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Issue No.

# BUSINESS OF FASHION

May 2019 | Volume XX // No. 5 // ₹ 100

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Infant Clothing | Maternity wear | Baby Products | Retail Store Solutions  
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## VISITOR PROFILE

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Dear all,

Remember the harrowing experience of innerwear shopping in India till just a few years ago? Especially for women folk. For them, it shopping for intimate apparel was an absolutely fleet-footed affair – they either hustled through the few insipid options laid out or had to be content with whatever the salesperson compelled them to buy. Choices were a distant second in a scenario when even getting the size right whilst evading ubiquitous stares was beyond the bounds of possibility.

But, fortunately, times are changing and how! All that remains of these past shopping experiences are anachronistic anecdotes. Time it did take but innerwear, finally, is out of the closet and is taking giant strides to becoming an exclusive fashion category in India.

The evolution is apparent in both the market and the consumer. While the consumer righteously considers innerwear as a fashion statement today, the market too has emancipated itself from its unorganised retail hegemony. The innerwear industry is now

amongst the most lucrative segments in apparel fashion for brands, retailers and investors alike. The market today is pegged at ₹32,000 crore, growing at a CAGR of 11 percent and accounts for ~9 percent of the total domestic fashion retail market.

The rapid transformation of the category has led it to branch out into several sub-categories, with each of them setting standards on their own now. Also, a slew of international, young and dynamic national brands have impinged on the arena, ushering in a phenomenal trend that has compelled the entire industry to spruce up offerings both in terms of products as well as experiences.

This had led to an increased popularity and demand of innerwear as a whole and has result is an increase in the importance of the category amongst retailers of all sizes and kinds.

Like always, this innerwear special issue features indepth insights into the market, trends, innovations and technologies that this segment has spawned in the recent years. As always we hope you find the issue informed and beneficial.

Happy Reading



**Amitabh Taneja**

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## INNERWEAR STUDY

### DYNAMICS

#### Changing Dynamics In Premium & Bridge-To-Luxury Innerwear Segment In India

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C9 Airwear brings to the table a range of progressive seamless wear that promises to maximise flexibility, mobility and performance, while enhancing consumer comfort and confidence...

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### KIDS SEGMENT

#### Quality Products, Affordable Prices Make Zero a Hero in Kids Innerwear Segment

Pradeep Arora, Director, Zero, who has been in the business of kids innerwear for close to three decades now, shares his understanding and market insights with IMAGES Business of Fashion...

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### INNOVATION

#### Wacoal to Introduce 3D High-Tech Machines in Select Stores

The lingerie brand, which is betting big on India and plans to open 150 stores in the country by 2021, is experimenting with this technology which will help women determine the correct size of the lingerie they need to buy ...

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### ANALYSIS

#### Analysis: The Men's Innerwear Domestic Market

The men's innerwear market is experiencing a paradigm shift as customers move over to sustainable buying. Avinash Mane, Commercial Head - South Asia at Lenzing Group shares an expert view...

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### RETAIL EXPANSION

#### Leggings Brand De Moza to Double Retail Network in FY19-20

De Moza plans to double its retail network this financial year from the current 140 counters to 300+ which includes taking the EBOs to 20 along with introducing the brand in other leading department stores...

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### PRODUCT INNOVATION

#### Supersox: Providing Innovative Styles & International Quality to Indian Consumers

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### INNOVATION

#### Mustang Socks & Accessories: Finding Innovative Health Solutions Through Socks

Launched in 1987, Mustang specialises in producing unique and colourful socks with special focus on fashion wear. The brand likes to be trendy, fun and relatable which is reflected in the products it creates...

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### BRAND LAUNCH

#### Size-inclusive lingerie brand from US, Parfait, launched in India

Distinctively designed to serve the full-busted woman with its expansive range of sizes, Parfait is dedicated to helping customers find the perfect fit...

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With a collection of shirts, formal trousers, casual pants, denims and accessories, Duke combines a nonchalant look that defines today's man...

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#### "Flexiwear" Says Sporto in New Campaign

Fashion plus comfort is important and the ease and acceptance to wear a product at any time is what the new campaign speaks about...

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Ushering in the seasonal flavours, W introduces #YOLO Dress, a collection that embodies sustainability...

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## IMAGES Business of Fashion

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**Sagar V,**  
Head - Retail Sales,  
Caratlane.

India's leading Omnichannel jeweller, CaratLane has launched its 15th store in Delhi NCR, taking the count of stores in the northern region of India to 19. Over the last decade, Caratlane has revolutionised the way in which Indian women buy and wear fine jewellery, by making modern, beautiful designs accessible to all.

Situated at the Kamla Nagar main market, this store



is designed to usher in a seamless jewellery buying experience. Speaking on the occasion, **Mithun Sacheti, Founder and CEO, Caratlane** said, “We are delighted to launch our 15th store in Delhi, to cater to our loyal and new customers alike. The northern region is a vital market for us and there has been an ever-increasing demand from our Delhi customers to launch more stores. The launch of this store is a testament to our commitment of making modern and affordable jewellery increasingly accessible to a lot more people in Delhi NCR and our new store will help them discover precious jewellery, like never before.”

“Caratlane stores are very different from the typical Indian jewellery stores. Be it our virtual try-on ‘magic mirror’ that adds a touch

of excitement when our customers try on jewellery, or the exclusive solitaire section, the store is designed keeping their needs in mind. Our limited edition pieces from the iconic Butterfly, Aaranya and Gold Lace collections will be showcased here as well” added Sacheti.

“Caratlane has designs starting as low as ₹5,000 and as a special launch offer for our customers, the store is offering a flat 20 percent off on diamond prices\* for a limited period,” said **Sagar V, Head - Retail Sales, Caratlane.**

Titan has increased stake in its jewellery subsidiary CaratLane to 69.47 percent with an investment of ₹99.99 crore. Caratlane registered a revenue of ₹292.5 crore for the year ended March 2018.



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# COVER STORY LAUNCHES SECOND STORE IN BENGALURU

The launch will mark Cover Story's second store in Bengaluru and its 28th exclusive store in India. The store is spread across a 919 sq.ft. area, at a prominent location in the mall amidst the most fashionable brands around...

## IMAGES Business of Fashion

Cover Story, a fast fashion brand for women by Future Style Lab will be launching its new store at Phoenix Market City, Whitefield Road, Bengaluru. The mall is every fashionista's ultimate shopping destination and a perfect location for Cover Story with its state-of-the-art retail havens, entertainment zone, F&B options and signature hospitality services.

The launch will mark Cover Story's second store in Bengaluru and its 28th exclusive store in India. The store is spread across 919 sq.ft. area, at a prominent location in the mall amidst the most fashionable brands around. The new store will stock the latest SS19 collection including Rivera, Escape, Urban Dreams, Enchanted, Miami Nights and Greater Plains.

Rivera comprises apparel inspired by the nautical trends with traditional prints and stripes in bold and graphic form. The flowy crepes, cotton, and schiffli make them perfect for spring. Escape takes a feminine approach towards workwear and features heavily accessorized oversized pockets, contrast stitching, and natural trims. This collection embraces colours like rust and khaki with boiler suit, shirt dresses and more. Urban Dreams showcase minimal workwear in sheer fabrics and pastel tones.

The Enchanted collection takes a pretty feminine turn, with dresses perfect for the summers. Lace/lace trims and embroidered mesh moves on into vintage prints in pretty colours like lemon, mint, and blush. Miami Nights introduces 80's party trend with shimmer and sequins. Slinky draped

shapes with shoulder and neck focus, sexy body con silhouettes give a fresh change with highlighted prints in jewel and neon tones on silver and black background. Greater Plains recreates a pretty prairie look from the plains of western America with soft checks, gingham and meadow florals in linen, cotton and schiffli.

At present Cover Story has 27 exclusive outlets across Delhi NCR, Mumbai, Surat, Kolkata, Coimbatore, Kochi, Chennai, Indore and Vadodara. Overall, Cover Story is present across more than 80 doors at Central, Kapsons, Iconic and Sohum. Additionally, the brand has its own online store [www.coverstory.co.in](http://www.coverstory.co.in) along with a strong presence in leading marketplaces including, Myntra, Jabong, Amazon and Koovs.





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# TOONZ RETAIL EXPANDS PRESENCE IN RAJASTHAN, LAUNCHES STORE IN JODHPUR

Successfully operating 105+ stores spread across 64 cities in 16 states, Toonz Retail offers a wide range of products for all needs and occasion of kids from 0 to 12 years of age...

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***“Western India has always been one of our most preferred markets when it comes to expanding. At Toonz Retail, we are always on the lookout for expanding more and more, especially in the Tier II and III regions as we see that a lot of demand for quality kids’ products, as the options available to them are really less. This makes Rajasthan a potential market for Toonz Retail; hence our newly launched store in Jodhpur will cater to the needs of parents and provide them quality products and experience under one roof”***

**-Sharad Venkta,**

MD & CEO, Toonz Retail India Pvt. Ltd.

One of India’s fastest homegrown kids retail chain, Toonz Retail, has further expands its presence in Rajasthan, with the launch of a new store in Jodhpur. Successfully operating 105+ stores spread across 64 cities in 16 states, Toonz Retail offers a wide range of products for all needs and occasion of kids from 0 to 12 years of age. The new store on Ganesharam Malviya Marg in Sardarpur, Jodhpur offers premium experience and quality to customers at an affordable price range.

The Jodhpur store showcases a complete range of exciting kids’ products including fashion, baby care, nursery, toys and school supplies amongst others. In apparel, the collection has been created keeping

in mind the current trend, and the collection is all about comfort, attitude and style. Toonz flagship brands Wowmom, Superyoung and Superyoung Celebrations will also be available here.

“Western India has always been one of our most preferred markets when it comes to expanding. At Toonz Retail, we are always on the lookout for expanding more and more, especially in the Tier II and III regions as we see that a lot of demand for quality kids’ products, as the options available to them are really less. This makes Rajasthan a potential market for Toonz Retail; hence our newly launched store in Jodhpur will cater to the needs of parents and provide them quality products and experience under one roof,” says **Sharad Venkta, Managing Director and CEO Toonz Retail India Pvt. Ltd.**, at the launch of the store.

Conceptualised in 2010, the brand opened its first store in Bengaluru. With a steady growth and market acceptance, today it is successfully operating in 16 states including Delhi, Karnataka, Andhra Pradesh, Maharashtra, Tamil Nadu, Kerala, Uttar Pradesh, Haryana and Punjab.

Internationally, Toonz Retail launched its first store in GCC in 2016, and recently has expanded to 3 stores.

It also has a strong online presence with Toonz’s own e-commerce portal [www.toonz.in](http://www.toonz.in) and availability on India’s leading ecommerce portals like Flipkart, Snapdeal, Jabong, Paytm and Amazon amongst others. Toonz has associated with world’s best brands across categories giving Indian mothers and their kids an exclusive, international and innovative choice.



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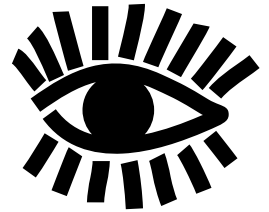
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# LUXURY FASHION IN INDIA: THE CONSUMER'S PERSPECTIVE

ACCORDING TO A RESEARCH CONDUCTED BY LUXURY CONNECT, THE LUXURY CONSUMER IN INDIA COULD BE CATEGORIZED INTO 8 MAJOR TYPES, EACH WITH THEIR UNIQUE EXPECTATIONS AND BUYING BEHAVIOUR. EXPECTATIONS TEND TO RISE HIGHER IN THE LOWER STRATA OF THE ECONOMIC VALUE CHAIN OWING TO DESIRE TO BELONG AND TRANSCEND TO THE NEXT LEVEL...

BY SHIVAM GAUTOM



India is one of the fastest emerging markets for luxury products. But it is a tricky market and brands and retailers that want to capture a share of this rapidly-evolving market need to understand their consumers and adopt top their expectations or risk missing one of the next greatest untapped opportunities in the Indian fashion retail segment.

Day 2 of the India Fashion Forum 2019 featured an insightful session on the growing luxury market in India, with focus on the consumer. With Instituto Marangoni as the Insight Partner, the session expounded on the consumer perspective of this niche yet flourishing market. The session was moderated by **Rachana Singh**, Business Consultant & Professor of Fashion Business, Istituto Marangoni and had the following luminaries on the panel:

- **Sandeep Gonsalves**, Co-Founder, SS Homme
- **Tina Tahiliani Parikh**, Executive Director, Ensemble
- **Amit Pratihari**, Director Retail, Forevermark India
- **Rajendra Kalkar**, Center Head, Palladium Mall
- **Abhay Gupta**, Founder & CEO, Luxury Connect

The Indian luxury consumer is hard to please. It is in fact a global perspective that Indian luxury fashion consumers



are very demanding, very specific about what they want, and they want it delivered. “Compared to other parts of the world, the Indian consumer is far more discerning. I think this is because of India’s rich heritage of bespoke fashion. A handmade, premium apparel product is not as exclusive to an Indian as it may be for his western peers—because we all have traditionally grown up with apparel products that were handpicked and handmade. Having said that, I would also have to confess that the Indian luxury consumer is wanting and ready to consume. It all depends on the value proposition and the story behind the product,” said Tina Tahiliani Parikh.

The luxury consumer base is spread across a wide demographic spectrum. And very naturally, consumer expectation and consumption behavior changes depending on the sub-segment of the consumer. Yet, the only thing that binds them is their penchant for value, service and attention. “There is a wide variety, right from consumers from the aspiring class who save up and students to the elite. What we have also observed is that the kids are pushing the older generations to consume luxury products. So basically, the challenge lies in identifying and differentiating the consumer and their specific expectations,” stated Abhay Gupta.

As one of the foremost high end malls of the country, Palladium Mall’s core consumer base consists mostly of luxury fashion seekers. “So you can trust me when I assure you that Indian luxury consumers are the most discerning in the entire world. We also have a big base of non-Indian consumers and their approach is a stark contrast to our Indian consumers,” said

Rajendra Kalkar. He goes on to add that pleasing an Indian luxury consumer is an uphill task and to retain one, is almost impossible.

Luxury is all about experience, which varies across consumer demographic. More than the final product, Indian consumers yearn for a heightened buying experience especially when it comes to luxury fashion. “We also have people today who consider ethical businesses and products that are responsibly sourced. So, I believe luxury is not about what a brand is communicating, rather it is about adding meaning and being personal to your consumers,” said Amit Pratihari.

Apple’s niche in the smartphone sphere is that it has transformed itself into an educating hub from being a mere retail store. Brands like SS Homme are progressing in the same vein considering the immense level of personalisation that luxury Indian consumers desire today. “We ensure that we educate our consumers through our consultants because the more they know about the product the easier it is to sell it to them. Another inherent part of luxury retailing is evolving in line with consumer feedback,” added Sandeep Gonsalves.

Nothing is as important in luxury fashion retail than understanding the consumer. This entails immense staff training and communication between the brand and the consumers, especially in terms of what the brand stands for. “We have to read their tastes and preferences and offer them viable solutions at the least lead time, because we mustn’t forget that in today, time is a luxury too,” stated Tina Tahiliani.

According to a research conducted by Luxury Connect, the luxury consumer in India could be categorized into 8 major types, each with their unique



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Co-Founder, SS Homme



***“There is a wide variety, right from consumers from the aspiring class who save up and students to the elite. What we have also observed is that the kids are pushing the older generations to consume luxury products. So basically, the challenge lies in identifying and differentiating the consumer and their specific expectations”***

**-Abhay Gupta,**  
Founder & CEO, Luxury Connect



The Panel Inaugurating Shirtopedia, India's First Coffee Table Book on Shirts



***“Compared to other parts of the world, the Indian consumer is far more discerning. I think this is because of India’s rich heritage of bespoke fashion. A handmade, premium apparel product is not as exclusive to an Indian as it may be for his western peers”***

**-Tina Tahiliani Parikh,**  
Executive Director, Ensemble

expectations and buying behaviour. Expectations tend to rise higher in the lower strata of the economic value chain owing to desire to belong and transcend to the next level. Another key characteristic in the luxury fashion world is personalization, be it in terms of product or service.

In modern times, it’s very important for a consumer to feel a connection to the brand that he loves. One way to build this connection is through a brand story. A relevant story can potentially create a strong loyalty that ultimately grows into customers feeling invested in a brand. A brand story is for more relevant in the luxury space because it gives the consumer a sound reason to invest on a product bearing a higher price tag.

“What we have seen in the jewellery space is that most American brands, that dominate the global diamond business, has a relatable story to tell. I feel Indian brands lack this, although we have a rich heritage of storytelling as a nation and culture. It’s really important in to have a story

that highlights and add to the product attributes and differentiate it from the mass range products,” said Amit Pratihari.

Pratihari also emphasized on the importance of building the right ecosystem for this segment to pick up momentum. “We need to build the ecosystem in a way that succeeds to encourage the consumer. We need good infrastructure, better malls for the entire segment to grow,” he adds.

As a growing young country, India holds a promising future for luxury fashion retail. The consumer mindset has undergone massive evolution and aspirational discretionary spending has increased manifold. As a word of advice to the students and upcoming brands, the panel concluded with emphasis on the importance of building a brand cautiously. Every touch point facing the consumer, right from the logo to product and packaging, everything has to stand out and tell the brand story, the panel concluded.

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## INTELLIGENCE & INSIGHTS FROM RETAILERS EXPANDING TO TIER II & III CITIES

WHILE AN INCREASING NUMBER OF BOTH DOMESTIC AND INTERNATIONAL RETAILERS HAVE BEEN VIGOROUSLY EXPANDING INTO INDIA'S VAST HINTERLAND OVER THE LAST FEW YEARS, PENETRATION INTO SMALLER CITIES AS SUCH NEEDS REHASHED RETAIL STRATEGIES AS WELL AS AN IN-DEPTH UNDERSTANDING OF THE CONSUMER...

BY SHIVAM GAUTAM

The retail sector is experiencing exponential growth, with development taking place not just in major cities and metros, but also in Tier II and III and smaller cities and towns. With rising incomes, lifestyle changes and increased digital connectivity, these smaller towns are often touted to be the future epicenter of retail growth in India.

While an increasing number of both domestic and international retailers have been vigorously expanding into India's vast hinterland over the last few years, penetration into smaller cities as such needs rehashed retail strategies as well as an in-depth understanding of the consumer.

At the second inaugural panel of India Fashion Forum 2019, a session was held with retailers who have ventured into and tasted success in Tier II and III cities. The panel, which was moderated by **Debashish Mukherjee**, Partner & Head, Consumer & Retail Industries, India, A.T. Kearney, shared its valuable insights on translating the fashion business into these new retail destinations. It consisted of:



1. **Sunil Nayak**, CEO, Reliance Jewels
2. **Lalit Agarwal**, CMD, V-Mart
3. **Rahul Vira**, CEO, Skechers South Asia
4. **Rajesh Seth**, COO, FBB, Future Group
5. **Anand Aiyer**, Business Head - Easybuy, Landmark Group
6. **Amit Chaudhary**, Co-Founder, Lenskart
7. **Arun Goel**, Vice President, Product Management, ShopClues
8. **Viren Razdan**, MD, Brand-nomics

fbf operates in 160 cities in the country, and out of them only eight metros account for Tier I towns. About 65 percent of its revenue come from Tier II and III towns. Of this, around 35 percent business comes from only Tier III towns.

“You will be surprised to know that we sell more ladies western wear in Tier II and III towns. This is a contrast to the normal belief that youngsters in these markets are not as fashion; which actually is not the case. We have witnessed huge penetration in kidswear and menswear and surprisingly, the only category where Tier II and III towns have a lesser contribution in terms of business revenues is ethnic wear. Also, our productivity in Tier II and III towns is at par with Tier I towns. So on any matrix when I cut the data and look at the business, Tier II and III towns have immense potential and I think so this number is only going to increase dramatically. In fact, we have dedicated teams in smaller towns and smaller cities to expand business. We, as a team in Big Bazaar, travel five days a week and I have been to almost 150 towns in the last seven years, and all I can tell you is that it’s unbelievable how these cities are turning around,” Rajesh Seth said kickstarting the discussion.

ShopClues currently is clocking hundred thousand audience a day hundred and about a million customers a month. About 60 percent of its orders are registered from Tier II and III cities.

“This shift of smaller town outpacing the metros and Tier I cities was inevitable and honestly there still is a huge market coming in the near future from this segment. We expect a growth of about 8X in physical retail and in the years to come. Also, in the years to come affordability will increase and these markets will be teeming with opportunity,” stated Arun Goel.

#### **Market Strategy: Tier I vs Tier II vs Tier III**

Tier II and III towns are large opportunities in small pockets. There obviously is no doubts about the aspirations of these markets but to be relevant to these markets, it’s very important to build a strategy imbibing the specific aspirational qualities. While consumer aspiration is at par with metros and Tier I cities, they still want a little bit of customisation relevant to the smaller markets.

“Landmark’s Max has been a quite a successful value fashion brand, yet in the last 13 years, we have not been able to penetrate deeper into small towns, mainly because of profitability – considering the large format, operating cost and the sales that comes in, it wasn’t very viable economically. So we came up with Easybuy to get to the small town. The new format is comparatively smaller, more compact and has features reduced prices (about 20% lesser than Max) so that it easier to expand to the smaller market and we can take chances. if you really want make scale it up I think little bit of customisation keeping aspirational elements of the metros goes a long way,” stated Anand Aiyer.

Reliance jewels is focusing more on Tier II and III cities and will continue to do so in the years to come. As a young brand, Reliance Jewels enjoys a better brand recall and assurance in these markets when compared to metros along with easier profitability. “As for retail strategies and product



**“You will be surprised to know that we sell more ladies western wear in Tier II and III towns. We have witnessed huge penetration in kidswear and menswear and surprisingly, the only category where Tier II and III towns have a lesser contribution in terms of business revenues is ethnic wear “**

**-Rajesh Seth,**  
COO, FBB, Future Group



**“As more and more people are getting onto the digital wave, commerce, in its true sense, is on its way and once it starts there will be a whole new amount of disruption. Basically, the digital medium is a channel that nobody can ignore and if any organization fails to adapt it, it might have to bear severe consequences”**

**-Rahul Vira,**  
CEO, Skechers South Asia



***“As consumers evolve, the tech factor will start bringing a greater confidence role versus the touch factor. So, it’s a equilibrium of tech and touch, and as the market matures, it will move towards tech and disruption will have to happen”***

**-Viren Razdan,**  
MD, Brand-nomics



***“Our total economy of the country sits in Tier II and III cities and not on Tier I primarily. When these towns and cities are consuming so much of the economy, we as brands which need to be present there and bring our accessibility”***

**-Amit Chaudhary,**  
Co-Founder, Lenskart



***“This shift of smaller town outpacing the metros and Tier I cities was inevitable and honestly there still is a huge market from this segment. In the years to come affordability will increase and these markets will be teeming with opportunity”***

**-Arun Goel,**  
VP - Product Management, ShopClues

mix, we ensure that the assortment and products differ from location to location even within the metros depending on what profile we cater to,” said Sunil Nayak.

Often, most brand depend on their respective planning department, who bank on parameters like local preferences, preferred price bandwidth, etc., to work on strategies and product assortment for different markets. “But the reality can be a stark contrast, at least that what we have noted,” added Rahul Vira.

Consumers from smaller cities and towns display similar preferences as compared to their metro peers. Although, a certain level of customisation is done in terms of the market profile, brands have to consider the evolved preferences that these customers have today.

“From what we have gathered from our store managers, we tend to undermine

the preferences and buying capacity of these markets. To sum it all, these customers are as aware as their metro counterparts thanks to the internet and the penetration of mass media. It’s a learning process as everything is evolving very fast and every time we move into a new market, we have a lot of things that can be learned only on ground,” he added.

According to Amit Chaudhary, it’s practically impossible to define a retail strategy for Tier II and III cities—one has to learn on the go. “Our total economy of the country sits in Tier II and III cities and not on Tier I primarily. When these towns and cities are consuming so much of the economy, we as brands which need to be present there and our bring our accessibility. Like crowded Big Bazaar stores across the length and breadth of the country. It’s because people understand that power of a brand and when they have access to it, they consume,” he added.

