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BUSINESS OF FASHION

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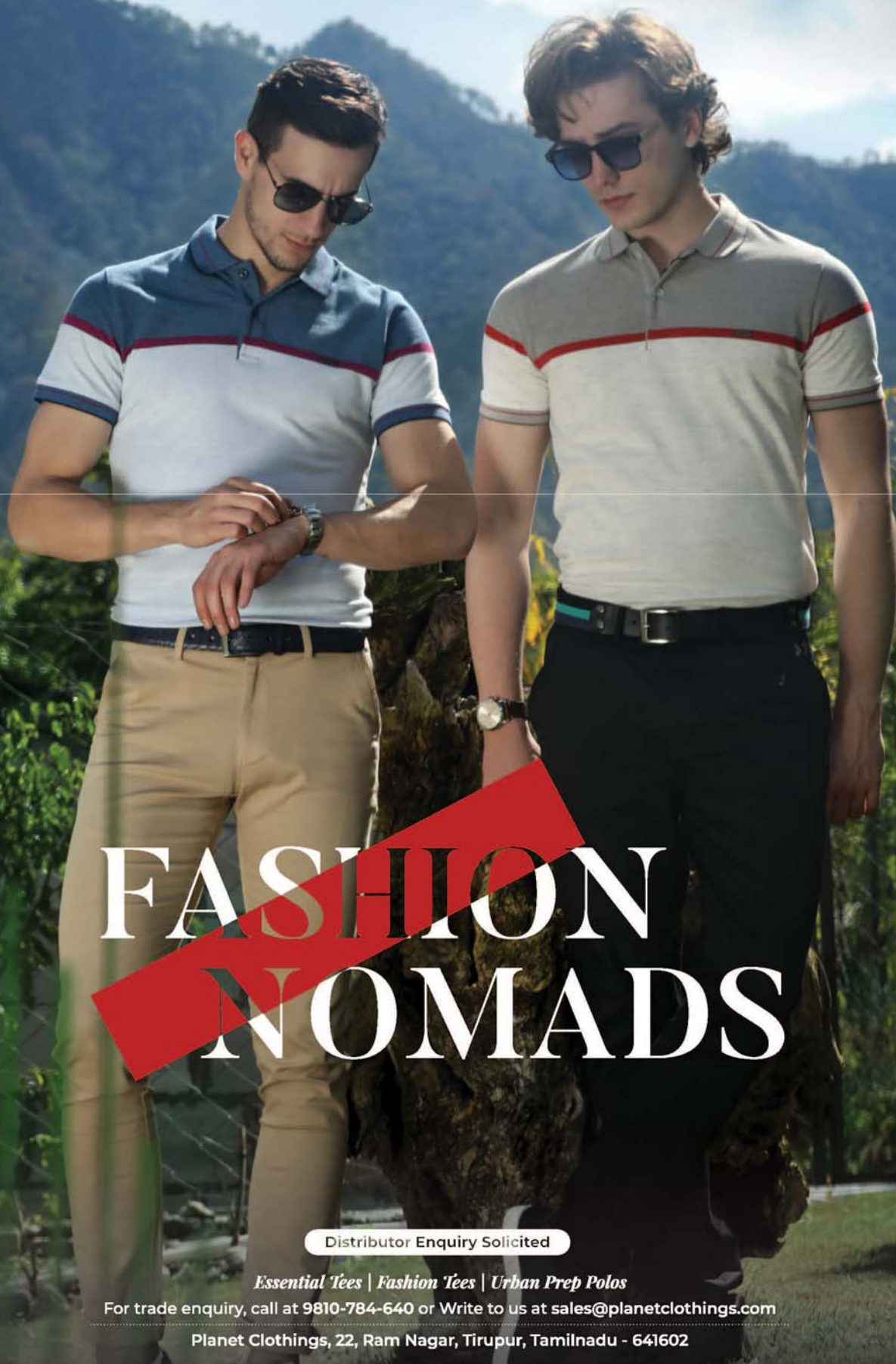
Casual Wear

SPECIAL ISSUE



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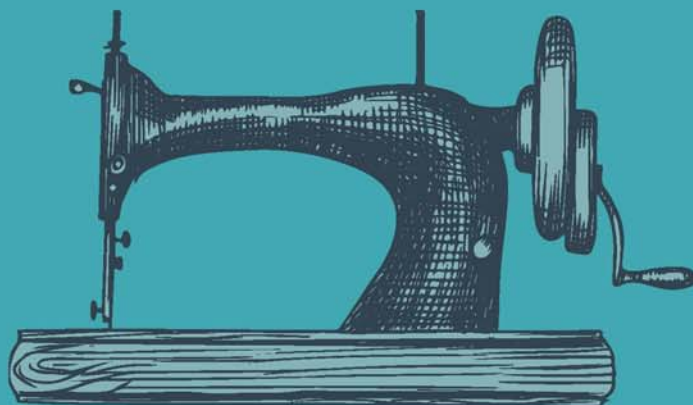
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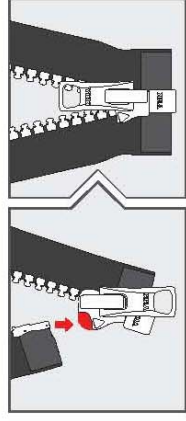
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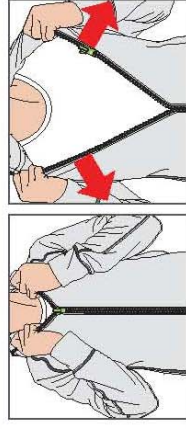
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*Pull the zipper apart above the slider.

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*Left hand insertion type is under development.

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

This zipper slider is asymmetrical.

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Dear all,

If you take a look around, chances are that 8 out of 9 people around you are dressed in casual clothes – denims, t-shirts, polos, tops, etc. Casual is the new uniform of the modern age and we see people wearing them everywhere – the grocery store, the movies, the mall, to school, out to lunch with friends, to dinner dates, the office... everywhere

Today, almost everyone, from New Delhi to London and anywhere in between, are more concerned with comfort and practicality than style and trends and that's the sole reason why casual wear has taken the globe by storm. It's so convenient after all and gives you the freedom you have always craved – freedom to choose how we present ourselves to the world; freedom to diminish the lines between men and women, old and young, rich and poor.

In India as all over the world, the casual wear market has exploded in the last few years. Changing lifestyles, higher disposable incomes, home grown brands bringing contemporary international fashion to Indian stores and well known international brands

setting up business in India, etc. – a profusion of factors have culminated to give impetus to the changing fashion sensibilities of the Indian populace. Also, a surprising fact that confounded me is the fact that when it comes to casual wear India is at par with global trends.

Also, the term casual wear has evolved into a broad term that covers a gamut of products – ranging from office and workplace casuals on one end of the spectrum to beachwear on the other. However, the boundaries between the different kinds of casual wear are fast blurring and the typical Indian consumer now prefers to use casual wear interchangeably in different occasions.

Overall, this edition indeed makes a powerful attempt at analysing the trends and consumption behaviour of the Indian casual wear market to aid upcoming as well as existing brands establish a strong brand equity. I hope you all find the issue as informative and as enjoyable as we enjoyed putting it together!



Amitabh Taneja

>

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CATEGORY LAUNCH

Vajor To Foray Into Menswear Segment; Eyes 10-12 New Outlets in FY19-20

Vajor is looking to foray into menswear, basic daily wear, ethnic wear and more sub-categories in the home segment

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TRIAL ROOM INNOVATION

IBM: Developing Next Gen Technology for the Fashion Industry

Retailers and brands are doing everything in their power to woo a consumer who has global aspirations. They are taking the help of Artificial Intelligence, Augmented Reality, Virtual Reality and everything in between to bring in consumers and increase their sales

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FOCUS FEATURE

Key Market: Indian Brands Want Supima Cotton to Craft Premium Products

Premier brands across fashion, accessories and home markets across the globe look to create value and a point of difference for consumers with an emphasis on premium fabrics and Supima's premium qualities play a vital role in forwarding this effort

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IFF 2019 | FOCUS FEATURE

Innovation: The Reason That Makes Cotton USA 'Cotton The World Trusts'

Cotton USA's work is based on relationships and works closely with cotton spinning and fabric manufacturing companies to build connections across the entire supply chain

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IFF 2019 | EXHIBITOR SPOTLIGHT

Cambridge: Providing International Styles at Affordable Prices

Over the years, the brand has strived to offer more variety across its core product segments rather than a rapid expansion of its product portfolio. This strategy has become a staple across all the brand's outlets and has also helped it to maintain the sharpness in its price

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IFF 2019 | FINALE SESSION

Fashion Innovations Across The Globe

In a special session, NIFT faculty and students - under expert guidance of senior NIFT Alumni - engaged in leading fashion houses across the globe presented some of the most happening innovations and discussed how Indian fashion creators are reacting to these

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FASHION RETAIL

RESEARCH

Casual Wear Market In India

Over the past few years, the market has witnessed acceleration, driven by growth in income levels, changing lifestyles, increasing casualisation among MNC employees, emergence of start-ups and the entry of foreign players. Technopak shares a research report

