Added to this is the huge unorganized sector with a full-fledged and well-developed market for counterfeit merchandise of global brands, retailing brazenly through not only MBOs but also leading online portals,” she adds.

As a whole, the sportswear market in India has traditionally been dominated by the big international brands, aptly named the ‘Big Four’ – Reebok, Adidas,

Nike and Puma. Most of these brands entered the country in the 1990s and in the years that followed established their presence through a flood of local franchisees.

But, in the recent past, given the enthusiasm of consumers towards sports and sportswear in general, a slew of brands, both home grown and foreign, have mushroomed to absorb the market tendencies to cater to the rising needs of the consumers. Indian brands, although young, have an edge over their international peers – the price segment in which they operate. “In the case of apparel, international bigwigs are growing at very slow rate compared to homegrown brands due to their high price points. Indian brands are creating huge demand due to their capability of manufacturing compatible quality in India and offering products at very affordable prices,” explains Mohit Prabhakar.

Of late, a legion of celebrity launched brands have surfaced in an attempt to cash in on the mammoth popularity they enjoy among the commonality. “With fitness fever gripping the nation, celebrities have also caught on to this trend. Bollywood stars Hrithik Roshan and Jacqueline Fernandez have launched their own sportswear brands which are gaining popularity amongst the general audience. However, for those who are more seriously into fitness, they still stick to more international and well-established brands because of proven technologies and brand equity,” remarks Vishal Gupta, Director - Retail, Puma India.

GROWTH DRIVERS

The average, modern Indian consumer’s lifestyle is undergoing a massive metamorphosis. Rising incomes and discretionary expenditure in urban India have allowed people to focus increasingly on health and wellness, as well as rising awareness of lifestyle diseases. The proliferation

of international brands represented by sports and Bollywood stars have kept sportswear in the public eye fuelling this drive as well.

Contemporary trends like taking long vacations, going on bike rides, hiking, travelling and indulging in recreational activities has been instrumental in driving growth of outdoor, sports inspired apparel. Most of the reputed brands of the sportswear domain have a wide range of outdoor apparel that makes a significant contribution to the total brand revenue.

Driving the sportswear trend further into the masses are Indian pop culture icons, who are becoming self-proclaimed spokespersons of the fitness movement that is sweeping the country by storm. The proliferation of international brands represented by sports and Bollywood stars have kept sportswear in the public eye, fuelling this drive.

The flourishing online retail market is yet another catalyst that has been successful in bolstering the growth of the sportswear market in India. E-commerce has especially been instrumental in aiding brands reach to smaller cities and towns where they are not physically present of yet. "E-commerce is a channel which is going to stay and keep becoming stronger because of its massive reach and the huge Indian population. As a brand we would never be able to reach them all with physical retail and hence would have to depend upon online. The younger population is also very tech savvy and spends a lot of their time on social media where they not only get to know fashion / trends but also make purchase decision," says Vishal Gupta.

"E-commerce is filling the availability gap for the consumers and thus growing fast. As physical retail would expand in these towns, we foresee that consumers would be happier to



Black Panther

experience the products and buy," says Sandeep Mukim.

Considering that the second innings of the Indian retail revolution is all set to start from the country's smaller cities, these geographical locations have emerged as key points of importance for the sportswear industry too.

"The next big consumer group to adapt to this trend is currently in the smaller towns and cities of India. Their rising aspiration makes our availability in these locations a prime priority," adds Sandeep Mukim.

"Sportswear is a brand-driven category and footwear even more so, and footwear is what gives international brands the edge. Added to this is the fact that sports footwear has a largely undeveloped domestic manufacturing capability in terms of material, styling and technology. So the sourcing from manufacturing bases like China entails high MOQs and huge investments. Also, footwear having a low shelf life is a high-risk business. As such, global brands have an edge as it gives them the critical value and volume to sustain



"We are extremely positive of the future and next opportunity is in making products for India at local prices. The domestic brands would take this advantage as local manufacturing is becoming more updated"

-Sandeep Mukim,
Managing Director, Proline.



EBOs and premium retail space in megastores,” explains Sakshi Juneja.

“However, Indian brands are pulling up their socks by smart sourcing of limited styles in footwear. Also, global brands are largely marketers who are dependent on local and international vendors for their apparel sourcing. Local brands like Black Panther, having vertically integrated manufacturing facilities are able to adapt and customize to customer preference more efficiently and will always have their own space,” she adds.

THE INDIAN CONSUMER

The modern Indian consumer too has metamorphosed over the time and the Indian sportswear market now speaks to a more educated consumer who is aware of the importance of the right type of gear. “Through the internet and via international trends the consumer is updated with the latest in sportswear technology. To keep up with the evolving consumer, sportswear brands now launch products and technology at the same time as their global counter parts. The coolest and latest technology is brought to Indian audiences, giving them a taste of the type of innovation and experience the brand has to offer. Along with performance technology, trends such as athleisure and street style have played a big role in inspiring product and collections for the Indian market,” says Vishal Gupta.

Although Indian consumers have come a long way from their earlier price conscious selves, vestiges of this trait are still witnessed today. In line with this, brands still have to make deliberate efforts in their pricing policies. “Our prices are competitive with other international players in the market. We also try to ensure that our price points are more or less the same in India and internationally. The key is providing an awesome product with cutting edge



“Nivia is capitalizing in a big way on our affordable price and technical products. In our factory at Jalandhar, we have total control from fabric designing to the final garment which is helping us in keeping our prices affordable for most products”

**-Mohit Prabhakar,
GM, Nivia.**

technology while keeping the pricing competitive,” says Vishal Gupta.

“Nivia is capitalizing in a big way on our affordable price and technical products. In our factory at Jalandhar, we have total control from fabric designing to the final garment which is helping us in keeping our prices affordable for most products,” states Mohit Prabhakar.

CONCLUSION

The sportswear segment in India, like many other fashion segment, is undergoing an astounding change of perception as well as evolution. A noticeable change in the Indian sportswear industry is that it’s becoming increasingly organized; and modern retail is picking pace in small cities too, much to the delight of brands, suppliers and retailers of sportswear and sports lifestyle products.

Overall, the industry is poised to grow, and India will be a key market as the awareness about sports and fitness increases and people become aware of being healthy.

“We are extremely positive of the future and next opportunity is in making products for India at local prices. There is large population waiting to consume this category, which has stayed away till now because of the absence of trustworthy home grown players. The domestic brands would take this advantage as local manufacturing is becoming more updated,” concludes Sandeep Mukim.



BLACK PANTHER

Juneja Global (formally Juneja Industries) commenced operations in 1981, mainly as a yarn and elastics manufacturing unit for captive consumption for parent company William Industries, India's largest manufacturer of socks. Today, in addition to having state-of-the-art manufacturing facilities for socks and sportswear, the group has a vibrant presence across the textile value chain – from production of base materials like yarns and elastics to knitting and processing of hosiery fabrics.

With a focused and hands-on approach by the Managing Partner, Anup Juneja, along with Satpal Singh as Business Head for the last 30 years, and Sakshi Juneja as Key Accounts Head, the sportswear business has consistently registered a year on year growth of 25-30 percent.

Product Categories

The brand has expanded its product offerings to encompass an entire range of active sportswear, athleisure, swimwear and sports accessories for men, ladies and juniors.

Black Panther range of outerwear includes tee and sweat shirts, shorts, track bottoms, gym clothing, cricket clothing, swimwear, etc. It also has an extensive range of functional accessories for active sports and athleisure like sports socks, sports stockings, wristbands, headbands, athletic supporters, knee caps, anklets, elbow guards, etc. The brand now has an exciting range of swimwear under the Aquaflex line and compression clothing under the sub-brand Flexfit, both of which have been very well received by the market.

Also among the latest offerings are the Flexfit line of professional compression clothing and very recently, the Proton label for functional sports briefs in poly spandex with moisture-management properties.

Product Expansion

As of now, the brand's focus is on expanding offerings to cover categories such as seamless inner and outer wear. To complement its line of swimwear, Black Panther plans to introduce swim accessories such as swimming caps, goggles, ear plugs etc. The brand is also planning to increase its capacity in high-quality socks manufacturing wherein,



BRAND UPDATE

- > Country & City of Brand Origin: MUMBAI, INDIA.
- > Total Number of EBOs: 8 AS ON (31ST OCT 2018).
- > Total Number of SIS: 200
- > Total Number of MBOs: OVER 4000
- > Total Number of LFS: OVER 200
- > Total Retail Space Occupied: OVER 1,00,000 SQ.FT.
- > Brand Portal: WWW.BLACKPANTHER.INFO



in addition, to their Black Panther label, the company is looking forward to tie-up with leading national and global brands as well as leading retail chains for their requirements of all varieties of socks under their private labels.

Retail Expansion Plans

The company is a distribution and MBO-focused company. The brand has a strong presence across India with a network of 4,000 MBOs. It is present in Shoppers Stop, More Hypermarket, Brand Factory, Megamart, Lulu's, etc. The brand is strongly looking at an expansion of adding another 150 MBOs to its retail network.

Black Panther is also looking at expansion through Large Format Stores opening in Tier II cities. For instance, Brand Factory is planning to open in Zirakhpur, Agra and Patna, where Black Panther would expand with their presence.

It is also present in overseas markets like the UAE.



PUMA

PUMA made a late entry into the Indian market in 2006 when its biggest challenge was to stand out amongst all the clutter in the sportswear segment. With other international brands already in the market, the brand wanted a differentiator to make it stand out. Its entry in India as a sports lifestyle brand, allowed it to bring to consumers the power of performance combined with high fashion designs. This strategy allowed PUMA to be positioned and perceived as the go to brand for stylish sportswear and athleisure in India. Having captured the lifestyle segment, over the years the brand has been consistently bringing to the Indian market high performance products, campaigns, athletes and experiences. Its high quality products and experiences have enabled it to firmly cement its foothold in the performance category.



Product Categories & Latest Collections

PUMA's core product offerings are - Footwear, Apparel & Accessories. Staying true to its brand ethos, the latest collection seamlessly fuses technology and fashion. The collection plays host to the biggest collaborations and products co-created with the likes of Virat Kohli, Selena Gomez and Lewis Hamilton. It's all about co creating and that's what we are doing right now with the product - co-creating with celebrities to create further desirability.

Expansion Plans?

The brand is currently present in more than 100 cities across the country and is always looking at the opportunity of a new market / mall / city which has the potential to justify a PUMA store. PUMA is planning to add at least another 40-50 stores next year.

Online Presence

PUMA has a very strong presence online with puma.com and is partner with both vertical players like Myntra and Jabong and horizontal players like Flipkart and Amazon.

Omnichannel Strategy

PUMA has piloted the Omnichannel route in stores to ensure customers do not go empty handed because of non-availability of a particular style or size or color. The brand is very confident that this initiative will help it to not only recoup lost sales but also to give 8-10 percent incremental sales.

Technological Initiatives

Endless Aisles - executed effectively in 60 own and operated stores pan India. Endless aisles are in-store kiosks which allow customers to browse and order products that are not available in the store. It is a new concept which provides the expected customer fulfillment for the retail consumers who prefer both online and offline shopping experiences.

Thermal Footfall Counter - this device allows PUMA to measure the footfalls in the store, gender wise and age group wise.

Free Wi-Fi - The brand has effectively activated free Wi-Fi for customers across all owned and operated stores.

Innovative Products

Footwear sees the best response amongst all the brand's product categories. Its latest and coolest technology has been the PUMA Hybrid. A combination of PUMA's two revolutionary technologies - NRGY beads and Ignite Foam, Hybrid has been the biggest and most exciting product innovation this year. In fact, the response has been so great that the Indian market has been leading globally in terms of sales.

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REEBOK

Reebok is an American-inspired global brand with a deep fitness heritage and a clear mission: To be the best fitness brand in the world. Not an easy one. But if there is one brand that can make it happen, it is Reebok, the brand that was fundamentally part of a fitness movement that forever changed the way we look at spandex and headbands. Sure, this is not the 1980s anymore – the world has moved on. But so has Reebok and it continues to be daring. Daring is knowing greatness doesn't come from sameness.

The past years have been characterized by a transformation from traditional sports to fitness. The three sides of the Reebok delta, a symbol of change and transformation, represent the physical, mental and social changes that occur when individuals embrace the challenge of bettering themselves in the gym, in their lives and in the world.

The Brand's Belief

Reebok's story has led us to establish Brand Reebok believes that, through sport, people have the power to change lives. As a brand Reebok defines sport as something greater. Greater than fandom, or the lives of all-stars. As everyday participation – for anybody and anybody. Reebok defines sport as fitness.

Reebok is obsessed with helping people become their absolute best – physically mentally and socially. Because everyone can 'Be More Human'.

Game Changers

Reebok's consumer obsession focuses on being distinctive, relevant, and authentic with its focus consumers – the Game Changers. These consumers, equally women



and men, of all ages, are driven by becoming their absolute best mentally, socially and physically. The Game Changers participate in a range of activities, are fitness-centric and are inspired by the broader fitness world. They share four essential qualities to create a unified mindset: self-betterment, perseverance, confidence and non-complacency. These are the core values that hold the Game Changers together. They instigate innovation, they define their own code, they risk everything, and Game Changers are no stranger to Reebok.

Key Categories

Reebok connects with the fitness consumer wherever they choose to stay fit – whether it's functional training, running, combat training, walking, dance, yoga or aerobics. For the Reebok brand's target consumer there are three categories that play a vital role:

Reebok Running: The approach here is very insight-driven and consumer-led, supporting authentic and desired cushioning experiences and leveraging innovative technologies for high-performance runners.

Reebok

Training: Remains central to Reebok's Game Changer mindset and offers a complete range of both highly specialized and versatile products that are at the forefront of fitness and true to the culture and community that Game Changers train and live in.

Reebok Classics: Fuses the brand's fitness heritage with the modern looks of fitness reflected in Running and Training to support the Game Changer consumer who seeks to reflect a fitness lifestyle in every aspect of life.

Brand Reebok believes that fitness should not be a chore, but a way of life. Fitness can prepare all who are willing to join in for the unknown obstacles. Capable of anything. Ready for everything.

Sustainable Innovations

Reebok has released its first ever biodegradable sneaker made with a cotton top and a bioplastic sole.

The launch is part of the brand's Cotton+Corn product initiative that aims to reduce the brand's environmental footprint with biodegradable products. In order to achieve the sustainable innovation, the initiative is investigating materials that grow, choosing to use plants rather than oil-based alternatives.



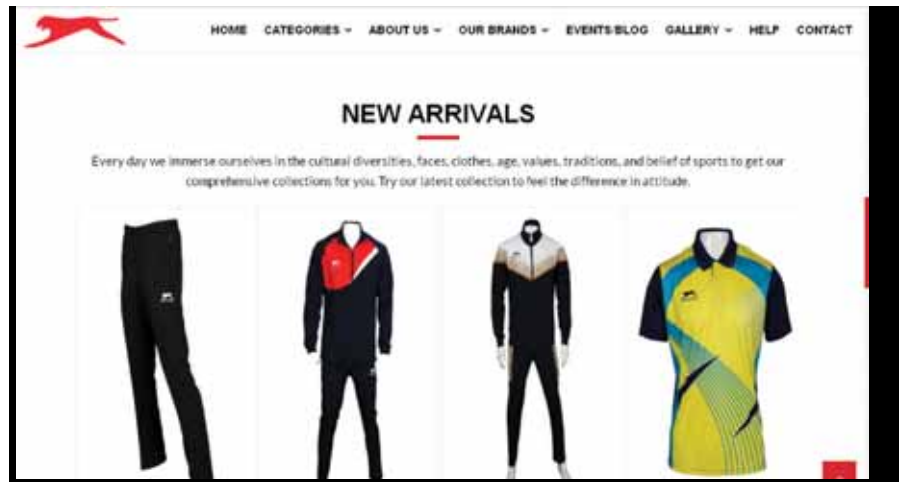
SHIV NARESH SPORTS

It was the year 1970 when R K Singh was at the prime of his athletic career. In spite of living in the capital city of New Delhi, Singh did not find specific apparel for playing various tournaments. He had to travel to Patiala, which is the hub of manufacturing apparel, to buy even simple athletic shoes and shorts. As a result, he started tailoring it at home. He learned things for over a decade and increased his production. In 1978, RK Singh finally laid the foundation of one of India's largest sportswear brand Shiv-Naresh.

The brand started its production in a very confined area of the house, initially. The store was run from the home. Since then, Shiv-Naresh has become an emerging brand in the Indian sportswear market. As Singh says, "Through our journey, we have understood the complex Indian market demands and style; so everything we do is only rooted in sports and its leading trends. For keeping up with the pace of the Indian market and its popular demands, Shiv-Naresh employs 1,100+ people and has over 7000 distributors across India."

Today, Shiv Naresh provides sportswear for various (national and international) teams, (sports) federations, PSUs and even the mass market for the daily fitness and sports' needs of a common man.

Some of India's leading athletes endorse that Shiv Naresh has been a companion and supporter in their rise to the stardom. No other Indian entity in trade would match in numbers the athletes Shiv Naresh has attired till date, or the clothing units its 24*7 production facility produces and delivers.



Core Product Categories

Shiv Naresh produces track suites, shorts, t-shirts, lowers, and apparel for athletics, hockey, basketball, boxing, wrestling, badminton, cricket, volleyball and football.

Brand Mission & Vision

Shiv Naresh's focus has always been on customer's satisfaction with uncompromising integrity. They carry products and services with finest values to the market. To meet customer satisfaction, the company ensures that their representatives are enthusiasts in addressing the customer needs. The brand always strives to make their products more reliable and economical using best technologies.

Product Expansion

This is a testimony to Shiv Naresh being synonymous with India's sporting success that sports biopic and sports movies like Mary Kom, Azhar, Budhia Singh Born To Run or Soorma have tied up with the brand to strengthen the Indian athlete quotient. Shiv Naresh has recently also diversified into sports shoes manufacturing. The brand with the 'from the Indian, by the Indian and for the Indian' philosophy had also partnered the inaugural Khelo India

Games with a vision to promote the "good sports spirit".

As Singh says, "Right now, we are focusing on making specific shoes for each sporting activity like boxing or wrestling. Most of our sales are through online outlets. Our next plan is to make jogging shoes. On an average, a sporting retail outlet has 30 percent of its turnover from garments and 70 percent from shoes. Once we release jogging shoes, we will enter the franchise business model. We don't have a significant product presence in the consumer market yet and once we develop that, we will deal with competition."

Retail Mapping

Shiv Naresh boasts of five production centers and is available pan India and covers a wide spectrum of MBOs, sports good retail stores. It also exports to the markets of Spain, USA, Canada, U.K, Australia, and West-Indies and other countries.

Online Presence

The brand has a strong presence on e-commerce websites like Amazon and Flipkart and also retails through www.shivnaresh.in.



UNDER ARMOUR

Founded in 1996 by former University of Maryland football player Kevin Plank, Under Armour is the originator of performance apparel - gear engineered to keep athletes cool, dry and light throughout the course of a game, practice or workout. The technology behind Under Armour's diverse product assortment for men, women and youth is complex, but the program for reaping the benefits is simple: wear HeatGear when it's hot, ColdGear when it's cold, and AllSeasonGear between the extremes.

Under Armour's mission is to make all athletes better through passion, design and the relentless pursuit of innovation.

International Expansion

International revenues have seen a consistent rise over the last few quarters. Through most of 2017 alone, the company recorded a mammoth high double digit increase in sales from outside the U.S. While the EMEA market continues to grow at a steady pace, Asia, and in particular China, is seeing the bulk of this overall growth.

Under Armour believes that the Chinese market could hold the potential to become a billion dollar plus market due to its recently unveiled regulatory initiatives.

Furthermore, in keeping with its strategy to target emerging economies, the company debuted in India by launching its brand on Amazon fashion some time back. At present, through its dedicated Amazon store, Under Armour sells more than 330 styles of clothing and footwear in the South Asian country.

Sustainability Quotient

Sustainability has always been part of Under Armour's DNA. To the brand Sustainability calls to mind their CEO and founder's calls to action: make great products and back them with a universal guarantee of performance.

Sustainability is also knitted into the company's strategy - to meet the expectations of their customers, investors, and other stakeholders. It fuels their growth sprint, and through it, that the brand is weaving into our daily operations practices which will maximize their opportunities and help them manage both costs and risks while preserving future growth. Each year, teams across Under Armour seek to execute their plan, and in it, the brand sets a high bar for our performance. The company believes as their Sustainability vision, systems and practices grow with it.

Turnover review

Under Armour, Inc. announced financial results for the third quarter ended September 30, 2018. The company reports its financial performance in accordance with accounting principles generally

accepted in the United States of America ("GAAP"). As Kevin Plank, Under Armour Chairman & CEO says in a latest press note, "Our third quarter results demonstrate that our multi-year transformation is on track." He further adds, "As we work through this chapter, we are staying sharply focused on our brand by connecting even more deeply with our consumers while delivering industry-leading, innovative products and premium experiences. Coupled with increasingly greater business discipline and resulting efficiencies, we continue to gain confidence in our long-term path and ability to deliver for our consumers, customers and shareholders."

2018 Restructuring Plan

The company expects to incur approximately \$200 to \$220 million in pre-tax restructuring and related charges in connection with its previously announced 2018 restructuring plan. Through the third quarter of 2018, the company has recognized pre-tax costs of \$154 million, inclusive of \$24 million of pre-tax costs recognized in the third quarter.