India’s is an amalgamation of many different markets, all of which are

at different stages of evolution and marketers have to adapt to that. “I think it’s a matter of timing. The market is there all right but the challenge for brands and retailers is to answer whether Tier II and III calls for massification or does it really mean going there and being present,” said Viren Razdan.

In a culturally diverse country like India where preferences change with every few miles, an infallible marketing strategy is near impossible to conceive. “We need to understand that what works in one Tier II market might not work in another Tier II market. Preferences of a small town in Gujarat will definitely be very different from that of a North Eastern state. We operate more than hundred 210 stores in 160 towns out of which almost 142 towns are Tier III. We see immense differences between all these markets. The market is there for sure, all we need to do as brands and retailers is be confident enough to understand what works and how do we tweak it,” quote Lalit Agarwal.

As a whole, the potential of smaller towns and cities are clearly apparent. But, aspirations are not turning into numbers for organised retailers at a pan India level, at the level of growth of the market. "India will probably be a combination of big brands and many regional players who piggy back on their designs and pricing and to create the local markets. The fact is 85 percent of the market is still out there and they have been catering to their own constituencies. These different markets which are going to exist, and I can understand organisations can't have split personalities by town type or color type or size type which is understandable so that's the takeaway. I wish the representation we're also with players who have more wholesale channels and etc., you will find a completely different SQ mix," said Divyanshu Dutt.

### Is Digital Disruptive?

Lalit Agarwal revealed that V-Mart has been least affected by digital commerce, owing to both its low income target group and its niche product mix. "Yet, I think feature digitalization will penetrate more in the years to come and we need to be ready to be capable enough to serve them on both online and offline channels," he added.

In the jewellery sector too, brand and retailers have been least affected by digital commerce. Yet, Sunil Nayak believes that brands across this sector will have to gear up to be able to seamlessly cater to their customers in the years to come.

Skechers' digital strategy revolves around three C's—Content,



***"The new format, Easybuy, is comparatively smaller, more compact and has features reduced prices (about 20 percent lesser than Max) so that it easier to expand to the smaller market and we can take chances. if you really want make scale it up I think little bit of customization keeping aspirational elements of the metros goes a long way"***

**-Anand Aiyer,**

Business Head, Easybuy, Landmark Group

Communication and Commerce.

"Right now, the disruption I see is more in terms of content because you are consuming a lot of content every day. As more and more people are getting onto the digital wave, commerce, in its true sense, is on its way and once it starts there will be a whole new amount of disruption. Basically, the digital medium is a channel that nobody can ignore and if any organization fails to adapt it, it might have to bear severe consequences," stated Rahul Vira.

fbf's motto is digital first. The brand has even digitised all its designs, which helps it to take decisions on new collections very easily. "We are drawing on digitisation in a big way. We have digitized our entire inventory management process we have an indigenous app which we've given to 365 of our stores managers we can they can do multiple functions at a press of a button. In the commerce front, we

are seeing a huge amount of business traction in our online channel and in the long run, Omnichannel strategy is going to be critical for our business," Rajesh Seth added.

Lenskart, a born and bred digital brand that now has 500 brick-and-mortar stores, believes that Omnichannel is not about adding channel; rather it is actually about using channels to complement each other and grow mutually, and making a seamless experience for of moving from one channel to the other for consumers.

Talking about digital adoption in the smaller terms from the consumer perspective, Arun Goel said that there is consistent growth in the number of visitors coming from the smaller Tier II and II towns. Also, there has been a consistent growth in number of orders happening from these locations, which is a testimony of the growing penetration of digital in these areas. "Also, I want to add that, fashion brands and retailers need to work on the technology front and team up with partners who can increase scales for them because we cannot afford to experiment and then grow in this competitive age. And I think, this is where digitization is going to help," he adds.

Especially in fashion, brands and retailers need to work on two paradigms – touch and tech. "In India too, as consumers evolve, the tech factor will start bringing a greater confidence role versus the touch factor. So, it's a equilibrium of tech and touch, and as the market matures, it will move towards tech and disruption will have to happen," said Viren Razdan.



# MYNTRA AND FOSSIL GROUP PARTNER TO LAUNCH WATCHES POWERED BY AI

'Tryst' offers consumers the most on-trend, stylish and contemporary watch design, identified by Vorta – Myntra's AI Platform for predicting fashion

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Fashion e-tailer Myntra has partnered with Fossil Group to launch the world's first collection of watches designed by insights derived from Artificial Intelligence. 'Tryst' offers consumers the most on-trend, stylish and contemporary watch design, identified by Vorta – Myntra's AI Platform for predicting fashion.

Manufactured and serviced by Fossil Group, shoppers are assured of the highest standards of quality and reliability. This, coupled with Myntra's phenomenal distribution network that covers over 19,000 pincodes, allows for the new collection to reach every city and town in the country.

engine that provides insights on dials, dial sizes, colours, designs, finishes and more, through a systematic and accurate prediction of trends.

Tryst derives its name from people's tryst with time during every day routines and the heartiest of moments, and connects it metaphorically with the classical wrist watch as it transcends those moments. 'Tryst' has launched the collection under three sections – Fashionista, Wanderlust and Athleisure, targeting millennials and Gen Z consumers in particular, offering products at prices ranging from ₹4,500 up to ₹8,000. **Manohar Kamath, Head, Myntra Fashion Brands** said, "Myntra and Fossil Group have partnered to create a product that benefits from Myntra's understanding of fashion and Fossil Group's fine craftsmanship and manufacturing capabilities, giving birth to 'Tryst'. Our tech prowess has greatly enabled us to identify, understand and fill gaps in the market with respect to trends and preferences of people and we are confident of becoming the market leaders in this segment."

**Steve Evans, EVP, Fossil Group** said, "We are looking at fast fashion within the accessible fashion watch space as an upcoming and important category in the Indian market. Being the first to introduce a range that incorporates the latest and most up-to-date design and style anywhere in the industry, we clearly see in 'Tryst', a winner for Fossil Group and Myntra. Our association is a perfect blend of fashion, backed by technology and the finesse of a fine watchmaker. We are introducing this concept exclusively on Myntra at this stage."



TY Lim / Shutterstock.com

In a fast-paced world, where ideas, concepts and even tastes tend to progress more rapidly, 'Tryst' offers fast fashion in watches. It will be releasing new capsules every three months, redefining industry standards compared to other watchmakers who usually turnaround collections in a year's time. This is being made possible by the Vorta

IMAGES Business of Fashion

# Innerwear Study



Plc courtesy: Wacoal



# INDIAN INNERWEAR MARKET

*Indian Fashion Retail which is currently estimated at ₹3,61,000 crore is expected to grow at a CAGR of 8.1 percent over next decade to reach ₹7,88,500 crore by 2028. Among all the fashion categories, innerwear has emerged as one of the fastest growing categories in last few decades. A commodity which was earlier depicted as a day to day essential has transformed itself into fashion wear with more emphasis on styling and comfort. In the last few years, the growing middle class income with increasing purchasing power, change of innerwear from need based to aspiration based clothing; increasing fashion consciousness among millennials, etc., has resulted in increased demand of innerwear in domestic market.*

**Ashish Dhir, Associate Vice President, Fashion - Textile & Apparel, and Saima Nigar, Associate Consultant, Fashion- Textile & Apparel, Technopak**



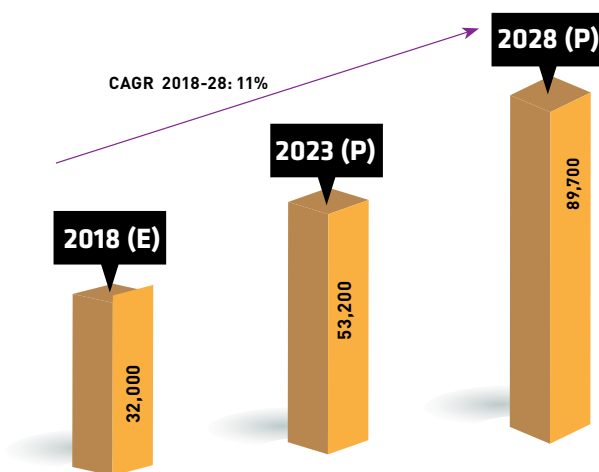


Traditionally, the innerwear market was largely fragmented and unorganised. But, in last few years the organised innerwear segment has shown promising growth in both men's and women's categories. Lately, the premium innerwear market in India has been experiencing increasing entry of global brands, mostly through partnerships and tie-ups with home-grown brands.

The Indian innerwear market currently estimated to be worth ₹32,000 crore accounts for ~9 percent of the total domestic fashion retail market.

In recent years, the women's innerwear segment has grown consistently and estimated to be worth ₹21,000 crore in 2018, expected to grow at an impressive CAGR of 12.5 percent over the next decade to reach ₹68,000 crore by 2028.

INDIAN INNERWEAR MARKET (INR CR)



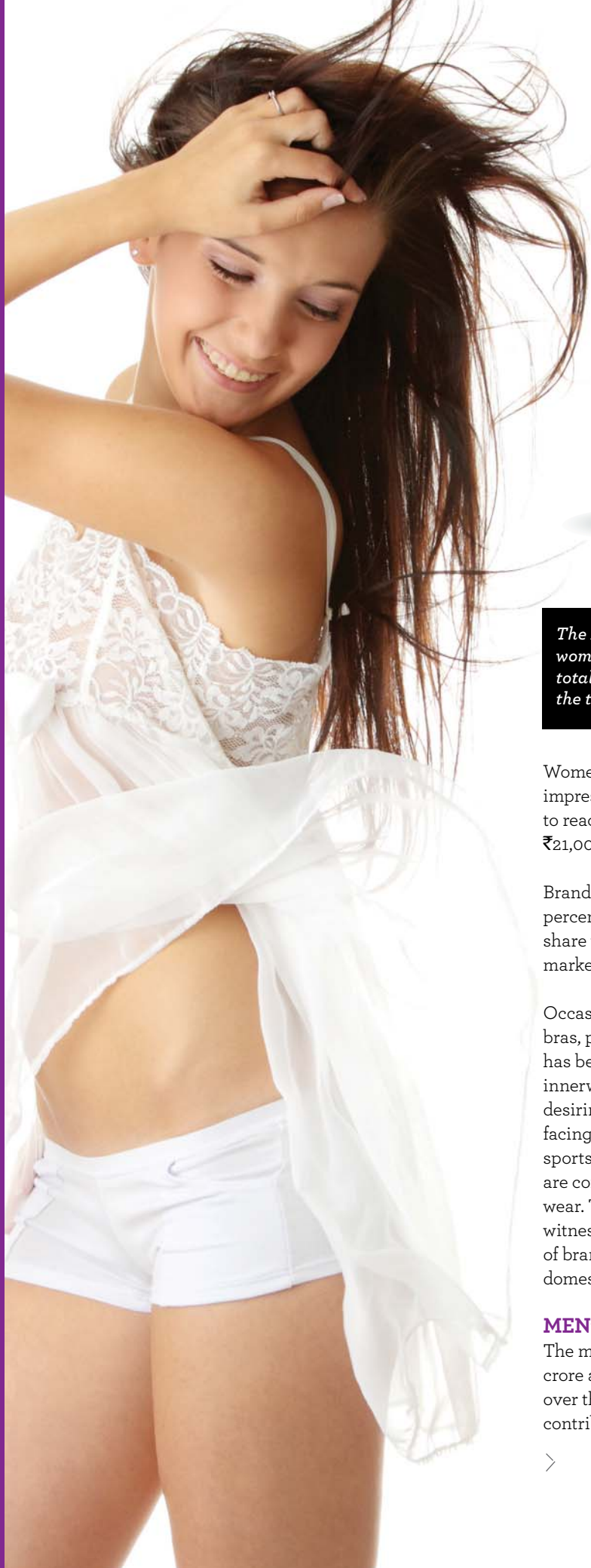
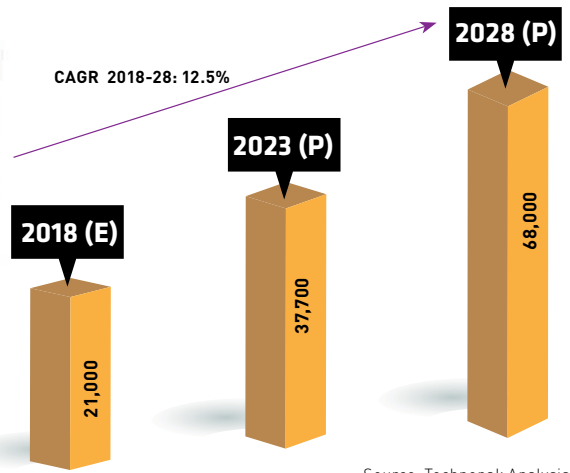
Source: Technopak Analysis

The men's innerwear market, which is estimated to be worth ₹11,000 crore in the year 2018, is estimated to grow at a CAGR of 7 percent to reach ₹21,800 crore by 2028.

### WOMEN'S INNERWEAR MARKET

The Indian innerwear market is primarily dominated by women's innerwear which accounts for 64 percent of the total innerwear market and it accounts for 16 percent of the total women apparel market. Various product categories in women's innerwear are brassieres, camisoles, panties, tees, nighties, shorts, etc. Brassieres and panties contribute 85 percent of the total women's innerwear segment.




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


Source: Technopak Analysis

*The Indian innerwear market is primarily dominated by women's innerwear which accounts for 64 percent of the total innerwear market and it accounts for 16 percent of the total women apparel market.*

Women's innerwear segment is poised to grow at an impressive growth rate of 12.5 percent over the next decade to reach ₹68,000 crore by 2028 from current market size of ₹21,000 crore.

Branded innerwear in women's segment contributes 38-42 percent of the total women's innerwear market and this share will be expected to grow to 45-48 percent of the total market by 2023.

Occasion specific products like seamless bras, strapless bras, padded bras, bralettes, etc., are being sought. There has been a rising demand for functionality based women's innerwear like shapewears, tummy tuckers, etc., for women desiring a slimmer look; non-wired brassieres for women facing comfort issues after prolonged use of wired ones; and sports bras suitable for physically active women. Women are conscious about the brands and styles for their intimate wear. The trend is not restricted to just metros but can be witnessed spreading in Tier I, II and III cities. This adoption of branded lingerie has led to influx of international and domestic innerwear brands.

**MEN'S INNERWEAR MARKET**

The men's innerwear market is currently valued at ₹11,000 crore and is expected to grow at a CAGR of 7 percent over the next decade to reach ₹21,800 crore by 2028. It contributes 7 percent of the total men's apparel market.







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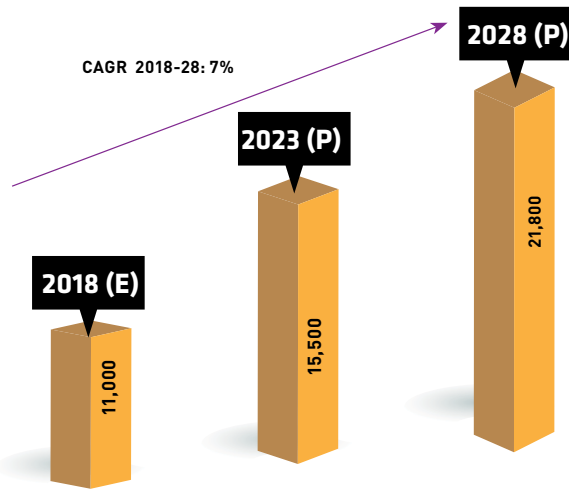


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## MEN'S INNERWEAR MARKET (INR CR)



Source: Technopak Analysis

The men's innerwear has the number of sub categories such as briefs, vests, underwear, pyjamas, boxers and shorts, etc.

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

### GROWTH DRIVERS OF INDIAN INNERWEAR MARKET

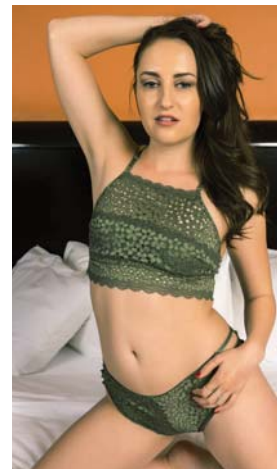
The growth of the innerwear segment in India can be attributed to the introduction of various international brands and the organised players. The evolution of branded innerwear is mainly rooted in urban India. But, recent influx of international brands into Tier I and II cities have resulted in providing a huge untapped market for organised players. With attention towards western outfits and an increasing demand for occasion and output based innerwear, the market has seen a holistic boom. Today, people look for innerwear with optimum functionality and comfort.

The rising purchasing power of among customers and increasing working women are other factors that have boosted the market.

### GROWING INDIAN MIDDLE CLASS- MOVING UP LADDER:

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





*The rich customer insights translates to a significant advantage for retailer's private labels to create products that incorporate the minute but important details – what prices Indian shoppers are looking for, what value they seek in that price range and what trends they desire.*

### GROWTH OF PRIVATE LABELS

Private labels have made tremendous inroads over past decade. Better margins and economies of scale are driving India's big retailers to stock shelves with their own labels. The rich customer insights translates to a significant advantage for retailer's private labels to create products that incorporate the minute but important details – what prices Indian shoppers are looking for, what value they seek in that price range and what trends they desire.

### CHANGE FROM NEED DRIVEN TO ASPIRATION DRIVEN BUYING:

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

### EMERGENCE OF ONLINE RETAIL CHANNELS:

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

### CONCLUSION

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



A woman with long brown hair is shown from the waist up, wearing a light purple bra with a delicate floral pattern. She is looking down and to the right, with her right hand resting on her neck. The background is a soft, light pink and white, with a large, flowing fabric element in shades of pink and white that frames her. The overall mood is elegant and feminine.

FASHIONABLE ON  
THE INSIDE!  
ANALYSING THE INDIAN  
INNERWEAR SEGMENT

From being a bare essential to transforming into an indulgence, innerwear has traversed a long trajectory in India. IMAGES Business of Fashion takes an indepth look at the changing trends in the women's innerwear market in India...

**Shivam Gautom with inputs from Gurbir Singh Gulati & Rosy N Sharma**

The innerwear market has come a long way in India. From being just a functional wear category to becoming a fashion quotient, the segment has brilliantly created a niche for itself. With the rising incomes, passion for fashion and need for comfort, innerwear, today, is among the fastest growing fashion segments in India.

### The Evolving Market

Traditionally, innerwear was an unorganised market in India. It still is, to a certain extent, dominated by a large number of small-scale players making ~60-65 percent of the market fragmented and unorganised. However, the market segment is evolving gradually and moving towards organised retail. "The innerwear industry is highly fragmented, with too many players in every price segment. The category is still largely unorganised, with organised players just forming one-third of the market. There is an influx of new entrants with international brands and online labels, which has helped increase the share of organised business, and this will grow at a faster pace than before," says **Smita Murarka, Head - Marketing, amanté.**

But the market as well as the consumer is changing at a rapid pace. Today, Indian consumers are fast gravitating towards innerwear that are not just functional but has a style quotient that reflects their individuality. Initially it was a damp market marred with lack of both products and product awareness. But new age customers exhibit evolved characteristics which has led to bolstered consumption patterns. With modern trends and product innovations, innerwear has turned to be an essential fashion need. "One of the main reasons for the growth of Indian innerwear market is because of the increasing size of the organised market and the declining share of the unorganised market. This factor has

also been instrumental in paving way for the various independent brands that are emerging as the key players in the market," says **Saket Todi, Senior Vice President, Lux Industries.**

With a variety of silhouettes in their outerwear, consumers now need to experiment with their intimate wear choices. From t-shirt bras to strapless bras, thongs to full briefs, the choices are multiple now. "Earlier innerwear companies would have 2 or 3 types of vest. Today if you pick up any brands' catalogue there will be plethora of designs and styles and for each product there would be numerous variations. The colour pallet has expanded," explains **Sanjay Kumar Jain, Managing Director, TT Ltd.**

With this growing need to style themselves differently, consumers are beginning to understand the importance of quality innerwear in the overall appearance, and this has organically fueled the growing preference for branded innerwear. "The industry is moving from price sensitive to brand sensitive. The premium segment is showing enormous promise to cater these changing needs. The premium innerwear segment in India is going to grow at around 21 percent CAGR in the next three years," says **Srikanth Ram, Business Head, Park Avenue and Color Plus.**

Aspirational lifestyles, rising purchasing power, availability of a wide variety and increasing number of working persons are the key factors that have propelled the market. "The rise of disposable income has led to increase in the spending capacity of the consumer which leads them to experiment with fashion and style, also digitalisation has led people to become more updated with trends and this is how it is transitioned," states **Richa Kalra, Co-Founder, Candyskin.**

Especially in the women's segment, consumers are more open about

ASPIRATIONAL LIFESTYLES, RISING PURCHASING POWER, AVAILABILITY OF A WIDE VARIETY AND INCREASING NUMBER OF WORKING PERSONS ARE THE KEY FACTORS THAT HAVE PROPELLED THE MARKET



Dollar

their preferences, and emphasize on exploring options before a purchase. They are more aware of products and sizes and do not hesitate to spend on innerwear. “Spends have increased for sure, with the middle income group having good amount of disposable income the buying capacity has really improved. Infact middle income group happens to be the reason behind retail revolution in India,” says **Hemant Kumar Jaiswal, Business Head, Bodycare.**

In the menswear segment too, innerwear has made its presence duly felt. The growing demand for innerwear has compelled consumers, especially youngsters to increase spends. It is no longer treated as merely an undergarment but is worn as a fashionable article of clothing that can be flaunted. This growth in demand has carved out a potential market for innerwear in India.

**International Brands Setting the Bar High**

Over the years, a plethora of global brands have entered the Indian innerwear market, and this has increased the number of aspirational buyers. While this has led to stiff competition in the market place, the brighter side is that Indian brands are now compelled to ameliorate both their products and services. The competition is intense, but this has led to a much awaited evolution of the market, brands as well aspirational customers.

“Entry of global innerwear brands has increased awareness, and with the rising discretionary spending, all segments have registered growth. Foreign brands have brought in variety through international styles and fabrics. Indian consumers are also willing to spend higher-than-before amounts on innerwear. This has provided an exponential boost



Park Avenue Color Plus

to premium and super-premium innerwear brands. Mid-segment brands have started extending their product portfolios as well,” says a spokesperson from Jack & Jones.

With the entry of these global bigwigs, the Indian consumer has been exposed to new styles, cuts, fabric, patterns, design, etc. This has made this entire category interesting and competitive. Consumers are willing to pay the extra in order to purchase the product they desire. “Innerwear is no longer limited to typical whites and they now have plenty options to choose from. Social activities like gym, swimming, sports clubs, etc., have been on the rise amongst Indian audience and therefore people are conscious of the innerwear brands that they wear. These social occasions give them an excuse to flaunt their innerwear, hence everything they own needs to be a brand that reflects their personality and social standing,” says **Vinod Kumar Gupta, Managing Director, Dollar.**

While these global brands particularly serve the haut monde, it’s the private labels that, some retailers believe, will compete with the



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***“Social activities like gym, swimming, sports clubs, etc., have been on the rise amongst Indian audience and therefore people are conscious of the innerwear brands that they wear. These social occasions give them an excuse to flaunt their innerwear, hence everything they own needs to be a brand that reflects their personality and social standing”***

**-Vinod Kumar Gupta,**  
Managing Director, Dollar



***India is a price sensitive country and that will always be a major driver for brands. Alongside price as a factor, we human beings love options for everything; hence the one that gives the most choices wins”***

**-Grishma Patil,**  
Founder, Candour London

homegrown brands in the near future. “In innerwear market, the entering global brands are more focused at the top end of the range. About 80 percent of the Indian innerwear market are controlled by domestic brands. I find bigger threat in the private labels coming from retail chains and e-commerce than the international innerwear brands,” says Sanjay Kumar Jain.