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CASUAL WEAR STUDY

COVER STORY

An Exploratory Study of the Indian Casual Wear Market

With mounting western influence, the entry of global brands and a penchant for comfort, casualisation has gained unprecedented momentum in Indian fashion. IMAGES Business of Fashion takes a look at the market nuances

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CASUAL WEAR STUDY

BRAND PROFILE

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Sheriff // Pg No.90



SPOTLIGHT

Innovation & Sustainability Rule the Indian Casual Shirts Category

Casual dressing in workplaces is boosting the consumption of casual shirts among men. A lot of brands are exploiting this emerging market opportunity with innovative product ranges and novel, eco-friendly fabric blends

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MARKET DYNAMICS

Casualwear Market In India & Its Future Dynamics

Ryan Fernandes, Head of Marketing & E-Commerce, Pantaloons shares insights on the Indian fashion retail market saying its worth is ₹3,61,160 crore (US\$ 54 billion) and will grow at a promising CAGR of 8.1 percent for the next 10 years to reach ₹7,88,532 crore (US\$ 118 billion) by 2028

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RESEARCH

The Swing Towards Casual Wear

A research report from Wazir Advisors shares how casual and unstructured clothing has become a global phenomenon. Old rules of dressing up are being re-written and consumer segments are driven by casualisation, inclusivity and an active lifestyle

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GROWTH CATEGORY

Men's Bottom Wear Market Coming Out on Top

The trouser category has had its fair share of increased patronage in India and the credit for this goes to category expansion which includes khakis and chinos that can be worn both casually and formally. IMAGES Business of Fashion takes a quick look at the market trends and demand for trousers in India

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CATEGORY LEADERS

Women Entrepreneurs in Casual Wear & Lingerie Retail

IMAGES Business of Fashion brings you women category leaders in the casual wear and lingerie retail segments in India who are making a difference and are crucial in building successful businesses

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FASHION CREATION

COLLECTION LAUNCH

Crocs Launches Latest Literide Collection

The latest collection is aesthetically inspired for customers on the go lifestyle, the collection provide foam insoles that are super soft, incredibly lightweight and extraordinarily resilient

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CASE STUDY

How LuLu Fashion Week 2019 Helped Up Sales & Footfalls

Prominent brands at LuLu Fashion Week 2019 showcased the latest trends in western wear, casual wear, ethnic wear and active wear along with new and trendy bags and luggage

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TRENDSPOTTING

T-shirts: Bringing in Casual Style & Comfort to the Traditional Indian Shirts Market

T-shirts are emerging as a huge category in the casual wear segment in India. The global t-shirt industry has evolved, driving fashion trends in the form of plain t-shirts, personalised t-shirts, graphic t-shirts, vintage t-shirt designs, etc. While the Indian market is yet to reach this level, brands and retailers are working hard to evolve to the next stage the category

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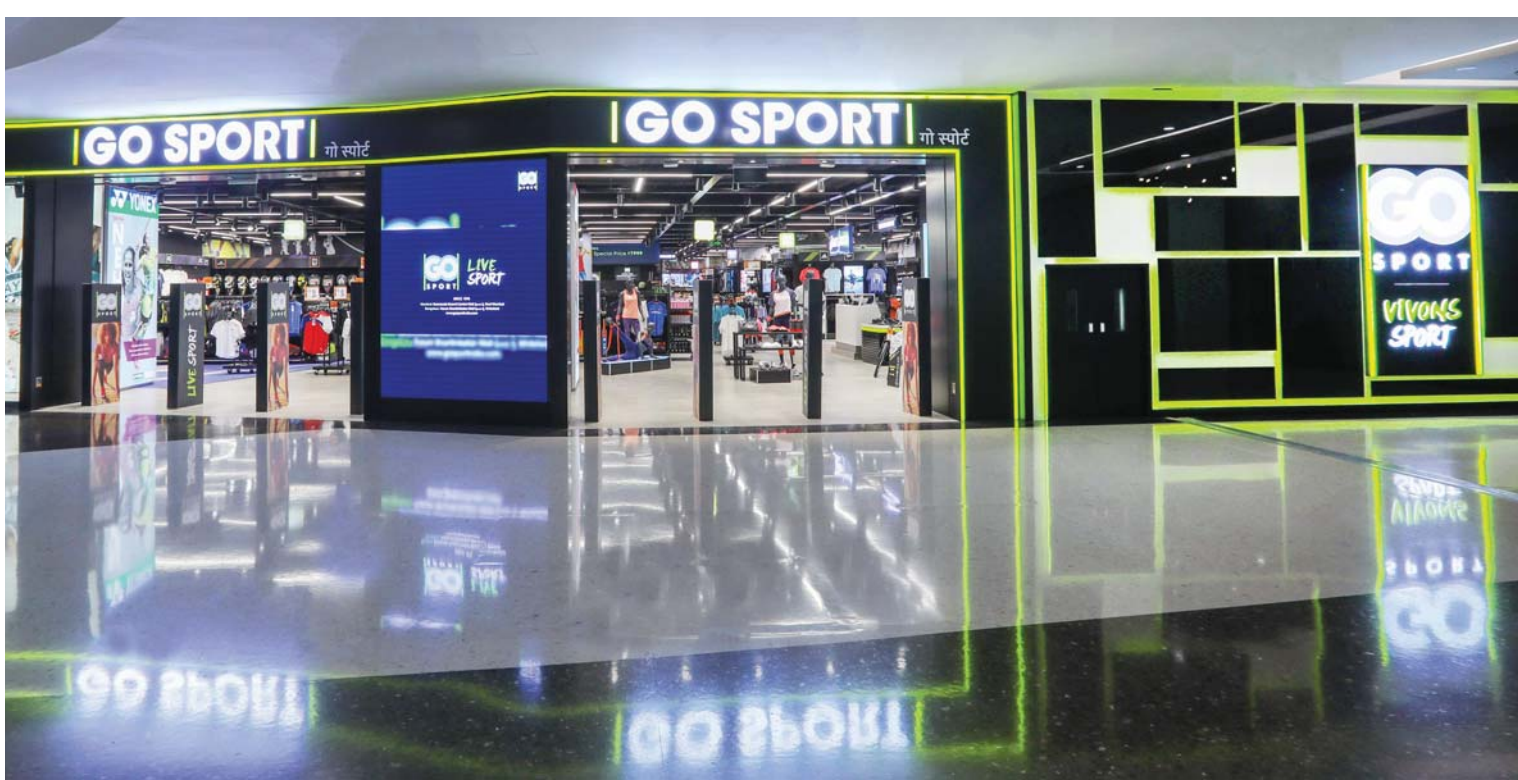
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TABLEZ LAUNCHES GO SPORT, INDIA'S FIRST SPORTS SUPERSTORE

GO Sport will be a specialist curator, working closely with sportspersons, experts and brands to create and showcase products that specifically enable enthusiasts to up their game and push their limits, whether they happen to be a beginner or a pro...

Gurbir Singh Gulati

Tablez, a leading organised retail group in the Middle East, launched the first outlet of GO Sport – a global sporting retailer – in India at Seawoods Grand Central Mall, Navi Mumbai. The store hosts a multitude of sports brands under one roof making it the first multi-brand, multi-sport and multi-specialty sports destination for all sports enthusiasts in the country.

The brand has positioned GO Sport as the place for all sports enthusiasts, and those who are keen on trying out new sports – they could be beginners, intermediate sports buffs and even experienced sportspersons. The brand is all set to inspire people to play sports and discover the pleasures and benefits of physical fitness.

GO Sport believes in the philosophy of going beyond personal boundaries and will be positioned as 'The Sports Superstore' in India. The concept, in India, brings together the world's biggest and most specialist sport and fitness brands under one roof, with 70+ brands and labels. GO Sport will be a specialist curator, working closely with sportspersons, experts and brands to create and showcase products that specifically enable enthusiasts to up their game and push their limits, whether they happen to be a beginner or a pro.

In an exclusive chat with IMAGES Business of Fashion, Adeb Adeb, Managing Director, Tablez, LuLu Financial Group & Twenty Fourteen Holdings, shares details about the entry of GO Sport in India and the future plans of the brand.

EXCERPTS FROM THE EXCLUSIVE CHAT...

Tell us about GO Sport and its entry into India with Tablez?

Tablez holds the master franchisee for GO Sport for India and Sri Lanka and it's been a very exciting time for us since 2018, from the time we have signed with the brand GO Sport. In India, we are waking up to a large retail revolution. The way we see it, sports as a category cannot be avoided in the country anymore. It took us more than 12 months of hard work to get the right mix and portray the right image of the brand in India and how we could adapt GO Sport International to an Indian context. A lot of R&D was done to understand the products required for this market and how we should position the brand here.

GO Sport caters to a large demographic, so, it's not just another sports shop. You can find everything in the store whether it is do with swimming, tennis, table tennis to badminton, cricket, and even



Adeeb Ahamed,
Managing Director, Tablez, LuLu Financial Group and Twenty14 Holdings

football. The beauty of this store is the availability of multiple brands under one roof.