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D:FY

D:FY has always been a company built on strong products to be able to service the Indian consumer. Being a fresh entrant in the market the company has done a lot of research and development with factories in China as well as with designers in Portland, USA to introduce a totally never given line of products to the Indian market. The company strongly believes in innovation and is committed to hard work and giving great products.

Product Categories & Latest Collections

D:FY has three sports shoes categories i.e. Gym, Walk and Multisport. The brand claims that their walking shoe is one of the lightest in the market, with dual density, high abrasion resistant sole and with D:FY Flo foam. The shoes have memory foam for additional comfort and are made of a knitted upper – D:FY WeaveFit, making them breathable, odor resistant and washable.

Gym shoe is made of a micro suede upper – D:FY FitSuede, which increased strength and stability at the mid foot and heel area, giving the gym goers additional support when lifting heavy weights. The fore foot is flexible for the same athlete to be able to practice

BRAND UPDATE

- > Country & City of Brand Origin:
MUMBAI, INDIA.
- > Total Number of EBOs:
15 AS ON (18TH OCT).
- > Total Retail Space Occupied:
15000 SQ.FT.
- > Brand Portal:
WWW.DFYSPORT.COM

cardio. The sole of the gym shoe is covered with anti skid rubber to give great traction even on the trickiest surfaces – D:FY FlexR.

The Multisport shoes are meant for every sport from a 10 km run to tennis, football, cricket or even kabaddi. The shoes are made of multiple uppers which give you great looks and versatility, all in one. The uppers have D:FY WeaveFit and D:FY 2E Mesh along with D:FY Flo foam, D:FY FlexR rubber. All of these have been researched and designed in Portland, USA. The fit of every D:FY shoe is made for Indian conditions and broader front, snug at the bottom and heel.

Expansion Plans

The brand is in the process of opening 20 stores for this fiscal year. The company in its first phase of expansion will look at stabilizing these first and then venture into the new markets such as Delhi NCR.

Online presence

The brand is currently available exclusively at Amazon.in.

Omnichannel strategy

The company has partnered with Olabi Retail as their front end partners. Olabi Retail is a true omni-channel entity and with this D:FY will be able to service all consumers from one global inventory view. As a consumer of D:FY one can walk in to their store and complete a purchase, pay part, pay full, pay later, ship part from store, pick up from store, or even ship from warehouse – all options are possible and the company will be able to reduce the incidents of loss in sales.

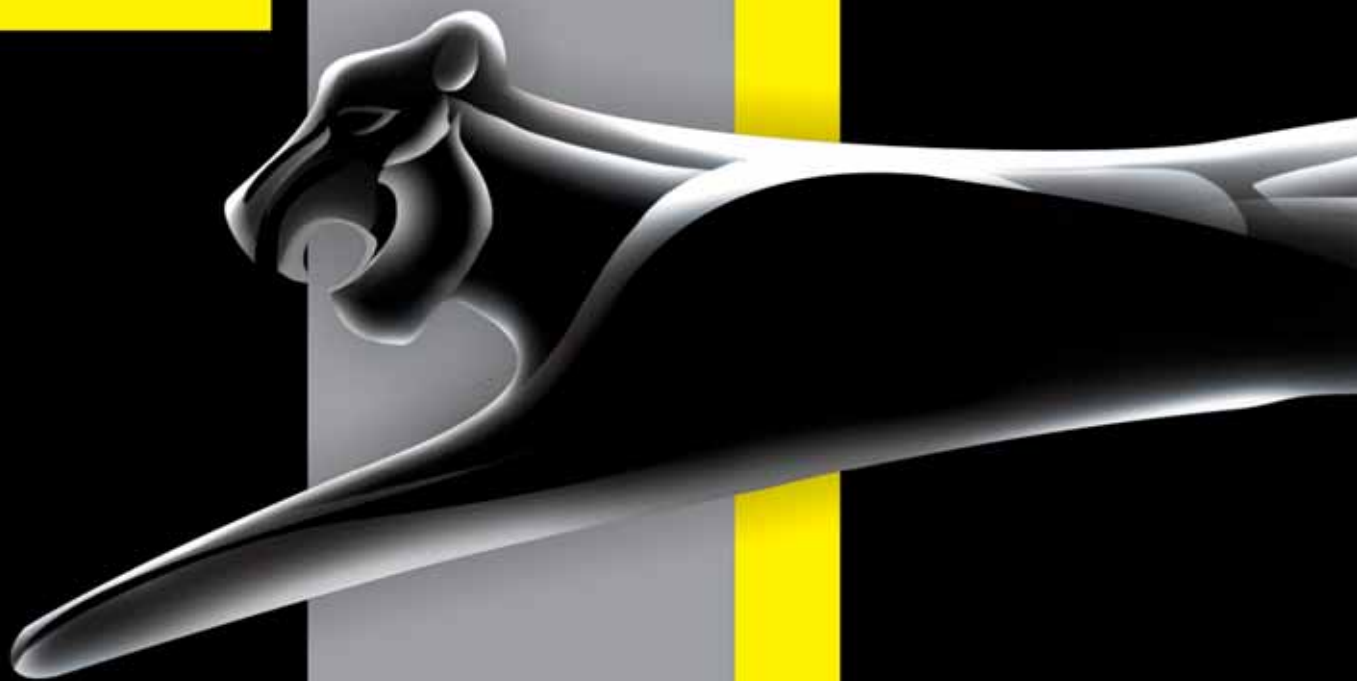
Innovative Products

The brand's apparel range is noted as the bestseller. D:FY is offering great quality, colors with an affordable price tag in their sports apparel range. The brand offers an innovative sock fit shoe made of a knitted D:FY WeaveFit upper which is extremely light weight and comfortable. It is made for multisport and can be worn across games.

Turnover Targets

D:FY is a new entrant in the market and it aspires to build a brand the right way. The company targets to touch a turnover of ₹ 50 crore for FY20.





Active sports and/or fitness activity ought to form an integral part of modern lifestyle. Black Panther aims at promoting a fit & active culture through a range of high performance apparels & accessories. Using the finest materials and best technology to deliver true world class products that enable you to live and project an active & healthy lifestyle.

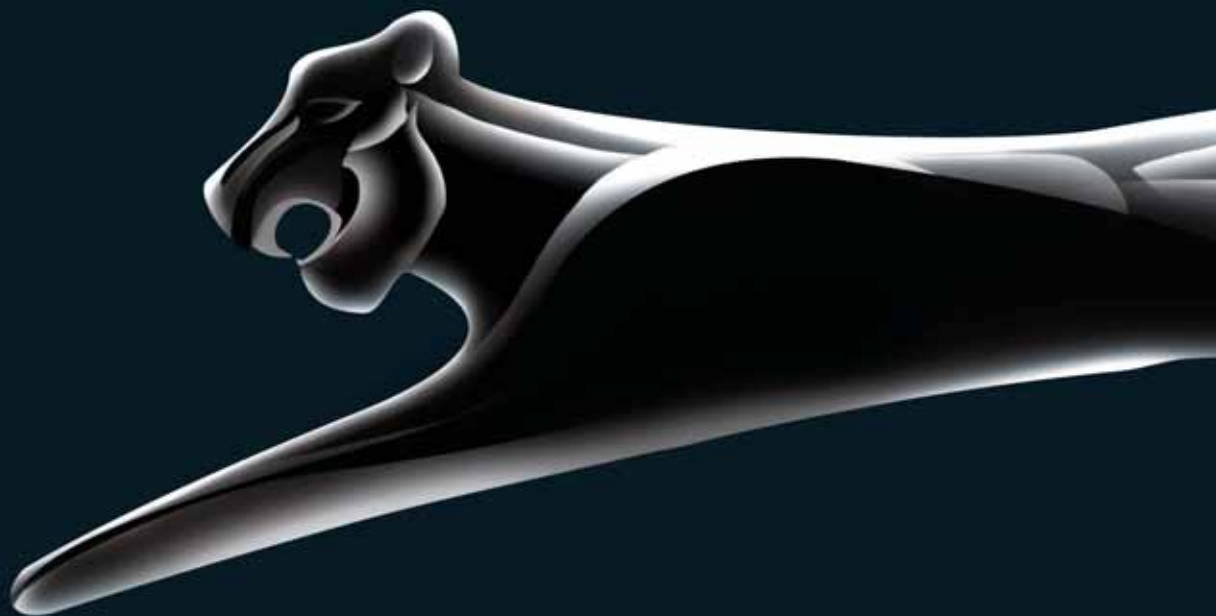
GET ACTIVE
KEEP FIT
STAY HEALTHY

LIVE THE SPORT



THE
FLEX
TIO
MAX





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



MENS / LADIES / JUNIORS

TOTAL SPORTSWEAR SOLUTIONS

APPAREL / ACCESSORIES / SWIMWEAR

LIVE THE SPORT
LIVE THE SPORT

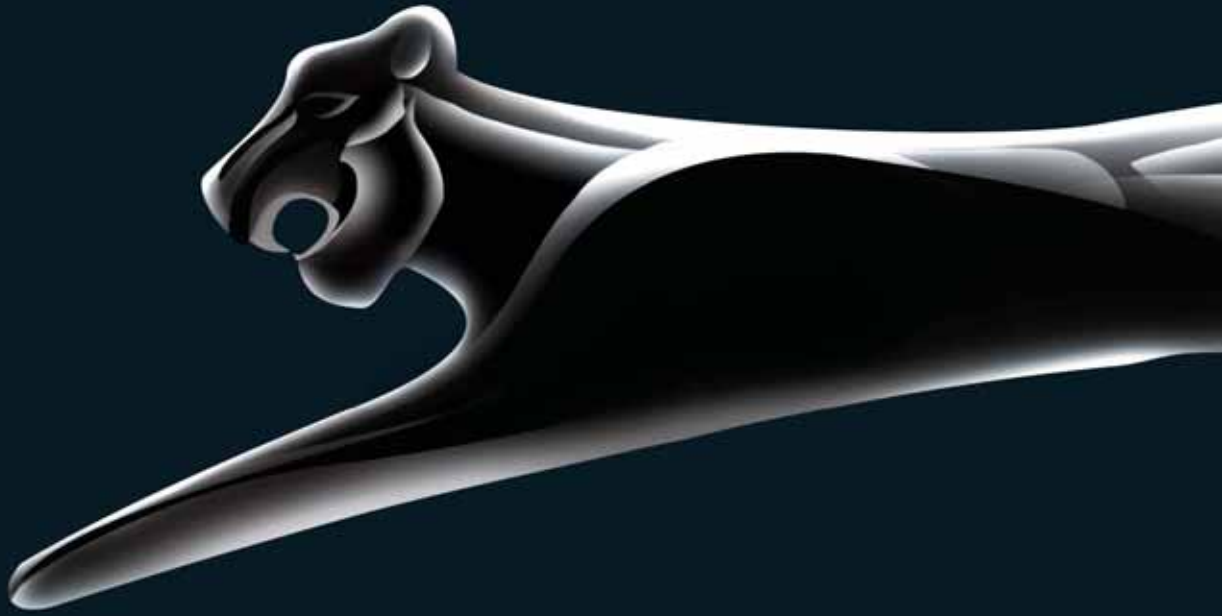
WORK / SWEAT / ACHIEVE

JUNEJA GLOBAL, Mumbai. Ph : 022 28362321 e-mail: sales@blackpanther.info



I LOVE TO TRAIN
I HATE TO GO MP LAIN





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

MENS / LADIES / JUNIORS

TOTAL SPORTSWEAR SOLUTIONS
APPAREL / ACCESSORIES / SWIMWEAR

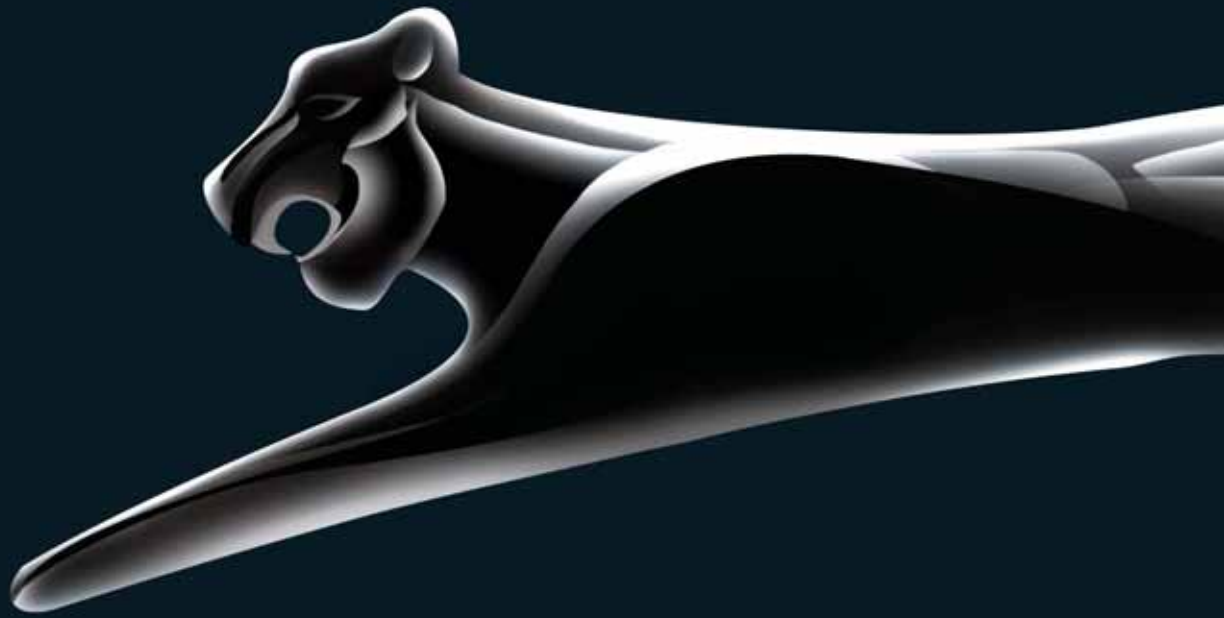
LIVE
THE
SPORT

WORK / SWEAT / ACHIEVE



GO THE DISTANCE
GET THERE





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

LIVE
THE
SPORT

MENS / LADIES / JUNIORS

TOTAL SPORTSWEAR SOLUTIONS

APPAREL / ACCESSORIES / SWIMWEAR

WORK / SWEAT / ACHIEVE

JUNEJA GLOBAL, Mumbai. Ph : 022 28362321 e-mail: sales@blackpanther.info

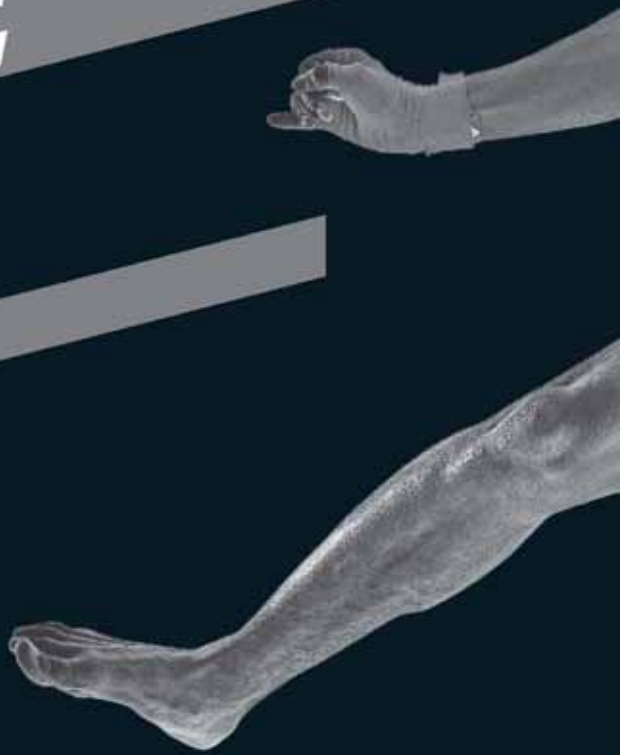
**BLACK
PANTHER**

since 1984

**FLEX
TO THE
MAX**

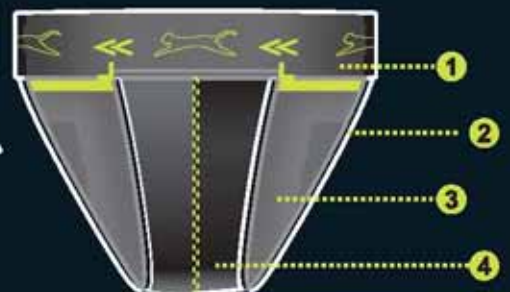
**SPORTS
BRIEF**

PROTON
P E R F O R M A N C E





PRO-DRY »
STAY DRY
ALL DAY





FILA BETS BIG ON THE INDIAN MARKET

India is a very strategically important market for Fila and with a sharp focus on EBO presence in metros and mini metros across the country, followed by smaller towns; the brand is well placed to grow to five-fold in the coming five years ...

Gurbir Singh Gulati & Shivam Gautam

Fila has had a long and colourful history! Right from its humble beginnings in Biella, Italy over a hundred years ago to the colossal stand that it enjoys today in a country like India, Fila has endured as a brand!

Fila entered the sportswear market in the 70s and has been a trailblazing vanguard at the nexus of the sports and lifestyle industry. Over the years, the brand has also been associated with many iconic moments in sporting history - from Bjorn Borg winning five Wimbledon titles in a row, Reinhold Messner being the first man to summit Mount Everest without bottled oxygen to German Silva winning the New York Marathon despite taking a wrong turn a mile short of the finish.

Parallely, the brand's business and reputation has also grown exponentially in the bygone years, buttressing on its brand mantra and producing incredible products inspired by the style, elegance and passion of its inherent Italian heritage.



The brand's business in India has also seen a similar resurgence – driven by a completely new product portfolio, underpinned with a strong offering of its Heritage footwear and apparel collection. IMAGES Business of Fashion had the opportunity of catching up with Rohan Batra, Fila India's Managing Director, who expounded on the brand's robust retail plans and product category expansion as well as its aggressive brand building exercise. Excerpts from the interview...

Tell us about the key product lines of Fila being marketed in India. What are the new ones scheduled for the coming year?

In the coming year, Fila's focus will remain on the Heritage apparel and footwear collection, but we will also continue to invest behind key categories in sport such as Motorsports, Tennis and Basketball. Towards the end of the year, we will also be debuting our first performance collection specially designed for the Indian market.

Innovation is the key in sportswear. Tell us about your latest innovations which have differentiated your brand from others?

Globally, we have sought innovation in new materials development with our R&D centers in China, Brazil and Korea. Through these centers we have managed to introduce materials such

as Energized Rubber, DLS cushioning, Evergrip and Evergrind abrasion resistant outsoles and FLOW cooling technology.

Our local innovation for India is focused on specifically designing motorsports footwear for the Indian rider, specifically high abrasion resistant materials on contact points on footwear. We have also introduced the HEXO and COMFORTX cushioning technologies to ensure comfort, flexibility and lightweight performance in both lifestyle and sports footwear.

Our biggest advantage is our connect with the local Indian market, where we are focused on innovating products that suit the tastes of real consumers and creating beautiful products that service these needs.

How important is India as a market for Fila? What is your growth strategy in the country?

India is a very strategically important market for the brand. We feel we are well placed to grow to five-fold in the coming five years.

The strategy we are following focus sharply on EBO presence across India in metros and mini metros followed by smaller towns. Enhancement of the digital sales channels through strategic partnerships with the key retailers is very important as well. We will also establish a large footprint across various key offline retail partners for different product categories across the Heritage and the sportswear businesses.

What is your sales strategy for localized retail? Tell us about your growth in Tier I, II and III cities in India?

The licensed structure of Fila India gives the brand a unique opportunity

>

"Fila currently has two standalone stores across Mumbai at Fort and Malad with the new retail design concept. In addition to its own stores, Fila has over 1,200 retail touch points through 250 large format lifestyle stores (such as Shoppers Stop, Lifestyle, Central and more) and a national dealer network of multi brand outlets across India."

–Rohan Batra,
Managing Director, Fila India

to understand the local retail and consumer environment to create products, design them, manufacture them and promote them through a team based in India. We focus on collecting as much data and feedback as we can on the ground and tailoring our product/price/distribution mix to suit the local market. We have the agility and flexibility to develop, collaborate or introduce products into the market that most subsidiaries of global brands do not have.

As seen in your reports, Fila's Heritage business has doubled every year. Can you throw some light on this business and key success factors?

We believe that globally the Fila Heritage line has seen resurgence and the designs have been accepted and appreciated by celebrities, fashion stylists, magazines, and consumers across the world. Our objective is to ensure the same range is available in India and is a true representation of the design sensibilities of the brand. Over the next one year, you will see the same collections being available in India along with collaborations from India that will reflect the same design language as the brand.

Tell us about your retail footprint with regards to exclusive outlets, large format stores and multi brand outlets?

Fila currently has two standalone stores across Mumbai at Fort and Malad with the new retail design concept. In addition to its own stores, Fila has over 1200 retail touch points through 250 large format lifestyle stores (such as Shoppers Stop, Lifestyle, Central and more) and a national dealer network of multi brand outlets across India.



The brand is sold online through multiple e-commerce portals such as Myntra, Amazon, Flipkart, Jabong, Koovs and Ajio.

In addition to brand-owned stores, Fila's plans to expand its retail footprint through a franchise network of standalone stores are also in the pipeline.

Tell us about your retail expansion plans in general and in specific to your iconic stores?