### **Price Sensitivity**

India has long been known as a price sensitive market, but the modern Indian customer has evolved overtime and now does not hesitate to spend for a worthy product. Yet, as a thumb rule, brands across segments and industries converge their endeavors to cap prices to the bare minimum in India. “India is a price sensitive country and that will always be a major driver for brands. Alongside price as a factor, we human beings love options for everything; hence the one that gives the most choices wins,” adds **Grishma Patil, Founder, Candour London.**

“As a brand, we have always opted for smart pricing strategy in order to attract consumers and boost brand preference. Exploring new areas of innerwear, Jack & Jones has introduced new prints like stripes & checks with solid colors, in cotton blends, comprising 95 per cent cotton and 5 per cent elastane fabric. Each design is inspired and conceptualised in Denmark. Every brief comes with an elasticized logo on the waist band having a snug fit. Starting price for a single pack is ₹249 and pack of two at ₹350, prints at ₹399, stripes at ₹399” says the Jack & Jones spokesperson.

While there has been a steady rise of discerning fashionistas, there also is a demand in the market for branded yet affordable lingerie for everyday use. “To

tap into this aspirational and value conscious segment, MAS Brands has launched a new sub-brand called every dé by amanté. It offers comfortable lingerie with an infusion of fashion and femininity at pocket friendly prices, starting at ₹495,” says Smita Murarka.

It’s also noteworthy to mention rising cost is taking a toll on most brands’ margins. “The production and cost of the product is costing us high by the day as the prices for raw materials are increasing, it’s been very difficult to price products at cheap and affordable price range. However we are doing so by reducing our margins. This is not a permanent solution and we are still figuring how much growth is required for our brand to be doing what we are already doing,” adds Richa Kalra.

### **Staying Creative**

In a rapidly evolving market like the innerwear market, brands and retailers are under constant pressure to stay ahead of the curve with routine



Dollar





***“Introduction of new products with unique designs and cuts from various brands are increasing the competition in the market. With so many new entries in the market, it is definite that the future of innerwear seems quite prosperous and thriving”***

**-Saket Todi,**  
Senior Vice President, Lux Industries

innovation and creativity. This is where data plays a big role. “Well we have enough database to work upon, working in the same industry for past 27 years gives us the edge over our competitors in understanding customer mindset better. We generally do not give discount on our products as our prices are very competitive,” states Hemant Kumar Jaiswal.

“Our products comes with unique Bio Wash which removes the hairiness and gives an excellent smooth feel. The seamless products are in great demand – it fits the body snugly and promises extraordinary comfort. We offer a range of products that not only appeal to one’s aesthetic senses but also provide an optimum level of comfort,” says Srikanth Ram.

Today, even the basic most products offered by brands feature quality fabrics and modern finishes. Brands are constantly working with innovative raw materials, fabric finishes, and exercising innovative

marketing techniques in an attempt to stay ahead of their peers. “We are doing an extensive range of products with innovative fabrics and different functions, which are useful in this category, we are also constantly trying to create comfortable products with functional features and fashion forward look and feel with premium qualities at as affordable prices as possible. With regard to brand promotion, we have done collaborations with MTV, digital promotions, new kinds of product detailed packaging, and we host fit sessions on a regular basis, because our brand promotes the ultimate fit with style and comfort,” says Richa Kalra.

amanté was India’s first brand to introduce 2mm ultra-thin padded bra for making the bra feel like second skin while giving the desired support and contouring. The moulded lace bra



offered the support of a T-shirt bra with the magic of lace. The brand’s latest innovation, the Sculpt Wire bra, has an encased silicon wire that guaranteed the support of a wired bra and the comfort of the non-wired bra at the same. The bra is designed for the contemporary women who, with her all-day busy schedule, deserves a bra that is made to move with her.

Candour London focuses more on fabric, prints and marketing innovations. “Fabrics have had a sweat free factor to it considering the Indian weather. Our branding and promotions have been with social media influencers along with a lot of social media contests keeping in mind the ongoing trends and which also include a lot of gifting, vouchers, hampers, etc. to drive as much as traffic possible to our brand,” says Grishma Patil.





amanté brand store

***“Tier II and III cities are really setting the trends. We are getting more and more orders from these cities with increased awareness about brands and of course E-commerce is playing a very big role in this. Based on the e-commerce sale data we are able to understand markets better and decide where we need to open more stores and increase brand reach”***

**-Hemant Kumar Jaiswal,**  
Business Head, Bodycare



Bodycare

Lux was among the first in the industry to appoint celebrities as brand ambassadors to make the brand more visible in the minds of the consumers. The brand has shared some of the most phenomenal tie-ups with its consistent association with the who's who of the Bollywood fraternity, starting from megastar Amitabh Bachchan as the current brand ambassador for Lux Venus and Lux Inferno, Varun Dhawan for Lux Cozi, and Parineeti Chopra for Lyra.

### **Technology As An Enabler**

Modern manufacturing is an increasingly automated and technology-driven industry. It relies on a slew of applications of advanced technologies and systems, that are changing the face of fashion manufacturing. Dollar Industries Ltd., was one of the first Indian innerwear companies with a fully backward integrated manufacturing unit. This state-of-art new processing unit is located at State Industries Promotion Corporation of Tamil Nadu (SIPCOT) in Erode.

“We are also the proud owner of a Spinning Unit situated at Vendasandur, Dindigul district. The unit is spread over 26 acres of land and is run meticulously. It is well equipped with the latest processing technology with Sclavos and MCS Dyeing Machines

and the top finishing ranges like Bianco Padder, Strahm Padder, Strahm Dryer, Monfong's Stenter and Lafer Compacting Machines to produce finished raw material dyed in any possible colour. Its production capacity is about 13.5 tons a day having 6 HPHT (High Pressure High Temperature) machines installed. This factory has a capacity of 1000 KL Zero Liquid Discharge with multiple evaporators and we follow the Norms of PCB, comply with labour laws and various quality systems,” states Vinod Kumar Gupta proudly.

Another company which is extensively using technology to create innovative products is Lux. To fight the rising temperatures, recently, Lux Cozi introduced India's first scented vest in the market. The range from Lux Cozi is a very innovative and one-of-its kind product which promises to keep the wearer stay fresh throughout the day, in all types of weather conditions – something which hits home in a country like India.

### **Traction in Tier II & III Cities**

Like most other fashion segments, innerwear is thriving in Tier II and III markets of India. Consumers from these small town and cities exhibit high aspirations and are eager to have a metro-like lifestyle. They are open to experimenting.





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***“The global brands are more focused at the top end of the range. About 80 percent of the Indian innerwear market are controlled by domestic brands. I find bigger threat in the private labels coming from retail chains and e-commerce than the international innerwear brands”***

**-Sanjay Kumar Jain,**  
MD, TT Ltd.



***“We have a beautiful future when it comes to this segment. The market was unorganised traditionally but is fast getting structured. Once the share of modern retail increases, we believe we have a bright future ahead”***

**-Richa Kalra,**  
Co-Founder, Candyskin

Industry sentinels attribute this bolstered growth to the proliferation of e-commerce. “Social media and the e-commerce revolution have equated the divide between a metro woman and Tier II markets. The knowledge and accessibility to products are available to both equally now. With this new wave the highest growth is coming from these markets,” states Smita Murarka.

Consumers of Tier I, II and III cities were compelled to consume from the limited choices that their local brick and mortar outlets stocked. With the advent of e-commerce, the smaller cities and towns were exposed to unlimited choices and options. The online market has not only increased the overall sales of the innerwear market but has also helped with brand awareness. “E-commerce is an amazing platform and is changing the rules of retail selling. Products are easily accessible here and also lots of attractive offers and schemes are available. The entire retail scene is destined to go through a significant

transformation in time to come and the pace of this transformation is very rapid,” says Vinod Kumar Gupta.

Also, e-commerce helped oust the traditional temple of innerwear shopping in India—accepting whatever the salesman has to offer. Now, consumers can shop whatever and whenever they like “Innerwear market has not just changed in terms of its style and fabrics but also in terms of buyer’s mentality. Girls no longer need their moms for lingerie shopping! The offline as well the ever-increasing online presence has made it easy and convenient to every type of buyer,” says Grishma Patil. “Tier II and III cities are really setting the trends. We are getting more and more orders from these cities with increased awareness about brands and of course e-commerce is playing a very big role in this. Based on the e-commerce sale data we are able to understand markets better and decide where we need to open more stores and increase brand reach,” says Hemant Kumar Jaiswal.



***“The industry is moving from price sensitive to brand sensitive. The premium segment is showing enormous promise to cater these changing needs. The premium innerwear segment in India is going to grow at around 21% CAGR in next 3 years”***

**-Srikanth Ram,**

Business Head, Park Avenue & Color Plus



***“Social media and the e-commerce revolution have equated the divide between a metro woman and Tier II markets. The knowledge and accessibility to products are available to both equally now. With this new wave the highest growth is coming from these markets”***

**-Smita Murarka,**

Head - Marketing, amanté

### **The Future**

The innerwear market in India is a lucrative segment poised for high growth. It is also an untapped as compared to other fashion segments. “We have a beautiful future when it comes to this segment. The market was unorganised traditionally but is fast getting structured. Once the share of modern retail increases, we believe we have a bright future ahead,” says Richa Kalra.

Moreover, with the change in consumption pattern and the youth’s readiness to spend more in this category, lifestyle retailers are showing more interest. Today, reputed large format stores like Central, Shopper’s Stop, et al., all have dedicated spaces for this category.

Given the promise that this segment holds, the competition is rife not only with the global brands, but also among



Candyskin



T.T Ltd.

all Indian brands, all for the better. With so many brands around, there is a constant pressure to perform better as customers will pick only the best product in the market. “Introduction of new products with unique designs and cuts from various brands are increasing the competition in the market. With so many new entries in the market, it is definite that the future of innerwear seems quite prosperous and thriving,” says Saket Todi.

Having said this, brands and retailers who are going to spend larger share of revenue in making their back-end strong to understand customer convenience, needs, and the current fashion and market trends, will champion the growth story in the years to come.

×

# > BODYCARE <

**Brand:** Bodycare | **Company:** Bodycare Creations Ltd. | **Year of Launch:** 2008 | **Headquarter:** Noida (Uttar Pradesh)

Launched in 1992 by Pawan Hosiery, Bodycare is a prominent name in the innerwear industry in India and overseas. The brand Bodycare came into existence in 2008. Since then it has gained more stability in the market. The brand specialises in stylish and intimate innerwear and provides a complete lingerie solution by offering bras, panties, camisoles, bikinis, bridal wear lingerie and more. It also provides utility products like tummy control panties, feeding bras, maternity panties and Teflon coating sanitary panties.



## Core Customers

The brand's focus customers have always been the middle and upper-middle income group. Its entire product line is based on the preferences and aspirations of this segment.

## Product Portfolio

Bodycare Creations has been a part of the women's innerwear market for a long time. It also has men's innerwear, BodyX. Among its portfolio are athleisure range under 'Bodyactive' for men and women.

## Most Innovative Product

Bodycare Creations has launched many

firsts in the innerwear segment. It was the first brand to introduce stain free panty (Teflon finish), Lycra stretch panties and prociac printed panties in the country.

## Category Expansion

The brand has been adding products to the existing product categories while creating new ones based on current trends and preference of its existing customers.

## Primary Markets

Bodycare Creations' primary markets comprises Tier II and III customers who follow fashion of the metro cities. It has plans to increasing its visibility in North East India, which looks very promising.

## Exploring New Markets

The brand is keen to expand its dealer network in North East India and is exploring options in the rest of the markets as well.

## Progress Through Online

### Retail

Online retail has shown promising growth for Bodycare Creations with the brand having grown 400 percent in its online sales in comparison to the last financial year.

## Turnover & Projection

The brand's total turnover has crossed ₹500 crore in the last financial year. It is targeting 15 to 20 percent increase in the turnover in the next 2 to 3 years. It is growing at 13 to 15 percent annually, it aims to increase to 20 percent YoY.



# > DOLLAR <

**Brand:** Dollar | **Company:** Dollar Industries Ltd. | **Year of Launch:** 1972 | **Headquarter:** Kolkata (West Bengal)

Established in 1972, Dollar Industries started its journey as Bhawani Textiles. Today, it is amongst the top three hosiery brands in India with a market share of over 15 percent in the branded knitwear market. With its headquarters in Kolkata, it has four manufacturing units in Kolkata (West Bengal), Tirupur (Tamil Nadu), Ludhiana (Punjab) and Delhi. It believes in eco-friendly ways of production and has introduced a zero discharge technique with evaporation system.

## Core Customers

Dollar's target audience is across the pyramid. The brand offers products for the men, women and kids through its wide assortment under premium range and economy range.

## Product Portfolio

The complete range of products at Dollar includes vests, briefs, trunks with latest cuts and fits. In apparel category, it offer t-shirts, gym-vests, Bermudas, leggings and track pants, while the women's range includes camisoles, panties and leggings, including a premium range of thermals for men, women and kids.

Under the premium range, Dollar offers renowned sub-brands such as Bigboss, Bigboss J-class, Bigboss Athleisure, Force Go Wear, Force NXT, NXT Athleisure, Missy, Ultra Thermals and Champion. In the economy range, the brand has sub-brands like Lehar, Bravery, Commando, Egyptian, Wintercare and socks.

Athleisure is a new product line introduced under the sub brands, Bigboss and Force NXT for teenage boys and men who have an active lifestyle.



## Latest Collection & Theme

This season, Dollar has introduced a new product category, athleisure for people who love sports. It has also launched flexi trunk and flexi brief under Bigboss. Moreover, it has experimented with innovative fabric that are stretchable and body hugging to give a snug fit.

## Category Expansion

Recently Dollar Industries has entered into a joint venture with Pepe Jeans to launch a new range of innerwear under the Pepe Jeans London brand name. The joint venture company 'Pepe Jeans Innerfashion' will manufacture and market a premium range of fashion innerwear and athleisure for men.

## Retail Presence

At present, Dollar is retailed through over 1 lakh MBOs across the country. It has also partnered with large format stores in the region to increase its reach to the customers. Additionally, it is available on all leading shopping portals

like Amazon, Paytm, Jabong, Myntra, Flipkart, Ebay, Snapdeal, etc.

Internationally, the innerwear brand is available in UAE, Algeria, Oman, Nigeria, Iraq, Iran, Qatar, Kuwait, Jordan, Ghana, Bhutan, Nepal, Sudan, Togo, Kenya, Bahrain and Rega. It is the bestselling innerwear brand in the Middle East.

## Exploring New Markets

Dollar has always been keen to expand its reach to cater to larger customer base. The brand does not have any exclusive outlet at present hence it will focus on introducing such format in the near future.

## Turnover & Projection

The last financial year turnover was ₹984.53 crore. The brand expects to scale from this point to cross ₹2,000 crore in revenue by 2024.

## Growth Rate

Dollar's revenue has been growing at CAGR 9.3 percent over the past five years.



# > EURO <

**Brand:** Euro | **Company:** Rupa & Company Ltd. | **Year of Launch:** 2001 | **Headquarter:** Kolkata (West Bengal)

Launched in 2001 by Rupa & Company, Euro offers a plethora of stylish options for all innerwear needs and moods, right from the classic briefs to stylish gym vests to bold trunks.



### Core Customers

The brand's target group is the Indian youth.

### Product Portfolio

Euro's present product portfolio comprises all the products in the innerwear category. It offers vests, briefs, trunks, gym-vests and kids (boys) innerwear items.

### Latest Collection & Theme

The latest launch from the brand is the Maxx brief, which is a very unique fashionable item in the category. The elastic of this product is themed in a very contemporary manner. It has also introduced three new products in the boys and kids range – colour vests, gym vests and inner elastic briefs.

### Most Innovative Product

The brand has recently introduced i-cool technology in fabrics. Fabrics treated with this special technology gives an instant cooling effect on the skin keeping moisture away.

### Category Expansion

In the kids range, Euro is planning to launch innerwear products for girls. It also has plans to launch premium quality innerwear for other specific target groups.

### Primary Markets

The brand enjoys a pan India presence. However, its primary market is East India.

### Retail Presence

Euro is present in the market through 4 EBOs and over 1,500 MBOs across India. In the LFS segment, the brand has partnered with Reliance Market, V2 Retail, Style Baazar, AGS Retail, RG'S Fashions, Baazar Kolkata, etc.

### Exploring New Markets

Madhya Pradesh and Tamil Nadu are the two important regions that the brand is planning to explore in a very aggressive manner.

### Progress Through Online Retail

Through online channel, the brand has witnessed over 200 percent growth in the past few years.

### Turnover & Projection

The brand aims to grow at about 20 to 30 percent in the next few years.





# > FRONTLINE <

**Brand:** Frontline | **Company:** Rupa & Company Ltd. | **Headquarter:** Kolkata (West Bengal)

When it comes to style and comfort, Frontline has always been the nation's favourite. For many years together, the Frontline range has set benchmarks in the innerwear segment and it continues to do so even today. Among the leading brands in the category, Frontline continue to retain its position in the segment. It has been consistently setting standards with the best of technology, fabric and finishes, all at an affordable price point. Its product range always captures evolving need of customers, be it cut, size, or comfort.

## Core Customers

The brand has always strived to extend the best of products across length and breadth of India. Its portfolio remains focused at making available the best quality of vests and trunks for the Indian males.

## Product Portfolio

The present product portfolio comprises all the products in the innerwear category such as vests, briefs, trunks, gym-vests and kids innerwear items.

## Most Innovative Product

In the wide Indian innerwear market Frontline has created its own brand image and undoubted leadership in the middle class segment. However, the brand recently launched a new brand, FL7 to cater to the premium segment with its rich experience and thorough knowledge. With a wide range of premium products, which has designs and quality that are at par with international standards, FL7 will cater to the upper and upper middle class segments.

The initiative will help the brand to diversifying its brand image from an undergarment brand to establishing itself as a brand providing a plethora of products ranging from premium innerwear, outerwear, athleisure, sportswear, loungers, sleepwear and casualwear.

## Category Expansion

Frontline is planning to introduce path-breaking products, which will make the Indian male feel more comfortable in his second skin, i.e. the innerwear, his daily attire.

## Primary Markets

The brand remains strongly focused towards pan-India, with special attention to high growth markets like North, East and West India.

## Retail Presence

The brand is retailed through 4 EBOs and over 1,450 MBOs across the country. In the LFS segment, it has partnered with Reliance Market, V2 Retail, Style Baazar, AGS Retail, RG'S Fashion and Baazar Kolkata.



# > GENX STYLE INNERS <

**Brand:** GenX Style Innners | **Company:** Lux Industries Ltd. | **Year of Launch:** 2001 | **Headquarter:** Kolkata (West Bengal)

From the house of Lux, GenX Style Innners is an extremely stylish-yet-affordable innerwear brand. Lux has tried to create an affordable inner wear range with GenX Style Innners, which is positioned as an economic brand. Made from top-notch quality materials, each product of the innerwear brand is manufactured with specific conceptualization and designing to obtain an ideal style matched with comfort requirements of today's youth. GenX Style Innners have a huge demand both nationally and internationally. Its products are available in the Middle East, Europe and Africa



from the brand is considered an innovation because of its stylish curves, stitches and colour range. Starting from shorts to track pants, vests and briefs, each and every product of GenX Style Innners has a modern touch, making it quite inventive for all its ranges. With its good quality, perfect fittings and economical prices, today, the products of GenX Energy series are highly in demand among the consumers.

## Primary Markets

The brand enjoys a pan India distribution network and is fortunate to enjoy a wide presence in almost all states of the country. Due to its strong demand, GenX Style Innners, at present, are estimated to be retailed across more than 100,000 retail outlets.

## Core Customers

As GenX Style Innners are always crafted with the latest trends and designs, the brand specifically caters to today's youth. It was launched in the market with an aim to satiate the gap between the stylish inners and economical inner wears. At present, GenX Style Innners have successfully marked its position in the innerwear market by satisfying the demands of the youth with its innovatively designed innerwears.

## Product Portfolio

Keeping the brand's USP steady, the range of inners from GenX Style Innners includes Gusto briefs, Tango briefs, Contour briefs, Elite drawers, Elite briefs, Stylo briefs, NV briefs, Fly briefs, etc. While, the inners are made from Egyptian cotton for long lasting comfort, the added contrasting shoulder straps give a vivid look along with enhancing shoulders and giving a pumped up look. The new vests from GenX Style Innners

are designed to be worn as a gymwear, sportswear or leisure wear.

## Latest Collection & Theme

The youth specific brand has recently introduced a new 'Action Wear' range. The range is launched to suit the needs of today's youth who are synonymous to action. The Action Wear collection includes trendy shorts and track pants to make the consumers feel relaxed, comfortable and extremely confident of own self. The other latest collections of this brand include vibrant vests and briefs to provide consumers a soothing comfort.

## Most Innovative Product

GenX Style Innners has always launched the most innovative and stylish products for its customers. Almost every product





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# > LUX COZI <

**Brand:** Lux Cozi | **Company:** Lux Industries Ltd. | **Year of Launch:** 2001 | **Headquarter:** Kolkata (West Bengal)

Touted as the 'People's Brand', Lux Cozi is a value-for-money brand which offers great comfort and style. It is among the top players in the men's innerwear market and holds a strong presence in the mid-to-economy segment. At present, it has a product portfolio of over 100 products catering to men, women and kids. Continuous product quality enhancement and improvisation is one of the strong ideologies of Lux Cozi which have helped the brand to ensure best quality garments and offering trendy fashions.

## Core Customers

Primarily catering to the economy to mid-economy segment, the brand's core customers are the general masses. It presents uncompromised quality at a very pocket friendly price, which is also the main USP of the brand.

## Product Portfolio

Lux Cozi proudly boasts a product portfolio of 100+ products catering to men, women and kids innerwear. The brand offers vests, briefs, boxers, t-shirts, leggings, shorts, track pants, spaghettis, thermals, panties and many other products represented by the most prominent brands. These brands

comprise category leaders such as Lux Cozi innerwear, Lux Cozi Bigshot, Lux Cozi Glo, Lux Venus, Onn, GenX, Lyra, Lux Cottswool, Lux Inferno, Lux Classic, Lux Mozze and Lux Karishma.

## Most Innovative Product

The latest launch from the company is the country's first 'scented' vest from Lux Cozi. This is an innovative product in the Indian market launched after months of research by the company. The scented vests range from Lux Cozi is a one-of-its-kind product to beat the heat in style this summer. These scented vests keep men fresh in the sultry Indian weather, while helping them uplift their mood as well making them unique.

## Category Expansion

The brand is working on some innovative launches and variations for the coming seasons. The management has a lot of ideas in the pipeline, which will be revealed soon.

## Retail Presence

The products of Lux Cozi is retail through more than 450,000 points-of-sale across the length and breadth of the country. The brand is also available on all major e-commerce platforms like Flipkart, Myntra, Amazon, Indiamart, PayTM, etc. Along with these, it sells its products through own stores, [www.luxinnerwear.com/](http://www.luxinnerwear.com/) [luxinnerwear.in](http://luxinnerwear.in) to reach out to its target audience and enhance visibility in the market.



# > LYRA <

**Brand:** Lyra | **Company:** Lux Industries Ltd. | **Year of Launch:** 2017 | **Headquarter:** Kolkata (West Bengal)

Launched in 2017, Lyra is one of the most desirable and sought after women's wear brands in the apparel market. With an overwhelming response from its customers, the leggings brand has successfully launched its lingerie range to cater to the needs of its customers and to expand its portfolio. Currently, Lyra is positioned as the largest brand into the women's wear segment of the country. The uncompromised quality and world-class style of Lyra is the main USP of its collections as they provide perfect shape, fit and comfort to its wearer.



round bikinis with inner elastic, hipsters with inner elastic, printed hipsters with inner elastic and printed bikinis with inner elastic. In assorted colours and styles, these panties are made up of super soft cotton fabric and provide a modern fit and sits just below the waist line. Furthermore, Lyra is soon coming out with its range of sports bra, secret shapers, beginners' cami bra and teenager's bra.

### Most Innovative Product

All products by Lyra are innovative considering the brand's product components, however the most innovative would be the 'encircled bra'. Made with super stretch combed cotton fabric, this bra has the perfect body shaping ability. The cups of the bra are supported by a quilted layer for extra support and soft adjustable straps offer mark-free skin.

Other lingerie from Lyra display features like back wings, hook and eye closure, under bust band and seamed bra cups. These inners are made up of super combed cotton, cotton elastane stretch, micro-fiber, mesh, pima cotton, tencel and tactel, which make these products innovative in its own way.