I don't think there is another large scale player in the Indian market who has done such a store. GO Sport is unique as it offers the culmination of lot of brands put together. We have brands like Adidas, Nike, Puma, Reebok etc. and all have a very visible space in our store. The idea is to make sure the consumer is not overwhelmed by one single brand but can pick and choose from a large variety. Along with this, GO Sport is bringing in many new sportswear brands for the first time to the Indian market as well.

"This year we will try to do another two stores in Mumbai and Bengaluru itself. We will stick to these two geographies for this year. Over the next year, we will look into key markets like Hyderabad, Chennai and more of the South"

Why, in your opinion, does the sports category hold a big promise for India?

Currently the sports segment is valued close to around US \$3.3 Billion here in India and is growing an approx to 9 percent year-on-year. This market is expected to touch around US \$5.5 billion by 2020. Sports holds a huge market potential as each city will grow and each market will mature. Health and wellness will be the prime important focus with the consumers and it's very important for a brand like GO Sport to provide what the young millennial of this country wants.

Tell us about your recent launch of GO Sport store in Mumbai and your future retail expansion plans?

We have opened our first store in India at Seawoods Grand Central Mall, Navi Mumbai. The next will be followed by the Prestige Shantiniketan site in June at Bengaluru. This year we will try to do another two stores in Mumbai and Bengaluru itself for GO Sport. We will stick to these two geographies for now. Over the next year we will look into other key markets like Hyderabad, Chennai and more of the South. Primarily, we are only looking at opening in malls which are well established.





Romuald Bauhon,
Export Manager, Groupe GO Sport

"We are very excited to be in India as it's a very strategic market for us. We wanted to be here as we strongly think that our concept will bring something very different to this market. During this journey the biggest success is to find the right partner and I think Tablez is the right one for us. With GO Sport, we are very clear that our focus will be on customer experience. The concept of the store is very aspirational and totally international"

ABOUT GO SPORT

- GO Sport, a French global forerunner in sportswear, equipment, and the fitness lifestyle, was founded in 1978, in the heart of the Alps following the Winter Olympic Games held in Grenoble.
- Part of the Rallye Group, GO Sport has been focusing on partnering with the world's best sports brands to offer products, services, and concepts that inspire and empower individuals to go forth and delve deeper into their relationship with fitness and sport.
- GO Sport has 108 stores in its network and 19 affiliated stores, spread across France, besides over 30 international retail outlets including India.
- GO Sport is also Paris Saint-Germain football team's official distributor and the leading partner of the GO Sport Running Tour since 2012.

How big are your stores?

The store in Mumbai is a 14,000 sq. ft. store; it's a large box setup. Having done this store we get to understand that there are so many SKUs under the sports category. An ideal size of a store to look at is a minimum of 10,000 sq. ft. Anything lower than this size would not do justice to any brand that wants to be associated with us. Moreover, in the future, we will be present across three to four locations in a city for the store to be more accessible to consumers.

Do you have plans to go Omnichannel?

What we have understood is that a collaborative offline and online model works best. We are still looking into

where an Omnichannel strategy works since in sports, sometimes a lot of heavy items need to be transported.

What are the key innovations in the store?

We have introduced a lot of new innovations in our store. Brand Asics is doing a gauge analysis which help check your foot lies – how it lies on the floor, what kind of position do you stand in and what is the best type of shoe which can be suggested for walking and running after this individual case study.

Then there is Yonex, which offers an option to string badminton, tennis or a squash rackets as per requirement.

The third is t-shirt printing – people can get their t-shirts custom printed with their names/team names.

Which are the new brands that are entering India through your store? What's the average ratio that you maintain between Indian and international brands in your store?

We have 16 brands in the GO Sport store which are unique to India which have never been showcased in a brick-and-mortar space in the country before including The North Face and some French brands. Indian brands occupy approximately 20 percent of the space in GO Sport, while the rest is dedicated to foreign brands.





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VAJOR TO FORAY INTO MENSWEAR SEGMENT;

EYES 10-12 NEW OUTLETS IN FY19-20

The brand which has already become an integral part of the consumer's lifestyle, has more to offer this year with new categories and product lines being launched. It is looking to foray into menswear, basic daily wear, ethnic wear and more sub-categories in the home segment...

Charu Lamba



Vajor, a youthful brand which was created solely to bridge the gap between run of the mill ready-to-wear and high fashion, has come a long way since its inception in 2014. The brand, apart from foraying into new categories, expanded its retail presence both online and offline within its few years of existence.

“We added decor as a category within 2 years of launch and ventured into the offline space too within just 4 years,” says **Founder & CEO, Vajor, Nathasha AR Kumar**. At present, it has stores in four metro cities, namely, Delhi, Pune, Chennai and Bengaluru, a physical rendition of Vajor's online aesthetics.

Exploring New Categories

Now, the brand which has already become an integral part of the consumer's lifestyle, has more to offer this year with new categories and product lines being launched. It is looking to foray into menswear, basic daily wear, ethnic wear and more sub-categories in the home segment.



“The brand has its own identity, which is about being organic, eco-conscious and rooted in its approach. We are aware of the concerns of our consumers and are providing them fashion that is body friendly and a platform which is trustworthy. Our monthly collections set us apart from other brands who are mostly doing 3-4 collections in a year. This way, we give our consumers the best of their fashion demands without being monotonous,”

-Nathasha AR Kumar,
Founder & CEO, Vajor,



“The idea behind introducing these new categories and product lines is to become more deeply incorporated in the consumer’s life. Vajor wishes to inculcate a modern bohemian lifestyle among its tribe. The same is achieved through mindful products and experiences. Every new vertical the brand comes up with is in sync with the same philosophy,” states Kumar.

“These new verticals will also help Vajor propagate itself as a lifestyle brand and not only a fashion brand which has always been the goal. Hence, new verticals simply solidify the brand as a one-stop-shop,” she says.

The brand is expecting that the new verticals will be contributing approximately 40-50 percent of the revenue by the end of this financial year.

How Other Categories Are Performing

Currently, dresses and jumpsuits under the clothing category are the fastest moving products for the brand. “Vajor clothing ensures functionality and aesthetics are present in balance in our products specially meant for the Indian body type. The Indian market is evolving with international trends and the consumer is more aware than ever before, hence our dresses and jumpsuits fulfill all their desires and sell the most,” explains Kumar.

The brand earns 60 percent of its revenue from clothing category, followed by home (25 percent) and rest from shoes and accessories.

What Helped Vajor Win Customers

The USP of the brand, which has helped it carve a niche for itself, is

that it launches a new collection every month, keeping with the fast pace of the industry and eliminating the barriers of seasonal fashion. The fashion market is growing with every passing day and what sets it apart is its ability to deliver an experience along with an impressive product.

“The brand has its own identity, which is about being organic, eco-conscious and rooted in its approach. We are aware of the concerns of our consumers and are providing them fashion that is body friendly and a platform which is trustworthy. Our monthly collections set us apart from other brands who are mostly doing 3-4 collections in a year. This way, we give our consumers the best of their fashion demands without being monotonous,” states Kumar.

“Our target audience comprises of modern, independent, mature and confident cosmopolitan individuals in the age group of 25-40 who fall into the SEC-A group,” she adds.



INDIAN INNERWEAR-NEW COLLECTIONS BY VAJOR

- **CAPE & CLOTH:** A workwear collection for modern, independent working women, reflecting the striking personality driven by her passion. The collection is perfect blend of comfort, practicality, fashion and need for working woman's wardrobe.
- **ROOTS:** This comprises of everyday essentials. The earthy-coloured designs are chic and can be wore year round without much seasonal fuss. The collection is available on the floor throughout the year.
- **HUMANE:** It is a half-yearly collection of the brand with animal motifs in the form of embroidery, patch and print like dog collars on apparels, accessories and decor items. The Humane line was established to do good for a cause, where a percentage of the sales is donated towards NGOs that are working to contribute for the betterment of our planet.



Sustainability - The Future of Fashion

The brand, which has sustainability as its core strand, is emphasising to grow more sustainable in its processes going ahead.

“We have managed to eliminate polyester entirely from the products and use only natural fibres. We are also working on reducing carbon footprint by graduating to measures like paperless billing, recycling and reusing for visual merchandising, banning plastic, switching to wooden and shell buttons in place of plastic ones and reducing plastic in packaging,” asserts Kumar.

With the launch of their ‘Experiences’ vertical, Vajor creates an ecosystem for their tribe that thrives and grows through engaging, mindful affairs well curated by the brand. “Vajor Experiences are unique, enriching and bespoke for a tribe of conscious, sustainable and balanced souls and camaraderie that are vital and soulful for a holistic growth,” she adds.

Future Plans

The brand, which earns 85 percent of its revenue online, is eyeing both online as well as offline expansion in India and abroad.

“This financial year, we are planning to open 10-12 stores in India. We are targeting metro and Tier I cities like Mumbai, Hyderabad, Goa, Bangalore, Delhi, Gurgaon, Lucknow, Kolkata, Chandigarh, Jaipur and Pune,” reveals Kumar.