Fila is looking to open 6 to 7 stores in the remaining months of FY 18-19 in Pune, Hyderabad, Mumbai among other key Metros. Fila is undergoing a global reboot with its evolution into a fashion label. In India, the brand is

planning to invest in exclusive outlets and is considering both Tier II and III cities in their expansion plans.

Throw some light on your Omnichannel strategy?

I think Omnichannel strategy is something that every single company across India is working towards. A true reflection of this would be when a brand is able to offer a consumer sitting in Bilaspur is able to buy a product available in the Mumbai or Delhi store in real time through various back linked system and channels. We are internally aligning and correcting things as we move to higher growth phase. Without a doubt Omnichannel will be a way of life for us much like the other players in the retail segment in the near future.

FILA: FUN FACTS

- Founded in 1911 – before Nike, Adidas or Puma – the brand fell on hard times after its '90s aesthetic fell out of favour and was eventually sold to its South Korea licensee Fila Korea for \$400 million in 2007.
- Fila currently operates in more than 70 countries worldwide, with 37 licensees.
- For the second quarter of 2018, Fila Korea reported revenues of \$706.2 million, compared to \$619.8 million the same period a year prior.
- Operating profit for the quarter was \$103.4 million, up from \$72.9 million the same period a year ago.
- Fila is among its top 25 brands in 2018 in the UK alone. Global searches for the brand were up 34 percent from July to August 2018, while 2,000 different sellers around the world sold at least one Fila item on the platform last month.

Leo Borg has signed a deal with Fila which will start from 2019? Can you share more details on this association?

Fila has a long and distinguished history in the world of tennis that continues with endorsements of ATP World Tour and WTA Tour athletes. Fila is a sponsor of the BNP Paribas Open, the Dell Technologies Tennis Hall of Fame Open, the Rogers Cup and Coupe Rogers, the Porsche Tennis Grand Prix, the Mercedes Cup, the Argentina Open, the Rio Open, the German Open, and the Junior Orange Bowl International Tennis Championship. In addition to event partnerships, Fila is an official supplier to Tennis Canada, Junior Tennis Champions Center, Van der Meer Tennis, John Newcombe Tennis Ranch, and the Kim Clijsters Academy in Belgium.

Closer to home Fila also partnered with ATP for the Tata Maharashtra Open last year and we are partnering with them this year as well. Earlier this year,

FILA reignited its partnership with Björn, a relationship that dates back to 1975. The partnership with Leo is a continuation of our commitment to the next generation of tennis players.

Tell us about your recent representation at Milan Fashion Week?

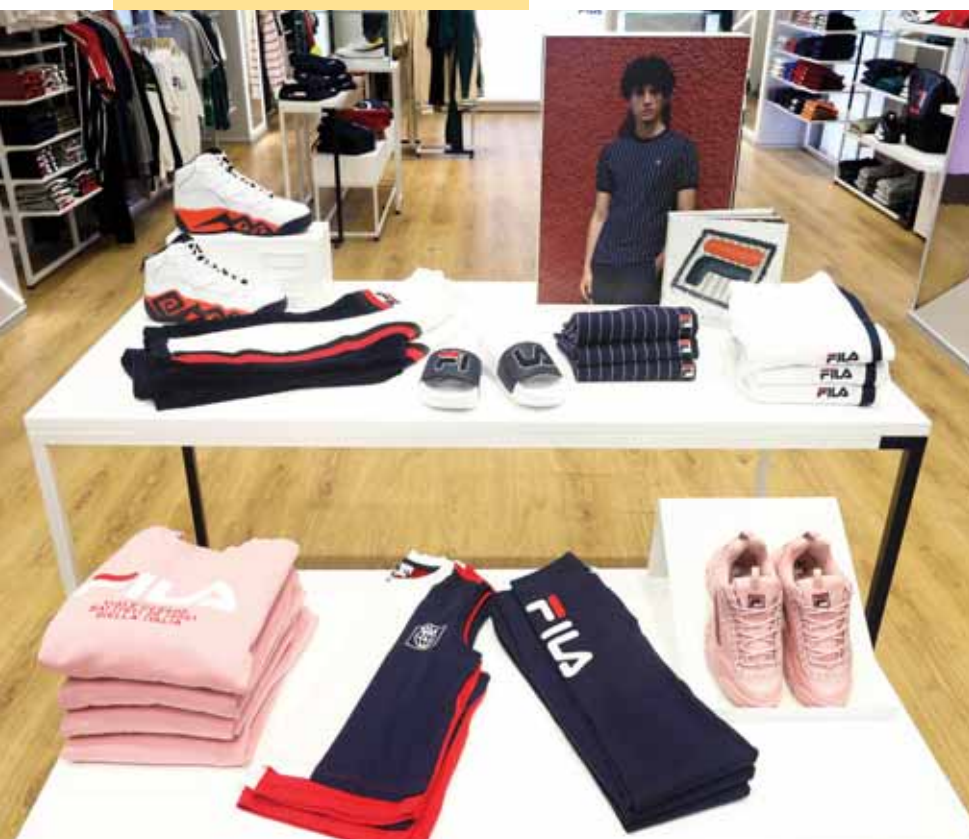
Since its beginnings, Fila has been synonymous with performance and sophistication, we have always chosen to defy expectations and challenge our limitations. Once again, we chose to combine the legendary history of the brand with our brave and outstanding vision for the future by showcasing at Milan Fashion Week. Not only that but we also chose to have an exhibition at the prestigious, cultural institution of La Triennale di Milano, setting a milestone that will celebrate the brand's centenary history.

The Milan Fashion week collection melds our past and future together.

Tell us about Fila's approach to sustainability?

Our newly created design lab in India is testing the use of multiple locally available sustainable materials indigenous to India to incorporate into our materials development for domestic production. The design lab is an investment we are making to ensure our products are locally relevant but also environmentally sound.

The focus towards sustainability is paramount, within the brand and the larger group of businesses to whom we belong. Our focus to design and develop products that have the least environmental impact is strong and we are working towards a future where we partner with manufacturers who take care in the sustainability of production processes for products and also raw materials.





A STEP IN THE RIGHT DIRECTION: THE BOOMING SPORTS FOOTWEAR MARKET IN INDIA

Over the past few years, India has rapidly caught up with the wider global fitness trend. If there's one fashion segment that made the most out of the rising craze for fitness, it is the sports / athletic shoes segment...

Shivam Gautam

India is becoming increasingly health-conscious, and Indians, irrespective of age, sex and demographic, are turning to sports, outdoors and adventure activities. For modern India, fitness and sports are not prerogatives of professional sportsperson anymore – it is a lifestyle. This change in lifestyle preferences has also heralded a boost to the sportswear industry in India. Products like apparel and accessories, and variety of sports gear and equipment now tops priority in shopping lists around the country. This stands especially true for sports shoes or athletic footwear – how can one partake in sports/fitness activities without proper footwear? Isn't it the prime priority of any fitness/adventure activity?

The Indian athletic footwear segment is witnessing a steady boom. According to the statistics portal Statista, revenue in the athletic footwear segment amounts to US\$3,232 million in 2018. The market is



“The segment comprises of big international players, local Indian brands and celebrity owned brands. Most of the major international brands are now present in the country. However, there is still a large unorganized segment which cannot be accounted for in terms of size”

-Vishal Gupta,
Director - Retail, Puma India.

expected to grow annually at a CAGR of 13.6 percent over 2018 to 2021. Globally, the United States clocked the most revenue at US\$ 16,143 million in 2018.

A report by the online portal MBA Rendezvous documents that India's sports footwear segment in general caters to men, women and kids, and while men's footwear comprises 55 percent of the entire industry, the women's and kids' share take up 30 percent and 15 percent of respectively. Like most other fashion segments, athletic footwear is dominated by the men's market. The women's market has traditionally not witnessed the same level of growth as the men's market but, especially in the last few years, this market has registered an increased demand.

As a whole, the athletic shoes market in India has traditionally been dominated by the big international brands, aptly named the 'Big Five' — Reebok, Adidas, Nike, Puma and Lotto. Most of these brands entered the country in the 1990s and in the years that followed established their presence through a flood of local franchisees. Even today, the sportswear market, as a whole, is dominated by these four brands, global players with others such as Under Armour, Fila, Lotto, Skechers, etc., collectively battling for the remaining market share.

The last few years have also witnessed the emergence of numerous home grown players and celebrity brands who are progressively absorbing the market tendencies to cater to the needs of the consumers. This is a clear indication that the Indian market for sports/athletic footwear is on the rise. “The sports footwear segment comprises of big international players, local Indian brands and celebrity owned brands. Most of the major international brands are now present in the country. However, there is still a large unorganized segment which cannot be accounted for in terms of size,” says Vishal Gupta, Director - Retail, Puma India.

GROWTH DRIVERS

Driven by the country's growing wealth, changing lifestyles, and rising urbanisation, an increasing number of Indian consumers are becoming more health conscious and are adding new health and wellness routines to their hectic lifestyles as a result. This growing awareness of being fit, healthy and the need to exercise has been the instrumental in pushing the boundaries of athletic sportswear in the recent past. This has led to a massive increase in action in the segment, cultivated a stiff competition and have compelled brands to continually adopt

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GROWING SIGNIFICANCE OF SPORTS FOOTWEAR

- A significant shift post liberalisation was that lifestyles expanded to foster great value for the sports/active segment and for casualization as a whole.
- The technological prowess of global sportswear giants enabled them to functionally and fashionably appeal to a young India.
- Today, these international giants dominate the sports footwear category. The market is held by Adidas, Nike, Puma, Lotto, Reebok, and we expect the newer entrants ASICS, Sketchers, Crocs, Salomon, etc., to begin posing challenges to the Big 4 soon.
- A highly notable home grown success story however is Woodland that is a top of mind name in the adventure and outdoor segment in India.

ATHLETIC FOOTWEAR

- Running and cross training/ tennis shoe
- Soccer/Football shoe
- American football/rugby shoe
- Soccer shoe
- Golf shoe
- Basketball shoe
- Hiking shoe
- Baseball shoe
- Others

GLOBAL FOOTWEAR MARKET: BY GEOGRAPHY

>> North America

- USA
- Canada
- Rest of North America

>> Europe

- U.K.
- Germany
- France
- Russia
- Italy
- Rest of Europe

>> Asia Pacific

- China
- India
- Japan
- Australia
- Rest of Asia Pacific

>> Rest of the World (RoW)

- South America
- Middle East



“The fitness revolution that the Indian youth started by waking up to better living and eating is directly propelling this industry to grow. Access to gyms and decent roads/parks is enticing an increasing number of people take up sports which in turn is helping the sports shoes category flourish”

-Prashant Desai,
Founder and Director D:FY.



“Between 2015 and 2016, sportswear in metros and Tier II and III cities grew close to 80 percent. The footwear category grew 100 percent for metro and Tier II cities and there’s also a strong demand we see from Tier III which grew over 110 percent”

-Arun Sirdeshmukh,
Head of Fashion, Amazon India

new strategies, shell out new products and collections, etc to retain their market position.

“The Indian youth is at the helm of this revolution. The fitness revolution that they are driving by waking up to better living and eating is directly propelling this industry to grow. Access to gyms and decent roads/parks is enticing an increasing number of people take up sports such as running and cross fit, which in turn is helping the sports shoes category flourish,” says Prashant Desai, Founder and Director D:FY.

Driving the sportswear trend further into the masses are Indian pop culture icons, who are becoming self-proclaimed spokespersons of the fitness movement that is sweeping the country by storm. The proliferation of international brands represented by sports and Bollywood stars have kept sportswear in the public eye fuelling this drive as well. Sports-inspired footwear is also registering growth in view of the growing culture of casualwear at workplaces.

THE ROAD AHEAD

The sports shoe industry in India is definitely gaining traction in the recent years, given people’s awareness and how conscious they are about their health. This has led to a slew of new players, both national and international, to enter the race. Most of these new players bank on affordable price points to dive into the masses, mostly in smaller cities and towns. These brands buttressing on online retailers like Amazon India, Flipkart, Jabong and Myntra to penetrate into the Indian market.

Smaller towns and cities are also emerging as top consumer hubs for athletic and sports inspired footwear and this demand is only expected to rise in the coming future. “Between 2015 and 2016, sportswear in metros and Tier II and III cities grew close to 80 percent. The footwear category grew 100 percent for metro and Tier II cities and there’s also a strong demand we see from Tier III which grew over 110 percent,” says Arun Sirdeshmukh, Head of Fashion at Amazon India.

N1

N1
ACTIVE

NUMERO UNO™
THE REAL DENIM

JEANSWEAR | FOOTWEAR | ACCESSORIES

LOTTO

Sports Lifestyle Pvt. Ltd. (SLPL) is the brand licensee of Lotto in the Indian market since July 2007. The brand Lotto under SLPL has grown significantly, driven by superior management capabilities, a dynamic team and an excellent distribution. SLPL also has been awarded the “best performing business partners worldwide” in 2007. Lotto under SLPL offers footwear, apparels and accessories. In the first 10 years, Lotto focused on the Italian market, becoming a reference brand in the sports articles segment and a leading company in tennis.

The Next Phase

In June 1999 the company was taken over by a group of local business people who were already very active in the sports segment. It was headed by Andrea Tomat, who took on the role of President and CEO of the new company, which was renamed Lotto Sport Italia S.p.A. The new ownership’s objective was to exploit the brand’s strengths – dynamism, innovation, quality, Italian design and a real passion for sport – combined with its increasingly painstaking and effective customer service. Special focus is given to footwear and technical clothing for football and tennis, also supporting the brand’s worldwide leadership with products that are cutting edge in terms of innovation and design.

Target Consumers

The brand targets all men, women and growing kids who have passion for sportswear and consumers who are fashion conscious with a semi-high purchasing power.

Retail Mapping

Lotto today distributes its products in over 110 different countries, through independent sports article stores, specialized chain-stores and large stores with specialized sports



Editorial credit: GeorgeVieiraSilva / Shutterstock.com



departments. Special emphasis is placed on monobrand stores (flagship stores, street stores, factory outlets) as well as corners and shop-in-shops.

Along with mono-brand stores, Sports Lifestyle is present in more than 200 shop-in-shops, utilising large multi-brand outlets, such as Shoppers Stop, Reliance Footprints, Central, Pantaloons, and Planet Sports. The company recently opened its 15th store in Delhi at Connaught Place. Spread over 600 sq. ft., the new outlet stocks football and tennis collection along with men’s and women’s footwear, apparel, and accessories. Lotto stores are already operational in India in Delhi/NCR, UP, Punjab, Haryana, Pune, Kolkata, MP, Raipur, Jammu, Assam, Uttrakhand, Gujarat, Orissa, and Bihar. The company plans to have 100 exclusive Lotto Sports Italia mono-brand stores in India.

Innovation

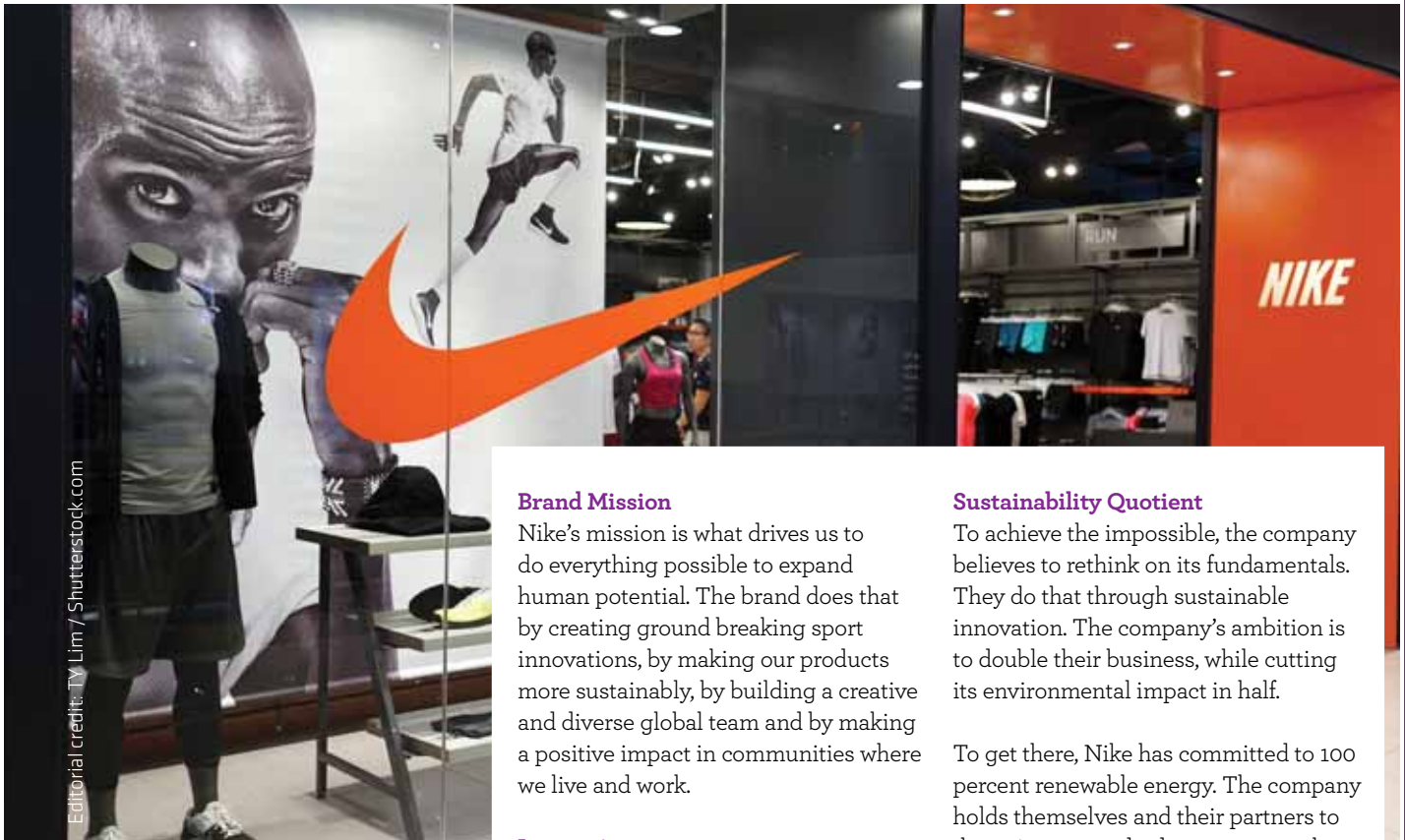
Continuous attention to innovation is one of Lotto’s main strengths along with technology, product design and Italian

style which are absolute requirements for Lotto’s high performance sports and leisure clothing and footwear, and are worn by many sports personalities like David Ferrer, Agnieszka Radwanska, Joan Capdevila, Paola Venturini, Vittorio Brumotti, etc.

Sustainability Quotient

As a brand Lotto is convinced that protecting the environment is a commitment and a responsibility a company has toward its stakeholders. The company gives utmost attention to the costs which is carefully balanced by an efficient use of resources, energy conservation, use of recycled paper and cardboard packaging, as well as the reduced use of polluting materials in production, etc. All this means a better use of raw materials, less wastage, and decreased waste material and harmful emissions, which have become an essential part of the Lotto philosophy and its corporate production.





Editorial credit: TV Lim / Shutterstock.com

NIKE

Nike is an American company that is engaged in the design, development, manufacturing, and worldwide marketing and sales of footwear, apparel, equipment, accessories, and services. The company is headquartered near Beaverton, Oregon in the Portland metropolitan area. It is the world's largest supplier of athletic shoes and apparel and a major manufacturer of sports equipment, with revenue in excess of US\$24.1 billion in its fiscal year 2012 (ending May 31, 2012). As of 2012, it employed more than 44,000 people worldwide. In 2014 the brand alone was valued at \$19 billion, making it the most valuable brand among sports businesses. As of 2017, the Nike brand is valued at \$29.6 billion.

Brand Mission

Nike's mission is what drives us to do everything possible to expand human potential. The brand does that by creating ground breaking sport innovations, by making our products more sustainably, by building a creative and diverse global team and by making a positive impact in communities where we live and work.

Innovation

Nike believes in the statement; 'Dare to design the future of sports'. For Nike innovation is about elevating human potential. The company is obsessed with the needs of the world's best athletes, using their insights to create products that are beautiful and useful for everybody.

To make big leaps, the brand takes big risks as it believes that incremental change won't get them to go where they want to go fast enough. Nike is a place where everyone is an explorer. It brings together diverse perspectives— scientists and shoe designers, coders and quarterbacks—to share knowledge of the body in motion. In short Nike's innovation team is made up experts—including chemists, biomechanists, physiologists, materials developers, coders, and even a planetary astrophysicist. United by our relentless drive, we invent innovation platforms that forge new frontiers in sport and style.

The company strongly believes that through innovations its products get more personal and their footprint gets more sustainable. And their digital services get more powerful.

Sustainability Quotient

To achieve the impossible, the company believes to rethink on its fundamentals. They do that through sustainable innovation. The company's ambition is to double their business, while cutting its environmental impact in half.

To get there, Nike has committed to 100 percent renewable energy. The company holds themselves and their partners to the strictest standards, so every worker is valued and engaged. Nike is coming up with new materials and techniques to do more with less and reduce waste. The brand is embracing sustainable innovation to push the limits of their business and its collective potential in unprecedented ways.

Turnover Review

Nike has reported fiscal 2019 financial results for its first quarter ended August 31, 2018. For the quarter, double-digit revenue growth was driven by the continued success of the Consumer Direct Offense, which fueled growth across all geographies as well as wholesale and Nike Direct, led by digital.