### Retail Presence

Aggressive marketing strategies and quality products ensures expansion in market share. Lyra holds a strong market retail presence with over 8,000 stores all across India. It is retail through 7 EBOs and through selected stores such as Metro, Style Baazar, V2 Retail, City Style and so on. E-commerce too plays a huge role in its marketing strategies. Lyra bras and panties are available online on Amazon, Flipkart and on own online store [www.mylyra.com](http://www.mylyra.com).

### Core Customers

Lyra can be considered as one of the most budget-friendly brands in the market. Its customer base includes teenagers and women of all ages. While the youth are more prone towards bold colours and patterns offered by Lyra, other age groups enjoy the soothing patterns and sophistication exuded by the lingerie range.

### Product Portfolio

Lyra has come up with different styles of bras and panties. It's bras range comprise non-padded bras, padded bras, cross-over moulded bras, t-shirt moulded bras and encircled moulded bras in versatile colours and designs. The panties include hipster and bikini briefs. The Lyra lingerie collection presents a complete set of intimate wear in the market. Like all products, its new range is also developed with perfection using the finest grade of fabrics and materials to grant a sense of comfort and satisfaction to its customers.

### Latest Collection & Theme

The latest collection of Lyra includes



# > MACROMAN M-SERIES <

**Brand:** Macroman M-Series | **Company:** Rupa & Company Ltd. | **Headquarter:** Bengaluru (Karnataka)

Macroman M-Series is India's largest and one of the most reputed premium innerwear brands from the house of Rupa & Co. Created for the urban male, since its launch, the brand has grown phenomenally with a pan India network. Following the success of Macroman M-Series, the brand later launched an equally powerful female counterpart, Macrowoman W-Series. Today, the portfolio boasts of over 500+ products with numerous designs available in a variety of fabrics and finest blends.

## Core Customers

Present market trends show an inclination amongst Indian consumers to spend more on innerwear, leading to aggressive growth of this category especially in premium and luxury segments. The recent mode of retailing through online channels has permeated into the innerwear category giving much exposure to the consumers. The category is no more considered a basic necessity but a fashion indulgence which gives confidence and a feel good factor.

## Product Portfolio

The brand offers products with numerous designs Macroman M-Series has over 500+ innerwear, sportswear, leisurewear, athleisure and t-shirts for men and women.

## Most Innovative Product

The innerwear segment has just come out of the closet in the fashion world. Innovation is the key to progress, with customer's needs changing overtime. The brand's products are mostly inspired from the range of superb curated products with the finest blends.

It continuously push the boundaries to launch new products and cater to the ever changing consumer needs. The brand has a strong team of designers and researchers who taps the market changes and adapt accordingly.

## Primary Markets

In the era of globalization 4.0, where markets are wide-and-open and competitions are high, the brand feels



the need to come out of the existing business processes and expand its primary market.

## Exploring New Markets

The brand has launched a few exclusive brand outlets and have plans to expand further in the country. It envisions to be India's best premium lifestyle brand and increase its footprints not only in the country but globally as well. It wants to revolutionalise the innerwear and outerwear segment. On the trajectory of learning and evolving, the focus of the brand has been to deliver at the highest level.





# > ONN PREMIUM WEAR <

**Brand:** ONN Premium Wear | **Company:** Lux Industries Ltd. | **Year of Launch:** 2010 | **Headquarter:** Kolkata (West Bengal)

From the house of Lux Industries, ONN Premium Wear was launched in 2010. The brand soon garnered substantial market share in the premium innerwear segment. Keeping pace with the latest fashion and trend, the brand boasts of great quality and international styling with its wide product range comprising innerwear, loungewear and outerwear. Since inception, it believes in providing the best quality products to the consumers. Strong demand from the retail fraternity and the consumers' fondness for the brand has been the key factor in the success of ONN Premium Wear.

## Core Customers

ONN Premium Wear is strongly positioned in the 20 to 28 years customer segment, a validation of the fact that the brand enjoys high youth appeal and is set to emerge as the most favourite brand of the new generation.

## Product Portfolio

The product portfolio of ONN Premium Wear includes bikini briefs, briefs, stylish vests, sports vests, mini trunks, long boxers, track pants/joggers, shorts, t-shirts and three-quarter pants. These come in an array of colours and designs to provide maximum style along with comfort.

## Latest Collection & Theme

ONN Premium Wear believes in providing high quality and innovative products to its customers with ultimate design, comfort and style. Recently, the brand expanded its product portfolio with fresh launches in the Relaxz range, which includes briefs, mini trunks, white vests, textile boxers, ladies t-shirts, kids t-shirts, and other junior range. The Relaxz range is a specially designed inner wear for the youth with individual qualities and characteristics, and provides a superior feeling of being grand, sporty, casual yet trendy.

## Most Innovative Product

All products of ONN Premium Wear are innovative in its own way. ONN Active brings forth the stylish outer wear products comprising modern fit track pants and joggers which could be worn both as a sportswear and a loungewear. The international styling with the perfect fit and comfort is the main USP of ONN Active which lures consumers to choose the brand over others.

## Primary Markets

ONN Premium Wear has wide retail outlets across different cities and towns in India. It is one of the fastest growing brands in the segment and enjoys a huge network of dealers, distributors and marketing agents almost everywhere to penetrate deep in the market.

## Retail Presence

The brand retail through 7 EBOs. It is available pan India through large format stores like Pantaloons and Brand Factory. It sells its products through own online store [www.keepitonn.com](http://www.keepitonn.com) and is easily available on all major online shopping sites like Amazon, Flipkart, Jabong, Myntra, Homeshop 18, etc.



# > PARK AVENUE AND COLOR PLUS <

**Brand:** Park Avenue and Color Plus | **Company:** Raymond | **Year of Launch:** 1925

Renowned brands, Park Avenue and Color Plus have made a mark in innerwear category. With the surge in market growth it has gone beyond basic product portfolio. The new trendy range of offerings are tailor made to suit the need of comfort, fit, style and unparalleled quality. A perfect blend of superior combed cotton/elastane that is breathable and extremely comfortable.

## Core Customers

Currently, the brands are catering primarily to urban, semi-urban men between 22 to 35 years. Importantly, this urban audience is evolving, with multi-cultural trends and ethnicity reflecting their increasing diversity.

## Product Portfolio

They offer a range of products that not only appeal to one's aesthetic senses but also provide an optimum level of comfort. Their product range includes vests (fashion & staple), briefs (fashion & staple), trunks (fashion & staple), seamless innerwear, sloungewear (sleep + lounge), sportswear, thermals, handkerchief and socks.

## Latest Collection & Theme

The latest collection displays sportif details and looks new, on clean, minimalist silhouettes. The look is retro but placing stripes within waistband elastics has a contemporary fashion look and is perfect for commercial updates. Nautical prints and stripes are updated on stretch cotton boxer briefs using pared-down elements, large scales and abstract motifs in two-tone colour combinations.

## Most Innovative Product

Their seamless innerwear is their most innovative product. It is lightweight,



made from multi-fiber blends (cotton/polyamide/spandex, polyamide/polyester/spandex) and articulated rib panel. It gives a 4-way stretch that allows greater mobility in any direction. With features like moisture transport system wicks sweat, it dries quickly.

## Category Expansion

As the importance of sleep and restorative fitness in performance is better understood, a new genre of active wear emerges. They have launched sloungewear, a fusion of active, sleep and lounge, is designed for periods of stasis or activity, indoor or out. Sloungewear has a luxe feel, combining comforting basics with a futuristic aesthetic. Designed for fitness, sleep or long-haul travel, these transitional pieces focus on comfort and functionality, utilising well-being fabrics with protective and restorative properties.

## Retail Presence

The brands have presence in 150 EBOs, over 3,000 MBOs and 48 large format stores.

## Exploring New Markets

The brands have presence in major cities through various channels, i.e., Retail MT, distributors and various store formats. The brands' major plans would be to increase their distribution strength and spends on ATL activities.

## Progress Through Online Retail

Innerwear follows traditional marketing and buying practices, where customers want to touch-and-feel while buying. The performance of the brands on online is slow but showing encouraging growth.

## Turnover & Projection

The brands will grow to ₹300 crore in the next 2 to 3 years.

## Growth Rate

The brands are showing double digit growth, they have been consistently out-performing the growth forecast for last 2 years.



# > SWEET DREAMS <

**Brand:** Sweet Dreams | **Company:** SD Retail Pvt. Ltd. | **Year of Launch:** 1989 | **Headquarter:** Ahmedabad (Gujarat)

With over two-and-half decades of existence, Sweet Dreams is among the pioneers of sleepwear in India. It has been one of the few sleepwear brands in India that have stuck to the specialty of quality pajamas all through the years. Recently, the brand ventured into other complimentary categories like athleisure, which gave them a good share in the sportswear market. However, it sticks to its core product of being a sleepwear brand with its latest campaign, 'sleep in style'.

## Focus Customers

Sweet Dreams offers sleepwear range for the whole family - men, women and children. In the recent past, the brand has gone through a transition and is now targeting the youth of India especially young couples who mostly live in semi-urban cities and usually in nuclear families.

## Product Portfolio

Sweet Dreams product portfolio comprises majorly of sleepwear sets, which are coordinated tops and bottoms in various fabrics. The brand boasts of a collection of over 1,000 styles each season, which would be the largest collection any Indian brand would be offering at present. It also has a huge range of separates (tops and trackpants) across 15 to 20 different fabrics and for purposes like travel, lounge, etc. And, it also offers workout/athleisure range, which are made with specialised performance fabrics for the purpose of gym, yoga, dance, etc.

## Latest Collection & Theme

The brand's upcoming collection, Autumn Winter 2019 highlights an uprising on the acceptance of sleepwear. Sleepwear is no longer reserved to



bedrooms, it has transformed into various array such as home, travel and even casual outing with friends. Based on these, the collection offers wide and exciting range with a mission to take the wearer from bed to sofa to poolside and even to a park.

The collection will focus on all things soft. The brand has attempted to create the softest lux range comprising night suits and tracksuits that are super comfortable and are a style statement. Alongside, the brand is offering luxurious loungewear that can be worn throughout the day. In a colour palette of dark hues combined with bright tops, it has created a perfect day-to-night look where a modern Indian woman can easily step out of home for her daily errands or grocery runs.

## Primary Markets

The brand's primary markets comprises North India, parts of upper North India, Uttar Pradesh, Gujarat, Rajasthan, Pune and some parts of Maharashtra.

## Retail Presence

Recently, the brand has opened 5 exclusive brand outlets—Pune, Dehradun, Rajkot, Surat and Ludhiana—that gave a tremendous response to them. It has expansion plans into 5 more cities this year.

The brand is available with 400 to 500 MBOs and over 3,000 lingerie stores including traditional retail and regional MBOs such as Chunmun and Half Ticket. It also has presence in departmental stores like Central, Shoppers Stop, etc. Online also, it is widely available on all platforms ranging from Myntra, Jabong, Amazon, Snapdeal and PayTM.

## Exploring New Markets

Sweet Dreams aims to exploring the markets of West and South India to get a stronger foothold.

## Progress Through Online Retail

The brand has been in the online space since its inception, the response and progress has been great.



# > TAB91 <

**Brand:** TAB91 | **Company:** Garvit Knitwear | **Year of Launch:** 2013 | **Headquarter:** Ludhiana (Punjab)

Founded in 2013, Tab91 redefined the casual wear market by introducing an extremely trendy, young and colorful collection which became a big hit with shoppers. The brand has been built and grown on a simple philosophy of the 3Fs – Fabric, Fit & Finish – and strives to deliver only the best to its customers. Tab 91 products are available in leading multi-brand outlets in India, Nepal, Bhutan, Bangladesh and the Middle East. It also has presence in all e-commerce platforms in India and the US. For men and women with a keen sense of style, the brand aims to offer contemporary products and to deliver best value in terms of fashionable products, customer service and practices.

## Focus Customers

The brand targets youth in the age bracket of 16 to 35 years. Offering a complete range of fashion wear with modern designs, it aids customers who want to look smart and trendy yet want an affordable product range.

## Product Portfolio

Tab91 offers a wide range of menswear including t-shirts, track pants, shorts, capris, bermudas, lounge wear, night wear, winter jackets, wind cheaters, pullovers, sweatshirts and fashion accessories. The womenswear range include tops, tunics, western dresses, lounge wear, capris, shorts, digital and sublimation printed tops, plus size tops, woolen cardigans, pullovers, sweatshirts, woolen tops, jackets, ponchos, shrugs and a wide assortment of fashion accessories like caps, mufflers, hand gloves and woolen socks.

## Latest Collection & Theme

Tab91 expects its latest Spring Summer 2019 collection to be a game changer for them this year. The brand offers Lycra cotton round neck tees, plotter print tees, linen kurta with flat knit combination, engineered stripes, auto stripes, all over prints, basic polo and round neck collection.

## Most Innovative Product

The flat knit kurta with linen combination is one of the unique and innovation products from Tab91. Also the plotter print range of the brand was appreciated for its innovative collection.

## Category Expansion

Tab91 is aspiring to get in to new segment of casual shirts and denims very soon.

## Retail Presence

Currently, Tab91 has presence in 350 renowned multi-brand outlets and 20



shop-in-shops at strategic locations. The brand is also available on Flipkart,

Myntra, Jabong, Amazon, Paytm, Shopclues, Limeroad and all other major e-commerce channels in India. Recently, it tie up in UAE for selling Tab91 in the Middle East.

## Exploring New Markets

Tab91 has plans to enter the markets of South India. Soon, the brand will explore the markets of Andhra Pradesh, Telangana, Kerala, Karnataka and other southern markets.

## Turnover & Projection

Last year, Tab91 closed at ₹25 crore. Within the next two years, the brand is aiming to reach a turnover of ₹40 crore. It is also planning to open exclusive brand outlets in the coming years in the North and in the next 2 years it endeavours to have at least 10 exclusive stores of the brand.



# > V-STAR <

**Brand:** V-Star | **Company:** V-Star Creations Pvt. Ltd. | **Year of Launch:** 1995 | **Headquarter:** Kochi (Kerala)

The promoters of V-Guard Group launched V-Star in 1995. Since inception the brand has captured the hearts of millions with its exquisite, affordable and comfortable portfolio of innerwear and lifestyle products for men, women and kids. Under the guidance of its founder, Sheela Kochouseph, V-Star has redefined the benchmark for excellence in the world of fashion with its stylish spread of innerwear and lifestyle products. Today, V-Star enjoys a commanding presence in both innerwear and outerwear segment with significant market share in South India and the Middle East countries. The brand is poised to scale new heights of growth and success with a slew of ambitious business plans.

## Product Portfolio

V-Star showcases a superlative spread of bras, panties, comfy blouses, camisoles, leggings, t-shirts, sleepwear and shapewear that are designed to complement femininity in the most beautiful way.

The products for men include, t-shirts, polo t-shirts, vests, briefs, trunks, shorts and track pants in an array of shades and cuts. The kids' range showcases t-shirts, track pants, vests, briefs, trunks, panties, leggings, camisoles, tights and bloomers.



## Retail Presence

V-Star has already made its presence felt in major towns and cities across South India including Kerala, Tamil Nadu, Karnataka, Andhra Pradesh and Telengana through 16 EBOs, over 7,500 MBOs and 275 LFS. On the e-commerce platforms, the brand is available on Amazon, PayTM, Ebay, etc., along with its own website, www.vstar.in. Globally, it boasts of a strong presence in the Middle East.

## Exploring New Markets

At present, V-Star has a production capacity of more than 20 lakhs of innerwear and outerwear per month for women, men and children. With more than 75 distributors and 8,000 dealers, The brand is going strong in the markets of Kerala, Tamil Nadu, Karnataka, Andhra Pradesh and Telangana. It is also looking forward to going beyond these markets and explore new horizons of growth in other parts of the country.



## Latest Collection & Theme

For all those women who just can't help falling in love with new trends in fashion, V-Star has introduced a new premium innerwear collection, Precious Purple. Made from soft cotton, matching elastic, imported laces and micro-fiber fabric, the collection is a class apart in terms of style and comfort. It is being launched under 11 different models namely Ameya, Juana, Fiona, Helana, Adora, Biara, Rayza, Dalia, Alissa, Elice and Amanda.

## Most Innovative Product

In the women's range, V-Star has recently launched new designs in bras, panties and comfy blouses. The comfy blouses are trendy readymade blouses.

## Category Expansion

V-Star is planning to add more lifestyle products in to the product portfolio.



## THE CHANGING DYNAMICS OF THE MEN'S INNERWEAR MARKET IN INDIA

In a 2016 survey of 300 Indian men, 75 percent said their innerwear purchases were need based and not on what was trendy in the market. Why is this so? Underwear, to the common man, is not a top priority garment. The awareness regarding the product, usage, care and lifecycle is almost non-existent...

**Brijesh Devareddy,  
Co-Founder, Buttalks**

This is what the typical innerwear buying behavior of the average Indian male is like – men will spend time to pick out a shirt or a trouser at a retail outlet. On the way to the billing counter, they will encounter the strategically placed underwear section. Here they will head straight for their usual brand, the one they have always been using, the same style. They would go on to pick up ‘a few’ underwear since they don’t really know how many they will need. He doesn’t even see what the other brands in the neighboring racks have to offer. It is an almost blind purchase. Also, most Indian men tend to purchase innerwear before travelling, as they realise they might not have access to laundry and would need fresh underwear to last the duration of the trip.

In a 2016 survey of 300 Indian men, 75 percent said their innerwear purchases were need based and not on what was trendy in the market. Why is this so? Underwear, to the common man, is not a top priority garment. The awareness regarding the product, usage, care and lifecycle is almost non-existent.



Urban India aspires to wear global brands and trends, whereas rural India wants to wear what urban India wears. Brands like Amul, Rupa and Lux have played the value and volume game and caused a shift from the informal to formal innerwear market. Jockey is now an aspirational brand in India, while it isn't considered so overseas.

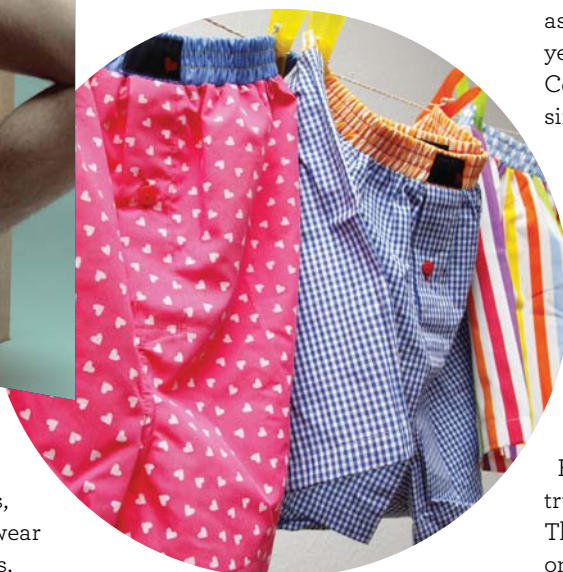
### Consumer Trends

ICICI Securities estimated the market to be worth ₹24,000 crore, with mid-premium and premium segments making up 40 percent or about ₹9,500 crore. This is expected to grow to ₹47,000 crore by 2020, and

consuming this grade of product and often do not venture into more premium products even if they can afford them. This is mainly due to a lack of awareness.

The premium and super-premium segments of the Indian innerwear market are expected to double in the next three years as they perceive that they have risen above the mass-market brands and have entered into the entry level products of international brands. Page Industries grabbed 55 percent of the premium innerwear market with its licensed brand Jockey.

One sub-segment which is gaining popularity is 'kinky underwear'. This isn't widely advertised or promoted as its conservative counterparts, yet it has a considerable demand. Consumers who are exposed to similar products globally, and with the LGBTQ community being more open, demand of such specialised products has greatly increased. Online shopping has made purchasing of these products easier, as one doesn't have to face the stigma of buying these from a vendor, face-to-face, as it is still considered a taboo.



Most Indian men tend to use their underwear well past their shelf lives, unmindful of any rips, tears, or loss of elasticity. Underwear usually last for around 30 washes, which means on an average, a pair of underwear should be replaced every four months. This isn't the case in India, where they are used for well over a year, unless they are rendered utterly unusable.

By and large, the industry has been quite stagnant in terms of innovations; there haven't been many game-changing disruptions, save for the increased accessibility to premium fabrics such as micro Modal, Tencel and Supima cotton by a larger audience, with new brands such as XYXX, Tailor & Circus, Damnesch and Dashing coming into the fray.

the premium, mid-premium segment is expected to double, growing at 17-18 percent CAGR to ₹20,000 crore by that time.

The Indian market can be divided into the sub ₹200, ₹200 to ₹1,000 and above ₹1,000 segments. Most of the unorganised sector falls under the sub ₹200 segment, which has been thriving so far on a customer base that has lacked awareness. This means that there is huge untapped potential in the market, with an enormous opportunity to grow. The growing middle class consumes products in the ₹200 to ₹300 price bracket. Consumers remain

However, the above statements hold true only for a niche set of consumers. These emerging trends are yet to catch on en masse, even among the urban populace, for the majority still treats such innerwear with disdain. Changing this perception is one among the many challenges faced by the men's innerwear industry in India.

### Challenges & Bottlenecks in India

The biggest challenge is the low level of awareness regarding what one should wear that will last for a good life span and the proper wash care instructions. Retailers don't try to educate their customers either as they are either not aware themselves or consider it delicate to talk to customers regarding a personal product such as underwear.

Also, the general public isn't aware of the value or existence of superior fabrics such as micro Modal, Tencel, Supima fabric, etc.

Packaging and marketing campaigns are also very generic and similar across brands, which make the consumer immune to product differentiation and value. Currently, they do not create a sense of aspiration, limiting the products to a necessity, rather than a want or craving.

Improved awareness would be an incentive for a person to discard a pair of underwear and get a new one. Manufacturers seem to play it safe by producing same staid colours and designs, instead of attracting consumers with bright shades and innovative designs. This repetitive product, though it has a long shelf life, it does not excite the buyer to buy more.

The usage of underwear can be compared to that of a toothbrush where users don't typically know when to replace them. A dental hygiene brand introduced a toothbrush that would let you know when to discard; maybe the underwear industry could take a cue from here.

The current buying experience of underwear isn't very friendly either. Most customers prefer sticking to their usual brand, as they are confident of fit and size. Men do not have the option of trying underwear before buying. Hygiene pads could be provided to customers thereby letting them try the product before buying. Some brands are now providing a free replacement or cash back if a customer isn't



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satisfied, which was unheard of until very recently.

### The Future of the Segment

In the days to come it would no longer be the norm where one shops for innerwear as an after-thought. Innerwear, once considered only as a basic necessity for personal hygiene, will become a proper fashion statement. What was once the bastion of staid white will be breached by the emergence, and acceptance, of bright colours, funky prints, and kinky designs. There would be specific products for sporting activities, for lounging, for the office, date night and so on. Underwear too would become like apparel where new products would be launched every season and the current shelf life of a particular product style would come down considerably.

Men will look for comfort, functionality, and style, while ensuring it matches their outfit and the occasion. The growing aspirations and increasing disposable incomes will only ensure higher consumption of premium

brands and goods but will insure increasing the market share of the organised sector.

Currently, the designs for underwear are universal but it's important to note that what works for Americans and Europeans won't work for Indians and Asians. Underwear needs to be tailor made for the local body type and weather conditions. When one wouldn't wear the same clothes for winter and summer, why should underwear be any different? Just as jeans would have a pencil fit, a relaxed fit and so on underwear too would be available with options, as the consumer who is aware will demand specific products.

Along with this, brands should be able to grow on the booming high street, e-commerce and omnichannel distribution models. While brick-and-mortar stores will never become obsolete, online platforms will contribute a large extent to the growing demand, as it is far more convenient to shop online, and at times cheaper.



### ABOUT THE AUTHOR:


#### Brijesh Devareddy


Brijesh Devareddy is a graduate in product design from Symbiosis Institute of Design. He founded Buttalks, India's only subscription service for men's underwear. He has a background in user empathetic research and development. His company Buttalks is an award winning personalised curated underwear concierge service for men.







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# SPORTS INNERWEAR NEXT GEN GROWTH ENGINE FOR THE INNERWEAR SEGMENT

The retail sector is working hard to keep up with evolving trends and consumers - especially the latter - who are demanding base layers that no longer look like functional underwear, but at the same time have all the functions of an underwear and much more - including being the perfect fit for a rigorous fitness regime...