“With these new store openings, we are planning to take the online-offline ratio to 60:40 in the coming year,” she adds.

The brand is targeting international markets where consumers are technology-savvy and there is a demand and awareness for a modern bohemian lifestyle.

“Till date we have been growing with 100 percent trajectory and this year these targets have been aggressively revised to 200 percent growth,” concludes Kumar.





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IBM: DEVELOPING NEXT GEN TECHNOLOGY FOR THE FASHION INDUSTRY

Retailers and brands are doing everything in their power to woo a consumer who has global aspirations, an overwhelming variety to choose from and very little brand loyalty. They are taking the help of Artificial Intelligence (AI), Augmented Reality (AR), Virtual Reality (VR) and everything in between to bring in consumers and increase their sales...

Gurbir Singh Gulati



Prashobh Chandralayam,

Partner/Executive Director, Retail Cluster,
Distribution Sector, India/South Asia, IBM
India Private Ltd

“While fashion’s artistry is both influential and captivating, it is the rise of innovation and technology that will ultimately shape the future of the industry”

In a world of mobile-savvy, always-connected Millennials, it’s a race for fashion retail to keep up with consumer expectations. The sector is doing a lot to catch up though, becoming a veritable hotbed of innovation. Retailers and brands are doing everything in their power to woo a consumer who has global aspirations, an overwhelming variety to choose from and very little brand loyalty. They are taking the help of Artificial Intelligence (AI), Augmented Reality (AR), Virtual Reality (VR) and everything in between to bring in consumers and increase their sales.

Aiding them in the process are technology companies, inventing and manufacturing new technologies to help brands and retailers meet shifting consumer expectations. One such information technology giant which has ventured into the path of retail technology is IBM.

The company – has been present in India since 1951 – has very recently introduced smart mirror technology loaded with AI.

In a freewheeling chat with IMAGES Business of Fashion, **Prashobh Chandralayam, Partner/Executive Director, Retail Cluster, Distribution Sector, India/South Asia, IBM India Private Ltd.** says, **“While fashion’s artistry is both influential and captivating, it is the rise of innovation and technology that will ultimately shape the future of the industry.”** He says that the solutions given by IBM can be game changer for the Indian Fashion Retail industry and that the company is all set to work for brands and give them customised technology solutions to bring in more footfalls.

India is not a country but a continent. This is certainly true for its fashion industry, where the culture, language and style changes every 20 kms or so. So, if a traditional fashion retailer follows international fashion forecasts blindly, it may not guarantee him success in India. To counter this, we are working on a pilot project called streetstyle.arl. We have tied up with a Large Format Store for the project. streetstyle.arl defines the fashion trend of a particular area and predicts whether it will remain consistent throughout the week. It will also compute whether different trends work at different times of the week, the month, the season.

These analytics will help the retailer understand what’s trending in his area – formals, casuals, prints, block colours etc. This data will also help the retailer plan his visual merchandising and thus generate more footfalls by ensuring the product in demand is present in the store.

EXCERPTS FROM THE EXCLUSIVE INTERVIEW...

Fashion in India is a versatile subject. It changes from East to West and from North to South. What study has IBM done to study fashion retail in this country? What kind of solutions do you think are needed to forward the industry in India?

You’ve summed up the diversity in our country admirably. It’s often said that

Feedback is extremely important for new business integration. How does your company work on the same?

We gather feedback in many different ways, the most recent being a fashion design team workshop we conducted, where we talked about the use of customer experience. Representatives of the Indian fashion industry were asked





IMB can be game changer for the Indian Fashion Retail industry and the company is all set to work for brands and give them customised technology solutions to bring in more footfalls

to share what they would like in terms of new user experience, and we got some great feedback.

Tell us about loyalty solutions?

I feel there are far too many solutions to loyalty. We are trying to stay away from commodity products for now. However, we are trying to just look at areas where IBM can make a positive impact on retailer profitability. In the fashion business a major problem area is the unsold inventory. This can be solved by using AI to create a better denim collection which promises style that is commercially viable and well-received in the market. This will create a better stock, more accurate merchandise, which in turn will improve the brand's profitability.

Tell us about your latest smart mirror technology?

The smart mirror is a concept that has been present for the last seven to eight years. Most large format retailers have tried this at some point in time, but it hasn't really worked out. The problem was that the old AR mirror did not give any recommendations to the customer. It only gave the customer choices that were available in store.

Although 95 percent of sales still happen in stores in India, a large number of consumers still feel that the typical store experience is underwhelming. Trial rooms have pretty much stayed the same with the least possible amount of innovation in the last few decades. Retailers in India are experimenting with different ways to engage their customers in their brick and mortar stores, to provide a superior experience. This is where our new smart mirror comes in. It is based on AI solutions. This means it will give choices that are customised to the consumer's individual taste. The idea behind the interactive AI mirror is to provide an enhanced and personalised shopping experience.

Our AI Smart Mirror is expected to enhance customers' offline shopping

experience through interactive fitting rooms which will connect retailers and customers digitally. The mirror will assist customers in understanding what product features are suiting them and can also recommend changes. The plan is to convert more footfalls into actual sales at stores using our smart mirror.

How does the AI Smart Mirror work?

Our AI Mirrors are equipped with sensors that recognise garments and give recommendations which the consumers can virtually try with the help of Augmented Reality. Based on that information, they can also suggest other products to browse, and allow the shopper to request a new size or new colour without popping out to ask a sales associate for help. They can also order those products online – on the spot.

The smart mirror also enables the shopper to see all looks side-by-side and in real-time to assess which look is their favourite. Email and social options are available at the AI mirror, so customers can seek opinions from friends in real time. Shoppers can also purchase the products used to create each look from the AI mirror, or see how to turn their look from day to night in one click. Now customers can browse through the catalogue which is recommended by the AI based on it the weather, occasion and location and the type of lighting.

What else have you created for the retail industry using AI?

The application of AI has gone far beyond driverless cars or futuristic robots that outsmart men in strategy. AI is playing a vital role in changing shopping experiences by using algorithms to track, analyse and satisfy each consumer and his specific needs.



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We have also created a Cosmetics.AI for the beauty industry in India. We are working with brands like Oriflame where our solutions in AI technology give recommendations to the customers as to the appropriate make-up and colours suiting their personality. The choices are made easier since they are personalised to consumer tastes and skin types and one can scroll through them easily, in the tap of a finger.

Do you think the Indian consumer is ready for technology like the AI Smart Mirror?

India will soon have to tag of the youngest nation in the world with a Millennial population of over 500 million which is greater than the combined population of US, UK and Australia put together. Since they will make up the largest consumer base in the country, it is extremely vital for retailers to engage them as they enter the shopping space and provide them with sociable and entertaining shopping experiences.

This young population thrives on technology, they appreciate good user experience. While they are embracing the smart mirror technology, we hope that the general population will understand and accept it soon as well.

ABOUT IBM

- Since inception, IBM India has expanded its operations with regional headquarters in Bengaluru and offices across 20 cities, establishing itself as one of the leaders in the Indian Information Technology industry.
- As a leading cognitive solutions and cloud platform company, innovation is at the core of the IBM company strategy. This is reflected in the end-to-end solutions delivered to clients, which span from software and systems hardware to a broad range of infrastructure, cognitive, cloud and consulting services.
- IBM helps clients solve complex business and technical issues by delivering deep business process and industry expertise. This is enhanced with advanced analytics, research capabilities, comprehensive IT infrastructure knowledge and the proven ability to implement enterprise solutions to deliver bottom line value to businesses and governments worldwide.

Technology is still debated from the brand point of view. How does a technology provider like IBM give worthy solutions for the Indian Fashion industry?

We are choosing the battlefield where we can make the most and right impact. This was the belief when we started the journey with AI for fashion. Our journey started in 2015 at Melbourne. We had done this with the Melbourne fashion week where IBM tried AI in fashion with its biggest and most influential fashion designer. Here we clearly realised that the peoples experience towards AI for fashion was better than what we thought. We were able to make a positive impact in the shortest possible time.

We at IBM also believe that the AI mirror will revolutionise the trial room experience, hence creating an

exceptional shopping experience. Our extensive experience creating efficiencies in the technology space allows us to offer a solution that bridges the gap between shopping online and in stores. Our virtual fitting room is built on technology, clothing layering; deform simulation, and true rendering, which allows us to deliver accurate fit and realistic-looking styles at high resolution. Our 3D virtual styling solutions give shoppers complete customisation power, allowing them to not only set accurate body measurements, but also their height, skin tone, hair style and colour. Down to trying clothing with different shoes, our technology provides the freedom to mix, match and style looks so shoppers feel a personal connection to the pieces they try. The idea, in the end, is to provide customers with a frictionless, engaging and personalised shopping experience.





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KEY MARKET: INDIAN BRANDS WANT SUPIMA COTTON TO CRAFT PREMIUM PRODUCTS

Premier brands across fashion, accessories and home markets across the globe look to create value and a point of difference for consumers with an emphasis on premium fabrics and Supima's premium qualities play a vital role in forwarding this effort...