Diluted earnings per share for the quarter were US \$0.67, an increase of 18 percent driven by strong revenue growth, gross margin expansion, selling and administrative expense leverage, and a lower average share count, partially offset by a higher effective tax rate.

×

SKECHERS

Skechers has been available in India since 2012. It is present in over 160 countries and territories worldwide via department and specialty stores with more than 2,305 company-owned and third-party-owned retail stores, as well as through the company's e-commerce websites.

Headquartered in Manhattan Beach, Skechers was founded in 1992 by Robert Greenberg and his son Michael. Today a global leader, Skechers USA, Inc. is a \$3 billion company dealing in high performance and lifestyle footwear industry. It designs, develops and markets more than 3,000 styles for men, women and children.

Beyond the US, Skechers products are available in Canada, Brazil, Chile, Japan, and 27 countries in Western and Central Eastern Europe, as well as through joint ventures in Asia and distributors around the world.



Positioning

Skechers India plans to carry forward the legacy of the global brand and establish the brand as a performance and lifestyle-oriented brand that caters to all age groups.

Product Categories & Latest Collections

Skechers India, designs, develops and markets a diverse range of performance and lifestyle footwear for men, women and children. Their product range can be broadly divided into Performance and Lifestyle. Performance refers to shoes that are suited for physical activities such as running, walking, training and golf. The Lifestyle segment provides casual wear that are more centered towards the look and feel of the product that the athletic benefits. Their core target group is from 16-40 years belonging to SEC A, although we

cater to an audience between the age group of 4-40 years.

Expansion Plans

Skechers India is on an expansion spree, which will cover PAN India. The brand's focus now is on Tier II and III markets. Skechers has been present in the Indian market for than 5 years now and the brands is growing at a rate of 100 per cent year-on-year and thus aims to have close to 400 stores in India over a period of next 5 years.

Online Presence

The brand is present on Amazon, Jabong, Myntra, etc., and its own portal, www.skechers.in.

Omnichannel Strategy

Skechers is fully adopting the omnichannel approach by integrating online and offline.

Innovation

Skechers is one of the largest sports and lifestyle footwear brand in the US, known for its performance based shoes. The brand has a diverse

range of high quality product range that meets day to day needs of the millennials.

Skechers footwear are designed and engineered to the highest standards. It has a team of world-class athletes who bring experience, knowledge and passion to the product creation process and fulfil the goal to provide the best and most innovative footwear in the market. The brand upped its game by bringing in the Goga Max insole technology, the next evolution of the athletic walking shoes. This provides more cushioning thereby offering better durability, stability and protection. Designed with the Memory Foam insole and a stretchable top fabric that conforms to the shape of your foot, Skechers leaves no space for tensed and edgy walking. The innovative 5th GEN cushioning, the next generation of Resalyte Midsole makes highly flexible training and running shoes extremely light-weighted and provide memory retention that avoids lurching from the ground and helps absorb impact.



JUKEBOX

The idea to launch a premium, high quality active wear brand came to the brand custodians of Jukebox about three years ago. They were intrigued by the fact that every well-heeled foreign traveling Indian customer bought premium active wear from stores abroad and pledged that they could give the same International quality to Indians under their brand Jukebox.

Jukebox is an outcome of through research in design, fabric and other technical and functional aspects of the garments for over two years. Today, the brand stands out in the Indian market because it provides the same quality and perfection to that the best active wear brands in Europe and USA do.

The brand specialises in fashionable all day wear active apparel and acts as an educationist in order to spread product awareness and help consumers distinguish between cheap versus good quality activewear brands like itself. It aims to educate its target audience of the fact that good activewear can be worn anywhere - to a mall, a café and even a cinema, not just to the gym. The brand is hopeful of developing a culture of 'Be Active Yet Very Fashionable'.



Core Product Categories

The mantra of Jukebox is focused on fitness, fashion and music. The brand is inspired by music and its effects on fitness and fashion. Music is deep rooted in its personality and it colours the overall personality of an individual. These individual personalities are amplified and supported by its perfect collections based on a distinctive music genre like grunge, pop, and dub. This helps Jukebox's customers to embrace their personal style and make a statement. The core product categories are - leggings, t-shirts, sports bras, jackets, tank tops, grip motion socks,

cooling towels, swimwear (to be added soon).

Most Innovative Products

The brand's leggings and t-shirts are its most innovative products. Grip Motion Socks are the best-selling from their product stable.

Technological Initiatives

Jukebox strongly focuses on the aspects of designing and producing its garments which are technologically advanced. The brand has used high density 40s cotton in its jackets with special light weight 'Hugo' fabric which gives superior moisture management to the wearer. Jukebox has also incorporated features and used 'Goreal' is our very special nylon based stretch fabric. Its products give a four-way stretch, UV protection, and is anti-bacterial, in keeping with the standards of sustainability.

Retail Footprint

The brand is currently selling through its own website www.wearjukebox.com along with Amazon and Flipkart.



FROM OFFICE- TO-CROSSFIT: BRANDS ACTIVELY TAP THE ACTIVWEAR MARKET IN INDIA

The consumer base for Activewear is increasing. IMAGES BoF talks to prominent brands and understand the factors propelling its growth, its market size and how is consumer behaving to this evolving apparel segment.

By Rosy N Sharma with inputs from Gurbir Singh Gulati



Rock It



Prowl

Activewear is one of the fastest growing segments in the apparel market. With the growing focus on health and wellness, as well as the rising awareness of lifestyle concerns, people are getting more conscious about their fitness regimes and workout-oriented lives. Hence, running marathons, hitting the gym and practicing yoga are no longer niche.

Considering this need and demand, there is an existing gap that is created in the market for activewear products. In India, the size of the activewear market is dramatically evolving year on year.

Internationally, the influence of brands such as Lululemon, PE Nation, Kenzo, Off-White, that are represented by celebrities and through social media, have kept Activewear in the public eye, fuelling the rate of this progression.

THE ACTIVEWEAR SEGMENT

Activewear is utility clothing, which boosts the physical performance and eases body movements, as it enhances comfort while engaging in fitness and sports activities. Technical performance is the core to an active apparel.

Many brands are manufacturing smarter garments in a bid to provide the ultimate in comfort and utility for patrons at affordable prices. Take for example Van Heusen. Features like odour shield, swift dry, high stretch, media pockets, sound immersion docks and mesh ventilation are a core part of Van Heusen's performance line. High stretch helps in not restricting movements no matter how one stretches. Anti odour finish helps in preventing the stink that sweat generates and swift dry helps in faster moisture wicking from the body.

"The biggest strength for an activewear brand is its performance that consumers experience after wearing it. If the product performs with him/her. They will become a loyal customer for a long run," explains Shankar Chowdhury, GM - Design (Athleisure & Activewear), Van Heusen.

Shruti Behal, Head - Product Design (Lingerie, Nightwear, Swimwear & Activewear), PrettySecrets too believes that technical performance in activewear is very important because it improves performance.

"For instance, if you are going for a run without wearing a sports bra you will feel the jiggle and it will make you feel



Rock It



“The biggest strength for an activewear brand is product performance, which the consumer would experience it after wearing it. If the product performs with him/her. They will become a loyal customer in a long run”

-Shankar Chowdhury,
GM - Design (Athleisure & Activewear), Van Heusen



“Men and women in the age group 25 to 35 years are the biggest buyers of Activewear. Women lead the consumer market share with a 60 percent share in this segment”

-Shruti Behal,
Head - Product Design (Lingerie, Nightwear, Swimwear & Activewear), PrettySecrets



Van Heusen

conscious about how you might look, whereas if you are wearing a correct compression sports bra your breast will stay at its place, avoiding the jiggle, which will make you feel more comfortable while running resulting in improvement in performance,” she says. “So, people today are ready to spend on good activewear for the value it provides.”

“Having understood the concept of activewear as a lifestyle trend, technical fabrics play an important role as they enable one to easily adapt to different environmental settings, making it cross functional and long wearing,” says Sunishka Goenka, Creative Director, Myriad Activewear. “The textile industry is drastically shifting to futuristic fabrics which are not only functional but also focus on longevity and usability. Hence, activewear brands have an upper-hand because their products are designed to perform, resist and sustain. Also, consumers have become more conscious and sustainable in their approach to invest in brands that offer products with longer shelf life.”

At Myriad Activewear versatility comes from sourcing advanced fabrics, which are then curated carefully for modern design. The technical performance textiles that are source are specially developed internationally from recognised manufacturers in Taiwan and China, who also supply to the big players in the activewear market. The brand designs a plethora of active-, street- and athleisure-wear, which help them to explore a variety of fabrics ranging from nylon, polyester blends, polypropelene, tencel and breathable yet aesthetically unique meshes. Having activewear as a major category, Myriad Activewear focuses on active properties such as dry fit, quick dry, high compression, sweat wicking and breathability to provide ease of movement for strenuous activities such as cross fit training, yoga, Pilates, gym, weight training, running, etc.

SPORTSWEAR VS ACTIVEWEAR

Jiggy George, Founding Partner and Managing Director, Mojostar explains that a sportswear is performance oriented. It offers technical functionality to help improve

performance. Activewear, on the other hand is designed for people with active lifestyles, there is functionality, but it also offers comfort and styling, such that consumers can wear it not only for fitness and exercise regimes, but also as casual wear.

Similarly, Sunishka Goenka says, “The differentiator between sportswear and activewear is the purpose of use and functionality. Sportswear is designed for a specific sport activity that demands comfort and at the same time high resistance and performance. For instance, a scuba diving suit is technically structured for performance

and is not suitable for daily activities. While, activewear is curated to amalgamate an active lifestyle with a casual social life, which is rather more flexible and transitional. For instance, yoga wear can be associated with leisure wear for daily chores within a lifestyle.”

Hence, activewear serves the purpose of an active life mixed with a casual social life, it can be used for exercising and then transitioning into casual wear. Activewear affords more flexibility and style along with functionality and comfort, while sportswear is more focused on functionality and performance.

MARKET DYNAMICS

According to Rishabh Oswal, Executive Director, Monte Carlo Fashion Ltd., which launched its activewear brand ‘Rock It’ last year finds the concept of activewear to be comparatively new for India. “Today, a significant number of people are motivated by good health and a fit life drives on various platforms. The activewear segment has emerged and is potent to tremendous growth in the years to come. Growing at a steady CAGR of 23.7 percent, the segment took a leap from ` 24,000 crore to ` 37,000 crore between the years 2014 and 2016. According to forecasts, the segment will grow at a CAGR of 11.3 percent by 2021,” he shares.

>



“Fitness movement is still an urban revolution and needs more to be democratized, however in Tier II cities the fitness awareness is sporadic but not completely missing. It is important to have a pan-India presence for any brand and as far as activewear is concern we are hopeful to crack the walls through online presence”

-Rishabh Oswal,
Executive Director, Monte Carlo Fashion Ltd

Pretty Secret



Rock It



“There are more activewear brands for men and therefore the sales are higher. But there is so much potential for women ctivewear brands and with Just F, we are addressing this under-serviced segment. Also, there is definite scope for older kids and early teens”

-Jiggy George,
Founding Partner & Managing Director,
Mojostar



Rock It

Shankar Chowdhury says, “Organised activewear is expected to be at `8,000 crore by 2020, this category is the next growing segment in apparel, with a large number of Indian consumers getting aware and conscious about fitness and wellness. It is expected to grow at a CAGR of 18 percent.”

Jiggy George, who partners with top celebrities to co-create authentic, high-impact indigenous brands such as Just F and Prowl observes that the activewear segment is vastly under-served, and with fitness trends growing by leaps and bounds in India, the head room for growth is massive.

THE CONSUMER & THE MARKET

Indian men and women are embracing the ‘stay fit and stay healthy’ lifestyle. “Men and women in the age group 25 to 35 are the biggest buyers of activewear. Women lead the market with a 60 percent share in this segment,” shares Shruti Behal. Jiggy Goerge states that there are more activewear brands for men and therefore the sales are higher. “However, there is so much potential for women activewear brands and with Just F, we are addressing this vastly under-serviced segment.”

Fitness as a trend is not just limited to metros. However, Rishabh Oswal feels that fitness movement is still an urban revolution and needs more to be democratised. “In Tier II cities, fitness awareness is sporadic but not completely missing. Women are reluctant participant in any workout, men comprise the majority in gyms. It is important to have a pan-India presence for any brand and as far as activewear is concerned we are hopeful



Van Heusen

to crack the walls through online presence,” he says.

Brands Just F and Prowl, promoted Mojostar focuses on Tier II and III cities in a big way. Jiggy George shares, “Just F with Jacqueline Ferenadez and Prowl with Tiger Shroff, have a massive fan following that is national and not metro centric. We are seeing this reflect in ours sales as well.”

Favouring online route over the traditional retail and standalone stores as the latter still do not service all towns and cities, he says, “Our consumers are everywhere and currently online is better suited to deliver than offline retail.”

Just F is available on direct to consumer website, www.justf.in, while Prowl is available on website www.prowlactive.com. Both the brands are exclusively available on Amazon Fashion.



Just F



Just F



Myriad

Shankar Chowdhury claims that online sales are fragmented. "There is no mid-priced player in this segment. You have the international brands selling at a premium and then you have larger mass brands where quality and performance are not at its best. But we believe that with proper communication this platform will mature," he says.

At present, the online sales are appreciating at a great speed with alternative options of payments and easier movement of inventory. People have started trusting online sales and have greater confidence in purchasing through payment gateways. Online retailers are collaborating with brands to have greater visibility and brand diversity across channels of distribution. E-commerce players who have made activewear as a separate category are seeing between 20 to 70 percent growth in this segment. For example, Amazon India set up a dedicated activewear store and collaborated with global and Indian brands selling activewear.

TRENDS & INNOVATIONS

Activewear is not limited to gym and yoga studios, people are comfortable in wearing them for a quick catch-up

with friends or hit the cinema theatre late at night. Apart from evergreen tees, track pants, joggers and tights, the segment is witnessing the emergence of new trends like sports bras paired with tights and jackets, similarly, crop sweatshirts paired with joggers/tights.

"Amongst the variety of activewear, mesh leggings, yoga pants, joggers and track pants are high on demand. Trendy, easy on skin and comfortable to wear these bottom wears can be easily teamed with tank tops or sweatshirts for both gym and a stroll through the park," says Rishabh Oswal.

Sunishka Goenka also states that customers are looking at outfits that are designed for comfort as well as transitional wear with an aesthetic appeal as Indian consumers are perceived to be price value conscious and price sensitive. For instance, the market demands more than just basic to enable to move from Mat-to-Meetings. Activewear trends are being integrated steeply even in the cooperate world, like athleisure joggers and sports bras are teamed with formal blazers which sums up a look from Office-to-Crossfit.

"Activewear with power branding is constantly used to create a striking look with mass appeal which enhances a brand visibility and brand recall to add an essence of brand luxury," she says.

CATEGORY BESTSELLERS

"The bare necessities for the basic physical activities would be the fastest selling within the activewear category, such as yoga pants, leggings and sports bra. As casual culture continues further, leggings are becoming





Pretty Secret



Myriad



“Activewear trends are being integrated steeply in the cooperate world, like athleisure joggers and sports bras are seen to be teamed with formal blazers which sums up a look from Office-to-Crossfit”

-Sunishka Goenka,
Creative Director, Myriad Activewear



Prowl

category crushers, replacing denim jeans. Sport bras are a vital part of this segment and have been one of the fastest selling products. Brands who expertise in sports bras have an upper hand as it is a technical garment with minimal costs and wastage, making it a profitable business with competitive price points,” says Sunishka Goenka.

Men focus more on bottom wear and shoes, while women stress on top wears as well. In men’s category the best sellers are training shoes, vests, track pants and in women’s category leggings, joggers, yoga pants, polo t-shirts, mesh t-shirts and sport-bras are trending the most.

FUTURE OUTLOOK

This segment will be seen making its way to both fashion and function, as a result the opportunities for growth will be multiplied. With the increasing awareness in health and wellness, brands will continue to focus on performance and adopt seasonal trends.

“The key drivers that will outcast other categories would be the influence of international fitness workouts such as bringing franchises of international gyms like Physique 57 (Barre Workout), decoding fitness futuristic fabrics that will optimise ones daily fitness routine and celebrating fitness events such as International Yoga Day. These realisations will bring a greater degree of acceptance to the market for activewear,” says Sunishka Goenka.

“Activewear is still treated as a luxury in India despite the reasonable price tags offered by various labels. Traditional wear is still used for multi-purpose activities, women not coming out of their silos and middle-aged consumer group yet not tapped are some of the reasons that activewear is still struggling in the age of fitness fanaticism,” concludes Rishabh Oswal.





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MOJOSTAR

Incepted in 2017, Mojostar partners with top celebrities to co-create authentic, high-impact indigenous brands in lifestyle space. Their vision is to build a world-class 'house of brands' which leverages the power, draw, and allure of celebrities to provide enriching brand experiences to fans. As a company they are focused on finding high potential consumer white spaces in the lifestyle market and matching them with celebrities who authentically represent the proposition. Mojostar is consumer-backed and not celebrity forward - an approach that makes them different from other players. The company supports it with strong in-house capabilities in design, product development, supply chain management and marketing communications.

Product Categories

Mojostar has two celebrity brands: **Just*F:** This is one of India's first women-centric athleisure brand by Jacqueline Fernandez.

Prowl: A new active lifestyle brand jointly created and owned by Tiger Shroff and Mojostar.



Just*F and Prowl are not just activewear brands but have distinctly differentiated product lines that are reflective of the core philosophies of their brand co-owners, Jacqueline Fernandez and Tiger Shroff.

Just*F is a fun, fashionable and unabashedly feminine brand that redefines the women's activewear space in India and offers products that meet the specific requirements women with active lifestyles need to achieve their fitness goals without compromising on the fun and fashion aspects. Prowl offers products not by collection, but by intensity: low, medium and high to suit the customer's level of movement. The range is designed to not only fit well, but also make one appear fit with details like ergonomic paneling, angular prints, asymmetry and shifted seams.

Just*F's activewear line offers sports bras, tights, leggings and tee shirts. The brand's athleisure line comprises sweatshirts, joggers and

jackets. Prowl is designed for today's #Readytomove generation. Its wide range strikes the ideal balance between function and style and offers T-shirts, tanks, shorts, sweatshirts, joggers, track-pants and compression wear.

Online Presence

Both Just*F and Prowl are available on the brand's own website, www.justf.in and exclusively on Amazon Fashion.

Technological Initiatives

In terms of technology, the company is working with wicking, anti odor and smart wash fabrics. On the construction front, it features ergonomic panels for ease of movement, chaffing free stitching, reflective prints for better night visibility, laser vent cut out and mesh cutouts for better breathability and many more such innovations.

Turnover

The company is looking at clocking a `500 crore turnover in the next 5-6 years.





MYRIAD

L launched in August 2017, Myriad Activewear is an athleisure and activewear brand that is functional for all purposes, all day and for all seasons. Myriad is not only about fitness wear but also is a combination of causal, street and sports luxe. The brand is among the first to introduce fashion forward and functional fitness products that have been curated specifically for India, something that gives the brand an edge over the other players in the market. This also helped it garner attention of influential wellness and fitness trainers, stylists, celebrities and magazines like Vogue, Cosmopolitan, Hello Mag India, etc., within a short span of its launch.

Product Categories

Myriad Activewear's core categories are divided into performance wear and athleisure wear and includes sport bras, compression leggings and wind duster light weight jackets. The brand's latest collection embraces a mix of active yet experimental fabrics such as clear and holographic PVC, PVC coated nylon and polyester blends and 3 dimensional structured meshes. The collection finds its voice through stark colours and injections of light that is reflected through its silhouettes.

Myriad Activewear aims to diversify its product categories into a range of men's activewear and accessories.

Retail Presence

As a new entrant, the brand plans to be as visible as possible alongside maintaining brand value and quality of products before further branching out with a larger more mass distribution network. As of now, it is exploring new Tier II and III markets such as Ludhiana, Hyderabad and Kolkata.

Online Presence

Myriad Activewear has a strong presence across e-commerce retailers like Jabong, Rock n Rock, Amazon, Confidress, Como Collective and La Sosta along with its own store myriadactivewear.com. The brand is

also active in Facebook and Instagram that engage it with a large portion of its sales.

Innovative Products

The most innovative and highest selling products from the collection are the ones that define the brand's essence - holographic PVC jackets, monochrome wide flair pants, and compressive power up leggings.

Turnover & Growth

The brand clocked a turnover of approximately ` 30 lakh in FY16-17.



BRAND UPDATE

- > Name of Brand & Company:
SSG APPARELS INDIA LTD
- > Country of Origin: INDIA
- > Headquarters (city, country):
MUMBAI, INDIA
- > Total Retail Space Occupied (in sq. ft.): 3000
- > Annual Turnover (FY 2016-17):
30 LAKHS
- > Website:
WWW.MYRIADACTIVWEAR.COM

VAN HEUSEN

Renowned apparel brand, Van Heusen, is a significant emerging player in the athleisure and active wear segment. The brand intends to take a larger share of the market in the years to come. When Van Heusen launched its athleisure and active wear range, the market was in its nascent stages, but with time, the segment is seeing a phenomenal acceptance of this product category.

Product Categories

Van Heusen's core athleisure collection is a fine balance between lounge wear and athleisure, where the key focus is on superior comfort. The brand is among the first movers to introduce performance attributes like swift dry and stain repellent feature into comfort wear. Its latest athleisure collection is called, 'Metropolis'. The collection is curated towards the need of the urban consumers, who are on the move and looking at a form of clothing that is comfortable yet fashionable.