**Gurbir Singh Gulati**

To understanding undergarments, one must comprehend that they are typically items of clothing worn beneath outer clothes, usually in direct contact with the skin, although they may comprise more than a single layer. They serve to keep outer garments from being soiled or damaged by bodily excretions, to lessen the friction of outerwear against the skin, to shape the body, and to provide concealment or support for parts of it. In the cold weather, long underwear is sometimes worn to provide additional warmth.

While these are bare essentials, the retail sector is working hard to keep up with evolving trends and consumers—especially the latter—who are demanding base layers that no longer look like functional underwear, but at the same time have all the functions of an underwear and much more—including being the perfect fit for a rigorous fitness regime.

### Sports Inspired Apparel

Sales revenue from men's underwear and women's lingerie items is expected to grow in India over the next couple of years owing to factors such as higher importance to personal hygiene, increasing disposable income, evolving lifestyle, improved standard of living, and changing preferences of consumers. One of the other important factors leading to its growth is the success of sports inspired apparel which in a way compliments the innerwear category also. The underwear segment in India is strongly focusing on being sporty to appeal the millennial.

Innovations being the key for product development the innerwear brands in India are now looking beyond aesthetic appeal. The sports underwear is seeing heightened activity in terms of functionality.

As the market develops we can expect to see more sportswear brands looking to incorporate functionality more typical of traditional underwear into their sports bra offering. Although this requires investment, added functionality offers both a point of difference in an increasingly competitive market and allows for a more premium price positioning.

The sports innerwear category consists of sports bras, active shorts for men and women, vest for men and women and camisoles for women. It is heavily subscribed to by young Millennials who want to define their fashion needs clearly.

As **Pranal Modani, Chief Business Development Officer, C9 (Sangam India Limited)** says, “The Indian demographic is evolving towards a younger population; with around 450 million people below the age of 34 years. We also have the fastest growth rate. If we combine this with growing urbanisation and globalisation, education level, there is a profound shift towards achieving a healthy lifestyle. With the advent of this healthy lifestyle; sports gear and sportswear market has seen a surge market size. These factors are leading to the recent popularity of sports innerwear.”

As **Pranal Modani, Chief Business Development Officer, C9 (Sangam India Limited)** says, “The Indian demographic is evolving towards a younger population; with around 450 million people below the age of 34 years. We also have the fastest growth rate. If we combine this with growing urbanisation and globalisation, education level, there is a profound shift towards achieving a healthy lifestyle. With the advent of this healthy lifestyle; sports gear and sportswear market has seen a surge market size. These factors are leading to the recent popularity of sports innerwear.”

### How Sports Innerwear Came Into Play

The Indian fashion segment has been witness to rapid changes and the gap between international fashion vs. domestic trends is narrowing. Today,



*“Men's wear comprises 40 percent of the market at ₹8000 crore, still lagging behind women's segment but showing a promising growth from last 5 years wherein a lot of established brands have entered the market. Consumer outlook towards this category is a major factor for growth. Today the consumers want to be as fashionable as possible even in their innerwear”*

**-Srikanth Ram,**

Business Head, Park Avenue & Color Plus



Indian consumers want to address their needs with a definite product solution. Like every other fashion category, the innerwear category too is undergoing this transition phase. On one side are the pure play sports wear brands like Nike, Adidas, Reebok, Puma, Decathlon, etc. which address the intimate wear category linked to performance sports and on the other hand are the core innerwear brands like Jockey, Dollar, Rupa, Dixcy, Lux etc. who create sporty silhouettes and an overall active look with their innerwear lines. These core innerwear brands are working on clean sports inspired active wear demands from consumers, trying to give their products with an edgy look with strong colour combinations.

Along with brands who are excited about the growth of this segment, consumers are also excited to adopt trends from this new segment.

Modani defines the advantages of sports innerwear saying, "Sports innerwear has evolved to use functional fabric and innovative manufacturing technology such as seamless manufacturing to provide wearer myriad benefits like sweat-wicking, better fit, and enhanced comfort. They improve the wearer's performance while engaging in a sports activity. Consumers are increasingly getting accustomed to buying specialised clothing for a particular occasion. If we take an example of a sports bra, there are high impact sports bra for vigorous activities and low impact for lower intensity workout. Any sports innerwear is selected by the buyer for maximising their performance."

The consumer is exposed to fashion in a big way and defines his life with its healthy aspects. Innerwear not only caters to his inner self personality but also personifies the fashion statement with every aspect of life.

**Srikanth Ram, Business Head, Park Avenue and Color Plus** says, "Today's youth go to the gym and are active participants in sports. The fitness quotient is an important aspect in people's lives. They want to look sharp even at the gym."

**How Sportswear Trend Has Affected: The Lingerie Industry**

The Athleisure apparel trend, hardwired into Millennial shopping habits, has started extending to underwear these days, which has a major effect on the lingerie industry. The youth have overthrown the yoke of body-poking wire bras for seamless and activewear alternatives. Comfort has always been—in the past 50 years—a



key driver for bras. Nowadays, however, women expect every part of their bra to be comfortable – and the definition of comfort has changed from slightly to completely.



The athleisure craze transformed how we used to think of sports bras: grey, thick, and strictly for gym class. Today, women wear their 'gym clothes' at all hours, no longer distinguishing workout wear from other categories in their closets. That's partially because exercise is considered very cool these days.

The sport bra's more feminine cousin, the bralette, has also seen a dramatic uptick in popularity. The latest fashion fads show off a lot of skin, and for that, a cool bra is necessary. Bralettes are available at all major outlets now; the 'it' undergarment. While millennials might be driving this trend, plenty of companies see a similar movement in the market with older generations.



**“Sports innerwear is moving toward a tight competitive environment and given the plethora of choices, the customer is becoming price sensitive.**

**Customer is also moving from unorganised retail towards organised retails outlets. Having said that, a big distribution and right marketing outreach can make a brand shine especially if they focus on sports marketing and celebrity endorsement”**

**-Pranal Modani,**

Chief Business Development Officer, C9  
(Sangam India Ltd.)

### Men's Innerwear Segment

The performance inspired clothing has effectively permeated every aspect of the fashion industry in recent years and has completely revolutionised men's innerwear too. Today men want underwear that, like sneakers, can take us from the office to the gym. There has been a lot of segmentation in the underwear industry.

The men's underwear market segment by type covers includes regular brief, boxer brief, boxer shorts, trunks and thongs.

### Key Product Innovations

C9: C9 is a women's innerwear and activewear brand. The majority of their clothing is based on seamless technology wherein they have high tech machines imported from Italy that convert functional yarn directly into garments. This provides the wearer various functional benefits like 4-way stretch, sweat-wicking, anti-chafing properties. The brand is committed to providing high quality clothing with trendy designs to the women of today at affordable prices.

*Park Avenue & Color Plus:* Park Avenue and Color Plus have made a mark in the intimate wear category with the

surge in market growth that shows they have gone beyond the basic product portfolio. The new trendy range of offerings from the brands are tailor-made to suit the consumer's needs of comfort, fit, style and unparalleled quality. Their new range has a wide range of designs and colour palettes with an affordable price tag in the premium segment.

### Future Outlook

The sports innerwear market for jogging, yoga and gym has been expanding in our country. Each innerwear maker has come up with the new products and new brands using their own technologies such as seamless clothing technology, easy-to-move structures, and special materials with the functions of heat-reserving, moisture absorbing, and heat generation.

The world over, a lot of fabrics are offered for men's and women's innerwear apart from cottons, like modal, nylon, silk, lace and polyester. While many changes are already setting in the country, we still need to catch up with the international trends showcasing a movement of sports and athleisure inspired innerwear category for both genders. Innovation will define the future of the innerwear category. The new age innerwear will progress towards newer advance materials which will provide ultimate comfort and flexibility to the active lifestyle of the consumer in India from indoor to outdoor.

On the whole the new category of ₹25,000 crore, athleisure, in India along with an increased focus of established sportswear brands is enhancing competition in this category. Sports stars and celebrities like Hrithik Roshan, Virat Kohli and MS Dhoni have also launched their own sports and lifestyle brands. A number of international and other clothing brand are jumping into the fray too to capitalise on favourable demographics and psychographics of the growing population of India.



A woman with long, wavy brown hair is sitting on a light-colored, tufted sofa. She is wearing a vibrant red, long-sleeved nightgown with lace trim around the neckline and a matching red robe. She is looking towards the camera with a slight smile. The background is a simple, light-colored wall with a window showing some greenery outside.

# INNOVATION & PORTFOLIO EXTENSION TO BOOST SLEEPWEAR DEMAND

According to a report by a leading global technology research and advisory company, the global sleepwear and loungewear market is all set to grow at a CAGR of nearly 9 percent during the forecast period 2019-2023. IMAGES Business of Fashion talks to renowned brands in the market to understand what is driving the market and the future prospects...

Rosy N Sharma

Once considered only as indoor wear, sleepwear and loungewear is gaining prominence as a category in the apparel market, with a promising future. Innovation in product design, product offerings, and new sub-categories are the key factors that are helping this category grow.

According to a report by a leading global technology research and advisory company, the global sleepwear and loungewear market is all set to grow at a CAGR of nearly 9 percent during the forecast period 2019-2023.

The report indicates that the increase in availability of sleepwear and loungewear products is one of the major trends being witnessed in the global sleepwear and loungewear market 2019-2023. Vendors are even entering the luxury segment to offer premium products to high-end customers. Moreover, the rise in middle-class consumers along with growing demand for branded products will help the vendors venture into the luxury category. During the forecast period, many existing sleepwear and loungewear vendors are likely to enter the luxury segment, which in turn is expected to boost the overall growth of the market.

According to dominant knitwear player, Lux, the sleepwear and loungewear market in India is creating a major buzz in the knitwear segment due to which knitwear has secured itself a prominent position in the fashionable apparel segment, beyond simple indoor wear. "Going with the trend, the future of sleepwear and loungewear seems bright and promising. The market is said to be growing at 20 percent CAGR, roughly," says **Udit Todi, Senior Vice President, Lux Industries.**

**Vishal Jain, Founder and CEO, Tab91** agreed saying, "Nowadays, the sleepwear and loungewear category is shifting from the notion of boring nightwear to becoming a wardrobe essential. The apparel category, is currently estimated to be worth ₹30,281 crore, which accounts for 10 percent of the total apparel market in 2018 and is expected to grow by 12 to 15 percent every year."

The relevance of sleepwear and loungewear has grown incrementally due to the kind of lifestyle that people lead in today's time, according to **Gargi Ruparelia, Head of Marketing, Sweet Dreams.** "Work, education, personal life, everything has become competitive and one is always on the go. With such a rollicking life comes the need to a quick comfort dressing when relaxing. Besides this, sleepwear and loungewear have also become a fashion statement with increased number of casual gatherings like pajama parties, movie nights and destination weddings," she says. "Also, Hollywood and Bollywood celebrities have been using sleepwear as street-wear making it extremely aspirational for customers."

Vishal Jain also adds, "We can easily see people wearing loungewear at the airport, to college, in shopping malls, etc. It is dominating every space."

#### Growth Drivers

The increase in the buying power and disposable income among consumers in Tier II, III towns and cities and even in smaller pockets has caused an uptick in spending patterns. According to the spokesperson of Rupa & Co., the company which offers loungewear solution through its brand, Bumchums, the sleepwear and loungewear category is growing rapidly across Tier I, II and smaller markets. "Consumers are increasingly exploring this category, driven by greater lifestyle consciousness and aspirations," says the spokesperson.



*"The relevance of sleepwear has grown incrementally with the kind of lifestyle that people lead in today's time. Even in LFS, space for loungewear and sleepwear has increased in share since the business they are bringing in is almost the same as lingerie. Aside from this, a lot of focused standalone stores of sleepwear and activewear have also come up as well"*

*-Gargi Ruparelia,  
Head of Marketing, Sweet Dreams*



Tab91



**“Most people today have become very particular about their outfits, they tend to wear it as a fashion statement and hence the demand for visually-appealing sleepwear and loungewear is driving the market. This is likely to lead to market expansion with more players foraying into this trendy, new segment which in turn will raise the demand for the product among the masses”**

**-Udit Todi,**  
Senior Vice President, Lux Industries



**“Western influences, changing trends and busy lives of people are the factors in general bringing about a drastic change in consumer acceptance of sleepwear and loungewear into their day-to-day lives. The category, currently estimated to be worth ₹30,281 crore, accounts for 10% of the total apparel market in 2018 and is expected to grow by 12-15% every year”**

**-Vishal Jain,**  
Founder & CEO, Tab91

**Dharmendra Nathvani, Owner and Director, La Lingerie** states, “With gradual development of social media and people having access to more content, information on essential sleepwear is out there and people are accessing it.” A prominent multi-brand retailer from the East, he stresses on the potential of Tier II and III markets. “The growth in these regions is tremendous as they have more spending power compared to our metropolitans. If the average ticket size of the product ranges anywhere between ₹2,000 to ₹3,000, then yes, the consumers are spending on this category though the percentage of people spending is still small when compared to the population of our country.”

“There is no doubt that the sleepwear and loungewear is a quick fashion option gaining much popularity among the youth,” acknowledges Udit Todi. “Like any other apparel segment, this segment too enjoys very high retail space today.”

“Even in LFS, space for loungewear and sleepwear has increased in share since the business they are bringing in is almost the same as lingerie. Aside from this, a lot of focused standalone stores of sleepwear and activewear have also come up as well,” states Gargi Ruparelia.

#### **Innovation & Portfolio Extension**

According to market analysts, the demand for visually-appealing sleep and loungewear is driving the market. Consumers today, especially women, are particular about their outfits and although sleepwear and loungewear are worn inside the house, the preference for visually-appealing products with better features is high. Retailers are innovating, expanding their product range and catering to different requirements, hence attracting more customers and driving the expansion of the market.

Since comfort and style drives this apparel segment, the use of latest







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Sweet Dreams

***“The market is still unorganised, though gradually it is moving in the direction of becoming organised. Also with new companies coming up with more options in this segment, it increases the options available to the customer and encourages healthy competition between retailers as well”***

**-Dharmendra Nathvani,**  
Owner & Director, La Lingerie

fabric-technology has allowed Bumchums to design and deliver stylish products, which feel great on the skin while being extremely comfortable. Some of the latest tech-innovations adding value to the segment are wrinkle free fabric, bio-wash fabric and i-cool finish.

“Seamless is the latest technological shift that we are seeing right now. Fabrics such as modal, organic fabrics and dry fit are the new age fabrics to work with. Brands are aggressively catering to the demands of the consumer by bringing in a shift in their collection,” says Dharmendra Nathvani.

“In terms of fabrics, lots of breathable, super soft treated fabrics are in. New technology like fragrance fabric is also being used internationally,” adds Gargi Ruparelia.

**Bridal Sleepwear**

Another trend which is big in the sleepwear and loungewear segment is matching couple sets and customised apparel. According to Gargi Ruparelia, bridal and bridesmaids sleepwear is a very special category. At

***“Since comfort and style drives this apparel segment, the use of latest fabric-technology has allowed Bumchums to design and deliver stylish products, which feel great on the skin while being extremely comfortable. Some of the latest tech-innovations adding value to the segment are wrinkle free fabric, bio-wash fabric and i-cool finish”***

**-Company Spokesperson,**  
Bumchums by Rupa & Co.

Sweet Dreams, they offer good quality products with imported fabrics and luxe designs. “These are specialised engineered products, as they need to fit the best. Hardly any brands in India are doing this in a focused way but the scope is huge,” she says.

Vishal Jain also says that the Indian woman today is bold when it comes to aspirations. She is now choosy and has started giving importance to every single thing that she wears. He says that if organised, the bridal sleepwear segment is a very big segment and has the potential to grow at the rate of 7 percent per annum, and the Indian consumer is ready to pay for a special product.

**The Road Ahead**

According to the Lux company spokesperson, most people today have become very particular about their outfits, they tend to wear it as a fashion statement and hence the demand for visually-appealing sleepwear and loungewear is driving the market.

“There is a tremendous opportunity in this segment, but we still need to create a lot of awareness in multiple cities for the benefit of comfort and fashion to be worn at night,” says Dharmendra Nathvani.

“There are lots of new untapped consumer segments who can be converted to organised sleepwear,” concludes Gargi Ruparelia.



Bumchums

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CHANGING  
DYNAMICS  
IN PREMIUM  
& BRIDGE  
TO-LUXURY  
INNERWEAR  
SEGMENT  
IN INDIA

There was a time when for the Indian intimate apparel industry, an underwear was functional – something that just did the job; why pay more for something that is on the inside and not visible to anyone? Here's a look at how this viewpoint has changed over the years, triggering a befitting change in the dynamics of the intimate apparel industry in India...

**Yogesh Kabra, Founder, XYXX**

Innerwear for men and for women is not just a basic necessity but something that shapes the future of their personal hygiene. The Indian Intimate Apparel Industry has evolved for better with time. However, the same industry earlier had limited the notion of underwear to bare minimum. For this industry, an underwear was functional – something that just did the job, because why pay more for something that is on the inside and not visible to anyone? Here's a look at how this viewpoint has changed over the years, triggering a befitting change in the dynamics of the intimate apparel industry in India.

Premium and designed luxury innerwear segment for women, also known as lingerie, changed the perspective for women and turned the basic necessity innerwear to something that every woman wants in her wardrobe, making the product aspirational and a need. An Indian woman today is

experimenting with brands of new age like Pretty Secrets, Soie, Clovia, Zivame, etc., with new age innovative cuts and functional properties and thereby creating their own niche in the ₹11,000 crore market.

The wave of premium innerwear hit the women's innerwear segment first and that is how the trend started. Designer innerwear advanced technology and industry trends, the luxury innerwear segment started gaining some recognition. The premium innerwear brands like Hanes, Calvin Klein, Hanes and Fruit of the Loom are some of the brands which are prevailing in the market providing different ranges of innerwear from affordable to premium. Some brands market themselves as brands who want to cater to the masses, while others are positioned as premium innerwear brands. It was eventually with the awareness of consumers and arrival of global brands that the gates to luxury innerwear were opened.

Innerwear category in itself is like a study to understand the consumer buying pattern as it begins at basic commodities but expands its horizons to most premium intimate wear. Consumers are

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## Indian Innerwear- Market Size & Segmentation

The innerwear segment in India is bifurcated according to:

### Gender:

**Men-** Vests, Briefs, Regular Briefs, Boxer Briefs, Boxer Shorts, Trunks Briefs, others

**Women-** Lingerie, Shapewear, Sleepwear, Sportswear, Maternity wear, Athleisure

### Geography:

Asia Pacific, Europe, North America, LAMEA

### Distribution channel:

Mass Merchandisers, Specialized stores, Mono Brand Stores, others

### Price Range:

Medium, Economy, Low, Luxury, Super Premium, Premium

### Age Group:

36 years and above, 18-35 years, 13-17 years

more aware and flexible now because of the approachability of new trends. Brands are taking extra effort as they know that today a customer's trust can be gained only by having products that are game changing and designs which are relevant in today's day and age. Customers are the best reality check any brand can get, they are always honest and more fashion conscious now than ever. Customisation of products portfolios is also something which shows that how diversified and skilled the designs of the brand are. Sticking to the USPs of the product, be it colourful prints or the best fit with premium fabric has always proved to

be fruitful as it gives you credibility for brand recall.

With cutting edge technology, innerwear segment is more thorough than it seems to be on the outside. Brands are open to looking at trends and processes from around the world, thanks to the advancement in technology and social media which has made advertising and marketing more transparent than ever. Customer retention and communication has improved drastically with the help of social media and website engagement. It not only helps in building trust for a customer but it helps in making the brand more approachable. Adaptability to market trends and developing the flexibility to adjust with the prevailing scenarios should be a thriving culture of and practices in the market to steer you clear for originality and approach's sake.

### History

The 70s and 80s were the decades when innerwear brands took a turn for the better and started to evolve on the footsteps of the fashion industry. The manufacturers and retail soon caught on to the logos trend and started using consistent names which went on to become famous underwear brands. The customers didn't really give any serious consideration to the underwear section, it was a basic necessity earlier and people did what was the basic minimum. It's said that brilliant advertising is not just catering to the need but creating a need in the consumer's mind when there was absolutely no awareness of the product.

The 90s brought the consumer power in the market which changed the nature for innerwear segment. Small labels started developing into brands and correct marketing changed the course of nature for many brands. If 90s was the beginning of something game changing, it was the 2000s that showed the results of the first wave with a breakthrough.



More than 8,000 distributors are engaged in ensuring the reach of Indian Hosiery industry and the brands involved. A lot depends on the strategies and practices adopted by brands for their sales and ad-campaigns. Innovative market and content trends can help the brand gain recognition and increases the organic reach according to the reliability.

### Present Scenario

With so much competition in the e-commerce sector, it's considered that the era of retail has ended. However since the retail space is limited, there is always going to be a showdown of the best brands to acquire the space with new fervor and competition. It is expected that the innovative retail strategies will be launched to woo retailers and to make sure they are always on board with new direct marketing strategies.

The widely popular women's innerwear market witnesses a slower pace of consolidation and it is equally slow to welcome new players. The lingerie market has well established brands and they cater to an audience of women who are not much inclined towards experimenting as innerwear is something so personal, that people go with their trusted brands for the longest time possible.

While the men's innerwear segment is gaining its momentum and it's really exciting to see where the trajectory lands. The thriving intimate wear market caters to the young audience and an audience which is more aware of the trends. So keeping up and competing in a world where everything goes viral in minutes, the only key is to be on your toes and be a step ahead in the trend game.

One of the reasons that brands are catching up slow is because the market is ready to cater to the need of price and availability but misses out on

PREMIUM INNERWEAR BRANDS LIKE HANES, CALVIN KLEIN, HANES AND FRUIT OF THE LOOM ARE SOME OF THE BRANDS WHICH ARE PREVAILING IN THE MARKET PROVIDING DIFFERENT RANGES OF INNERWEAR FROM AFFORDABLE TO PREMIUM



The Indian innerwear market was evaluated to be worth ₹19,950 crore and is estimated to grow at 13 percent to reach ₹68,270 crore by 2024. Until the 1970's era, innerwear was still inside the closet as a basic commodity and was overpowered by the organised sector which entered the Indian innerwear market after 1990's. It was between 2000 and 2008, that major international players owning premium brands entered the market. Later, the Indian innerwear market started expanding with the help of various retail formats

such as EBOs, departmental stores and LFS.MBOs are considered as the ones selling the most in innerwear retail outlets, as it serves a larger audience. Featuring your brand in MBOs gives you an upper hand on recognition over the other brands as you are featured among the most innovative design and trends. EBOs cater to its own audience in larger cities and with time, more and more women prefer EBOs and don't mind walking into one.

the customer needs. The market is constantly in the need of an aggressive player who is inclined towards investing heavily in marketing and puts customer experience at the centre of everything it does. It might be a slow consolidation rate for some years, but it has proved to be successful for many new age home grown brands. According to the reports by Technopak, the current innerwear market size is worth ₹27,931 crore which is estimated to grow at a CAGR of 10 percent over the next decade to become ₹74,258 crore by 2027.

>

### New Fabrics & Trends

Innerwear should not just make you feel comfortable on the inside but should give you a refreshing confidence whenever you step into it. The Indian audience is rising above the solids and boring Whites. From pop colours to luxury underwear with silver waistbands, brands have expanded their product portfolio like anything. Not only in terms of design and patterns, but there's equal experimenting with fibres. Technical advancements have led us to innovating in our fabric and we have moved on from basic cotton. Materials like micromodal are coming into age. It is finely extracted from the pulp of beechwood trees and then constructed into a fiber, which can put the finest cotton to shame. Advancements have been made in innerwear to give customers a better and hygiene friendly experience which can save them from yeast or bacterial infections. While a brand in US manufactures underwear for war soldiers with sensors which is helpful in preventing internal pelvic wounds during war time.