Gurbir Singh Gulati

Clothes are your second skin, your first layer of contact with the physical world, and as such consumers need to be careful of the fabric they buy when they go shopping. However, when confronted with those rows and endless aisles of clothes, how do you know what's best for you? Simple – simply opt for Supima cotton. It's light and comfortable, yet strong and durable.

This American-grown, extra-long staple cotton is the epitome of luxury, quality and craftsmanship. Premier brands across fashion, accessories and home markets across the globe look to create value and a point of difference for consumers with an emphasis on premium fabrics and Supima's premium qualities play a vital role in forwarding this effort.

The USP of Supima

Suffice to say that when you shop, all cottons are not of the same grade – something that is obvious to the simple touch at times. This is where consumers need to make a choice and buy clothes made of Supima cotton.

Supima and regular cotton are two different and distinct species of cotton. The most common type of cotton grown around the world typically has a fiber length of only about 1 inch, whereas Supima cotton's fiber averages 1.5 inches. While shorter fibres produce yarns that are rougher and subject to pilling on the surface of the product, longer fibres contribute to the strength and softness of apparel and home products, ensuring that they are more comfortable, retain colour longer and resist pilling over time.



Ted Sheely,
Chairman, Supima

"It all started in 1952 with a very small group of farmers who grew pima cotton and thought they needed an entry into the branded market. It started as an organisation and continues with 500 to 600 growers which produce more pima cotton than we ever did before"

Other reasons to buy this include the fact that despite its clear and distinct superiority over regular cotton, Supima cotton products do not require any special treatment and can be taken care of just like regular cotton clothes. Being two times stronger than regular cotton, Supima is also more resistant to daily wear and tear.

"It all started in 1952 with a very small group of farmers who grew pima cotton and thought they needed an entry into the branded market. It started as an organisation and continues with 500 to 600 growers which produce more pima cotton than we ever did before," explains Ted Sheely, Chairman, Supima.

In an exclusive interview with IMAGES Business of Fashion, Ted Sheely, Chairman & Marc A Lewkowicz, President & CEO, Supima speak on the growth of Supima cotton and its key markets including India, their new ventures and the growth outlook for the business in the coming fiscal.

EXCERPTS FROM THE EXCLUSIVE INTERVIEW...

How has India developed as a market for Supima Cotton?

It's always been a race between India and China for who is consuming more Supima cotton. We have good relations with buyers in India since we deal with them directly, and when they meet us directly, they too feel more confident in purchasing the cotton we have to offer.

Tell us about traceability?

Supima cotton growers have tied up with a company called Oritain for traceability. We do all sampling in California, Texas and Arizona. Here we can verify and tell you where the cotton came from and this in turn can guarantee that it's Supima cotton.

Products can cross multiple borders and pass through several sets of hands before reaching the stores, making it increasingly difficult for companies to trace the journey of their products. By mapping Supima's growing regions and

helping licenses to verify the origin of products, the cotton industry is making an important step towards rooting out fraud in the global supply chain.

With over 500 licensees in more than 45 countries, Supima partners with over 200 brand/retailers around the globe that use Supima cotton, all of whom now have the capability to independently verify the authenticity of their product. By working with Oritain, licensees can assure consumers that their Supima cotton garments are authentic and have not been substituted or blended.

Do you have special tags for Supima cotton so as to educate the consumer on the originality of the product?

Most brands put in a Supima tag with their label. Sometimes, if a brand blends in long staple cotton in their product, we help calculate the percentage of Supima cotton uses and what was blended in. We do the basic research and then it's up to the brand to do spot-testing in a systematic manner.

What has been the growth level in India for you?

The India consumption for Supima currently is around 2 lakh bales (1 bale = 480 lb) every year now. It has almost doubled, and the growth has been coming from both sides - from the mills as well as the brands.





Marc A Lewkowitz,
President & CEO, Supima

MARC A. LEWKOWITZ,
PRESIDENT & CEO SUPIMA

What are the brands which are working with Supima?

We have over 200 brands which we work with from all over the world. Several of them are based in United States like Brooks Brothers, Levi's etc. In the UK we have Marks & Spencer and John Lewis which also have a global footprint and Japanese companies like Uniqlo, a part of Japan's fast retailing companies. Then there are other brands like American Vintage and partnership with companies like Macy's.

We see lot of opportunity in India where we are working with companies like Raymond, Arvind Jockey, Rupa, etc. Then we are also working with start-ups like Grey Basics doing T-shirts here in India. We are also beginning to get consumer enquires from India asking about Supima and about our products that are available in the market.

What is the product category that you provide?

When we look at the global marketplace, Supima is being looked at as cotton of most ultra-premium quality and there's

no product that can't be made out of this. Any product made from cotton can be made with Supima. Here in India we see a lot of Supima cotton being uses in shirting and in the domestic apparel industry which includes sarees, dhotis etc. There's a growing segment seen in the t-shirt business and in the knitted apparel segment as well.

Shed light on the global and Indian prospective on Supima?

If we look at the demand cycle, China and India are the top two markets for us. India is the key importing nation for the consumption of Supima cotton fibre that is being spun into yarn and made into fabric for both home and apparel. A lot of this, unsurprisingly, goes back to USA and to the Middle East.

In terms of the apparel program, India has a big segment in terms of manufacturing. There are great products that come out of this country in terms of shirting fabrics wherein some are specifically going back to US and to Europe. Apart from the apparel segment the Indian market has the growth opportunity with the home textiles.



"There are over 200 brands which we work with from all over the world. Several of them are based in United States like Brooks Brothers, Levi's, etc. In the UK we have Marks & Spencer and John Lewis which also have a global footprint and Japanese companies like Uniqlo, a part of Japan's fast retailing companies"

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INNOVATION: THE REASON THAT MAKES COTTON USA ‘COTTON THE WORLD TRUSTS’

COTTON USA'S WORK IS BASED ON RELATIONSHIPS AND WORKS CLOSELY WITH COTTON SPINNING AND FABRIC MANUFACTURING COMPANIES TO BUILD CONNECTIONS ACROSS THE ENTIRE SUPPLY CHAIN...

GURBIR SINGH GULATI



Cotton Council International (CCI), the export promotion arm of the National Cotton Council of America (NCC), is a non-profit trade association that promotes U.S. cotton fiber and manufactured cotton products around the globe with its Cotton USA trademark. CCI has 60 years of experience promoting U.S. cotton fiber and products to trade and consumers. It works with spinning mills, fabric and garment manufacturers, brands, retailers, textile associations, governments and the USDA to facilitate the use of U.S. cotton. Our reach extends to more than 50 countries through 20 offices around the world.

CCI's mission is to make U.S. cotton the preferred fiber for mills/manufacturers, brands/retailers and consumers, commanding a value-added premium that delivers profitability across the U.S. cotton industry and drives export growth of fibre, yarn and other cotton products.

In an exclusive interview with IMAGES Business of Fashion, **Peush Narang, Representative – India, Cotton Council International**, talks about the different programmes Cotton USA showcased at India Fashion Forum 2019, held in Mumbai, and the company's India initiatives.

Excerpts from the interview...

Tell us about Cotton USA and its initiatives for India? What's new?

Cotton USA is the brand name for all U.S. grown cotton that is owned by Cotton Council International and that we promote globally. CCI works with spinning mills, fabric and garment manufacturers, brands and retailers, textile associations, governments and the USDA in many countries and every continent to facilitate the use of U.S. cotton. Our work is based on relationships and we work closely with cotton spinning and fabric manufacturing companies to build connections across the entire supply chain. Innovation is a key reason that makes Cotton USA 'Cotton The World Trusts'. Our recent 'What's New in Cotton' initiative showcases innovative technologies that will inspire everyone in the textile supply chain to think about the new opportunities that U.S. cotton can provide them.

What are the different programs that you have showcased at India Fashion Forum 2019?

We had showcased our 'U.S. Cotton Trust Protocol' which lists the recently established national goals for continual improvement in key areas of environmental stewardship, farm productivity and resource efficiency, including land, water, air, input and energy use by 2025.

Tell us about U.S. cotton's quality, sustainability, transparency, premium value and innovation which you promoted at IFF?

The U.S. cotton industry is the first to establish national quantifiable goals for sustainability. Additionally, its farmers operate under voluminous, stringent and enforceable regulations.

The six specific goals the Task Force has set to achieve by 2025 are:

1. Reducing by 13 per cent the amount of land needed to produce a pound of cotton fibre



2. Reducing soil loss by 50 per cent, in balance with new soil formation
3. Reducing greenhouse gas emissions by 39 per cent
4. Reducing energy to produce seed cotton and ginned lint by 15 per cent
5. Increasing water use efficiency (more fiber per gallon) by 18 per cent
6. Increasing soil carbon in fields by 30 per cent

The U.S. cotton industry has a robust system for 100 percent bale classification. Every cotton bale has a Permanent Bale Identification (PBI) tag that identifies where the cotton was grown along with its characteristics including fiber length, strength, color, micronaire, etc.