Expansion Plans

Currently, the brand's key focus areas are Tier I and II cities. Simultaneously Van Heusen is also formulating its Tier III launch plans.

Online Presence

Online is a space that has huge untapped potential for the brand. Van Heusen's athleisure and active wear range available on major in all major e-commerce portals, however the brand believes that it still needs to leverage this to its potential.

Omnichannel Strategy

Van Heusen is already present pan India. The brand's goal is to focus on the distribution and services of its product range in all levels of the market.



Innovative Products

Van Heusen Innerwear and Athleisure believes that innovation and quality are the two integral part of this category. The brand's utility joggers pants and travel joggers with hidden pockets are its key selling brands. Apart from these, its t-shirts with performance features has got good acceptance in the core market.

Turnover & Growth

The brand has just crossed the ₹100 crore milestone, and in coming years it is expecting more growth.



BRAND UPDATE

- > **Name of the Company:** ADITYA BIRLA RETAIL & FASHION LTD.
- > **Country of Origin:** INDIA
- > **Headquarters (city, country):** BENGALURU, INDIA
- > **No of MBOs present in (on same date):** 9000+
- > **No of LFS present in (on same date):** 200+
- > **Annual Turnover (FY 2016-17):** ₹100 CRORE (INNERWEAR & ATHLEISURE)
- > **Website:** WWW.VANHEUSENINDIA.COM/ATHLEISURE

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V-STAR



Belonging to the promoters of V Guard group, V-Star has captured the hearts of customers with its exquisite, affordable and comfortable portfolio of innerwear and lifestyle products. Propelled by Sheela Kochoseph, the brand has continuously redefined the benchmark for excellence in the world of fashion. One after the other, V-Star is energetically crossing major milestones of growth. V star is one of the leading innerwear and outerwear brands in south india and middle east. V-Star catalogues wide range of innerweares and outerweares for men, women and kids.

Brand Mantra

At V-Star, the mission is to emerge as a trendsetting and youthful lifestyle brand providing delightful products that are fashionable and trendy. The brand's products fully satisfy the need of customers because of the quality, style and comfort they promise.

Target Consumer

V-Star caters to men, women and kids. With its exquisite range of products the brand targets men and women who are above the age of 17. Its kids' range focuses on the 3 to 12 years age group.

Product Portfolio

V-Star showcases a superlative spread of innerwear, athletic blouses, leggings, t-shirts, sleepwear and shapewear that are designed to complement femininity

in the most beautiful way. The products for men that include, polo t-shirts, innerwear and track pants are available in an array of shades and cuts. The kids' wear segment showcases product ranges in t-shirts, track pants, innerwear, leggings, and tights.

Primary Markets

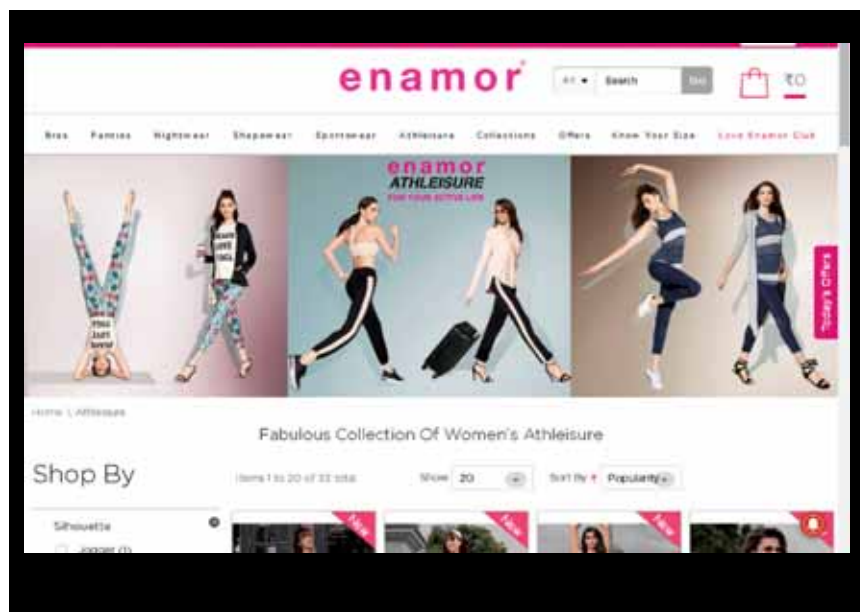
The brand's strongest markets include Kerala, Tamil Nadu, Karnataka, Andra Pradesh and the Middle East.

Future

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



ENAMOR



BRAND UPDATE

- > Country & City of Brand Origin:
BENGALURU, INDIA
- > Total Number of EBOs:
14 (AS ON SEP 2018)
- > Total Number of Point of Sales:
OVER 4500
- > Brand Portal:
WWW.ENAMOR.CO.IN

Gokaldas Intimatewear Private Limited (GIPL) was created as a joint venture between Gokaldas Images Private Limited and Barbara of Paris, France in 2001. GIPL launched the brand Enamor in 2003, to present a range of lingerie exclusively made for the Indian woman. Back then, only a few brands catered to the women of the upper society. With the fast growing economy, there was a definite need for premium lingerie. The company employs over 1,500 people including skilled factory workers. As manufacturing capability is the key to success for any lingerie brand, GIPL invested in a state-of-the-art manufacturing facility in Bangalore spanning across 70,000 square feet. The current capacity is 4 million pieces annually, scalable to 10 million pieces.

Target Consumer

Enamor's core consumer is a woman who's independent, confident, successful and is fabulous, the way she is. She pays great attention to the way she dresses and is constantly seeking novelty- a mindset that paved way to the early success of the brand.

Core Product Categories

Enamor is India's premium online lingerie shop featuring a range of trendy bras, panties, nightwear, sportswear and athleisure.

The brand has recently launched its athleisure range for the autumn winter 2018 collection which is inspired by yoga. The USP of the athleisure range is its versatility when it comes to its design and style.

Retail Mapping

The retail strategy involved modular shops in large format stores with trained counter consultants. Regional stocking points were set up across the country to service multi-brand outlets and

ensure delivery in 24 hours. In order to do so, distributors and C & F Agents are appointed in all major metros and state capitals of the country. At present, Enamor has around 4,500 points of sale across the country. The brand has 14 EBOs and plans to take the total count to 27 by the end of this financial year.

Currently, the brand is concentrating on cities like Delhi, Mumbai and Bengaluru. Delhi is a prime area of focus for Enamor.

Future Plans

Enamor, which is also present online, does not believe in the discounting policy. Currently online contributes less than 10 percent to the overall revenue. By the end of this fiscal, the brand is looking at 30 percent plus growth and will be investing around `4-5 crore capex for expansion.



YOGUE ACTIVEWEAR

In 2015, Yogue was launched to address the need of flexible clothing for performing physical exercises, something that could also crossover into casualwear. The brand follows a philosophy “from treadmill to runway in casual chic style”. The brand aimed to offer apparel that are not only trendy enough to be casual-wear, but are also flexible enough to be performing physical exercises in. As a brand Yogue believes in an equitable view of the society and is of its blue-collar work ethics.

Target Consumers

Currently the brand – which stands for Yoga + Vogue – focuses young customers from the metropolitan cities in India. But as the awareness for fitness spreads, the brand plans to make inroads in the interiors of India.

Product Portfolio

Yogue manufactures tights, capris, shorts and tops for women, and joggers, workout vests and t-shirts for men. They also make hoodies and winterwear garments. It focuses on bringing the best in sportswear technology as they are laser-focused on providing maximum comfort apparel to the modern yoga practitioner.

There fabric is specifically manufactured for “sweaty and stretching” activities. It is moisture-wicking, lightweight, ultra-stretchable and breathable. The needlework and the fit of Yogue’s apparel are the proof of the brand’s workmanship and passion.

The sports couture brand is known for its infectiously energetic designs and is also known for being one of the first Indian companies to offer digitally customized yoga wear to its customers.



Product Expansion

Yogue comes from the fusion of words Yoga and Vogue (fashion), so the brand’s vision is always to introduce fashion element in its yoga wear collections. Be it eclectic prints or garment forms, the brand has always been trying to push the envelope in terms of what can be done design wise, while at the same time keeping a strong

focus on the fact that its consumer will be exercising in these clothes. So for Yogue, it’s a fine balance of high performance fabrics, flexibility and design.

DE MOZA

De Moza was launched by Audaz Brands Retail India Pvt. Ltd., in 2013 to provide the widest range of fashion bottom wear of the best quality for women and children. The brand was introduced with a vision to build a 'Made in India' brand by delivering great value fashion for the young Indian consumer through fast growing modern retail formats.



Brand Mantra:

The brand aspires to deliver great value fashion for the growing, young Indian consumer with a focus on 'Made India' brands.

Target Consumer:

The brand's target consumers are trendy, bold, confident, fashionable and experimental women.

Brand's USP:

Trendy fashion bottom wear with over 100 designs in stock and ready at any point of time is De Moza's unique selling proposition.

Active Wear Product Range:

De Moza's active wear product portfolio encompasses a wide range of leggings, joggers, tops and sweatshirts. Made with superfine bio wash cotton stretch and fine construction the entire range is known for its extreme stretchability.

Up coming Plans:

De Moza plans to expand its EBO presence to 40 by the end of FY 2019 and strengthen its presence in two more leading, premium large format stores. It is also in the process of partnering with a few more character licensees, apart from its tie up with Stylumia.com, to expand its product portfolio for AI based trendspotting.

BRAND UPDATE

- > Company:
AUDAZ BRANDS RETAIL INDIA PVT. LTD.
- > Launch Year:
2013
- > Brand website:
WWW.DEMOZASTORES.COM





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STARTUPS, RELAXED OFFICES FUELING GROWTH OF ATHLEISURE SEGMENT BY 25 PERCENT YEAR-ON-YEAR

IMAGES BoF talks to brands offering athleisure wear such as Harkirat Singh, Managing Director, Woodland; Darshan M, CEO, Deivee; and Vishal Patel, Managing Director, Hustle to understand what is propelling the segment to grow and what are the future prospects of this emerging segment...

By Rosy N Sharma

What is athleisure? Well, the Cambridge dictionary describes athleisure as a style of clothing that is comfortable and suitable for doing sports, but also fashionable and attractive enough to wear for other activities. Darshan M, CEO, Deivee gives the term an alternate definition. He says, "Athleisure is actually a trend to wearing sports performance wear for leisure." Improved fabrics have allowed sportswear to become more versatile, comfortable and fashionable. The athleisure line-up include leggings, tights, sweatpants, sneakers, hoodies and jackets.

FACTORS PROPELLING THE POPULARITY OF ATHLEISURE

According to Harkirat Singh, Managing Director, Woodland, there has been a significant rise in the demand of athleisure in India recently. A key factor in increase in demand can be attributed to the growing health consciousness among Indians. There is a rise in health and wellness expenditure among Indian consumers which has contributed to the segment's growth and athleisure fits the bill since it is a combination of trendy sportswear and relaxed apparel.





“Every year we can see new players entering the segment and the segment rapidly growing along with its customer base. Since, the trend has just picked up, athleisure is a long term fashion trend.”

-Vishal Patel,
Managing Director, Hustle

Vishal Patel, Managing Director, Hustle explains that athleisure is perfect for the Millennial consumer who is always looking for an option that fills the gap between sportswear and trendy clothes, helping them switch effortlessly between work and workout. “Athleisure can be worn both in the gym as well as for going out to a casual meet or even a party and that, according to me, is the biggest contributor for the growth of the segment,” he says.

There has been a rise in health awareness and the increase in the number of gyms, fitness centres and yoga studios across the country is proof of the growing change in the lifestyle of urban Indians.

Whether you are running a marathon or just chasing your kids at home or chasing deadlines at work, comfort is the number one priority to choosing athleisure over traditional clothing options. No longer does the consumer want to change from the gym or yoga session to something to go catch a coffee or attend a meeting,” he adds.

He observes that athleisure is more popular with women than men globally and in India as well. “It is because women can easily pair a running leggings with a format jacket and look comfortable in an office setting, but men won’t look appropriate. Also women multi-task between home and office and need comfortable clothing even more than ever.”



Darshan M says that the reason this trend has emerged is because of the general trend of dressing down. He explains, “You don’t see formal clothing in offices anymore. It started with denims replacing formals and now comfortable tracks are replacing denims. The startup culture and relaxed office spaces have fueled the growth of this segment. It’s currently growing at 25 percent year-on-year.”

“Comfort is the number one reason people are moving towards athleisure.

Harkirat Singh on the other hand feels that athleisure segment for men has become as popular as for women. This has given a new sense of style and a variety of options to men in terms of apparel and footwear. “Of the 20 to 25 percent annual growth witnessed in 2016-17, men’s wear grew at a rate of 8 to 10 percent, while women and kids’ apparel segment grew at 11 to 15 percent. Seeing the current trend, it seems there will be a categoric growth in this segment for kids as well,” he says.



MARKET SIZE

Going by the present scenario, athleisure is the fastest growing segment across the fashion space. According to Harkirat Singh, the segment is witnessing a growth rate of 20 to 25 percent annually. Considering its size, Darshan M says that non-sports brands too have started offering athleisure ranges.

Myntra, in 2017, had reported that it had a phenomenal response to its athleisure ranges. Athleisure as a segment has seen 1.5X growth, compared to rest of the portfolio of the e-commerce major.

Likewise in 2016, Van Heusen forayed into the segment by introducing premium and innovative innerwear and athleisure range for men. According to the brand, its product offerings received phenomenal response from consumers across the country. This propelled them to tap into the rapidly growing women's segment too, which is witnessing 15 percent year-on-year growth.

"The exact size of athleisure market is difficult to measure right now. However, every year we see a new player entering the segment and the segment is growing rapidly along with its customer base. Though the trend has just picked up, athleisure is here to stay in long run fashion trends," says Vishal Patel.



"Tier II and III cities have immense potential for athleisure segment. The rise in the per capita income of the middle class in these cities has resulted in movement of consumers from unbranded to branded segments."

—Harkirat Singh,
Managing Director, Woodland



TRENDING IN THE MARKET

According to Darshan M, currently there are three main types of athleisure clothing in the market. First, the authentic active wear - these are clothes made for performance and being using for leisure. This is the original and true form of athleisure. These clothes are made with performance features and are built for technical use. For example, the yoga range of Deivee is made for professional yoga practices and is designed by yogis for yogis. However, a lot of its customers use them as office wear.

Second, sports-inspired athleisure wear - these are not designed for sport but by sportswear. These are not usually made with technical fabrics. For example, polo tees. These are inspired by Polo and Tennis players of the early 20th century and is worn as a casual collared tee all over the world.



“The reason this trend has emerged is because of the general trend of dressing down. You don’t see formal clothing in offices anymore. It started with denims replacing formals and now comfortable tracks are replacing denims. The startup culture and relaxed office spaces has added fuel to the growth of this segment. It’s currently growing at 25% YOY.”

–Darshan M,
CEO, Deivee



Lastly, sustainable athleisure – today consumers are making informed decision on who makes their clothes, what raw materials go into its making and what is the impact of their choices on the planet. Increasingly informed customers are seeking out organic and sustainable clothing.

A new athleisure range is smart workout wear. At Woodland, athleisure is about casual clothing which includes jogger pants, shorts, sweatpants, yoga pants, gym stringers, gym tanks, sports bras, sweat-wicking gym tees, sneakers,

hoodies and so on. “These are designed to be worn for exercising and are equally comfortable and sassy for running other errands too,” says Harkirat Singh. “Considering the segment is relatively new, it has been noticed that all the products under it have been selling be it apparels, footwear or others. It is a trend to sport the right attire even at gym, the benefit that athleisure has is that it is also perfect for workout or brunch and beyond.”

“Tees and track pants are the fastest selling products within the space. However, hoodies and jackets which are popular globally are not a hit with Indian audiences since we live in a hot and humid country,” shares Darshan M.

“At Hustle, we bridge the gap between gym and casual wear; so you have a fashionable, stretchable pro gym wear to suit the Indian weather,” Vishal Patel adds.

KEY INNOVATIONS & SUSTAINABILITY

Darshan M shares, “The challenges to sustainability in athleisure is huge. About 99 percent of all athleisure brands in the country use polyester. And everyone know the ill effects of using polyester fabrics. These plastic garments are polluting the water bodies. In fact, due to these plastic garments, there is micro plastic filaments in every food we eat even in the water bodies. Today the oceans have one piece of plastic for every 5 fishes. By 2050, there will be 5 pieces of plastic for every fish in the ocean. If the athleisure market keeps growing at its current rate and more or more people buy cheap polyester goods we are looking at global catastrophe in the making.”

Deivee, which is a 100 percent sustainable active lifestyle brand, uses only organic, fair-trade and recycled raw materials to manufacture its



clothes, which means it puts purpose ahead of profit. “It only works with ethical factories and is very particular about the impact on the planet. It also works with rural artisans and helps in improving the lives of the farming communities. It believes in adding value to the entire value-chain from farmers to end-consumers,” says Darshan M.

Deviee’s products are made to suit Indian body types, Indian environments and local sensibilities. It is the only brand in the segment to design clothes for different body types. The brand’s mantra is to provide the best products money can buy while making a difference to communities a person works and lives in.

Woodland maintains a commitment to innovation and sustainable business practices in line with its tradition of promoting outdoor and adventure sports worldwide. Few of its product innovations include heat lock apparels made in lightweight fabric with micro fibre to regulate the body temperature but retaining body heat. Aquasorb apparels which block rain and snow. Super charged cotton collection to keep the wearer cool, dry and light.



Hustle

Pure green apparels which are made out of recycled plastic turned into fibre to manufacture garments. And, tech shoes that are embedded with battery powered temperature control system, with their anti-microbial property, the shoes absorb sweat to keep the feet dry.

Hustle claims that its joggers, vests, t-shirts and jackets are the bestsellers amongst its product range. The brand’s target audience is between the age group 16 to 24 years, which is often called the “social media generation”. Vishal Patel states that in order to offer innovative range, it analyses trends through social media and translates them into products.

Their USP lies in understanding its audience by having a huge presence on all social platforms while their pan India operation network remains the backbone of the brand. “The graphics we use on our products for categories like t-shirts, vests and joggers, are inspired by the latest social media trends,” Vishal Patel explains.

TIER II & III DEMAND

Today, Tier II and III cities are as important as Tier I for any brand as the markets in urban cities. These cities have immense potential owing to the rise in the per capita income of people in these cities and the shift of consumers from unbranded to branded products.

“We have customers from small towns and villages who are as informed as their metro counterparts. Social media and internet has ensured easy flow of knowledge and information. The early adopters however will continue to be the urban consumers,” says Darshan M. “Online is the key growth driver for athleisure and many more categories as it democratizes the access to the best products to consumers living outside the top metros. Now a customer in the North-East has the same access as someone living in Delhi, Mumbai or Bengaluru. About 70 percent of our business happens online and this trend is only going to grow.”

Harkirat Singh also states, “E-commerce has helped athleisure segment to grow day-by-day. It has been noticed that online sales of this segment has increased in high single digits.”

FUTURE OUTLOOK

According to Harkirat Singh, the future of this segment is bright as it has received tremendous support from the industry. It has become customers’ favourite which is the main reason of its growth and success. Thanks to the increased knowledge and initiatives towards health and fitness, this trend is here to stay.

Hustle too, is confident about the segment’s acceptance in the Indian market and is looking for better business in the coming years. “Athleisure was brought into existence by simply breaking the rules of classic gym wear and casual wear categories. There are rules yet to be written but still it’s become more of an understanding right now. Any category needs its ideal time to surface as a steady independent division in itself. As they say, customers are the king and I think it’s them who will write the rules while we will try our best to cater to their demands,” concludes Vishal Patel.



Hustle

GROVERSONS

Groversons is one of the oldest lingerie manufacturers in the country, established in 1953 by late C.L. Grover. The company first branded its products under the name Paris Beauty which became the flagship brand of the company. Today, the Groversons Group, under the guidance of current Managing Director, Rakesh Grover has achieved many milestones, and overgrown over with every passing year.

Groversons is the first lingerie company in India to get ISO9001:2008 certification. The group is one of the largest manufacturers of lingerie and intimate apparel in the country today. The group today has a production capacity of about 25 million pieces a month. Marketing and selling the wide product range under different brands.

Employing over 2,200 people directly and indirectly, the group has a wide range of products and a strong distribution network across India. It also has its presence in other countries like Dubai, Saudi Arabia, Iran, and New Zealand.

Brands Of Groversons

Paris Beauty: The flagship brand of the group is also the oldest lingerie brand in the country. This brand has a huge variety of products from 100 percent cotton braziers to knitted and fashion bras, slips, camisoles and panties. ParisBeauty is an economy brand that targets the masses.

Miss-T: Miss-T is the brand that is focused towards the changing trends of the market. It is a premium brand which targets the youth and showcases a wonderful range of bras and panties.

Winta: Introduced to the market in 2012, Winta is the latest addition to the group; this brand offers thermal wear for everyone - men, women, kids and even toddlers. **Sunaina:** This brand is focused on economy fashion women's innerwear.

Innovations

The brand has a few specialised fabrics which are not yet in the market. There is also a new multi-way style which can be worn in a number of ways and which has been made with a few technical betterments.



Retail Mapping

The brand has 15 EBOs and is also present in 16,500 MBOs across India.

Expansion Plans

The brand's management has identified a huge space to grow in the South Indian market as the product acceptability is high. The gap in the South Indian market is just right to provide the growth spurt which Groversons needs.