### Modern-Day Customers

The exposure to various international brands and organised players has kind of contributed in the Indian innerwear market growth as it made customers familiar with the concept of luxury

innerwear. Customers are well informed about the quality standards and consequently more inclined towards buying more products. With increasing number of working women keen on spending on luxury items, the market is boosted too. Adding various layers to products with more innovative colour palettes and design patterns has refined the innerwear industry to a more advanced and innovative community. This innovativeness and ideation not only caters to every kind of audience but has worked well for the brands as well, as it brings customer retention.

### Value for Money

The domestic innerwear market has been on the rise with the entry of global brands and premium innerwear brands. One thing which has really worked out for all these brands is the thriving nature to incite customer satisfaction. Customers are looking for comfort and quality over anything, and then come the affordability parameter which filters out the kind of audience which is targeted by brands for their premium ranges. With a diverse product portfolio, brand appeals to all classes which give any customer a wider range of options to choose from. Customers do not overlook crucial requirements like quality and comfort, and don't hesitate to pay a little more for better results. With increasing amount of disposable income, the international Indian customers are spending on innerwear more than before. Many established brands are focusing on introducing newer and better line, while adhering to customer satisfaction. The Indian consumers have come a long way from not exploring innerwear out of their neighbourhood to actually



visiting EBOs and MBOs to find premium quality and fabric. Premium innerwear lies in the mass range of ₹100 to ₹250, and the luxury range is from ₹400 to ₹3,000.

### Influence of Advertisement

With the "Make in India" programme, there are a bunch of rising entrepreneurs currently in the market who have understood the mantra of good advertising and importance of good products. If the products are genuine they are definitely going to speak for themselves but in this day and age of trending media, rising brands shouldn't miss out on the race for innovative marketing and really connecting with the consumers on a day to day basis through social media.



#### ABOUT THE AUTHOR:

##### Yogesh Kabra

Yogesh Kabra completed his MBA from Hult International Business School, Boston, where he was recognized on the dean's list for academic excellence. He specializes in supply chain management and Design Thinking. Before pursuing an MBA, Yogesh has spent 3 years in learning manufacturing process of woven fabric at factories across India (Bhiwandi, Surat, Delhi, and Tirupur). In the US, Yogesh worked at the Verizon Innovation Centre on a project to develop solution to integrate customer experience across all mobile and digital channels.



# CASUAL WEAR

## SPECIAL ISSUE



Casual wear has taken over the globe by storm! The fashion industry has probably not witnessed a force more unrestrained than casual wear in its past. Even India, a country that has always lagged behind global fashion trends, was quick to adapt to this casual way of dressing. And, with mounting western influence, entry of global brands and the rising penchant for comfort, casualisation is poised to only gain momentum in the near future.

The June issue of IMAGES Business of Fashion promises to take you on an odyssey of exploration, of the opportunities brimming in the Casual Wear segment in India. Along with it, the issue will also red-hot trend of Athleisure, which is fueling the contemporary, global mantra of Fitness First.

## IMAGES BUSINESS OF FASHION

### HIGHLIGHTS OF THE ISSUE

- >> Define and Size the Total market and its Main Segments
- >> Outline the Opportunities and Challenges
- >> Evaluate Top Global Casualwear Trends & their Pervasiveness in India
- >> Study its impact on Womenswear & Kidswear
- >> Showcase the ways and success mantras of Casualwear Brand Leaders
- >> Trend Forecast by Key Leaders of the Industry



### TO PARTICIPATE PLEASE TALK TO OUR BUSINESS DEVELOPMENT ADVISORS:

**BUSINESS HEAD:** Santosh Menezes, +91 9820371767, santoshmenezes@imagesgroup.in

**NORTH:** Gauri Srivastava, +91 9873800387, gaurisrivastava@imagesgroup.in

**EAST:** Pragati Kumar Sinha, +91 9804338455, pragatisinha@imagesgroup.in

**WEST:** Radhika George, +91 9833446767, radhikageorge@imagesgroup.in

**SOUTH:** Smriti Bhagat, +91 9686902343, smritibhagat@imagesgroup.in



**A NOT TO BE MISSED ADVERTISING OPPORTUNITY**

# C9 AIRWEAR: THE QUICK TICKET TO FITNESS

C9 Airwear brings to the table a range of progressive seamless wear that promises to maximise flexibility, mobility and performance, while enhancing consumer comfort and confidence...

**Team IMAGES Business of Fashion**

Launched in 2015, C9 Airwear brings to the table a range of progressive seamless wear that promises to maximise flexibility, mobility and performance, while enhancing comfort and confidence. IMAGES Business of Fashion talks to Pranal Modani, Director C9 Airwear, about the brand's range of shapewear and the dynamics of the category in general.

## EXCERPTS FROM AN EXCLUSIVE INTERVIEW...

**How has the popularity of shapewear grown over the years in India? What will be the average market size of the shapewear segment and at what rate is it growing?**

Shapewear and corsets enjoy huge popularity in the West and are rapidly gaining appeal among women in India. They are perfect for wearing under almost any outfit, ranging from trousers and tops, to shorts and tanks, to dresses and skirts. The shapewear segment has shown good growth in India driven by rise in disposable income of consumers, latest fabric technology and change in lifestyles of people. I would say that the segment is growing at around a CAGR of 9-10 percent in India.

**What are the consumers insights in as far as accepting shapewear goes and how is the category performing at the retail shelf?**

Honestly, the most obvious and common feedback is that it gives a slimmer experience. And slim, as you know, is always in. At the same time, it also provides shape to the body and it also has a few health benefits to offer.



### How has the shapewear segment grown globally vs. in India?

In the West, shapewear is more popular, as most apparel is body defining. In India, not many years have elapsed since women have started wearing dresses and skirts. Hence, it's only the younger generation, especially in the metros, which has started wearing shapewear. Older Indians are yet to get comfortable with the trend.

### Is shapewear only popular among women in India or it does enjoy popularity among men too?

Men's shapewear is also increasingly becoming popular as even men feel the social pressures of having fit look for wearing trendy slim-fit shirts and trousers.

### Share insights into your brand's product category and what are your expansion plans for the shapewear category?

As of now, we have 9 styles in shapewear in total—Full Body Shaper, Thigh Shapex, Brief Shapewear, High & Low Waist Brief Shaper, Open Bust Shapewear, Waist Belt Shaper, Thigh Shapewear and Petticoat Shapewear. What we are focusing on now is smooth contouring on targeted power zones.

### What are the top sellers in this category?

Compression wear is segmented into targeted zones for more a comfortable and slimmer look. Among product type segments, the waist shapers segment is most sought after and accounts for the highest value share. The market is also segmented on the basis of control types like firm control, light control, medium control and tummy control. The medium control segment is expected to account for the largest share in terms of value.



### What are the challenges in the growth of the shapewear segment what are the opportunities of growth?

The biggest problem is that the industry faces an acceptance challenge. There have been reports that assert that continuous wearing of shapewear can cause blood clots, acid reflux, breathing problems, etc. The truth is that experts claim if worn the right way, there would be no health implications at all.

Also, factors like technological advancement in garment design, lightweight fabrics, fashion that emphasises body shape, re-branding of panty girdles and celebrities wearing shapewear are contributing to the increased demand of shapewear.

### Shed some light on the new technology, styles and fabrics used in shapewear.

Companies are constantly innovating and providing new mix of fabrics to provide better comfort and performance to address the needs of rapidly evolving shapewear market. For example, a lycra and elastane mix shapewear offers versatility ranging from firm control to featherweight smoothing and from understated elegance to high fashion style.



***"Men's shapewear is also increasingly becoming popular as even men feel the social pressures of having fit look for wearing trendy slim-fit shirts and trousers"***

**-Pranal Modani,**

Chief Business Development Officer, C9  
(Sangam India Ltd.)





## QUALITY PRODUCTS, AFFORDABLE PRICES MAKE ZERO A HERO IN KIDS INNERWEAR SEGMENT

Pradeep Arora, Director, Zero, who has been in the business of kids innerwear for close to three decades now shares his understanding and market insights with IMAGES Business of Fashion...

When people go shopping for their children, the first thought in their minds is comfort. From comfortable, stylish clothes and shoes lead to relaxed, happy kids, so why should innerwear be any different?

In India, the innerwear category has broadened from basic requirement of commodity wear to designer wear with emphasis on styling and comfort. The Indian innerwear market holds immense growth potential and is slated to grow phenomenally over the next five years. When it comes to kids, the definition of innerwear is more refined.



***“The same garment is used as innerwear in winter and outerwear in the summer in a country like India. For instance, the child wears only a sleeveless vest as outerwear in summer, and innerwear in winter”***

**-Pradeep Arora,**  
Director, Zero

Innerwear for children is bifurcated on many factors – product type, category type, material type, and age group to name a few,

**Pradeep Arora, Director, Zero**, one of the country’s foremost kidswear brands, says innerwear for children is need-driven and performs multiple functions. “The same garment is used as innerwear in winter and outerwear in the summer in a country like India. For instance, the child wears only a sleeveless vest as outerwear in summer, and innerwear in winter.”

Arora owns a fleet of brands namely Zero, Teddy, Simply and Smarty. Showcasing clothes made from 100 percent cotton, all his brands offer an extensive array of products for newborns up to 12 year old children.

#### **The Market**

India is a price sensitive market and when brands like Zero offer good

quality products in latest designs at affordable prices, it appeals to the prospering Indian middle class. According to Arora, the kids innerwear market stands at ₹5,000 crore and it is growing at CAGR 25 percent.

“Since the customer is quality and price conscious one has to do justice with the product,” he says. His brand is of the firm belief that educated and informed parents want the best for their kids and will settle for nothing less.

“We have already set the trend of giving the best quality at a reasonable rates,” he asserts. The brand takes pride in having a pan India presence and supplying to the most remote of locations through the online medium. However, in case of kids innerwear, Arora says that offline stores have much more traction since parents are very conscious about the quality of the fabric they buy, so they go to shops to see the cloth for themselves and buy something only when they are satisfied. They could also check the cloth in offline stores and then order the same online.

#### **Fabric Innovation & Technology Adoption**

Fit, comfort and feel are crucial when manufacturing kids innerwear. Preferring 100 percent cotton over other fabrics, Arora says, “Every year, we add new fabrics to every brand. For manufacturing clothes for brand Zero alone, we use 40 types of fabrics. In our group companies we have more than 60 types of fabrics or even more. Additionally, every year we introduce new shades in all colours. Every year the patterns and designs change.”

His brands use latest technology at every stage of production including yarns, knitting, processing and printing. Arora concludes on a high note saying that his manufacturing units have just added new machines in knitting and processing.



# WACOAL TO INTRODUCE 3D HIGH-TECH MACHINES IN SELECT STORES

In an all-encompassing chat with IMAGES Business of Fashion, Tomoyasu Ito, Representative Director, President and Corporate Officer of Wacoal Corp., talks about the journey of the brand in India as well as their expansion plans in the country...

Charu Lamba



**I**t was while serving during World War II at Imphal in India, that the founder of Wacoal, Koichi Tsukamoto, realised the importance of innerwear and more than that, the introduction of comfort as an important factor. Post the war with more women taking up roles and duties beyond being housewives and the westernisation of women's clothing, the need for good looking yet comfortable lingerie started being felt acutely. Tsukamoto wanted all women to feel beautiful and confident, and this became the base of his concept of introducing lingerie brand Wacoal in 1947. Over the years, Wacoal—which operates in over 70 countries—has risen to become the number one brand in the lingerie segment in Japan. Other big markets for the brand include US, the UK and China. "For us, it seems like the perfect opportunity to expand our presence in India, since the country is one of the fastest growing retail markets in the world with 1.3 billion people," says **Tomoyasu Ito, Representative Director, President and Corporate Officer of Wacoal Corp.**

The brand's mission is to contribute to society by helping women express their beauty and this goal extends to the 600 million women in India.



Wacoal has been in India for 4 years now. We took the time to understand consumer requirements in India - fit, quality and sizes are extremely varied, and launching products in American sizes wouldn't address their concerns. Measurements of around 40,000 women were studied and researched upon to enhance the comfort factor. Now, Wacoal has various products of different fits for women. The rate of repeat customers of the brand is 35 percent.

**Tell us about any recent innovations you have introduced.**

'Fit and comfort' of the product is considered to be the biggest USP of our brand. Wacoal has its own manufacturing units all over the world where we produce over 80 percent of our designs. We achieve high quality and high performance with the balanced mix of our own production units and research undertaken by Wacoal's Human Science Research Centre. This is our biggest strength that differentiates us from other brands. Instead of pursuing glamour, we pursue excellent supportability with unique materials and designs based on the research and development.

We are all set to develop exclusive merchandise for the Indian market and plan to expand this in the coming years.

Apart from this, in Japan, we are in the process of placing 3D high-tech machines which will help women understand the exact sizes that they should buy. And if the experiment goes successful then we will be soon launching this technology in all our stores.

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*"Technology has, in recent times, created a knowledge revolution, dissipating information at everyone's fingertips. Naturally, customers are today aware and empowered at a global level and this is bringing in huge changes in his behaviour. The modern customer is absolutely confident, is content specific and exhibits a growing penchant for luxury"*

**-Tomoyasu Ito,**  
Representative Director, President &  
Corporate Officer, Wacoal Corp.

**EXCERPTS FROM THE INTERVIEW:**

**How, according to you, is the lingerie market evolving in India? What is the current positioning of India on the global business radar?**

India's upper middle class is growing rapidly, aided by a GDP growth of over 7 percent annually, followed by an increase in disposable income. In fact, disposable income is actually growing faster than GDP in the country. Despite the fact that a majority of customers are price-conscious, there has been an increase in the introduction of premium and international goods. We believe this market change will accelerate in the next 10 years, and this is why we think it's a great idea for Wacoal to expand its presence in the country.

**How is Wacoal creating a niche for itself in the already established lingerie segment in the Indian market?**

### Which is your fastest moving product in India and globally and why?

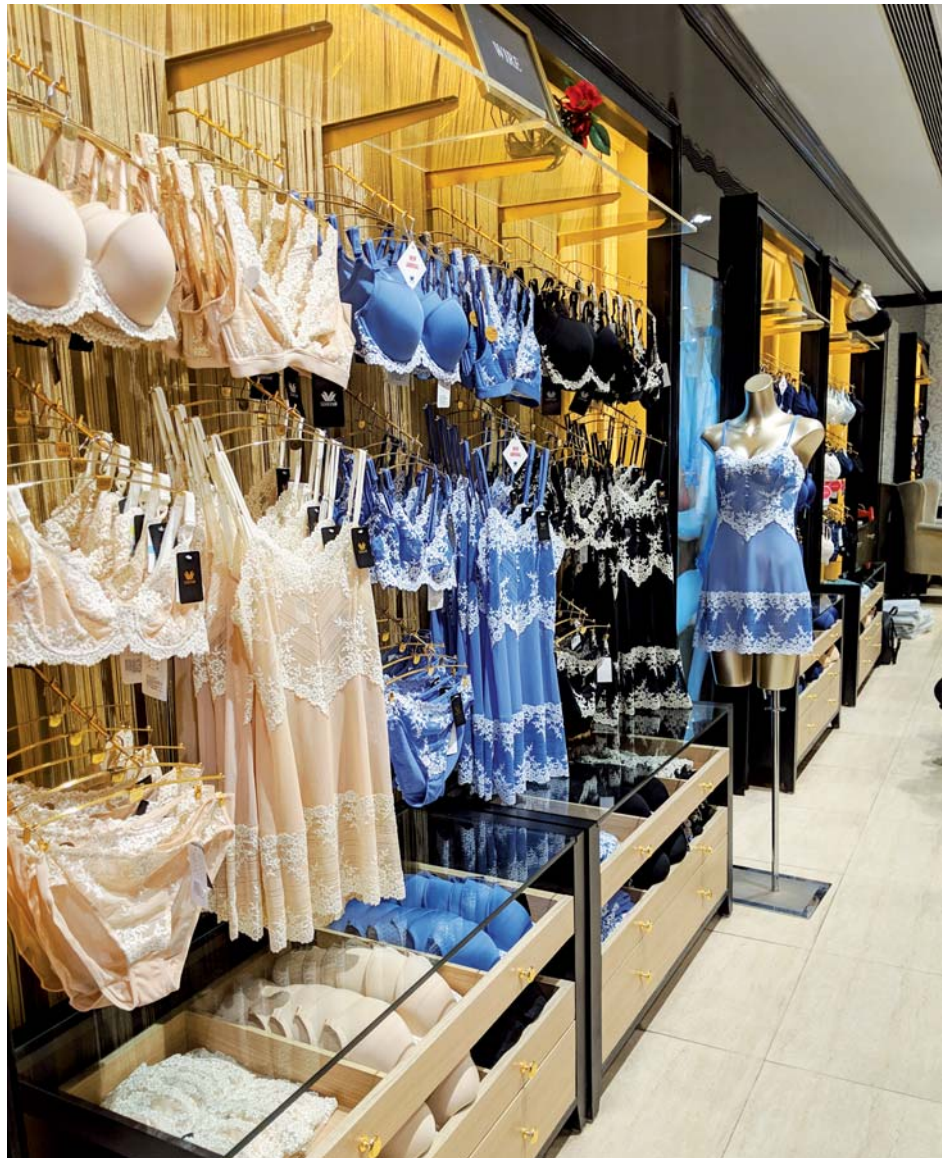
Gococi non-wired bra is one of our fastest moving products globally and in India. This is a seamless non-wired bra that provides great support and fit. What makes this unique is the peanut style pad cup that joins together the right and left cup.

### Throw some light on marketing plans for the coming years in India.

In the fiscal year 2019, where the number of stores is fairly small, our promotional campaigns will be focussed around the opening areas of our stores. This will be done through mall advertising, press ads in regional newspapers and outdoor advertising. By 2020 we plan to run nationwide advertisements which include brand ambassadors, TV commercials and an extensive PR campaign. At the same time, we will also promote on social media and other digital platforms.

### How much does online contributes to your overall sales?

E-commerce contributes 6-8 percent of total sales. In Japan e-commerce contributes 14 percent of total sales, in the US it is 30 percent.



### Share with us the insights about the brand's growth prospects in India.

Currently, we have 12 stores in India. However, we intend to launch an additional 15 stores in 2019, 23 stores in 2020, 30 through shop-in-shop model, and aim to have 150 brick-and-mortar stores in the country by 2021. All the stores will be owned by company. We will be growing our presence in Tier I and II cities such as Ahmedabad, Bhopal, Goa, Jaipur, Chandigarh, Hyderabad to name a few, taking the total to about 30 cities. In addition to setting up more stores in the existing markets, i.e, Mumbai, Delhi, Pune, Chennai, Bengaluru and Kolkata. Wacoal plans on aggressively focusing on 10 top cities taking advantage of existing operation network in all 4 regions such as West (Mumbai), North (Delhi), South (Chennai) and East

(Kolkata). We are also currently present on four e-commerce platforms, Myntra, Jabong, Tata Cliq and our own website [www.wacoalindia.com](http://www.wacoalindia.com), but sales are minor. We plan to strengthen our presence on these platforms first before we move to other platforms.

### How much are you planning to invest in India to aid the expansion plans?

Over the course of three years i.e from 2019 to 2021, we plan to invest US\$15 million.

### By when are you aiming to be profitable in India?

We plan to achieve US\$ 25 million revenue target within 3 years and US\$ 100 million revenue target within 10 years.

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# SAVE THE DATE

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# ANALYSIS: THE MEN'S INNERWEAR DOMESTIC MARKET

**The men's innerwear market is experiencing a paradigm shift as customers move over to sustainable buying. IMAGES Business of Fashion brings you an expert view...**

**Avinash Mane, Commercial Head - South Asia, Lenzing Group**

Innerwear is no longer a basic need. Earlier it was all about giving shape to the human form as per global and popular standards of physique and human structure. Innerwear is now about intimacy, security and comfort. It has become an extension of a person's personality. A style statement!

Brands are tapping on these new phenomena by proceeding to do away with traditional styles. Innovative brands are coming up with comfortable and stylish innerwear, albeit now, with sustainability in mind.

Since innerwear is no longer viewed as a commodity, functionality and eco-friendliness are becoming important aspects, both for customers and brands. This is why conscious brands have begun exploring innerwear ranges which is eco-friendly. This push for innovation, change and increased

responsibility is because of millennials and Gen Z, who are increasingly making informed buying choices.

A report published by PWC indicated that 21 percent of the respondents to a survey were willing to shell out an additional 5 percent on sustainable fashion and this includes innerwear. The expansion of intimate market is set to rise with customers demanding multifunctional intimates. Fibre and fabric manufacturers will also have to change their methods with changing demands for more sustainable material in the woven industry.

### Defining Factors Innovative Fabrics That Are Changing The Way Consumers

**View Innerwear:** Fabric remains the main feature which differentiates the product. While cotton has always been a preferred fabric of choice; it is clearly being explored with other fibres like spandex and modal. In fact this trend is on the rise. A lot of brands catering to the discerning consumer have started offering more options of cotton (Supima), spandex and modal (Tencel/Lenzing Micro Modal) thus mixing best of all worlds. Tactel (nylon) is another fabric that is being used owing to its strength and smoothness. Since comfort, innovation and performance drive the innerwear segment; game changing technologies have made way for such fabrics. On the forefront of these innovation is Tencel

Modal Micro (formerly known as Lenzing Micro Modal) which is a wood based cellulosic fiber. With elements like permanent softness, enhanced breathability, colour retention and superior hygiene properties, combined with style Tencel is a key addition to the men's innerwear market and has been doing wonders. Uniquely derived from renewable wood sources and produced using Eco Soft technology, Tencel cellulosic fibers answer to both the demand for sustainability and comfort and is a preferred choice among the key innerwear brands.

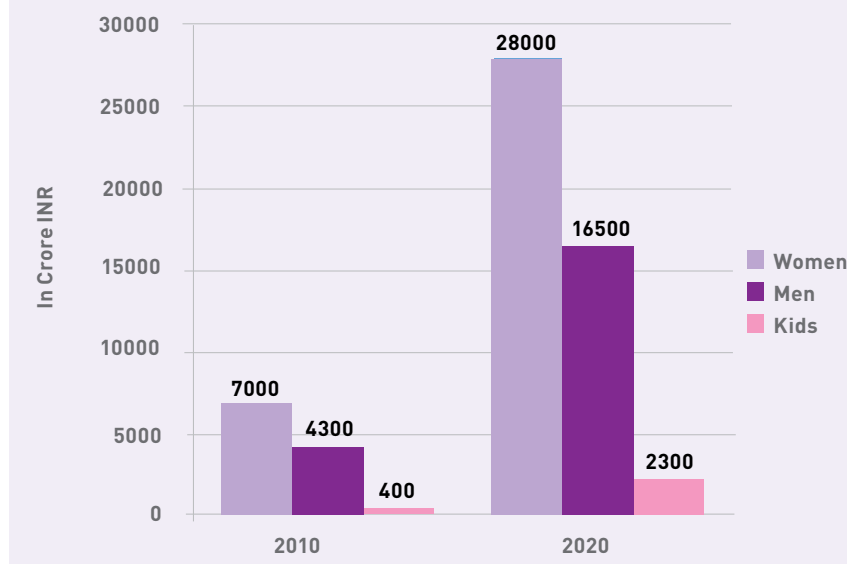
The innerwear industry can further be driven only if manufacturers take the lead in producing materials

of advanced technology without compromising on the 'green credential'. And it's not just customers, brands and apparel companies are becoming conscious of the after effects of fast fashion on the environment and are therefore focusing on sustainable material so as to not leave behind a carbon footprint.