The Cotton USA Mark is a sign of softness, strength, comfort and sustainability to consumers around the world. It identifies superior cotton products made with a majority of cotton grown in the USA. Cotton USA is committed to bringing the latest in cotton innovation. It's part of the premium value offered to the entire cotton supply chain.

Tell us about Cotton USA licensees and potential business partnerships that you have from India and the

potential that you explored at IFF?

India is amongst one of the largest users of cotton and offers limitless potential, as both the manufacturers and the final consumer have a desire for better quality cotton and Cotton USA has all the attributes to become the fiber of their choice. We have more than 35 licensee mills in India who are buying U.S. cotton, and the leading brands in India have already started labelling Cotton USA to create differentiation in their product lines.

Since U.S. cotton is a fibre of choice globally, share the growth potential for the Indian Market? How companies in India have gained a better understanding of how U.S. cotton can add value to the products they manufacture?

We have more than 35 licensee mills in India who are buying U.S. cotton. The leading brands in India have already started labelling Cotton USA to create differentiation in their product lines. India is amongst top 10 markets for U.S. cotton and has been growing every year.





CAMBRIDGE: PROVIDING INTERNATIONAL STYLES AT AFFORDABLE PRICES

OVER THE YEARS, THE BRAND HAS STRIVED TO OFFER MORE VARIETY ACROSS ITS CORE PRODUCT SEGMENTS RATHER THAN A RAPID EXPANSION OF ITS PRODUCT PORTFOLIO. THIS STRATEGY HAS BECOME A STAPLE ACROSS ALL THE BRAND'S OUTLETS AND HAS ALSO HELPED IT TO MAINTAIN THE SHARPNESS IN ITS PRICE...

IMAGES BUSINESS OF FASHION



Casual menswear brand, Cambridge, has been dressing people for over three generations now. The brand boasts of a glorious heritage of over five decades. It began operations in 1960 with a focus on shirts and trousers and years later it has transformed itself into a complete fashion solution provider for men.

Over the years, the brand has been known for its unwavering dedication to provide international styles at affordable prices. It's an uphill task for sure, but Cambridge has been successful in not only tasting success but also keeping its pricing and quality consistent. "We have always been a volume driven business. And we have somehow managed to not get effected by the trends in the market. We didn't dally with a variety product range, instead we concentrated on maintaining the core lines. We also worked smaller volumes, which actually helped us turn around stocks relatively faster," Prashant I Bhatia, Director, Cambridge Apparels, told IMAGES Business of Fashion at the sidelines of the India Fashion Forum 2019 held in Mumbai in March.

Over the years, the brand has strived to offer more variety across its core product segments rather than a rapid expansion of its product portfolio. This strategy has become a staple across all the brands outlets and has also helped it to maintain the sharpness in its price.

Premium Products

The brand's consistency in its product and quality has helped it earn a long list of loyal consumers over the year. But keeping up with the evolving preferences of the consumer is a grueling task. "The very definition of customer loyalty has changed over the years, especially now that we have so many players in the segment today.

Customers aren't driven by brand propositions anymore - every brand is offering the same thing. Moreover, the younger generation of consumers get dwindled by price and experience propositions, by fads and peer pressure," said Bhatia.

In the early 2000s, Cambridge launched its premium most range of shirts under the brand name Platinia priced at Rs. 699. From then on, it started expanding its product portfolio to include formal trousers, suits and jackets to name a few. "Then came a time when we realised that our

customers not only want premium products but also want something exclusive. So, while we continue to maintain the affiliation with the parent brand Cambridge, we realised that Platinia now needs to be an independent brand," explained Bhatia.

Today, the Platinia range starts at Rs. 999 and goes upto Rs. 1,900 depending on the season of the year. Apart from shirts, the brand offers a wide range of business casual shirts, formal trousers, cotton trousers, jeans and suits. Platinia is also launching a trendy range of accessories soon. Cambridge has also recently launched a new range of ethnic wear called Aaryajan.

Retail Presence

Cambridge has 90 EBOs and is present in 200 plus MBOs across India. The brand retails in a mix of EBOs and MOBs in the West Bengal, Bihar, Jharkhand, and Karnataka. The brand has plans for expanding the EBO count by 20 more stores by the end of 2019.

The company is also vying to get into Large Format Retail. "This is the main reason that we have participated in India Fashion Forum 2019. We want to get into a reputed LFS like Central and partner with other such family stores and in the same time encourage our existing retailers to launch SIS formats of Platinia," Bhatia concluded.





FASHION INNOVATIONS ACROSS THE GLOBE

IN A SPECIAL SESSION, NIFT FACULTY AND STUDENTS - UNDER EXPERT GUIDANCE OF SENIOR NIFT ALUMNI - ENGAGED IN LEADING FASHION HOUSES ACROSS THE GLOBE PRESENTED SOME OF THE MOST HAPPENING INNOVATIONS AND DISCUSSED HOW INDIAN FASHION CREATORS ARE REACTING TO THESE...

IMAGES BUSINESS OF FASHION



Innovations across the globe are transforming not only lives and lifestyles of consumers but also the approach of creators towards the entire process of designing, developing and presenting fashion to the consumers. In a special session, NIFT faculty and students - under expert guidance of senior NIFT Alumni - engaged in leading fashion houses across the globe present in this session some of the most happening innovations and how Indian fashion creators are reacting to such developments.

Kicking off the session, **Prof. (Dr.) GHS Prasad, Professor and Joint Director, NIFT, Hyderabad** delved on the myriad innovations happening in the fashion retail industry around the world. "There is an evident shift in the industry; people who visit brick-and-mortar locations are looking for an experience, not just a place where they can buy stuff. The brick-and-mortar retail sphere is now being revolutionised with the adoption of technology, resulting in bolstered customer experience management. Across the world, physical stores account for about 90 cents of every dollar spent in retail. At the same time, it is also to be noted that 71 percent of shoppers today read reviews and compare prices on their mobile phones and about 53 percent of purchases are digitally influenced," he said.

“This is the age of hybrid models. Brick-and-mortar is on the verge of merging with mobile and the Internet to ensure an unmatched experience to the customer. This is the future of fashion retail for sure. Brands continue to look for ways to stand out in a more connected, on demand and personalised world. Also, technology is going to play a major role in providing experience in brick-and-mortar, aided by mobile phones and apps,” he further explained.

Store, Brand & Product Innovations

Brands like Massimo Dutti, Nike and Zara have already initiated self-checkout stores to great response worldwide. According to Prasad, about 95 percent of shoppers prefer to be left along while shopping and hence, self-checkout counters are slated to be the next big trend in retail.

With a name like ‘House of Innovation 000’ Nike NYC is a call to an origin, a center point for what a flagship store can be for its city. Six stories (including a below-street-level floor) cover more than 68,000 square feet on the corner of Fifth Avenue and 52nd Street. Inside, the promise of living retail comes to life. On each floor, groundbreaking features offer spaces and experiences that are both personal and responsive. Throughout, consumers can enjoy services that are deeply customizable and effortlessly smart and seamless. Further, the fully loaded Nike App promises consumers even more experiential choices through their smart devices.

Zara’s Augmented Reality stores allow it to show models wearing the latest fashions to customers when they put their mobile devices near a sensor within its brick-and-mortar

stores or near certain shop windows. If customers like the clothing on display, they can purchase the looks through their mobile devices. The retailer will bring the technology to 120 of its locations around the world. Also, the Zara AR app allows customers to point their phones at everything from a mannequin to an empty Zara store window to the screen on their e-commerce purchase and the clothing will come to life on a model for several seconds. From there, customers can click to shop the look and related items.

“We all are looking forward for these trends to diffuse in India very soon,” said Dr. GHS Prasad.

Prof. (Dr.) Srinivasa Rao, Associate Professor, NIFT, Hyderabad

expounded on how fashion should align with the challenges that the world is facing now – challenges like a resource crunch, climate change, vulnerable economic conditions and even changing consumer behavior. The fashion industry has to move on a more ethical and responsible way of sourcing and manufacturing that ensures safeguarding not only the planet and forwarding social causes but also protecting all vendors and stakeholders of the industry.

Dr. Rao delineated the example of designer Ryan Yasin’s Petit Pli, a new line of origami-inspired children’s garments that grow with the wearer. A Petit Pli garment can fit a child from about three months to three years thanks to 3D stretchable pleats. It also seems like a viable option that can help cut down on waste and pollution, a notorious effect of the textile industry, as well as save parents’ money.