Online Presence

Groversons is doing well online, upgrading the whole online ecosystem from their website to their page as well as selling on various portals. They are bullish on online growth in the near future.



THE GAME IS ON FOR GAME BEGINS

Dhananjai Lifestyle ventured into the kids sportswear segment with its brand, Game Begins to tap into the emerging sportswear segment for kids. With its wide product range, the brand focuses on covering all segments with innovative and functional collections...

IMAGES Business of Fashion

Launched in 2017 by Dhananjai Lifestyle Ltd., Game Begins is one of the first sportswear brands in the kids category in India. The brand targets consumers in the age bracket of 1 to 16 years and caters to all categories that a growing child needs in today's day and age.

Monidipa Nandy, Brand Manager, Game Begins says, "Our journey from inception till date has been a roller coaster ride. Being the first ever kids sportswear brand in India, we have had to go through a lot of research and development to create a space for kids sportswear in the market, starting from concept, to design, fabrics, patterns, prints, print techniques, market acceptance and retail."

"The major advantage we got was that there was huge demand for sportswear among consumers in kids category and that gave us the motivation to get going. On the basis of direct demand from consumers, we have been able to pull sales in place of pushing for sales," she adds.

Product Range

The brand offers an entire range of kidswear from basic essential tees, shorts, tracks, track suits, coordinated sets, sweaters, sweatshirts, jackets and hoodies.

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BRAND UPDATE

- > No. of EBOs: 2
- > No. of SIS: 5
- > No. of MBOs: 2,000+
- > No. of LFS: 10
- > Total Retail Space Occupied: 10,000 SQ.FT.
- > Annual Turnover (FY 2016-17): ₹ 20 CRORE

"Our product range are made keeping the forecasting in mind," she says. The digital printed sports t-shirt, army printed tees, joggers, hooded jackets, sweatshirts, sweaters, track suits, etc., are the brand's bestselling range.

"We use different textured fabrics and a variety of techniques in printing/embellishment like HD sublimation printing, digital printing, etc.," she further explains

This Spring-Summer, the brand is planning to add nightwear for kids aged between 1 to 6 years. They also aim to add swimwear to its product range. "Most importantly, we have tied up with international sports club like Manchester City Football Club (MCFC) and Paris-Saint-Germain (PSG)," she says.

Retail Presence & Expansion Plans

In a short span the brand boasts of retail presence through two exclusive



brand stores, more than 2,000 multi-retail outlets, 5 shop-in-shop formats and presence in 10 large format stores. In terms of online, the brand has presence on Firstcry, Hopscotch, Amazon, Snapdeal, Udaan, Flipkart, Shopclues, Paytm, Limeroad and many more.

"Right now we are focusing on our distribution channels, online partners and LFS businesses," shares Monidipa. Strongly supporting an Omnichannel strategy, the brand is focusing on expanding its online partnership and adding more distributors and wholesalers to the business.

Turnover & Growth

In the last financial year, the brand achieved a turnover of ₹ 20 crore. In the next two to three years, it is projecting a 30 percent year-on-year growth.





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'Demand of Women's Athleisure Wear Growing at A Rapid Pace Globally'

The Athleisure market is poised to grow 15-20 percent year-on-year. Seeing the immense scope in the category going ahead, Lotto also started changing its outlook towards the market by expanding into the athleisure segment...

Charu Lamba

Lotto Sport Italia S.P.A, a major name in international sports industry, is nothing less than a household name in India. The brand is manufactured, retailed and licensed by Sports Station India Pvt Ltd (SS IPL) in India. The organization has been instrumental in the brilliant re-launch of the brand Lotto Sports in India, making it available across nation.

According to Shivam Kataria, Vice President, SS IPL Retail, since Lotto has been in India from a very long period of time, either customers have grown up wearing the brand or are aspiring to wear it. "The brand awareness of Lotto is so strong in India that many customers instead of considering it as an Italian brand, think that it is an Indian brand."

Abroad, the brand is associated with football and tennis. But it gained its share of popularity in India in the running segment. Slowly and gradually as the Indian market followed international trends and inclined towards the athleisure segment from performance wear, Lotto has also changed its perspective.

"The Athleisure market is poised to grow 15-20 percent year-on-year. Seeing the immense scope in the category going ahead, Lotto also started changing its outlook towards the market by expanding into the athleisure segment. However, the running segment, football and tennis shoes remain core to the brand," states Kataria.

Explaining it further, he says, “A majority of people across the globe have started participating in sports, not for competition but for their well-being, for interaction and for fun. They want sportswear which can be worn in the morning, afternoon and evening. They want to feel comfortable wearing the same shoes in office as well as to a club, and this is the major reason behind the rising demand of athleisure.”

Another category which has seen a spike in demand at Lotto is women’s wear.

“Currently, 30 percent revenue is coming from the women’s segment. We are targeting to close this year with 30 percent contribution from women customer including footwear and apparel,” asserts Kataria.

Target Consumer

The brand caters to modern-day consumers who consider fitness a lifestyle. It also focuses towards catering to the needs of serious sports enthusiasts. Lotto is also positioned as a brand, which delivers international standard sports merchandise to Indian sport enthusiasts.

Omnichannel Strategy

According to Kataria, there are two ways to go Omnichannel - to have your own website or to partner with various e-commerce players. “We have partnered with various e-commerce players as cost of customer acquisition is quite high with our portal.”

“Omnichannel is still evolving in India and in the next six months to one year, the entire system around Omnichannel is expected to get cemented,” he explains. Going forward, Lotto is planning to introduce their own e-commerce portal.

“Store integration from an Omnichannel perspective is underway and we can expect it to be fully functional in six months,” he states. The brand, which has men’s footwear as the fastest moving category, gets 25 percent contribution to the overall revenue from online business.

Future Plans

At present, the brand has 36 EBOs across major locations in Delhi/ NCR, UP, Haryana, Maharashtra, West Bengal, MP, J&K, Uttarakhand and Gujarat. It has presence in over 200+ MBO’s including Sports Station, Reliance Footprints, Pantaloons, and leading e-com portals like Flipkart, Amazon, Snapdeal and Jabong.

Elaborating on the expansion plans of the brand, Kataria reveals, “This fiscal, we are planning to open more 15 EBOs in North, East and South regions and add another 25-30 stores next fiscal. Our plan is to double the store count in one year’s time.”

“In the next fiscal we will be adding 100 more SIS. We are also looking forward into new categories like bags, luggage and light fitness equipment,” he adds.

At the same time, the brand is expanding the categories like women’s wear and apparel. According to Kataria, Tier I and Metro cities are where Lotto’s business is and Tier II and beyond is where its growth lies.

The brand, which has been growing on 35-40 percent year-on-year, plans to grow at the same scale this fiscal too.

“The same store sales growth has been flatish or slightly negative as compared to last year. However, we are expecting to see a good season from January onwards,” he says.

The sportswear brand, which endorses the best of athletes in the sports arena including major names like Luca Toni, David Ferrer, Agnieszka Radwanska, Carla Suarez Navarro, Kevin Anderson and many more, is targeting `150 crore plus revenue in India.



“A majority of people across the globe have started participating in sports, not for competition but for their well-being, for interaction and for fun. They want sportswear which can be worn in the morning, afternoon and evening. They want to feel comfortable wearing the same shoes in office as well as to a club, and this is the major reason behind the rising demand of athleisure.”



HRX, India's homegrown active wear brand, was founded in November 2013 by Bollywood star Hrithik Roshan and Exceed Entertainment in a bid to revolutionise the fitness scenario in India, as a value-for-money, high quality alternative to international brands.

The brand offers a range of products including sports shoes, men's joggers, T-shirts, backpacks and select womenswear (joggers, sports bras, t-shirts). Product categories include HRX Active Wear, HRX Casual and HRX Yoga and are available on e-commerce platforms including Myntra, Flipkart and Jabong. Dominated by vibrant colours, HRX's lightweight products are made of premium fabrics to give the wearer a contemporary fit.

The Hrithik Roshan-backed fashion brand is eyeing `500 crore turnover by 2020 from its apparels and footwear section, fueled by expansion in product categories and offline presence next year.

Talking about this, Afsar Zaidi, Co-Founder, HRX says, "The first store of HRX will be opening in Bengaluru and then we will be expanding to other cities like Pune, Delhi-NCR and Mumbai."

ATHLEISURE SEGMENT POISED TO GROW 30% Y-O-Y

AFSAR ZAIDI,
CO-FOUNDER, HRX

The Hrithik Roshan-backed fashion brand is eyeing `500 crore turnover by 2020 from its apparels and footwear section, fuelled by expansion in product categories and offline presence next year...

Charu Lamba



The brand is currently weighing both the options - malls and high-streets - to open the stores. The average size of the store is expected to be around 2,000 sq. ft.

"We will continue to sell online through Myntra and Jabong. Offline stores will let consumers touch and feel the product and will help us get instant feedback. This will further increase the scope of product improvement and developing new categories," states Zaidi.

HRX – which has been growing 100 percent year-on-year – is targeting Rs 300 crore revenue for the current fiscal. According to Zaidi, “Footwear has seen a great upsurge lately. From contributing 35 percent to the overall sales the numbers have gone up to 50 percent.”

Besides this, the company, is looking to foray into personal care, sunglasses and backpack categories as well.

In an exclusive interview with IMAGES Business of Fashion, Afsar Zaidi talks about future of athleisure wear in India along with the performance of his brand. Excerpts from the chat...

Throw some light on the market size of athleisure wear in India.

The Indian athleisure/active wear industry is currently estimated at a

whopping `8,500 crore. It is expected to continue growing at CAGR of 12 percent and touch expected sales of approximately 6x at `54,000 crore by 2020.

According to you, what are the growth drivers of the athleisure segment in India?

With Indians becoming more health conscious and image sensitive, their pursuit for fitness has increased. The average age bracket for Indian fitness enthusiasts is 20 to 35 years, which makes for the majority population of young Indian students and professionals.

To be able to tap into this big chunk of the Indian population with available disposable income and the affinity for fitness, brands have started focusing on active wear/athleisure segment.

What are the factors limiting the growth of this category in India?

Any new brand in a credibility driven category like sportswear/active wear/performance gear needs a certain incubation period and several trials and errors till it becomes good enough to help athletes, sports people and common people in general for providing performance enhancing features and technical advances. This process takes anywhere between 5 to 7 years with sustained efforts and focused communication plus constant innovation and improvement before we are home with a credible and acceptable product.

What are the price points at which you sell your athleisure range?

Our average price point is approximately `900. It varies from category to category. We can safely say that any given day our pricing is 30 percent lower than the other big international players in the market.

What are the fabrics that you use for your athleisure range?

Vibrant styles, signature cuts and

lots of mélange would be found in the upcoming capsules. We use fine stretchable, knit, mesh and breathable rapid dry fabrics which are usually finished with N9 and UV protection layers to enable people to train or perform better while in HRX clothing.

What have been the technological advancements and innovation in the athleisure segment at HRX?

We have recently launched our first performance range of shoes called Metagrip. It has a unique cushioned and light flexible sole enabling runners to run long distance with lesser effort. In clothing it is almost hygiene for us to now provide rapid dry, N9 or anti-microbial layer and UV protection.

How are Tier I and II cities faring in this segment?

Fitness no more is an urban phenomena. The top metros contribute maximum and at the same time other cities like Pune, Lucknow, Jaipur, Indore, Ludhiana etc., are not far behind in their contribution to the fitness industry.

Has e-commerce changed the athleisure game in India? If yes, how?

E-commerce makes it easier for people to access different products even from distant geographies. One doesn't need to go to a mall today to shop, even trials and returns are easy given the kind of policies e-commerce players offer.

Price is a clear advantage because e-commerce provides deeper discounting than offline retail. Hence, it works for today's consumer who is time-pressed anyway and still wants to shop.

What is the future of this category in India?

Fitness industry in India is a sunrise sector poised to grow at least 30 percent year-on-year.





YOGA WEAR:

CLOTHES THAT OFFER THE TRIFECTA OF EASY MOVEMENT, COMFORT & BREATHABILITY

The increasing inclination towards a fitter lifestyle among the younger generations in India has boosted the popularity of yoga wear. IMAGES Business of Fashion takes a deep breath and dives in deep to analyse the progress of the sector in India...

By Shivam Gautom

Athleisure is possibly one of the biggest trends to have hit the discipline of fashion retail till date. Think of women wearing yoga pants for a night out after work. There are CEOs donning yoga bottoms to board meetings. While some have downplayed the rise of athleisure as a passing fad, a sizable number of industry reports seem to indicate otherwise. Athleisure reflects a lifestyle shift, a growing trend of fitness consciousness that view athletics not only as a hobby but also as an all-around lifestyle. Hence, this relaxed standard of clothing has naturally emerged as a new segment that is progressively been preferred over casual wear.

Within this category, a popular sub-category has emerged – yoga wear. Yoga clothes have transcended the realm of traditional exercise and is now a rising fashion fad in the active wear/athleisure segment. Influencers and A-listers are often seen sporting yoga wear on a daily



In order to get a hang of the current dynamics of the yoga wear market and the prevailing trends in India, IMAGES Business of Fashion caught up with Malika Baruah, renowned Yogini and Founder of Proyog, a yoga wear brand born out of the Indian desire to preserve the principles of yoga. Excerpts from the interview...

How would you define yoga wear? What are the key differentiators of this segment from other sportswear categories?

Going by the practice and principles of yoga, we believe one should wear clothing that allows easy movement, is comfortable and also naturally breathable. It should almost be like a second skin because yoga requires ease in movements. Most sportswear categories make clothes using plastic materials like nylon and polyester. The garments are often tight and restrictive and loaded with chemicals. As a yogi, ideally one should make choices that support the environment.

How has the yoga wear category grown?

There are over 300 million yoga practitioners in the world who collectively spend billions of dollars on yoga wear and accessories. In the US alone, as per a 2016 report, over \$27 billion are spent on yoga products annually. In India yoga as a consumer market is still in a nascent stage. However, people today are far more conscious about fitness that ever before.

There is a rising popularity of yoga wear, but is it a category that will benefit Indian players?

Sales in this category is growing fast amongst Indian consumers. Indian brands can benefit if they focus on performance and provide quality at par with global players. Moreover, Indian brands need to draw from our rich history of yoga, innovate consistently and work towards building an international presence.



basis thus adding to the growing popularity of this category.

In 2017, e-commerce giant Amazon revealed about the jump in sales for yoga fashion merchandise in the Indian market. The retailer has seen a growth of over 225 percent year-on-year for yoga products under sports category. According to Apparel Resources, the majority of the demand was from urban areas. Mumbai, Delhi, Bangalore and Hyderabad emerged as top four cities that ordered these products. The remaining 60 percent came from other Tier I, II and III cities, reinforcing the percolation of this demand even to smaller cities and towns.

The result has been a number of established brands entering into this segment as well as emergence of dedicated athleisure brands to capitalise on this growing popularity. This has led to a growing scene of competition in the category, compelling brands to exercise rigorous innovations in their product categories.

The market today is ablaze with a plethora unique propositions - right from products that are free from chemicals including bleaches, toxic waxes, sulfur and heavy metals commonly used in the production of clothing to offerings that are pushing the envelope in terms of colors, fits, flexibility and silhouettes.

What are the products that are included in this category and what are the fastest moving ones? What are the latest trends?

Under apparel, sports bras, tank tops and tights are the bestsellers in the women's category and tracks and shorts top the men's category. Then there are a range of accessories like blocks, straps and yoga mats leading the category. Trends are constantly evolving within this segment. However, clearly performance based innovations are the most sought after.

How are consumers accepting this yoga wear as a different category from Active wear in India and globally?

Yoga wear is a sub-category of active wear. In the west, people are already well equipped with wardrobes for different activities and occasions - whether it's gym wear, ski gear or yoga wear. Unfortunately within active wear, yoga wear has been loosely defined.

Is yoga wear as popular with men as with women? Is the kids category also looking at this new segment?

While it's true that a lot of men are now adopting yoga as a form of exercise, the market is still predominantly a women's market. The market for kids' wear is pretty nascent at the moment and will probably take a few more years to come into its own.

Tell us how the industry is gearing towards providing a line of sustainably produced yoga wear? How has your brand worked towards it?

A lot of brands are embracing sustainability over the last few years and consumers are becoming more aware of the disasters caused by the



use of plastic in apparel. At Proyog we are continuously innovating materials to create organic and sustainable yoga gear. Our new yoga mat is also created with natural rubber and jute, all sourced in India. It is completely biodegradable. We want to put India on the map with our range of premium yoga products that's both great for you and the environment.

Do you think the government can play an active role in promoting yoga wear?

The Indian government has made great headway in promoting yoga in the country and internationally, with the International Day of Yoga being celebrated across the world. It would be great if yoga could become a part of the Asian Games and Olympics in the coming future.



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TRACKING THE DYNAMICS OF INDIA'S GYM WEAR MARKET

Whether or not one shows dedication in maintaining their gym routine is debatable, but it is an undeniable fact that gyms are doing well when it comes to their membership registers being filled. India's waking up to being healthy and this means tons of gym memberships. This also means that when one takes a gym membership, the very next thing they do is head off to stores that deal in gym wear. Or they just log on and buy gym clothes and accessories. The demand for gym and active wear is growing in India because of a desire to stay fit and healthy. IMAGES Business of Fashion takes a look at the market dynamics...

Setting the context for the story, Pallavi Burman, Head - Marketing, HRX shares, "The Indian active wear industry is currently estimated at a whopping `8,500 crore. It is expected to continue growing at CAGR 12 percent and touch expected sales of approximately 6X at `54,000 crores by 2020."

Burman attributes the reason for this to growing health and wellness trend in India along with an increase in the number of sporting clubs, increased interest in sporting activities like football, basketball, tennis, badminton and cricket, the Indian active wear industry is fast proliferating. She says, "More disposable income and general inclination towards fitness is rising and resulting in the growth of this industry."





“As of today, each distinct category is reinventing itself. This is a phase where the consumer market is changing since there is a generic shift towards more flexible lifestyles. Once this change settles in, I believe there will be clearer newer distinct definitions for sportswear and athleisure.”

-Nivida Kohli,
Design Manager, Numero Uno

Another major reason for an increase in demand for gym wear is having Bollywood celebrities being spotted in gym gear, especially the likes of Hrithik Roshan, Malaika Arora and Kareen Kapoor Khan. It isn't uncommon to see Page 3 pictures of these celebrities in their gym wear. The glamour magazines often have pictures and articles of how celebrities are taking gym wear to the streets and this eventually does give a fillip to the demand for workout clothes in the country.

MARKET OVERVIEW

Perhaps the above well explains the emergence of active wear in the country. Where dedicated gym wear is opted for only by a handful few, those opting for working it out in the gym clubbing their active wear or sportswear as gym wear. No wonder then that brands in India too offer gym clothes under the category of 'active wear'.

Pallavi Burman decodes the difference between the often clubbed together categories of active wear, athleisure wear, sports / performance wear. “By definition, athleisure and active wear clothing are those which can be worn from studio to street. Sportswear or performance wear, however, is clothing which help athletes or sports persons enhance their performance specially

items like shoes, technologies like compression, socks in some sports etc.”

Nivida Kohli, Design Manager, Numero Uno shares her views, saying, “As of today, each distinct category is reinventing itself. This is a phase where the consumer market is changing since there is a generic shift towards more flexible lifestyles. Once this change settles in, I believe there will be clearer newer distinct definitions for sportswear and athleisure.”

However, a lot many online players have an exclusive category for gym wear and some have gone a step further to have their portals dedicated to offering nothing else but gym clothing.

The emphasis is more on offering men's gym wear than having something specialized for women and unfortunately in India, gym wear still consists of mostly leggings and sports brassieres, although bigger brands have started innovating for women as well now.

Taking note of this gap, brand Mojostar in association with Bollywood actor Jacqueline Fernandes, recently launched their exclusive portal www.justf.in that is dedicated to women's active / gym wear.

>

FASHION RETAIL-FUELLED MOTIVATION

- The term “encloded cognition” describes the systematic influence that clothes have on the wearer’s psychological processes.
- The psychological effects of wanting to adorn yourself in fitness gear that makes you feel good about your body are very real.
- The value of boosting your own motivation by getting yourself in the right headspace to work out can be a huge step forward in preparing your brain to expect exercise to occur.
- In addition to this, active wear can even serve to make you more aware of your body’s movements, strength and fluidity.

Courtesy: femaleforlife.com



Just F was launched after Jacqueline and CEO Mojostar, Abhishek Verma, realized the gap in the market for women’s gym / active wear.

“Sportswear needn’t be super masculine, so we are introducing fusion elements, florals, and may even add lace to some designs,” says Jacqueline Fernandes in a media interview. She has actively participated in the designing of the brand and has ensured that little things are not given a miss like pockets in fitness wear, the positioning of the straps and hooks and the materials used for leggings.

According to Abhishek Verma, the focus for the brand for now would be functionality and support. The brand is also going quite aggressive with their collection of sports bras.

The research by the brand indicated that most of the international brands that are present in this category design their range keeping in mind the target audience of western countries, which don’t fit the average Indian woman. Another reason for launching Just F was to give Indian women appropriate exercise clothing at reasonable costs, especially since most international brands come with a hefty price tag.