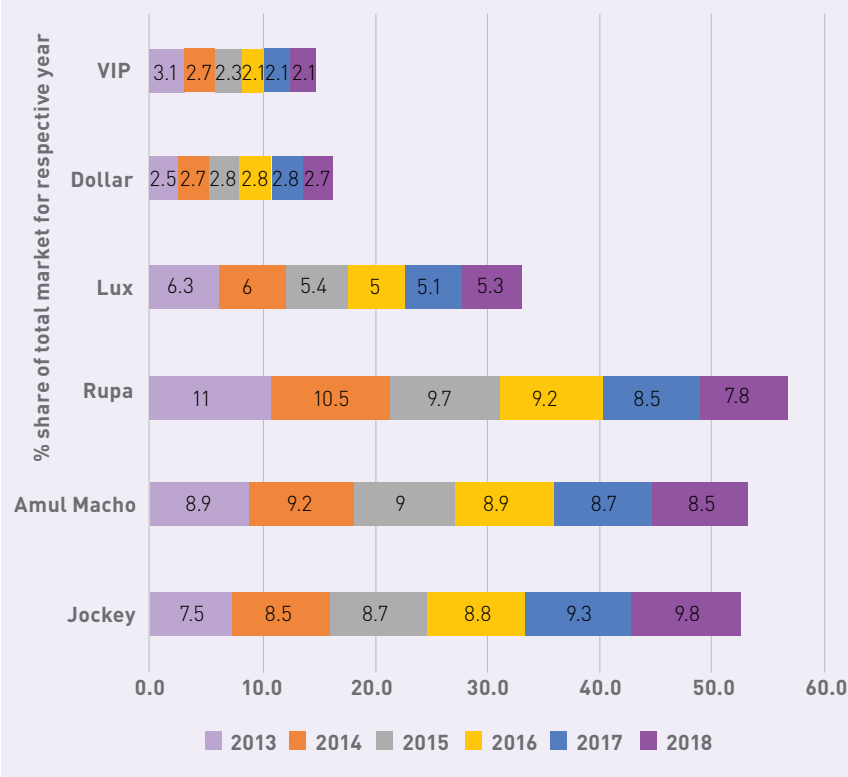
**Market Growth:** The Indian Innerwear segment has grown at 15 percent during the start of this decade (2010-2015). During this period, the share of intimate wear in the total apparel market increased from 6.4 percent to 7.1 percent. In the year, 2018, the segment witnessed sales of over a billion units for men's underwear alone. The segment is expected to grow equally well till 2020 and account for nearly 8 percent of the total estimated apparel market. It is expected to become a ₹47,000 crore market, by the year 2020. As disposable incomes increase, the focus has shifted to buying right and buying responsibly.

The Indian innerwear market is dominated by the women's segment which accounts for a staggering 60 percent of the overall market. Kid's intimate wear merely has a 4 percent

### INNERWEAR MARKET GROWTH 2010-2020



## TOP 6 INNERWEAR BRANDS-PERCENTAGE SHARE



share in the total market. The men's segment currently holds 35 percent of the total market. The men's innerwear segment is valued at around ₹8,500 crore. It had a CAGR of 14 percent since 2010. With increased disposable income and changing consumer behavioral patterns, the segment is expected to maintain its current growth rate reach ₹68, 270 crore by 2024.

### The Transition of the Market

Traditionally, the segment is highly unorganised and fragmented. Many small scale players operate in this segment and usually cater to their local regions and don't have a widespread distribution network. The segment is however, evolving due to the influx of global players and growing awareness. This has opened up the segment to intense competition and it is gradually moving towards an organised retail structure.

Until the 90's, the sector didn't receive much focus and innerwear was viewed as an essential commodity with little to no customization or focus on style and comfort. Innerwear was just a basic necessity and not a much talked about and discussed product. Sustainability was a farfetched concept, as brands were trying, back then, to simply normalize comfortable intimate wear.

As global innerwear brands began foraying into the Indian market in the early 2000's, the focus was generally to woo women into buying premium brands. The paradigm shift happened after 2010 with men also becoming the focus of innerwear brands. Today men are also making conscious buying decisions. Changing lifestyle choices has trickled down to the intimate category as well. This change in buying behaviors' is not restricted to India alone but is being seen world over. This has resulted in the phenomenal growth in this segment over the last five years.



**Brands & Patrons:** A number of global and Indian brands dominate the men's innerwear segment. Six brands grab nearly 36 percent of the market share i.e. Jockey, Amul Macho, Rupa, Lux, Dollar and VIP. Premium brands include UCB, Levis, M&S, feuk, CK, Gant, Emporio Armani, etc. In order to retain its core customers but also foray into the premium range, Indian brands like Rupa and Amul have introduced premium brand extensions like Rupa Euro, Rupa Macroman, Amul Macho.

New brands like Levis innerwear and established ones like Jockey and Macroman which are popular among Indian masses increasingly been using Tencel (Lenzing Micro Modal) in their products to offer better choices to their consumer. Interestingly, there are new Indian brands like XYXX Crew, which produce majority of their collection using Tencel (Lenzing Micro Modal).

### Consumer Segments

**Who Buys What & Why:** Research shows that men's innerwear consumers can be segregated into four core categories on the basis of their purchasing behavior. The first group consists of men from metro cities in high-paying jobs with high disposable incomes who seek only premium brands of innerwear. The



next is men with well-paying jobs from metro cities who assess multiple factors before making a purchase decision. Factors such as price, style, convenience, quality, etc., come into play while making purchase decisions. The third category is consumers from Tier II and III cities who aspire to live a lifestyle like those in metro cities and the last group consists of men with low disposable incomes who have cautious buying patterns.

According to a recent study, most customers prefer shopping for innerwear not more than twice a year. 10 percent of shoppers buy innerwear only once a year and prefer to buy multiple products at once. The innerwear category is usually purchased on the replenishment of existing stock which is why customers prefer buying innerwear in packs of two and three. However, with fashion kicking in and influencing buying behavior, impulse buying has led consumers to buy innerwear in singles as well.

Due to the demand for differentiated and sustainable options, men's innerwear is experiencing a gamut of offerings. Global brands are increasing their product range by diversifying into luxury loungewear and sleepwear. For



instance, big brands like Calvin Klein and Gap have already introduced a luxury loungewear range. Innovation is not restricted to product segments but has extended to product types as well. Brands are introducing various types of innerwear. For instance, briefs come in low-ascent, medium ascent, skyscraper and numerous cuts. Innerwear apparel players are extending their product portfolios by venturing into activewear, casual wear, formal wear, etc. Brands have created sub categories of men's innerwear like vests, briefs, boxers, shorts, pajamas, etc. Just like the women's innerwear segment, the men's segment also divides the product range into classes such as super-premium, premium, medium and economy segments. Unlike the women's segment however, the economy segment in men's innerwear is the highest contributor to total men's innerwear segment. It is expected that in the next five years, the premium and super premium categories are going to

witness a phenomenal growth due to growing brand awareness and fashion consciousness.

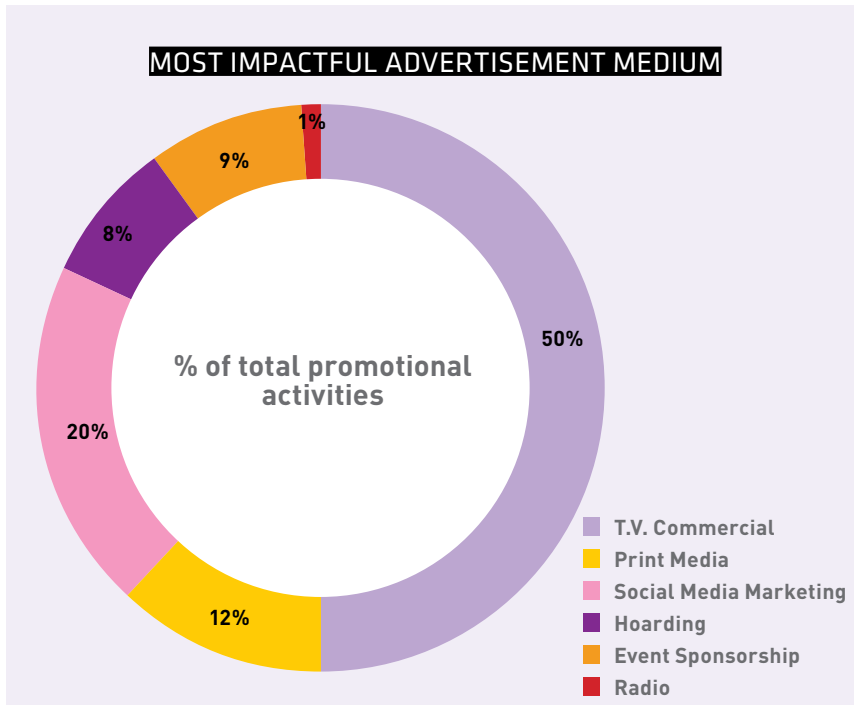
#### **E-commerce Vs. Physical Stores:**

Distribution channels play a very important role in the success of a product. It is becoming very important, in today's digital age, for products to be available where consumers are looking for them. Which is why, innerwear brands are making their presence available on online retail stores like Myntra, Amazon, Jabong, etc. Some brands have their standalone websites as well, in addition to being available on online retail stores.

In the physical market, Indian and foreign brands are available across all metro cities as well as Tier II and III cities. Local and small players also carry global brands in retail outlets. Premium brands either have their standalone stores in prominent areas or malls or they are sold in departmental stores with multi-brand retailing. Since most global and regional brands have a similar distribution model, there is no shortage of supply. When it comes to style, customers have a plethora of choices and a variety of styles to pick and choose from. But when it comes to sustainability, very few brands have a range to boast of. This is where some brands outsell others.

>





The presence of the innerwear brands across platforms, both online and offline, simply shows how rigorous innerwear brands are increasingly becoming about their visibility, awareness and popularity. Catering to the evolving Indian customer is making innerwear brands innovate. Not just with product type, but with promotional techniques as well. The fragmented and unorganised distribution structure increases the complexities for brand's interaction with the target consumers but marketers need to re-strategise and chalk out their marketing plans in line with evolving consumer needs.

**Ads & Promotions:** The category is highly advertised and celebrities

with widespread influence and fan following from Bollywood are roped in as celebrity influencers. The men's innerwear segment is the only segment to have a plethora A-list celebrities. Celebrities like Shah Rukh Khan, Salman Khan, Ranveer Singh, Akshay Kumar, Hritik Roshan dominate the scene. This could perhaps be because the segment in addition to advertising, is trying to create awareness about the product range and performance.

Ads are the most popular platform and the biggest promotional influence for the men's innerwear segment. In addition to TV ads, Print media with full page Ads are also popular, with brands foraying into in-shop branding, retail gate branding, product posters and event sponsorship. However, despite heavy promotional activities,



customer engagement in the innerwear segment is not very high. Brands are trying to bridge this gap by customized marketing. Brands are also trying to engage with young consumers and try and normalize conversation about innerwear and intimate wear. Combining brand engagement and customer buying behaviour, brands are trying to take a more customized marketing approach. Innovative marketing is the way forward in the men's innerwear segment.

From commoditising innerwear to later sexualising it after the 90's, brands are now focusing on ecologizing it. The innerwear industry has thus come a long way since then and is adapting to changing mindsets and changing preferences. As more and more brands try and grab a piece of the thriving innerwear market, competition is increasing. Both global and local brands are fighting for market share and volumes. While the competition for who rules the segment continues, consumers see innerwear as a fashion statement albeit with no guilty conscience. As the segment grows, most innerwear brands will face this challenge - how to differentiate their brand from that of the hundred others available. And while brands come up with new ranges of design, portfolios, new fits and styles - the greenest option is the way ahead to set a brand apart.



**ABOUT THE AUTHOR:**

**Avinash Mane**

Avinash Mane is the Commercial Head, South Asia of Lenzing. He is presently responsible for the complete business of India, Pakistan, Sri Lanka, Bangladesh, Thailand, Mauritius and Nepal markets for Textile & Non-Woven business. Apart from regular sales activities, it involves interactions with all key stake holders in the entire supply chain, providing end to end solutions to the Industry. He is responsible for coordination for providing sourcing solutions for global brands in South Asia market and for business development in various segments, driving marketing and co-branding initiatives for India and other South Asian countries.

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## HIGHLIGHTS OF THE NEXT MEGA ISSUE

**JUNE 2019 CASUALWEAR SPECIAL ISSUE:** The June issue of IMAGES Business of Fashion promises to take you on an odyssey of exploration, of the opportunities brimming in the Casual Wear segment in India. Along with it, the issue will also red-hot trend of Athleisure, which is fueling the contemporary, global mantra of Fitness First.

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- > Outline the Opportunities and Challenges
- > Evaluate Top Global Casualwear Trends and their Pervasiveness in India
- > Study its impact on Womenswear & Kidswear
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# LEGGINGS BRAND DE MOZA TO DOUBLE RETAIL NETWORK IN FY19-20

De Moza plans to double its retail network this financial year from the current 140 counters to 300+ which includes taking the EBOs to 20 along with introducing the brand in other leading department stores...

**IIMAGES Business of Fashion**

**L**eggings as a category is gaining prominence in women's wardrobe in India, owing to the convenience and comfort it offers to the wearer. Women can wear it for various purposes - to work, when working out or simply under a kurta for a fashionable look. This versatility has gone a long way in sustaining the demand of the product.

According to a recent study, the global leggings market is estimated to value at approximately US\$ 29 billion in 2018 and is expected to register a CAGR of 6.3 percent. The first five-year cumulative revenue (2018-2020) is projected to be nearly US\$ 95 billion, which is expected to increase significantly over the latter part of the five-year forecast period.

With the sales of leggings increasing in India, retail players are seen evolving with times, experimenting with different materials apart from the typically used nylon, lycra (aka spandex), polyester blend or cotton. Likewise, De Moza, the only brand in the county that offers the widest range of fashion leggings and basic plain leggings in cotton and viscose, introduced new fabric modal with anti-microbial and fragrance features. "Modal is a very soft fabric across fibers. We have developed a unique formula to make the fabric anti-microbial and in order to give a long lasting fragrance," says **Agnes Raja G, Founder and Director, De Moza.**





***“Modal is a very soft fabric across fibers. We have developed a unique formula to make the fabric anti-microbial and in order to give a long lasting fragrance”***

**-Agnes Raja G,**  
Founder & Director, De Moza.

### **The Rise of Leggings Segment**

According to Agnes, the leggings segment has been around since early 2005 but only started gaining traction in late 2009. “The main shift was from classic churidar bottoms which was a major category when traditional brands started introducing the mix-and-match concept,” he explains.

“Today leggings is a global trend due to its suitability for all occasions like active, casual, traditional, etc. You can wear them under a kurta or a t-shirt according to your occasion,” he adds.

A report on the leggings market finds that it is fragmented in India owing to low entry barriers. However, the

every effort to come up with an array of designs. This is serving to boost market growth. Thus, in order to stay ahead of competition in the market, leading players are banking upon quality products, solid distribution chains, strategic partnerships and brand recall.

### **Expansion Plans**

“We are looking to double our retail network from the current 140 counters to 300+ which includes taking our EBOs to 20 along with introducing the brand in other leading department stores,” says Agnes.

“Leggings are not just coordinated bottom wear to be teamed with traditional wear but has its own trends due to a wider fitment. It has become



initial capital required to set up a manufacturing unit is reasonable enough to attract new entrants. Bigger players particularly are pulling out all stops to improve quality and design of their products, while their smaller regional counterparts too are making

an integral part of women’s wardrobes today. The segment is not going down anytime soon. In fact, we will see a lot more fashion trends in the being incorporated into the segment very soon,” he concludes.



# SUPERSOX

PROVIDING  
INNOVATIVE STYLES  
& INTERNATIONAL  
QUALITY TO INDIAN  
CONSUMERS

Supersox was founded by Harsh and Vivek Saraf in 2012 with a vision to offer the widest range of socks to Indian consumers. In a freewheeling chat with IMAGES Business of Fashion, Harsh Saraf, Business Head, Supersox explained how his very young brand came to have a vibrant personality of its own, bringing superb quality and an international style to Indian consumers...

**Team IMAGES Business of Fashion**



There was a time when socks were just a utility garment – to keep one’s feet warm. Today, the definition of socks has changed tremendously. They are a fashion statement, there are special socks for sports which absorb sweat, odor banishing socks, anti-skid socks for kids, socks that prevent health issues like the growth of bacteria and fungi, athlete’s foot and promote foot health in general.

The increasing utility and popularity of socks has led to a growth in its market. Globally, men dominate the socks market. It has been found that nearly half of the men wear socks while performing their day-to-day activities. Around 50 percent of the global population uses socks every day. According to a global report, the socks market was valued around US\$ 11.7 billion in 2018 and is expected to reach around US\$ 24.16 billion by 2025, at a CAGR of slightly above 10.09 percent between 2019 and 2025. By region, Asia Pacific accounted for the largest market share in terms of revenue in 2018 and is expected to show good growth over the estimated timeframe. This growth can be attributed to the thriving retail sector in Asia Pacific countries, such as China and India, and increasing fashion trends among the youth.

In India, Supersox, which is a relatively new brand in the socks segment, is transforming the socks market with its wide assortment of products. Launched in 2012 with a vision to offer the widest range of the best quality socks to Indian consumers of all ages, the young brand with a vibrant personality



***“We acquired Disney licenses to launch their characters socks. At the this point we are focusing on exploring the vast category of socks, by focusing on the needs of narrow and small groups who have very unique requirements and are trying to constantly refine all our products continuously, to always remain best in class for our consumers”***

**-Harsh Saraf,**  
Business Head, Supersox

introduced socks of superb quality and international styles to the Indian consumers. “We have the widest range of products for any sock brand in the world, with over 8,000 SKUs catering to men, women, kids and new borns for all occasions and uses. Our brand’s primary focus is to provide the same great world class quality and to sell it at an economical and affordable price, to make it a go to brand for socks in India,” says **Harsh Saraf, Business Head, Supersox**. “Our product offering being so diverse, we currently cater to pretty much all of India. There is practically no product we do not make to take care of any Indians socks needs. We also make sure that Supersox should fit and fulfill all the requirement for any Indian men, women and kids with making consistent innovations in our product line.”

**Retail Presence**

Over the years, Supersox has strengthen its presence in the general trade channels and today it boast of more than 300 distributors and 12,500

active MBOs for the brand. “The brand is growing at a very good pace and is probably the fastest growing brand in the category,” states Saraf. “The journey so far has been very exciting and full of ups and downs, but overall has seen good growth, so despite being challenging it has been fruitful.”

It is present pan India, but its primary markets are Maharashtra and North India. Supersox also has an e-commerce website [www.supersox.in](http://www.supersox.in), which brings together the brand’s best collections of socks to the Indian consumer. It is also present on all major e-commerce sites including Amazon, Myntra, Flipkart, Jabong, etc. The brand delivers to more than 30,000 pincodes across the country.

**Fabric & Specialty Ranges**

The brand uses different materials to make socks such as nylon, wool, and cotton. It offers basics and solid colours in combed cotton, mercerized cotton and terry cotton for casual, formal and sportswear purposes.

In order to increase its product assortment, Supersox recently acquired licensee rights from Disney to manufacture and sell their range of characters for socks.

“We acquired Disney licenses to launch their characters socks. At the this point we are focusing on exploring the vast category of socks, by focusing on the needs of narrow and small groups who have very unique requirements and are trying to constantly refine all our products continuously, to always remain best in class for our consumers,” says Saraf.

“Aside from this, we have many specialty ranges including, frill socks, silicon anti slip socks, loafer socks, net transparent socks, denim collection, USA collection, Disney socks, winter socks, etc. Our latest collection includes Marvel Avengers socks, US collection, frill baby socks, classy missy



collection, denim collection, metal collection, season collection and many more,” he adds.

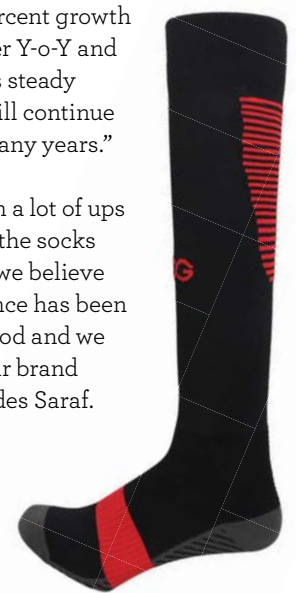
The brand’s most innovative product includes supergear socks, which are a special performance socks. It has been created keeping in mind the specific requirements of each sport. “We have been very regularly innovating and launching different socks patterns, qualities and designs,” he says.

**Future Growth**

Since inception, Supersox has been trying to reach and fulfill the needs of the complex and diverse population of India, and with its increasing e-commerce and ground presence throughout the country, it sure has captured new markets with new strategies.

Despite having a pan India reach, the brand is aiming to penetrate much deeper in all existing markets. Saraf says, “We have been steadily gaining 50 percent growth in our turnover Y-o-Y and we expect this steady growth rate will continue for the next many years.”

“We have seen a lot of ups and downs in the socks business, but we believe our performance has been reasonably good and we hope to see our brand grow,” concludes Saraf.



# MUSTANG SOCKS & ACCESSORIES: FINDING INNOVATIVE HEALTH SOLUTIONS THROUGH SOCKS

Launched in 1987, Mustang specialises in producing unique and colourful socks with special focus on fashion wear. The brand likes to be trendy, fun and relatable which is reflected in the products it creates...

## IMAGES Business of Fashion

Bringing in a legacy of over 3 decades with 21st century relevance, Mustang Socks & Accessories, started by Naazneen Katrak and Lubeina Shahpurwala, is a complete package of comfort, quality and customised quirky innovative designs. The brand symbolises trendy lifestyles, making socks a necessary fashion accessory for every occasion, across all age groups.

Mustang Socks designs are not only limited to school or regular office socks for men but have been able to break barriers in terms of making a mark in party wear, socks and accessories for lunch/dinner outings, football matches, evening outdoors, fitness regimes and so on. The brand caters to a wide range of customers – men, women, kids and toddlers, with unique designs, personalised to meet the needs of these different categories for different occasions.

The primary set of audience include youth in the age group of 15 to 25 years. Children in the age group of 0 to 14 years as well as senior citizens comprise its secondary audience, as they do not take front-end the purchasing decisions. Over the years, Mustang has gone from being just a socks brand to including other products in its portfolio. These include Leg Warmers, Tights, Leggings, Headbands, Wristbands, Children's Briefs, Children's Vests, Camisoles, Baby Handkerchiefs, Wipes, Biker Sleeves, Mittens and Bottle Covers.





**-Lubeina Shahpurwala**  
Co-Founder & Partner,  
Mustang Socks & Accessories

*IMAGES Business of Fashion talks to Lubeina Shahpurwala, Co-Founder & Partner, Mustang Socks & Accessories, about the latest offerings from the brand, expansion plans and future projections.*

## EXCERPTS FROM THE EXCLUSIVE CHAT...

### Tell us about your latest collection and its theme.

Our upcoming collection is designed specifically for the winter season. For this collection, we are mainly focusing towards offering the required warmth in the season.

### What are the top-most innovative products in your collection?

We realised that there was an increasing need for socks that would help people suffering from diabetes. Keeping this insight in mind, we designed a range of distinctive socks that are non-compression and come with special features like the gentle welt grip, a comfort cuff that has a soft grip on the leg aimed at improving the health problems of diabetic patients. They also help people suffering with blood pressure and water retention problems.

### What are your plans regarding new product range or category expansion?

Socks are always going to remain our key focus. Our vision is to change the



perception of socks from being just an ordinary commodity to an essential fashion accessory.

### Tell us about your primary markets.

Mustang has its presence across India with the help of a strong and reliable distribution network. Our focus is on the smaller untapped markets since our presence has been consistently growing in the larger cities.

### Tell us about your retail presence.

Our products are currently available at online platforms such as Amazon, Firstcry, Hopscotch, Myntra and Jabong. We don't have a retail presence of our own and are selling our products through a strong network of distributors pan India. We are now vying to introduce our own e-commerce platform soon.

### What are your plans for exploring new markets in India?

We already have a network of over 40 distributors pan India and we are constantly strengthening the same for a wider reach. Currently, we hold a



stronger presence in the north and west regions of the country. We do have a presence in south and east markets and are looking at increased partnerships and associations in this region.

### What has been your progress through online retail?

We see superb potential for business to go online with the influence of the strong internet user base that is constantly growing along with the various advancements in technology.

Our journey in the online space has had its share of challenges that include –operational, regulatory, digital, inventory management, promotions, returns and cancellations etc. It is our ability to prepare ourselves proactively to meet these challenges that will decide whether we will be a successful venture.

### What are your plans for the years to come?

We have a large presence in the Indian market and Mustang's share in the marketplace is growing every year. Our focus is to ensure that our loyal customers of 31 years continue to support us along with their families. Our Mantra of 'A Breed Apart' is what defines us in every respect.