Next, he cited the example of bio-tech-textile developed by Algalife – innovative natural and healthy pigments and fibers, from



“Corsets, that enjoyed huge popularity, went out of fashion when its negative impact was observed in the form of health problems and deformed body shapes. But now it has been redesigned into a functional corset by Dene Adams”

-Prof. (Dr.) Ruchika Dawar,
Asst. Professor & CC-FMS & CIC, NIFT
Jodhpur



“There is an evident shift in the industry; people who visit brick-and-mortar locations are looking for an experience. The brick-and-mortar retail sphere is now being revolutionised with the adoption of technology, resulting in bolstered customer experience management”

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Professor & Joint Director, NIFT, Hyderabad



“Fashion should align with the challenges that the world is facing now – challenges like a resource crunch, climate change, vulnerable economic conditions and even changing consumer behaviour”

-Prof. (Dr.) Srinivasa Rao,
Associate Professor, NIFT, Hyderabad



“Today, life has moved on faster than the 7P concept that was widely followed earlier. Customers today want experiences, and these experiences have to be emotional, and succeed in igniting, and exciting the customer”

-Prof. (Dr.) Sushil Raturi,
Professor, FMS, NIFT Mumbai

the microorganisms the algae. Conventional fabric production causes many environmental concerns. Growing natural fibers, such as cotton, requires large amounts of water. Textile dyeing is another huge problem, both in terms of water use and pollution. Algae Apparel has solved both these issues in a brilliant way, by looking under the sea to find an untapped resource in algae. Algae is a renewable and degradable aquatic organism, that can be turned into bio-fiber and environmentally friendly dye. A bonus effect of wearing clothes made from algae apparel is that the fabric releases anti-oxidants, vitamins and other nutrients to the skin.

Prof. (Dr.) Ruchika Dawar, Asst. Professor & CC-FMS & CIC, NIFT Jodhpur, expounded on tangible approach to functional garments, citing the example of the new functional corset by Dene Adams. “Earlier the corset was considered as an elegant and desirable object in women’s wardrobe and much attention was given to its design and execution. But soon, as its negative impact was observed in the form of health problems and deformed body shapes, it went out of fashion. But now it has been redesigned into a functional corset by Dene Adams,” she said.

When it comes to concealment, accessibility and comfort for extended wear, the Dene Adams’ line of essentials holsters is unlike anything else available. The brand’s concealed carry corsets allow the wearer to holster weapons in a sub-layer of the compression pulling their gun to their bodies. The fabric is softer which allows for more stretch providing you the ability to carry a larger gun. A great shapewear garment, Dene Adams’ line of corset holsters is great for all seasons and features trigger protection as well as fast and smooth draw time guarantee.

Experiential Marketing Prof. (Dr.) Sushil Raturi, Professor, FMS, NIFT Mumbai, addressed the audience in detail on experiential marketing. “Today, life has moved on faster than the 7P concept that was widely followed earlier. Customers today want experiences, and these experiences have to be emotional, and succeed in igniting, and exciting the customer. There are a variety of models to ensure customer experiences; and one of them is the Smith model,” he said.

The Smith model lets brands and retailers offer five types of experiences—experience through senses, experience through emotions, creative cognitive experiences, social identity experiences and physical act experiences.

“Brands and retailers can cash in on the 5 senses to ensure a superior experience for the customer. Emotional appeal also goes a long way, that’s why we see so much loyalty for brands that contribute towards social causes. Creative cognitive experiences refer to experiences that result from the consumer being a part of the development process of a product—in this scenario, the customer becomes a co-creator. Social identity experiences are more tailored for the young generation, let’s say you buy something, like it and recommend it and based on it your friend buys it. Physical act experiences refer to products that alleviate the customer’s lifestyle and end up being a necessity there after,” he said.

According to Dr. Raturi, of all these experiences, the most potent are creative cognitive experiences, and physical act experiences and they influence purchases the most. “These two can potentially convert a customer into a brand advocate,” he said, concluding the session.



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LOOKING FOR BLACK SWANS & GREY RHINOS: WINNING CONSUMERS BY A BIG MARGIN

SIMPLE EXAMPLES OF BLACK SWAN EVENTS INCLUDE THE INTERNET, COMPUTERS, GOOGLE, THE GREAT DEPRESSION AND THE RECENT TRENDING HASHTAG #METOO. IN THE FASHION WORLD, EXAMPLES OF SUCH EVENTS INCLUDE THE INTRODUCTION OF JEANS IN 1853, EVOLUTION OF ZARA IN 2000, SWEATSHOPS IN BANGLADESH IN 2013 AND THE RISE OF E-COMMERCE IN 2012...

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Black swans are events or occurrences that deviate beyond what is normally expected of a situation and are extremely difficult to predict. While black swan events are typically random and unexpected, grey rhinos refer to highly possible yet ignored threats.

Simple examples of black swan events include the advent of the Internet, computers, Google, the Great Depression and the recent trending hashtag #MeToo. In the fashion world, examples of such events include the introduction of jeans in 1853, evolution of Zara in 2000, sweatshop in Bangladesh in 2013 and the rise of e-commerce in 2012. Grey rhinos, on the other hand, is a metaphor for missing the big and obvious thing that's coming. Simply put, it refers to a highly probable, high impact, yet neglected threat. Monetary policies, geopolitical risks, impact of new technology, global warming and sustainability are general example of such an event. In the fashion retail universe, example of such events are discounts, unsold inventory, planning by season, long lead times, 10 percent EBITDA, etc. "We all from the fashion industry face these events on a routine basis. Now the question is, how do we combat these surprises and prepare ourselves for these probable threats?"

Ganesh Subramanian, Founder & CEO, Stylumia addressed the convention.

Anthropology, Not Technology

"More than focusing on technology, brands and retailers need to understand humans first. If we can understand humans, the fashion fraternity can face and prepare itself for both black swan and grey rhino events," said Subramanian.

The fashion industry has long been creating fashion for seasons but now

is the time that it changes course and create fashion for the consumer. Take for example a new project that H&M is working on that involves listening to consumers in Instagram before making products - this is marking a new shift from consumer to business. "We need to move from common practise to common sense. The shift we are seeing right now is putting consumer at the center then the store at the center," he added.

The Future of Fashion

Just as Amazon and Netflix are taking over the entertainment world, fashion too should start stepping abreast of times. It's time for fashion to embrace technology and data and understand the consumer deeply. The business of fashion has a plethora of inherent risks. Product designs are one of the foremost in this aspect. Research showcases how most fashion leaders globally are worried about planning demand across channels, because the complexity is increasing with the increase of channels.

"Every brand and retailer creates what they individually feel are great designs. But, practically, only about 30 percent of them wins. We all have fast movers and stock out. We all face product surprisingly, incorrect quantity calculation, distribution uncertainties, etc. If we succeeded in improving about 10 percent forecast accuracy, the jump in profit will be around 20-50 percent," Subramanian said at his talk.

In the future, winning leaders will either make it happen, let it happen or wonder what happened. To be a leader in this fast moving world, brands and retailers will have to do and learn instead of waiting and seeing. "Remember that if you want to be 100 percent sure, you will be 100 percent late because there are only two types of businesses -- the quick and the dead," he concluded.



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DECODING A 360 DEGREE PERSPECTIVE OF THE CUSTOMER EXPERIENCE JOURNEY

IN A CUSTOMER EXPERIENCE SESSION HELD AT INDIA FASHION FORUM 2019, A DISTINGUISHED JURY COMPOSED OF TIME-HONORED LUMINARIES FROM THE RETAIL INDUSTRY DELIBERATED ON EXPLORING WHAT ACTIVATES BRAND AWARENESS AND EMOTIONAL ENGAGEMENT WITH A BRAND TO DETERMINE STRATEGIES FOR DRIVING SALES...

IMAGES BUSINESS OF FASHION



Brands and retailers have long been trying to understand what drives and changes a customer's relationship with a brand. In the modern retail era, where choices are exploding exponentially, it is indispensable for every brand to decode what drives and impacts customer experience and their expectations from a brand.

In a Customer Experience session held at India Fashion Forum 2019, a distinguished jury composed of time-honored luminaries from the retail industry deliberated on exploring what activates brand awareness and emotional engagement with a brand to determine strategies for driving sales.

The session was moderated by **Amin Kassam**, Chief Retail Operations, Shoppers Stop, and the panel consisted of the following eminent retail personalities:

1. **Vinay Bhatia**, CEO - Group Loyalty & Analytics, Future Group
2. **Rajesh Sethuraman**, Head - Marketing, Easybuy Format, MAX Retail, Landmark Group
3. **Sarfaraz Miller**, Head - IT, Celio* Future Fashion
4. **Shambhav Chauhan**, Executive Director, JadeBlue Lifestyle
5. **Arun Gupta**, CTO, Praxis Home Retail

Booming opportunities in modern retail have resulted in increased competition, especially with retailers realising that superior customer experience is and will be the key differentiator in the near future, so much so that in the years to come,

retailers will measure the success of their business in terms of experience per square foot instead of sales per square foot. At the same time, the rise of the modern, discerning consumer, empowered through technology has compelled brands and retailers to significantly ante up the experience bar.

The Evolving Customer Journey

As technology is empowering consumers, brands and retailers are becoming more and more successful in tuning this to their advantage. However, this is not to say that there have not been limitations.

“Data is a boon, but what do we use data for? To gauge customers’ past performances which might tend to influence their behaviour in the future. On the customer front, while they have huge amount of information at their disposal today, the interpretation is very subjective. And this is exactly the struggle that the retail fraternity has been facing for a long time. I believe the future will be all about offering experiences that are seamless across all channels,” said Arun Gupta.