GROWING DEMAND

Pallavi Burman says that with Indians becoming more health conscious and image sensitive, their pursuit for fitness has increased. “The average age bracket for Indian fitness enthusiasts is 20-35 years, which makes for the majority population of young Indian students and professionals. This target set loves to experiment with their wardrobe. Office wardrobe has drastically changed – we don’t see dress pants and brogues and oxfords anymore. Jeans and trainers have smoothly replaced these items. Everything in today’s clothing spells comfort and chic,” she says as way of explanation of why there a fillip in the performance wear category in Indian retail has been noticed.

She explicates that to be able to tap into this big chunk of the Indian population with available disposable income and the affinity for fitness, brands and minimalistic wardrobe brands have to focus hugely on active wear and the athleisure segment.

GYM WEAR ESSENTIALS IN INDIA

According to Pallavi Burman, a pair of leggings and shorts for women and men respectively – usually a loose tee and a pair of decent walking shoes – constitute for basic gym wear in India.

“But this isn’t enough if the exercise routine includes more than walking.



“The focus for Mojostar for now would be functionality and support. The brand is also going quite aggressive with their collection of sports bras.”

-Abhishek Verma,
CEO, Mojostar

While almost 50 percent of Indians still prefer traditional ways of staying active like walking and running, the other 50 percent are inclined to swimming, cycling and other sports and training means. For targeting this kind of segmentation one needs to delve deeper into sub categories.”

What makes gym wear more intricate for women is the inclusion of a high-performance sports bra. Without a well-designed sports bra, the gym wear ensemble for women remains incomplete. Quite a few Indian brands that have taken note of this and the range available online as well as offline is exhaustive. It is interesting to see brands like Triumph launching exclusive brassieres for gym wear considering they are a premium lingerie wear brand. The option they have is bounce control certified by world renowned Research Group in Breast Health, the University of Portsmouth. Elaborating on the same, Jennifer Kapasi, Commercial Director, India & Sri Lanka, Triumph International shares, “Triaction by Triumph is a stylish, high-performance sportswear collection that gives modern women the freedom to train how and when they like. Boasting the best bounce control levels on the market, three versatile fits and superior comfort, Triaction supports women throughout the day—on the go from the gym or studio in complete style.”



INNOVATIVE FABRIC PLAY

Anything that stretches and helps absorb sweat yet keeps the fabric dry is the most preferred fabric when it comes to performance wear. Reiterating the same, Pallavi Burman says, “The fabric we use is always stretchable “wicking” blend made up of polyester and lycra. We also use a breathable mesh fabric as design and utility elements and several other performance enhancing features like anti-microbial layering, UV protection, rapid dry etc.” When you go through the collection, what catches your attention is interesting mélanges

for both men and women. She says, “Color blocking and coordinated sets are finding a big audience in this space now.”

Adding in a safety feature to go along with their sportswear, Numero Uno uses reflective N1 ACTIVE prints that act as safety alerts along with digital and high-density prints for a futuristic fashion flare. Kohli further adds, “For our sportswear/active wear, we are using fabrics that have technically





“The Indian active wear industry is currently estimated at a whopping `8,500 crore. It is expected to continue growing at CAGR 12 percent and touch expected sales of approximately 6X at `54,000 crores by 2020.”

-Pallavi Burman,
Head - Marketing, HRX

“Triumph’s Magic Motion series is made from the most comfortable fabrics. Powered by LYCRA sport technology, these bras have stay dry properties, bacteria-reducing fabric with moisture management mesh. Extremely elastic fabric using LYCRA, guarantees unique freedom of movement”

-Jennifer Kapasi,
Commercial Director, India & Sri Lanka,
Triumph International

management mesh. Extremely elastic fabric using LYCRA, guarantees unique freedom of movement.”

advanced finishes with features like Anti-Static, quick dry, moisture wicking, Windproof, water repellent, Anti-microbial, odour control, easy care etc.”

Triumph has developed two series of specialized brassieres that use innovative fabrics for the woman on the go. Their Dynamic Lite series with 3D Powertech material is made from the innovative fabric Dynamic Lite, which offers flexibility that keeps its shape over time. It fuses three innovative fabrics in one, is a two-way stretch fabric, has a strong lightweight mesh and soft moisture management lining which are insightfully laminated together, allowing the bras to stay very light and adjustable to all body shapes. These features make the bra light and comfortable to wear with its functional unpadded fabric combination. This innovation received an honorable mention at the 2016 Red Dot Design Awards.

Elaborating on the second innovation, Jennifer Kapasi says, “Our Magic Motion series is made from the most comfortable fabrics. Powered by LYCRA sport technology, these bras have stay dry properties, bacteria-reducing fabric with moisture

The next generation LYCRA® SPORT technology combines the proven stretch performance of LYCRA® fibre with demanding testing standards that measure fabric performance descriptors on a simplified 1-10 scale. The three indexes measure Power, Comfort and Energy (PCE™). Triumph has gone ahead to combine these indexes to create performance levels tailored to fit each garment’s end use.

The range at Just F is made using polyester-spandex or polyester-cotton blend which well suits the Indian climate.

PROMOTING GYM WEAR

Since gym wear is a part of the performance wear/active wear category, brands don’t actively engaging in marketing and promotion initiatives targeting gym goers. However, on the other hand, some brands like HRX go the extra mile to reach to their target audience right at the place they are at - i.e. the gym!

Pallavi Burman reveals, “Ours is the first homegrown, successful fitness brand in the country. We have multiple partnerships for various verticals all-leading to and adding up to fitness. We have our active wear and athleisure



LOGGING ON TO BE GYM-READY

A few dedicated online portals offering gym wear include names like

- www.devotedstore.com
- www.aestheticnation.co.in
- www.gymxapparel.com
- www.justf.in
- www.creez.in
- www.satvaliving.com
- www.physiapparel.com



collection exclusively available on Myntra, we have the signature HRX Work out available at all Cult gyms, we have HRX Athlete meal packs selling at Eat.fit and we have our Mi HRX fitness bands available with Xiaomi. Across the three partners we have active communication all around the year on Digital, TV, OOH and Cinemas. Needless to say Hrithik is the face of HRX and this is the biggest draw for building customer engagement.”

On whether there is a genuine demand for gym / active wear in the country, especially by women, Jennifer Kapasi says, “Women who regularly work out and those who lead an active lifestyle desire sport specific garments designed to help optimize performance. They pay a lot of attention to the fabric when buying a sports bra. In general, they will tend to look for hi-tech fabrics with ‘moisture-wicking’ and ‘stay-dry’ features. One of the most important qualities women look for is a high percentage of Elastane which not only makes the bra comfortable to wear but also retains its shape after multiple uses.”

To launch their Autumn/Winter ‘18 Triaction – a collection by Triumph – took a digital approach through the launch of an online campaign ‘Team Triaction’, featuring four inspiring women, undertaking a fitness challenges to test both mind and body.

“Team Triaction is led by actress and fitness enthusiast Mandira Bedi. She is joined by celebrity fitness instructor and owner of a Pilates studio Namrata Purohit; popular yogi and influencer Yogasini (aka Radhika Bose); and lifestyle and beauty influencer Juhi Godambe. The campaign also included a weekly contest with four rounds for Instagram and Facebook fans,” states Jennifer Kapasi.

GETTING FUTURE READY

While there are a lot of dedicated online portals for gym wear, it remains to be seen how these enterprises survive over a period of time with their niche offering. With fitness being seen as a goal on everybody’s to-do list, especially with the new year approaching, all the gyms will experience a full house and so the sale of gym wear eventually is going to go up, but it is completely upon these brands to maintain the tempo for after all.



ANALYSIS

BIG DATA

IN-STORE TECHNOLOGIES

RETAIL OPERATIONS

SUPPLY CHAIN & LOGISTICS

RETAIL FORMATS

MARKETING & BRANDING

LOCATION STRATEGY

INNOVATION TRACKER

STORE DESIGN

CUSTOMER EXPERIENCE

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[THE AUDIENCE]

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FASHION

CREATION





IN FOCUS

SPYKAR TO GET INTO THE ATHLEISURE SEGMENT

Spykar eyes up to 30 percent higher sales at `700 crore in FY19

Pg No. 156



CENTRESTAGE
DUKE UNVEILS MODISH SPORTS & RUNNING SHOES COLLECTION '18-19

These sports shoes provide comfort to the feet, exhibit a sporty style, and guard people from rough surfaces and tough movements. They also ensure smooth movement, durable traction for high-energy workouts and offer enhanced foot motion...

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IN FOCUS

SMART GARMENTS: THE NEXT BIG THING IN SPORTSWEAR

Fitness wearables are no longer just a matter of wrist straps or pieces of practical jewellery. Such technology now works via our clothing. In fact, smart garments are all set to supercharge the fashion industry in the years to come...

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MARKET SCAN

ANKUR TEXTILES RAISES THE BAR ON WOMEN'S FABRIC INNOVATION

Ankur Textiles manufactures voile-based women's wear fabrics for the domestic as well as international markets and hero brands are Chakori, Tip-Top and Panama...

Pg No. 163

FASHION TRENDS

WOMEN'S WEAR TRENDS 2018 SAYS, "I AM THE BOSS LADY!"

Supporting women-based issues like #metoo, gender-equality or equal pay, women expressions took the mainstage this season. In keeping with the winds of change, women's wear preferences also changed throughout the world...

Pg No. 168-171



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SPYKAR GETS INTO THE ATHLEISURE SEGMENT

Spykar eyes up to 30% higher sales at `700 crore in FY19

Homegrown denim brand Spykar is eyeing a growth of 25 to 30 percent this fiscal to clock a revenue of `700 crore, a top company official has said. The brand clocked retail sales of over `550 crore in 2017-18.

“We see a remarkable change in consumer sentiments which encourages us to stick our neck out to go for such aggressive growth. This fiscal year we are aiming to close at `700 crore, a growth of around 25 to 30 percent,” Sanjay Vakharia, Chief Executive Officer, Spykar Lifestyle told PTI. According to the PTI report, the revenues of Spykar have doubled and the profits grew by 4x in the last 3 years. The

company is also expecting a better growth in the festive season this year at 15 to 18 percent and plans to expand its retail presence to 350 stores soon. It currently operates 220 stores in 140 cities, which are franchisee outlets.

“We plan to spread in 200 towns soon. And increase store count to 350 stores,” he said, adding that lack of real estate space is a serious issue as the supply is not conducive for aggressive growth in retail. The company which gets around 40 percent of its business from Tier II, III and IV cities, has forayed into the athleisure category and expects the segment to contribute significantly in future. Vakharia

expressed, “We are getting into the athleisure side of the business and we will make sure that it will start contributing to the business in a major way.” In terms of revenue contribution, men account for 90 percent of sales but the company expects women’s share to increase to 25 percent in future.

Accessories account for 4 percent of revenues currently which it expects to double to 8 percent by the financial year end. With e-commerce being a preferred mode of shopping these days, currently online space contributes 7 percent to the business and the company expects to close it at 10 percent for this fiscal year.



“We see a remarkable change in consumer sentiments which encourages us to stick our neck out to go for such aggressive growth. This fiscal year we are aiming to close at `700 crore, a growth of around 25-30 percent.”

—Sanjay Vakharia,
Chief Executive Officer, Spykar
Lifestyle





DUKE UNVEILS MODISH SPORTS & RUNNING SHOES COLLECTION '18-19

These sports shoes provide comfort to the feet, exhibit a sporty style, and guard people from rough surfaces and tough movements. They also ensure smooth movement, durable traction for high-energy workouts and offer enhanced foot motion... IMAGES Business of Fashion

Running, cycling or gyming are some of the ways we can keep ourselves fit in this modern world. With this concept in mind, Duke has presented an all new Sports Shoes collection 2018-19, inspired by the fashion culture of Austria. The collection is stylish, projecting the 'cool' factor. The brand aims to provide the latest in fashion trends, meshed with classic charm, in men's shoes. These sports shoes provide comfort to the feet, exhibit a sporty style, and guard people from rough surfaces and tough movements. They are not just confined to people indulging in outdoor physical activities, but also for those who just like a sporty look. These shoes ensure smooth movement, durable traction for high-energy workouts and offer enhanced foot motion.

The collection has a loving, detailed branding. A breathable mesh upper with high quality PU provide comfort in a sports shoes of Duke designed

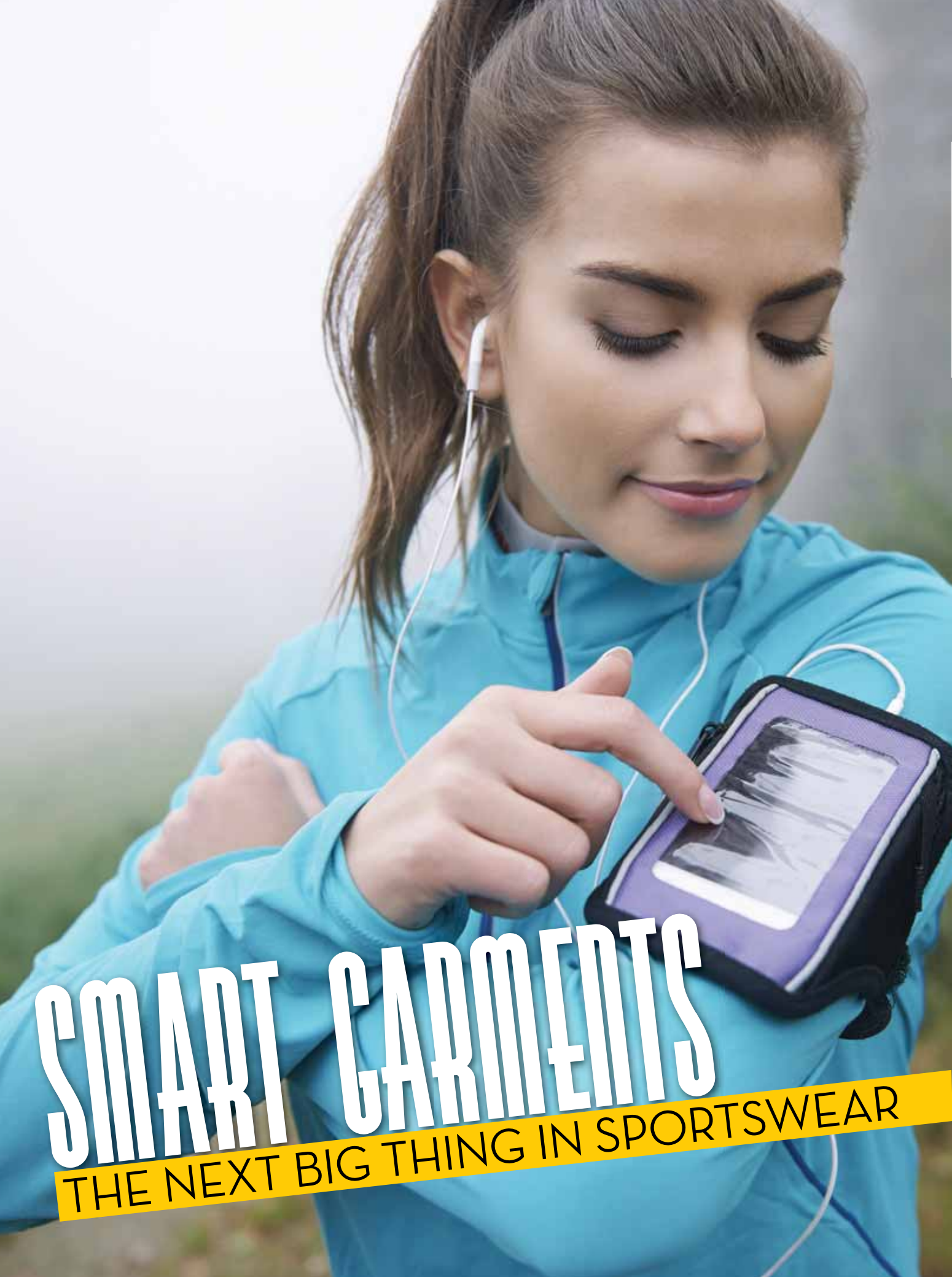
for optimum support. Duke sports and running shoes which are made on phylon rubber sole, made from high quality raw materials and using strouble and stuck on techniques, offer great cushioning and have excellent lightweight structure for performing different activities. The strength of the shoes protect the runner from injuries as well increase stability and power transfer when the foot strikes the ground. Cushioning, support, shock absorption, breathability, traction, lightweight, and stability are just some of the elements in the sports and running shoes for men.

According to Kuntal Raj Jain, Director, Duke Fashions (I) Ltd, "Our Target Audience is today's youth who is looking for trendy and stylish range that is sync with international designs, fashions and quality. Duke is a value for money brand and our mission is to make available the international designs and styles at highly reasonable prices. We see it as our duty to provide our customers the inspiration they need to look and feel

confident. With the needs of the fashion industry changing constantly, we are always looking towards the product that can deliver a high degree of style and quality. We work to develop quality that challenge industry standards in sustainability, performance and feel. The way we do business is a way of redefining what business can mean and the effect it can have."

The Sports Shoes collection of footwear is come in a wide array of styles, colors, and sizes, which makes it easy to find a pair that fits almost all buyers and their needs. The new range is available at selected Duke Stores and online and is priced between `999 to `3,599.





SMART GARMENTS

THE NEXT BIG THING IN SPORTSWEAR



We are fortunate to have been living in an era which will go down in history as the apogee of technological advancement. Technology is an indispensable part of our life today. It has thoroughly morphed all aspects of human life — right from the way we communicate, travel, exchange information to the way we eat, live and drink. Hence, it is but only natural that technology has heralded a propitious change in the way we dress and clothe ourselves today.

After the huge success of fitness wearables like Apple Watch, Fitbit, Polar fitness monitors, etc., etc., smartness and intelligence is progressively making inroads into the clothes we wear. The fashion world, more so in the last few years, is abuzz with words like wearable technology, smart garments, intelligent garments, e-textiles, etc. Although used interchangeably, in a broad sense, they all refer to any piece of clothing with integrated sensors and digital components. The integrated technology monitors the physical conditions of the user and uses big data analytics to predict and show the results. Newer smart clothing technologies can also sense and monitor the environment condition as well.

GROWTH DRIVERS

A recent survey by the World Economic Forum (WEF) reveals that 92.1 percent of corporate leaders believe 10 percent

of people will wear clothes connected to the internet by 2025, and 85.5 percent believe 105 percent of eyewear will be internet connected.

Growing use across various industrial verticals such as sports and fitness, healthcare, military and defense is driving the smart clothing market globally. The rising demand for monitoring body activities through sensors is expected to surge the demand for smart clothing market over the forecast timespan. Growing awareness among individuals regarding fitness is providing an impetus to the industry growth. In addition, the inclination of athletes towards the use of these products to prevent injuries and optimize their performance will have a positive impact on the business. Additionally, incorporation of newly developed and advanced fibers such as nanofibers and hybrid materials is expected to drive the growth of smart clothing market.

THE MARKET SIZE

As per the US based global market research and management consulting company Global Market Insights Inc., the size of the smart clothing market was over US\$ 150 million with shipments of around 800,000 units in 2016. The market is expected to balloon to over USD 4 billion by 2024, and shipments are forecast to grow at over 50 percent CAGR.



MARKET SEGMENTATION

BY PRODUCT

- Smart T-shirts
- Smart Pants
- Smart Jackets
- Smart Undergarments
- Smart Socks

BY APPLICATION

- Sports & Leisure
- Health Monitoring
- Military
- Industrial

BY REGION

- North America (U.S. & Canada)
- Latin America (Brazil, Mexico, Rest of Latin America)
- Europe (U.K., Germany, France, Italy, Spain, Hungary, Belgium, Netherlands & Luxembourg, Rest of Europe)
- Asia-Pacific (China, India, Japan, Singapore, Australia, New Zealand, South Korea & Rest of Asia-Pacific)
- Middle East and North Africa (GCC, North Africa, South Africa & Rest of Middle East and Africa)

Fitness wearables are no longer just a matter of wrist straps or pieces of practical jewelry. Such technology now works via our clothing. Smart garments are all set to supercharge the fashion industry in the years to come.

By Shivam Gautam

AROUND THE WORLD

>> GOOGLE

In 2016, Google introduced Project Jacquard, which in layman's terms are touch sensors woven into fabric. When linked to your phone via Bluetooth, you can control music and phone calls, plus get navigation directions all from touching your clothes. The first commercially available piece of Jacquard clothing is the Levi's Commuter Jacket, which went up for sale in October 2017 for \$350. Google is now working on an improved smart garment. The company has recently been awarded a patent that talks about giving improved haptic feedback to users who are wearing an 'interactive garment'. As mentioned in the patent, the tech can be used in jacket, shirt or pants.

>> POLAR TEAM PRO SHIRT

Polar Team Pro combines wearable technology, GPS and motion tracking with heart rate monitoring to create the ultimate solution for player tracking in team sports. Polar has two slimline capture points that, courtesy of the clinging material, are pressed against the body during exercise. They send data to a removable sensor pod, which is clipped into a pocket on the back collar, which then forwards the data on to the user's smartphone or tablet.

>> NADI X

Sydney-based Wearable X's Nadi X, a pair of smart yoga pants utilises a series of sensors that are able to track the user's movements and provide haptic feedback in the form of small vibrations in order to nudge him in the right direction with his yoga practice. It syncs up via Bluetooth to the user's phone and, through the companion app, gives additional feedback. The Nadi X app comes with a Welcome video and then 30 poses. Each has a step-by-step video, audio guide and text-based guide so you can move in and out of the poses correctly and safely, there's also a little indicator next to each, specifying whether it's for beginners, those who consider themselves intermediate or advanced yogis.