## SIZE-INCLUSIVE LINGERIE BRAND FROM US, **PARFAIT,** LAUNCHED IN INDIA

**Distinctively designed to serve the full-busted woman with its expansive range of sizes, Parfait is dedicated to helping customers find the perfect fit...**

**IMAGES Business of Fashion**

**U**S-based global size-inclusive lingerie brand, Parfait has launched in India. Distinctively designed to serve the full-busted woman with its expansive range of sizes, Parfait is dedicated to helping customers find the perfect fit. Parfait's collections focus on both core and plus size customers, including 30 to 44 band sizes, D to K cup sizes, and M-4XL bottoms, making the brand a natural fit for India's growing plus-size market. Headquartered in Los Angeles, United States the company serves women across 20 plus countries through its 700 stores and online stores worldwide.

The company's venture in India is part of its global vision of delighting customers around the world through its products and services. Currently underrepresented even with overwhelming demand, at present more than 60 percent of women in India wear some amount of plus-size clothing. Parfait aims to fill this gap by offering their full-size range up to K cup and 4XL bottom (varying by style), available in silhouettes from bras to sports bras, boyshorts to high waist briefs, babydolls to bustiers.



***“There is a huge gap in terms of size and comfort and what is required and needed by plus size women to feel self-empowered and confident. The outlet for plus size intimate apparel purchases in India are much more limited than markets of other sizes. While there are mass merchandisers and discount stores offering products but only at lower quality and with limited sizes. Parfait lingerie will cater to this underserved plus-size market”***

**–Akhil Srivastava,**  
Managing Director, Parfait India



***“Bringing Parfait to India allows our brand to continue fulfilling its mission in offering high-quality, stylish and affordable lingerie to women around the world. According to recent statistics, over 90% of Indian women are wearing the wrong bra size. We hope to help change this by our offerings and help millions of women throughout the country find comfortable, supportive, and stylish lingerie that renews their confidence, comfort and health”***

**–Ken Zhang**  
CEO & Co-Founder, Parfait

the past few years due to the availability of brands, changing technology, changing consumer behaviour and increased awareness. The Indian lingerie market is growing at a high rate of 16 percent and is sized at US\$3 billion.

“There is a huge gap in terms of size and comfort and what is required and needed by plus size women to feel self-empowered and confident. The outlet for plus size intimate apparel purchases in India are much more limited than markets of other sizes. While there are mass merchandisers and discount stores offering products but only at lower quality and with limited sizes. Parfait lingerie will cater to this underserved plus-size market with stylish and supportive pieces,” says Akhil Srivastava, Managing Director, Parfait India.

Apart from its huge product offering Parfait also aims to educate customers and assist them in making right lingerie decisions. “There is extreme ignorance that prevails among women when it comes to buying lingerie. Most women don’t know their correct sizes and usually buy that is uncomfortable and unappealing. As per research, 80 percent of women in the USA wear the wrong bra size while for India, the numbers stand at a disappointing 90 percent. We aim to bridge this gap with Parfait,” he further added.

Parfait’s mission of helping women in India find their perfect fit establishes an opportunity to serve India’s underserved plus-size market and supports Parfait’s vision of delighting customers around the world through its products and services. With Parfait’s full support, India’s plus size customers will now be able to shop with confidence for comfortable, high-quality lingerie and feel beautiful and supported always.



The company has entered the country via 100 percent FDI. As part of its retail strategy the company will open shop-in-shop models in association with leading retailers across the country along with partnerships with leading e-commerce platforms and company website. “Bringing Parfait to India allows our brand to continue fulfilling its mission in offering high-quality, stylish and affordable lingerie to women around the world. According to recent statistics, over 90 percent of Indian women are wearing the wrong bra size. We hope to help change this by our offerings and help millions of women throughout the country find comfortable, supportive, and stylish lingerie that renews their confidence, comfort, and health,” says Parfait CEO and Co-Founder, Ken Zhang.

The Indian lingerie industry is seeing a growth that is unparalleled. It has undergone a transformational change in





# LINGERIE: GROWING FROM BARE ESSENTIALS TO BECOMING FUNCTIONAL & INNOVATIVE

Possibly the most neglected, yet definitely the most crucial foundation, of our clothing culture, innerwear has evolved and how. It's no longer just a category of just bare essentials but has gradually morphed into this mammoth industry balancing on functionality and design innovation...

**Aniket Satam, Designer & Guest Faculty, Istituto Marangoni**



Famous poet and playwright Oscar Wilde once infamously captured the monstrosity of our trend driven industry by saying: "Fashion is a form of ugliness so intolerable that we have to alter it every six months." Today this frivolous obsession of 'what's new' has altered our demands to few days from being a bi-annual affair.

One segment in the fashion department which is growing and how is lingerie. In the times of exhibitionism and liberal revolution, the lingerie industry has grown from being just a basic nude, black and white ripple into this huge tsunami of diverse varieties.

Lingerie may be occupying the smallest drawers of our closet, but it is the one piece of fabric which is closest to our skin. Possibly the most neglected, yet definitely the most crucial foundation, of our clothing culture, innerwear has evolved and how. It's no longer just a category of just bare essentials but has gradually morphed into this mammoth industry balancing on functionality and design innovation.

Here is an overview of the new emerging trends influencing the innerwear category.

#### Sports Illustrated

As sports and fitness takes the center stage, the gym look becomes more relevant than the airport soirees. And all thanks to the paparazzi culture, the talking point is a fit lifestyle once again. From Pilates to Yoga, the sports bra has emerged as one of the most modern essentials in every woman's wardrobe. And it's no longer just the usual, boring basic grey style anymore either, or the branded logo centric designs.

What's in trend is an eclectic mix of materials, sporty mesh inserts, bold contrasting colour blocking, statement athleisure details such as drawstring, buckles, straps, etc. and most strikingly, back detailing.

Super luxe, minimal lines and stretch shapes such as jersey bralettes, sports banded briefs and bikini sets are growing stronger. Brands such as Fenty by Rhianna and Offwhite have inspired this trend of



lingerie meets street style elements. Easy silhouettes, graphic details and maximum brand opportunities form the core foundation of this trend. High-leg silhouettes and tongue in cheek laced up ascents are fun yet comfortable to lounge in. They are multi-functional as they can easily oscillate from low-impact workout regimes to post sports lounging must haves.

For the less experimental crowd, there is the revival of the retro staples style from the 70s and 80s. The old school ribbed cotton jersey with the colour blocked elastic is doing great. Rewind and replay the retro aerobics videos for style inspiration. It's the right time to upgrade your everyday urban-style underwear with cool sporty ascents.

#### Honest Brands

Transparency of trade and authenticity of the product are two core factors which consumers expect for all purchases they make today. Campaigns are getting real and diverse. There is this immense wave of cross cultural pollination which is contributing to this melting pot effect in context of aesthetics and ethics. With the power of social media





and global awakening, consumers are demanding acceptance and appreciation of different ethnicities, shapes, ages and sexual orientation.

The new wave, the young ones, the Gen Z is questioning the air-brushed consumerism. The raw and the real, the unfiltered and unedited is the mood of the moment. Imperfection is celebrated like never before. There is no pressure to thrive for perfection, but the focus is shifted to embrace flaw-some-ness (how awesome are your flaws).

Fair trade awareness, growing ecological solutions to diversity integration and cultural appreciation, all of it is interlinked and fueled with this mass consciousness towards common ground initiatives. The prime

focus is to cultivate a new environment, which supports celebration of individualism.

### Fluid Categories

Sensitive economy, volatile trends and slow fashion consciousness is responsible for this new trend of multi-functional silhouettes, which easily transcends across design categories. The lines between intimate wear, loungewear and beachwear are blurring and crossing over RTW and activewear as well. Terms like 'inside-out' or 'bed to beach' are proving that this hybrid category is here to stay. Not only the style lines and design foundation but also the versatile and diverse application of new age fabrics is making this trend sustain and thrive.

Street-style mavericks are further adding stylistic idioms to layer their wardrobe mixes. From silk slips over denims, lacy bralettes over crew tee-shirts to men's boxer with crop tee's, there are no rules whatsoever anymore.

### Comfort Calling

Comfort is the ultimate king across categories. People are choosing textile innovation over overt decoration and on other sides brands are investing in patent science. Eco-friendly processes and textile science has taken the lingerie world into a whole new realm of comfort solutions. For example, the EVO yarn at Wacoal is created from castor oil plant with antibacterial properties and further treated for moisture management and odour-controlling finishes.

Post comfort, better fits definitely takes the main lead in terms of key product feature in intimate apparel category. Underwire construction is on hit list which still somewhere carries this colonial hangover of corsetry. This uncomfortable steel construction detail is now being replaced with new technologies such as the fluid curvessence 3D wire that follows the natural curve of the body for a more comfortable fit. The molded bras with no visible seams are here to stay and proliferate across categories as key construction foundation.

### No Looking Back

Back is the new erogenous zone and cleavage for sure is losing its spot for the next couple of season. With deep backless styles making its comeback for evening wear and resort styles going for maximum exposure, there is this immense demand for this uprising category of well fitted back less bra. Bras such as soft bras, no-wire bras and no-bra looks will prevail. Design details such as adhesive silicone wings, mono-wire structures, internal silicone pads and tape works not only provide great lift and shape, but also provide a smooth, clean neckline.

*The key moods for the coming season could be categorize in three main categories as below:*

- **Sweet Nostalgia:** This mood navigates across the poised and feminine grace. It's this poetic homage to the vintage elegance and old-school simplicity. Delicate details such as sheer frills, lace trimmings, cotton lace scallops are the key features of this mood. Vintage prints such as timeless floral, ditsy patterns, gingham checks and washed out stripes are major for this trend. Think about washed out fabrics such as hammered satin, brushed-back sweat and silk ribbed jerseys. Decorations have a hand-done feel inspired by hand embroidered surfaces such as floral sprays, French knots and calligraphic initial details. The overall mood is part rustic, part romantic with bold dosage nostalgic cliché. But, recreated in luxe eco-fabrics, subtle textures, intricate details and au naturel feel.

- **Micro-Manifesto:** This mood focuses on well-being and technology. The design details focuses on the lightness of being and celebrates the visceral and tactile nuances of nature. The products features are fine balance of sensual textiles, technical details and mood altering science. The focus is on creating lingerie with intimate experience, which is soothing, personal and utmost functional. Chromotherapy is explored in designing the products, which focuses on application of colour science on human mind. The mesh and laces construction for this theme mimics the microbial structures of the nano-biology around us. It's refined yet detailed, technical as well as organic. Prints and surfaces are blurred and watered down with painterly finesse. There is soft ethereal charm to the patterns which are all nature inspired. Enamored

>





elegance is maintained with delicate patterns on sheer bases. The barely their fabrics with innovative finishes makes this trend a cross bred between clinical precision with poetic grace.

- **Creative Chaos:** The mood captures the pulse of the global youth. Obsolete optimism is best way to define this theme. It thrives on individualistic expression of unaltered creativity. The designs are explosion of varied ideas, which all celebrate the quest for new directions and new dimension. The aesthetics

may be norm core but statement making. Basic is Bae – is the hero slogan of this trend. Youthful and zesty, fun yet responsible, this theme is all about Gen Z ideologies. Multi-functionality is the core of this trend. Rebellious attitude and revolutionary approach makes this trend a bold statement. Collage patchwork, splicing and blocking of color and surface treatments are done with a sense disruptive creativity.

Lingerie trends have encompassed the needs of modern times. From focusing on new-age sustainability to modern technological application, lingerie is becoming an integral link to trace the graph of modern lifestyle. From self-care to self-expression, innerwear has come a long way. It has truly evolved from being one's basic necessities into wardrobe essentials.



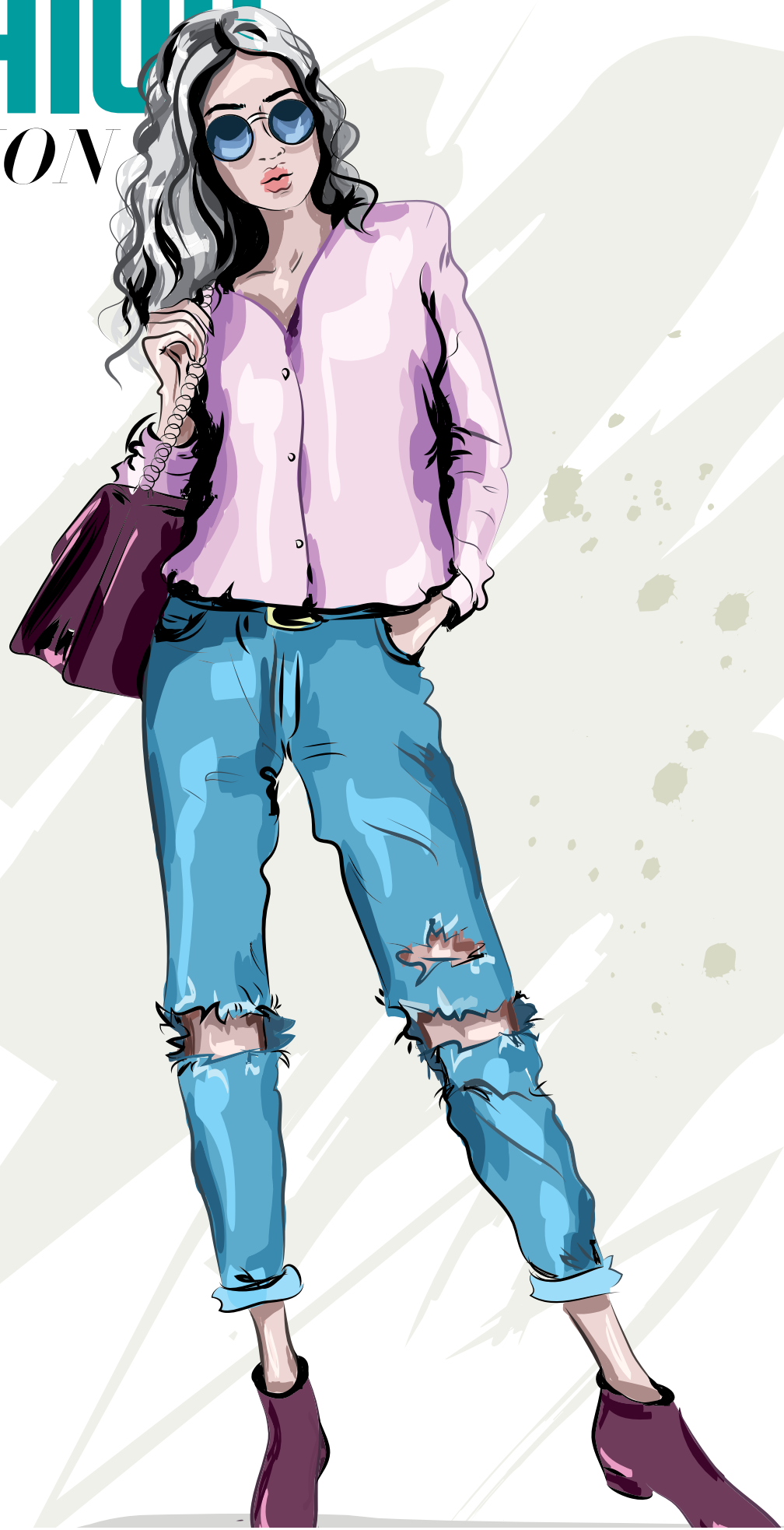
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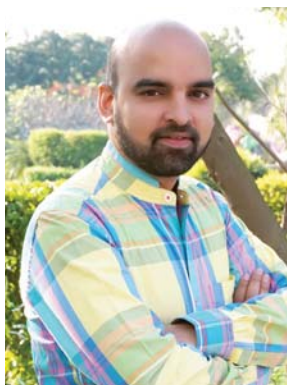
**Aniket Satam**

Designer Aniket Satam launched his label in the fall of 2012 at the prestigious HKTDC, Hong Kong. He debuted at the Lakme Fashion Week under the illustrated Gen-Next Category in the following year. In year 2016, Aniket won India's first national Fashion reality show – Sketch to Store, which was judged and mentor by Sabyasachi Mukherjee. He was awarded an exclusive short course scholarship for Istituto Marangoni at their Milan campus. On his return, he debut at the India Fashion week under the ELLE first cut show. His designs are spotted on spectrum of movie stars and public figures. Along with his label, Aniket also consults various independent design houses, exporters and fashion labels. From spring of 2018, Satam is part of Istituto Marangoni as their guest tutor. He teaches fashion marketing, communication, digital design and marketing, fashion advertising etc.



# FASHION CREATION





***“Our target audience is today's youth who is looking for a trendy and stylish range in sync with international designs, fashions and quality. Duke is a value for money brand and our mission is to make available these 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. Our ‘Shirts, Trousers and Denims’ Collection 19 is based on the same philosophy.”***

**-Kuntal Raj Jain,**  
Director, Duke Fashions (I) Ltd.



**D**uke has launched an impressive collection of various styles, colours and sizes in shirts, trousers and denims in its Spring-Summer'19 collection inspired by the fashion culture of South East Asian Islands. The range includes a complete array of fine-crafted, washed cotton shirts, formal trousers, denims and accessories with unique and creative designs for everyday wear and special occasions. The brand's cool and edgy style is embodied throughout its latest collection, featuring fun that blends high functionality with bold fashion statements.

The trendy and contemporary workwear formals are perfect for young professionals who want to express their sartorial tastes. The range caters to the needs of young men by offering a range of clothing for daily office wear which can double up as smart casuals for an evening out after. This range showcases bright and effected colours in half sleeves, full sleeves, Henley and collared shirts which provides snug fits and tailored fit comfort and yet are easy to maintain. There are button up shirts, which get cotton or poly cotton fabrics in breezy tones as well as stylish, well-cut trousers. Apart from these, Duke's new collection offers a wide selection of jeans from regular, skinny, to straight and slim fit; either light or heavy washed. With a collection of shirts, formal trousers, casual pants, denims and accessories, Duke combines a nonchalant look that defines today's man.

**Kuntal Raj Jain, Director, Duke Fashions (I) Ltd.,** says, “Our target audience is today's youth who is looking for a trendy and stylish range in sync with international designs, fashions and quality. Duke is a value for money brand and our mission is to make available these 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. Our ‘shirts, trousers and denims’ collection'19 is based on the same philosophy.”

The price range of the collection starts from ₹545 onward, which is easy on the pocket yet high on style.



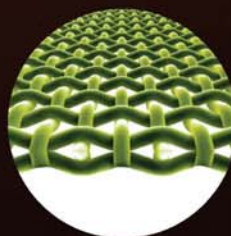


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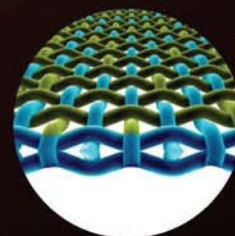
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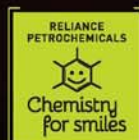
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## "FLEXIWEAR" SAYS SPORTO IN NEW CAMPAIGN

Sporto, an athleisure brand from J G Hosiery, has launched a new TV campaign titled "Flexiwear". Through a series of three films, the brand celebrates everyday sporty moments while at work or at home that demand high flexibility and agility from the wearer. Sporto's products can be used in any situation whether at home, at office or during workout. Fashion plus comfort is important and the ease and acceptance to wear the product at anytime is what the brand's new campaign speaks about.

The first film opens with a red heel flying towards the camera. That the heel is being thrown at the protagonist for sexting his girlfriend's best friend, who avoids it in a Matrix-style

backward bend. The second film shows him flying towards his office biometric machine in order to sign in on time and the third one follows his impeccable way of saving his boss' phone.

Elaborating on the campaign, **Navinn Seksaria, Joint Managing Director, J G Hosiery** said, "Sporto is a versatile range meant for both active as well as leisure wear i.e., Ath-Leisure wear, which has been an upcoming global trend amongst the contemporary youth. Our products come with stretch as well as comfort, hence it is flexible in its usage for all situations in life, whether casual sports or unwind or workplace. Hence, with this campaign we are positioning it as flexiwear, an ideal partner for life's everyday sports. The films speak to today's youth with a fresh, disruptive treatment and very

relatable situations." Conceptualised by Famous Innovations its **Founder and CCO, Raj Kamble**, commented, "With today's youth trying to max out both socially and professionally, their lives are no less than a sport. There is a sport hidden in many of their normal, daily activities. And Sporto Flexiwear with its athleisure offering was perfectly poised to tap into the same. We have attempted films that are relatable, yet entertaining and we hope they will help the brand stand out on television."

The campaign went on air since a few weeks, with high frequency spots during the IPL. It will be supported by digital, outdoor and print.





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## W LAUNCHES SS'19 WITH LIVAECO

Ushering in the seasonal flavours, W introduced #YOLO Dress, a collection that embodies sustainability...

**IMAGES Business of Fashion**

**W**ith sustainable fashion as the core mantra, W, the leading women's apparel brand recently launched its spring summer collection in association with Livaeco, fashion fabric brand of the Aditya Birla group.

The collection was launched with a contest, #WYOLOWOMEN, which was run across 4 cities, identifying and acknowledging sustainable practices adopted and encouraged by women. The brand picked 15 women, who were inspiring lives every day and they are featured in W's spring summer collection'19 catalogue.

Sharing at length about the brand's endeavour towards sustainability, **Anant Daga, Managing Director, TCNS Clothing Co. Ltd.**, said, "Sustainability in the realm of fashion industry is a relatively newer concept. We strongly believe that brands today have a great role to play in contributing towards a sustainable future." Last year W had launched a new line of Harit Khadi products styled by the company and the collection received huge encouragement from its customers.

Daga further explained that from inception, W, has always tried to be ahead of the Indian fashion scene. "The #YOLO Dress tailored in partnership with Livaeco is the perfect style statement that balances sustainability and fashion. It is our bit to comply to the environment by being more responsible and to introduce products that are natural, comfortable and affordable," he said.

### **The Ingredient**

Livaeco, the eco-enhanced variant of Liva, is made with the use of raw materials from sustainable and certified forests, lowest water consumption and low greenhouse gas emissions during the manufacturing process, coupled with a unique traceability solution for ensuring source credibility.



According to Daga, in women's fashion there is never one fabric, but multiple fabrics and every fabric is not a sustainable product. Compared to any other fabric, he finds Livaeco to be more eco-friendly and sustainable. He shared, "We are nowhere near reducing the fashion quotient, but this is just about making fashion sustainable. And as a company we believe that this is not a one-time initiative but something which will be built season after season."

He revealed that the company is expecting revenue from products made from sustainable fabrics to double in the 18 to 24 months to 10 to 20 percent from about 5 to 10 percent at present.

#### Retail presence

TCNS Clothing sells its brand, W, across India through multiple distribution channels. As of December 31, 2018, it sold its brand through 521 exclusive brand outlets, 1,598 large format store outlets and 1,496 multi-brand outlets, located in 29 states and 2 union territories in India. Internationally, it sells its products through 6 exclusive brand outlets in Nepal, Mauritius and Sri Lanka. In

#### Sustainability at Its Core

- W partnered with Solar Charkha Mission to launch a unique collection, Harit Khadi.
- Solar Charkha Mission is an initiative by the Government of India to revive and promote the 'lost glory' of this swadeshi handwoven fabric that signifies our cultural heritage, through a unique, solar energy based production model that would provide employment to thousands of men and women in the rural and sub-urban sectors of India.
- This innovative method of weaving Harit Khadi is not only eco-friendly, but also scalable as it uses solar power driven charkhas and looms instead of manual ones to ensure continuity in the workflow involved in the production process of this fabric.

addition, it sells its products through its own website and online retailers.

Sharing their retail expansion plans, Daga said, "On an average we are opening 70 to 80 stores every year, this is how we are expanding annually."

#### Road Ahead

Daga opined that with passage of time there will be more groups who will follow suit, at present the participation



is limited. The sustainable products are offered at a premium price point. Through #YOLO Dress the brand aims to give its customers the choice about the kind of fabric they want to buy.

"We are happy pre-empting this in India. I am sure a lot of players will follow these steps and more-and-more people will come to sustainable products. As far as consumers goes, there are a lot of them who really care for all this and will be very happy to have something like this in the Indian wear and probably this is a choice which they will appreciate and were waiting for," he concluded.



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