>> SUPA POWERED SPORTS BRA

A stylish looking sports bra, the garment includes a heart rate monitor and AI features to ensure that users get the most out of workout. By monitoring your heart rate, the Supa.AI app tracks how the user's workout is going, pinpointing optimal training heart rate zones and giving feedback on where the user can improve performance.



Smart t-shirts are emerging as one of the most popular and widely used categories of this segment in recent times. Projected to grow at over 50 percent CAGR from 2017 to 2024, these smart garments can provide biometric data such as heart rate, breathing rate and volume, muscle activity, etc., which are utilised to optimize performance and workout plans professionally. Smart jackets are set to witness growth over the future owing to the ability of these products to control the mobile devices of the wearer and connect to several services such as music and camera, device charging, etc., directly from the jacket.

Military and defense applications are predicted to witness high growth with a CAGR of over 55 percent from 2017 to 2024. In order to gain visibility into the health of a soldier as well as crucial battlefield insights, various government institutions are investing heavily to develop technologically advanced military uniforms.

The US smart clothing market, the biggest hitherto in the world, is estimated to witness huge adoption and will dominate the industry with the significant revenue share. Increasing investments by various sports associations to eliminate the possibility of any preventable injuries of highly paid professional athletes is expected to fuel the industry growth.

The Asia Pacific smart clothing market is expected to witness substantial growth over the forecast timespan. This can be attributed to the growing adoption of various wearable devices coupled with the increasing demand for advanced features in the products. In addition, rising security concerns and increasing military and defense budgets across countries such as India and China is predicted to witness huge demand for these products.

THE INDIAN SCENARIO

The smart garments segment is still in its nascent stages in India, and very under-developed compared to its peers in the Asia Pacific.

>> SENSORIA FITNESS SOCKS

Utilizing three textile pressure sensors, the Sensoria Fitness Socks measure the pressure placed on the user's foot when running. By doing so, it effectively offers feedback such as pace, distance, time, and information on the users running style. Via the companion app's AI coach, the user's gait is analyzed each step of the way.

>> LUMO RUN

From the makers of the Lumo Lift posture tracker, these smart running shorts and capris pack in a sensor that can monitor a host of metrics including cadence, ground contact time, pelvic rotation and stride length. The smart running gear supports real time coaching, with feedback sent through to your headphones to help improve running form and reduce the chances of injury

>> PIRETA

Pireta has developed a unique free-form process to add durable, conductive, metallic patterns to textiles without changing the fabric feel or performance. Pireta's technology allows electronic systems to be assembled and interconnected on a wide range of fabrics, enabling a new generation of truly wearable smart garments and e-textiles.

>> HEXOSKIN SMART SHIRT

The Hexoskin Smart Shirt is equipped with sensors that monitor your heart rate, activity levels, breathing and movements at all times. With data captured in real-time and sent to its companion app (on iOS and Android), you can consistently see how intense your workout is, how many calories you've burned, and even what your current fatigue levels are like.

>> ATHOS FULL BODY KIT

Athos's range of smart clothing has micro-EMG sensors woven into its fabric. Besides looking very neat and stylish, it also means that Athos's vests, shorts and leggings are immensely accurate at detecting what your body is doing at all times. The companion app helps the user see the distribution of work divided up by muscle group, ensuring that they can work on maintaining balance and not overworking any particular muscle too hard.

>> SPINALI DESIGN'S SMART BIKINI

The French company's The Neviano UV Protect swimsuit collection is equipped with a removable medallion-style waterproof sensor that aims to stop you staying too long in the sun. Once you've entered your skin type in the companion iOS or Android smartphone app, it'll continuously monitor the temperature throughout the day and will send out warnings when it's time to apply some more sunscreen or get into the shade.

The Indian ecosystem is just experiencing the advent of wearable technology and while the initial focus is mainly on the fitness and healthcare sector, there is a lot of scope for innovation in the existing product line – such as gamification, introducing social incentives to encourage community / group adoption as well as building an augmented product by providing a comprehensive set of services and charging based on usage. There are immense opportunities in the other sectors as well.

Here is a look at some of the best Indian companies who are shelling who are breaking new ground in the smart garment industry:



>> SYGNAL

Hyderabad based startup, Broadcast Wearables Pvt Ltd. is an AI based wearables company on a mission to make everyday devices smart. It is the parent holding of SYGNALS who has the distinction of producing the world's first touch-enabled t-shirt.

Loaded with a bunch of sensors packed in a small chip, the brand's smart t-shirts are equipped to track a plethora of things including, the number of steps taken in the entire day, calories burnt even in the slightest form of exercise, floors climbed, distance walked or run. It can also navigate the wearer to a desired location. All the data is synched through Bluetooth to the app, and can be viewed for at least three days.

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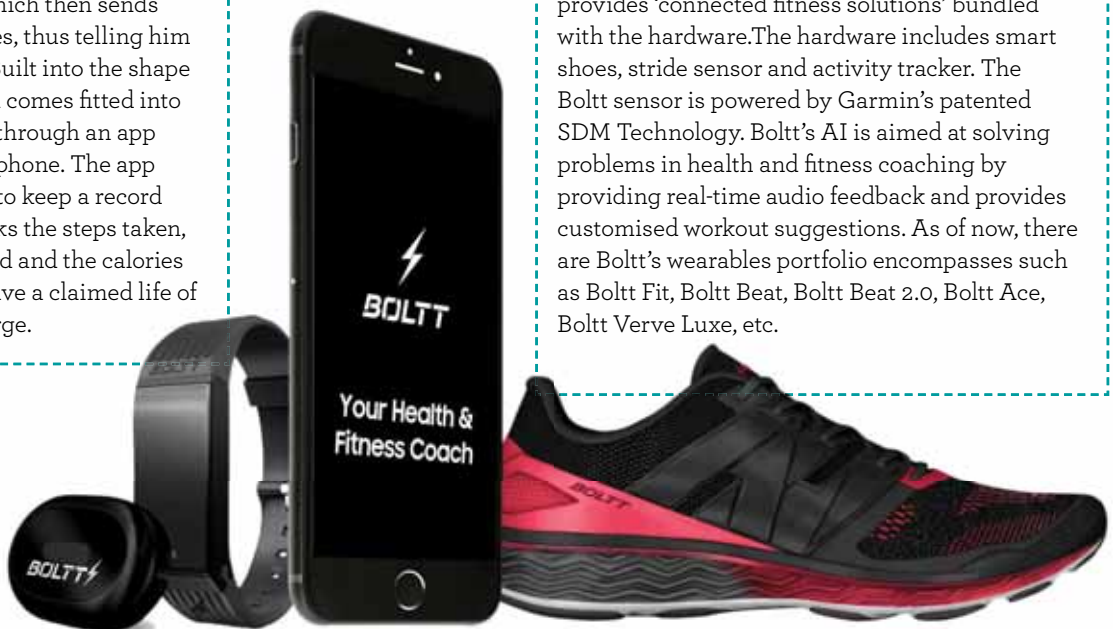


>> LECHAL

Hyderabad based Ducere Technologies Pvt Ltd., is another noteworthy name in the field of Indian smart fashion. The company's offering Lechal uses GPS to track down the users location through a GPS linked app, which then sends vibrations to his soles, thus telling him which turn to take. Built into the shape of a small pod which comes fitted into insoles, it functions through an app installed on a smartphone. The app also allows the user to keep a record of his route and tracks the steps taken, the distance travelled and the calories burned. The pods have a claimed life of 15 days on each charge.

>> BOLTT

Boltt is a 'sports tech-brand' that is developing next generation consumer-centric solutions for personal health & fitness. Known for its advanced artificial intelligence (AI) ecosystem, Bolt provides 'connected fitness solutions' bundled with the hardware. The hardware includes smart shoes, stride sensor and activity tracker. The Bolt sensor is powered by Garmin's patented SDM Technology. Bolt's AI is aimed at solving problems in health and fitness coaching by providing real-time audio feedback and provides customised workout suggestions. As of now, there are Bolt's wearables portfolio encompasses such as Bolt Fit, Bolt Beat, Bolt Beat 2.0, Bolt Ace, Bolt Verve Luxe, etc.



>> ARROW

Popular shirt brand Arrow from Arvind Ltd., launched its first smart shirt and India's first smart garment in 2016. The Smart Shirt comes with an inbuilt chip on the cuff that can be programmed by downloading the Arrow mobile app on a near field communication (NFC)-enabled smartphone. The Smart Shirt allows the wearer to share things like his LinkedIn profile, his Facebook profile or visiting card through a tap on the shirt's cuff with a smartphone. Among other functions it performs are connecting via Bluetooth to play your favourite songs on the phone or switching your phone to 'meeting mode'.



ANKUR TEXTILES RAISES THE BAR ON WOMEN'S FABRIC INNOVATION

Ankur Textiles manufactures voile-based women's wear fabrics for the domestic as well as international markets and hero brands are Chakori, Tip-Top and Panama...

Gurbir Singh Gulati



Ankur Textiles, which exports super fine voiles to countries like Switzerland, Thailand and the Gulf region, where they have important clients including many high-end embroidery manufacturing companies, is currently working on many new innovations.

The company's latest inventions include power stretch products for ladies' trousers and innovative blends of linen, bemberg and modal.

Operating Model

Talking about how his company is gearing up in this disruptive fast fashion world with their latest offerings and developments at the company, Bhati says, "We work on a distribution-based model. We have pan India distributors who sell to renowned MBOs across the country."

Ankur Textiles has more than 10,000 touchpoints in India and the company's current manufacturing capacity is 50 million metres/annum. Women's wear fabric is highly disruptive space in the current fast fashion market. Apart from segmenting by price, the broad segments are plain, dyed, fancy and jacquard, prints and embroidered. Ankur Textiles occupies a good decent share in the plain dyed fabrics for blouses and dress materials. However,

one of the main challenges in this market – which is highly disruptive and works on a fast fashion mode – is keeping pace with innovations and changing consumer preferences is the main challenge.

"We are all set to broaden our product basket by diversifying into high-end prints for the domestic as well as international market. In the next three years we would be increasing our offering to 60 million metres/annum," says Bhati.

Future Plans

In the last few years a very visible shift has been from plain dyed to structural fabrics like play of fancy yarns, jacquards, digital and sublimation prints.

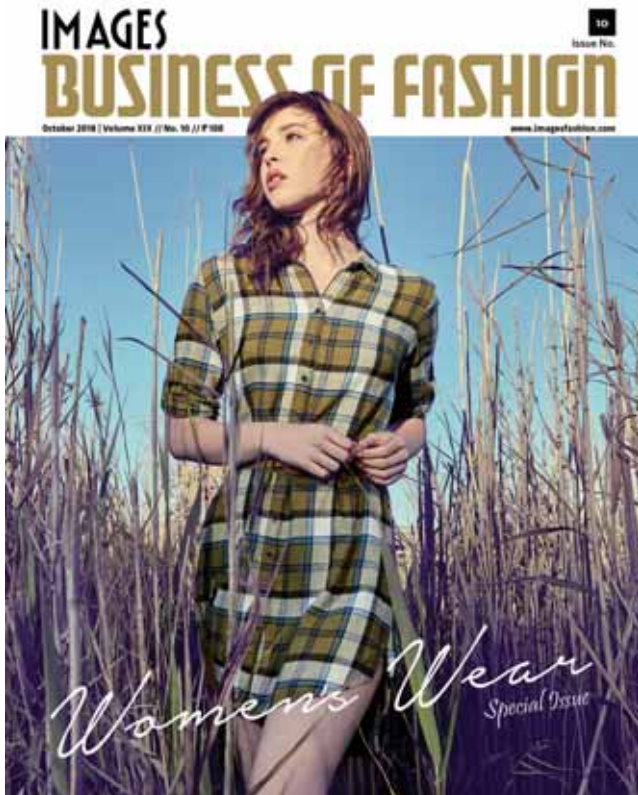
"In the next five years, you will see a very fast emergence of fluid fabrics made out of manmade fibres like viscose, modal, tencel, linen and their intelligent blends and weaves, mainly because of their cotton like comfort and breathing properties. With the added distinctive printed fabric in its portfolio, Ankur Textiles is gearing up to embrace new clients and brands in domestic as well as overseas markets," concludes Bhati.



Ankur Textiles, earlier known as Lakshmi Cotton Mills, was taken over by the US\$ 1.7 billion textile-to-technology conglomerate, Arvind Limited, in 1979. Since then it has been manufacturing voile-based women's wear fabrics for the domestic as well as international markets. Its hero brands are Chakori, Tip-Top and Panama to name of few.

"We make variety of blends in cotton, polyester and viscose. As of now, the main focus is on multi-fibre blends. We enjoy leadership in rubia; a product for Indian blouses," explains Brijesh Bhati CEO, Arvind Limited. Bhati says that the women's wear fabric category has been staging a double-digit growth YoY over the last 2 to 3 years and the fashion inclination is more towards fancy, jacquards and prints.

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HIGHLIGHTS OF THE NEXT THREE ISSUES

DECEMBER 2018 THE INNOVATION ISSUE: Top 10 innovations in Fashion Retail Technology, Store Design & VM, Great Product Ideas, Fabric & Ingredient Innovation and Promotion Campaigns.

JANUARY 2019 THE BRANDS IN INDIA MEGA ISSUE: The 11th edition of the Encyclopedia of Fashion Brands in India. It's the indispensable guide book that the entire fashion value chain refers to every year while strategizing their annual master plan.

FEBRUARY 2018 THE KIDSWEAR SPECIAL ISSUE: A rich profusion of factors have been instrumental in shaping kidswear as one of the most commercially viable segments of the Indian fashion industry. A detailed report.

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INDIA'S 1st COFFEE TABLE BOOK ON SHIRTS

India is a Shirt Country. Shirts dominate t-shirts in an average Indian male's wardrobe and consequently the men's shirts category is one of the largest in the domestic market. Shirts have also prominently led the development of the ready-made garment industry in India. Brand building in shirts was rewarded by brand loyalty and this led to the birth of many of India's biggest fashion brands. The market has since grown with rapid casualization, the emergence of be-spoke, and the acceptance of designer and super-premium shirts. Much larger women participation in work force has led to the rise of women's shirts as well.

IMAGES Group is proud to announce the making of India's first ever study on shirts. The subject of shirts is a critical issue for all fashion players in India. In this special volume, we present a research on the size, segments and opportunities in the Indian Shirts Market, we will also map the super-premium, premium, designer, mid and economy segments individually.

Research and academic organizations interested in participating can mail to surabhi.khosla@imagesgroup.in



WE WILL ALSO...

- Present India's finest shirt brands and shirting fabric manufacturers
- Debate upon the blurring lines between formal and casual shirts
- Study the impact of global brands on Indian shirt market
- Study made-2-measure and customization in shirts
- Feature the most creative and innovative launches of AW18-19
- Project the top trends for shirting in 2019-20

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WOMEN'S WEAR TRENDS 2018 SAYS, “I Am The Boss Lady!”

Supporting women-based issues like #metoo, gender-equality or equal pay, women expressions took the mainstage this season. In keeping with the winds of change, women's wear preferences also changed throughout the world...

Trends in the women's wear segment for 2018 are a spirit in self-expression, then be they voicing over or participating in online and offline activism. Supporting women-based issues like #metoo, gender-equality or equal pay, women expressions took the mainstage this season. In keeping with the winds of change, women's wear preferences also changed throughout the world.

Since the activism, voices and expressions were all by products of anonymous trolling and violence, protectiveness became the central theme this season, in the form of trench coats, statement jackets, wrappers, all fastened in the mid region over feminine, flowy dresses. The statement - made by structured / flowy dresses, styled with long or short jackets - is loud enough to show the boldness of women.

Another major feature this season was a silver fetish, denoting the fluidity of women along with boldness. The subtle play on transparency indicates playful, yet understated glamour. Jackets, along with shorts, are here to stay - at least for some time - displaying the rise of the power of working women who know how to be boss and how to enjoy life all at the same time!

Another prominent feature is the asymmetrical hemline, transiting from flowy resort wear or party wear to work wear category, making it a win-win situation for working women, women who are not afraid or ashamed of bringing their children to work, breastfeeding them in public or even during political meets!

In a nutshell, times and women, both are-a-changing, and fashion is readily keeping pace with both.

ABOUT SHASWATI SENGUPTA

Shaswati Sengupta has worked closely on trends and research for many international brands including Nike, BBC, British Council Library, NTT Data Japan, etc., and domestic brands like Chennai Silks, Poompuhar, Rene, etc. She is passionate about fashion, people and sustainability. She teaches 'Sustainability Studies' in NIFT, Chennai.

Currently she is working pro-bono with InkLink Charitable Trust (inklinktrust.wordpress.com), in the field of women empowerment for marginalised women and the education for underprivileged children. She had currently trained 360 crime affected women in plastic waste recycling and how to make a living out of waste. Her work with marginalised women and children was recognised by UNICEF India and various print media.

TREND: PLAYFUL TRANSPERANCY



TREND: TRENCH LOVE



TREND: SILVER SHINE FETISH



TREND: SHORTS AND JACKET



TREND: LONG FLOWY



TREND: ASYMMETRIC HEMLINE



INNOVATION

SPECIAL ISSUE



IMAGES BUSINESS OF FASHION

Innovation is the key to business survival in today's ever changing and competitive landscape. Innovation takes place at the intersection of fashion and technology and is progressively changing the way in which fashion businesses operate today. It, infact, is the sole parameter that helps brands and retailers stay at the head of fashion, style, and demand.

The December issue of IMAGES Business of Fashion will showcase the current innovations that brands and retailers are buttressing on in the Indian Fashion Retail sphere. Along with comprehensive insights, the Innovation Special issue will feature the top innovations across:

- » Fashion Retail Tech
- » Store Design & Visual Merchandising
- » Fabric & Ingredient Innovation
- » Promotions



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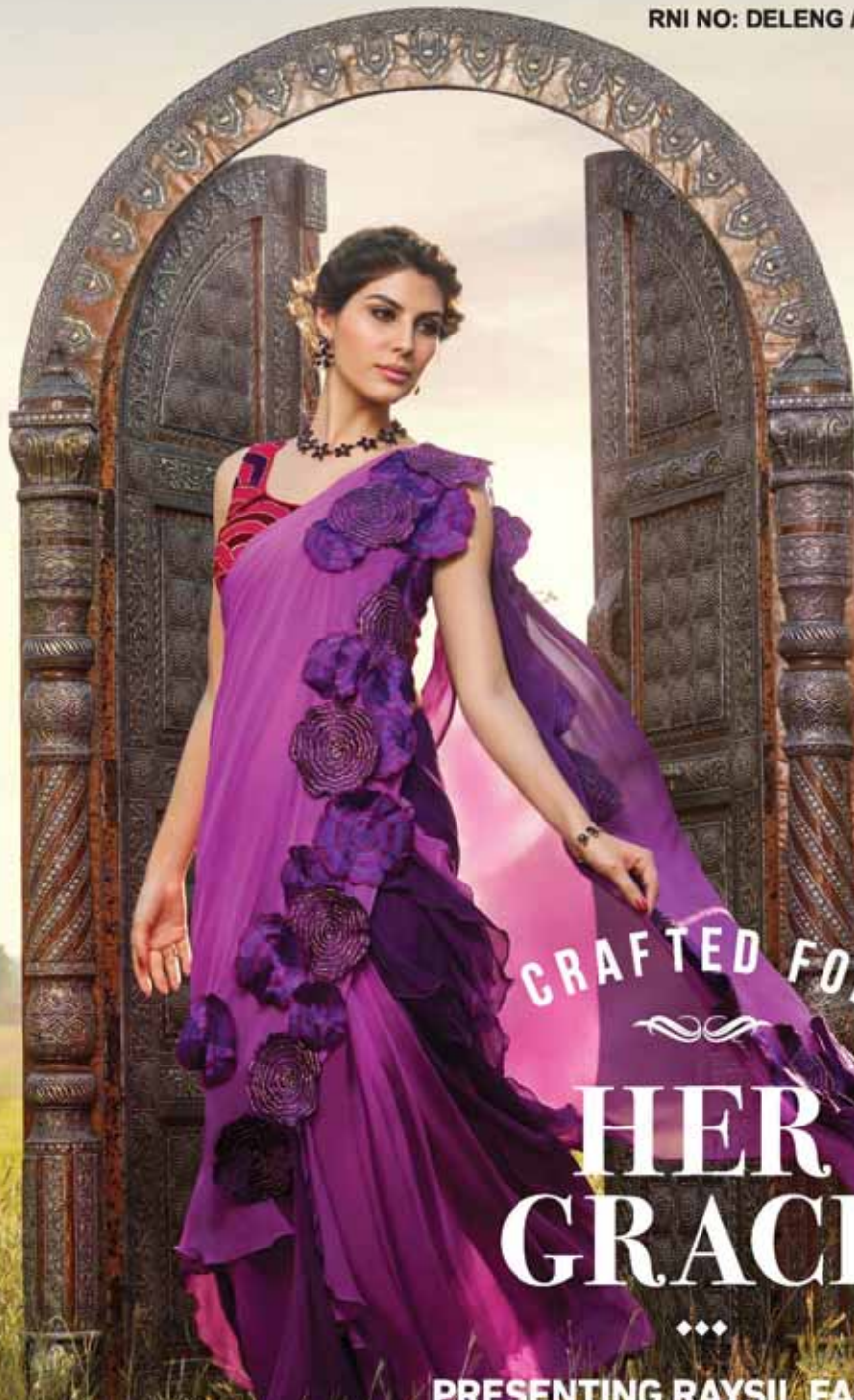
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