Debunking a common retail myth, Vinay Bhatia, talked about how customers do not classify the various formats that they shop in. Retailers, on the other hand, tend to stick to terminologies -- value format, departmental stores, MBOs, et al. Ultimately, retailers have to come up with novel ways to keep the customer engaged to their respective brands. “Since we have been deliberating on the role of technology since so long, I personally think, technology can be an actual enabler only when we would succeed in simplifying it for everyone, especially in a country like India,” he added.

Along with the experience, customers’ attention today is progressively

leaning towards ease of browsing and buying. At the end of the day, a brand or a retailer has to ensure that everything he has to offer – right from technology, product, price parity to buying experience – culminates into an experience that successfully makes an impression on the consumer,” stated Sarfaraz Miller

The Emotional Attachment

The Indian market is adapting to a change in dynamics in as far as the customer is concerned. Keeping this in mind, Rajesh Sethuraman believes that brands should actually focus on being a part of the customer timeline. “My suggestion will be to use the information available from the customer to interact and engage with him. We as retailers should look at evolving mediums like digital technology to interact with customers so as to help them to discover the brand,” he said.

Just like processing information, dealing with problems, and spending free time differ between the genders, it turns out that men and women have

different shopping habits as well. “So does retailers need to focus on gender specific ways to ameliorate consumer experiences?” asked moderator Amin Kassam.

According to Vinay Bhatia, such measures of personalisation will definitely give brands and retailers an edge although it might be a little trickier to execute everything in store.

“It’s little tough to do this in store because, unfortunately, most of our membership or loyalty programs come into play only after a consumer pays the bill. Although there now are apps that can help identify a customer and his choices when he comes into a store. Once these apps become the norm, I am sure this level of personalisation would be very possible,” he said.

Driving Frequency

The online market place has influenced footfalls and will continue to as it gains momentum. How does a brand



“While customers have huge amount of information at their disposal today, the interpretation is very subjective. And this is exactly the struggle that the retail fraternity has been facing for a long time”

-Arun Gupta,
CTO, Praxis Home Retail



“I personally think technology can be an actual enabler only when we would succeed in simplifying it for everyone, especially in a country like India”

-Vinay Bhatia,
CEO - Group Loyalty & Analytics,
Future Group



“I feel we should use the information available from the customer to interact and engage with him. We should also look at evolving mediums like the digital medium, not purely on acquisition mode but to interact with customers so as to help them discover the brand”

-Rajesh Sethuraman,

Head - Marketing, Easybuy Format, MAX Retail, Landmark Group

use customer journeys, customer information and analytics to drive frequency?

While modern technology has armed retailers with the possibility, it depends upon the retailer or brand where it draws the line in terms of knowing the customer and infringing on his privacy.

“General Data Protection Regulation (GDPR) has already been imposed in Europe and India is expected to adopt it by the end of this year. Once that is implemented, everything you do has to have consent. Consent and concern based architectures obviously have a very different challenge compared to what we currently see,” said Arun Gupta.

Consumer Opinion

In the interactive segment of the session, moderator Amin Kassam asked the audience if there is anything that they think retailers need to work on. A very valid point that was voiced was the lack of quality product description both in physical and digital retail. Especially in e-commerce, consumers seek accurate, reliable and robust descriptions with significant product information. Lack of content might prove to be a major purchase deterrent.

At the same time, while a basic form of product description is a staple feature in e-commerce, the importance of crisp product content has always eluded physical retail. While brands and retailers invest heavily on advertising with in store media like radio and television, little importance is given to content about the product.

Vinay Bhatia responded that the physical retail world is fast picking up on the lack of content. “It’s a part of the digital world as data has been a huge part of their business traditionally. I can assure you that the offline players are working on it and this is a trend that is fast catching up. We are working on QR Codes for individual products; so in the future you can just scan the code and have access to all the product information,” he said.

To sum it up, understanding the modern consumer is joint learning session for all brands and retailers and it is an evolution happening at a very fast pace. Technology will play a massive part in the future, but it has to be symbiotic and it has to be growing complementary. In the end, brand who are willing to listen to their consumer and cater to their evolving needs will emerge victorious.



Casual Wear Study



Pic courtesy: Status Quo



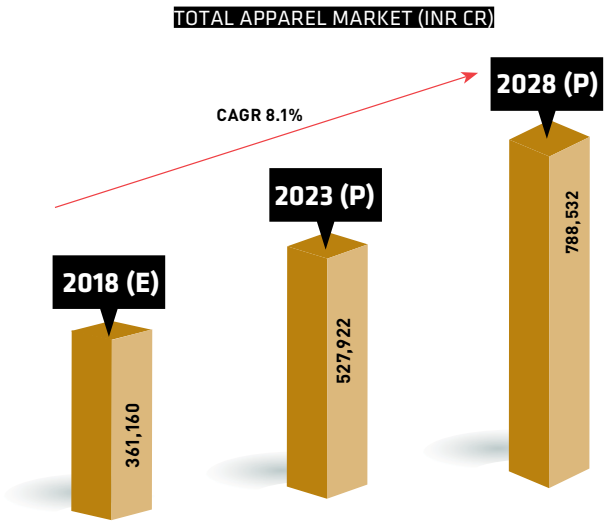
CASUAL WEAR MARKET IN INDIA

The Indian casual wear market has evolved very quickly and has emerged as one of the fastest growing segments in the Indian Fashion Market. Over the past few years, the market has witnessed accelerating growth, driven by growth in income levels, changing lifestyles, increasing casualisation among MNC's employees, emergence of start-ups and the entry of foreign players. Home-grown brands have also launched trendy casual wear products and repositioned the brand in to mirror global fashion trends. The increasing availability of international fashion at affordable rates, are causing casual wear sales in India to surge. Formal wear is increasingly giving way to trendier lines of clothing that includes casual apparel. Casual wear brands in India have shown potential in all segments of the market- premium, medium, lower and is going beyond the boundaries of urban markets in major metros, casual wear is picking up pace in mini metros, Tier II and III cities as well.

Saima Nigar, Associate Consultant, Fashion- Textile & Apparel, Technopak

Market size overview

It is envisaged that the current fashion retail market worth ₹3,61,160 crore (USD 54 billion) will grow at a promising CAGR of 8.1% for next ten years to reach ₹7,88,532 crore (USD 118 billion) by 2028.



Casual Wear Categories

Smart Casual: Generally neat yet informal attire qualifies as smart casual wear.

Business Casual: Business dress has three primary categories: Power Business, General Business, and Business Casual. While Business Casual attire is a recent addition to traditional business dress, it is no longer considered to be a trend.

Active Casual/Sporty Casual: This category encompasses apparel for gym, running, rollerblading, biking, tennis, racquetball, golf and other such sports. Most sports have particular items of clothing that support participants in performing well in that game. This category is not about playing a sport, but more about the relaxed look of a spectator.

Rugged Casual: The Rugged Casual category draws garments from the typical apparel of the more outdoor sports, like hunting, fishing, backpacking, rock climbing, etc.

Men's Casual Wear

With the market size of ₹1,56,496 crore (USD 24 billion), menswear is the largest segment in apparel market and is expected to grow at a CAGR of 7.6 percent for next ten years to reach market of ₹3,26,869 crore (USD 49 billion) by 2028.



Nowadays blue denim is being replaced by the colourful, printed denims or jeggings. Due to high demand new synthetic fabrics are now used extensively. The trend is not restricted to women.



Owing to the gradual shift of men's apparel market towards casual wear such as denims, activewear and t-shirts/polo are growing at a much faster CAGR of 13 percent, 15 percent and 10.5 percent respectively. This is also a result of growing fashion consciousness and aspiration beliefs, higher disposable income, increasing corporatisation, and acceptance of specialised clothing with features such as odour resistant jeans etc., not just in metros, but also in Tier I and II cities across India.

Women's Casual Wear

Women's apparel market in 2018 was ₹1,31,389 crore and is expected to grow at a CAGR of 8.3 percent to reach ₹2,90,504 crore by 2028.

A women's casual wear collection largely comprises tops made out of chiffon, cropped or utility pants, fashionable skirts, silk, velvet, cargo, capris and shirts made out of denim, silk and chambray, different washes of denim, leather or denim jackets, etc. Because comfort and functionality is of utmost importance, casual wear is quickly replacing the traditional sarees and salwar kameez in a woman's everyday wardrobe. Complimentary accessories like scarves, hats,

mittens, handcrafted belts etc., have made the women's casual wear market much more versatile and dynamic.

Denims

The Indian denim market is exhibiting continual growth trends over the years. With newer technologies and trends, territories the market is only going to see some exciting moments ahead. Not only men, even teenage girls in rural areas are opting for denim wear. Denim is a high growth casual wear category as the consumers find it to be fashionable and comfortable, and gave it the necessary style quotient. A lot of choices are available to the consumer for finishes looks, colors, washes. Nowadays the blue denim is being replaced by the colourful, printed denims or jeggings. Due to high demand new synthetic fabrics are now used extensively. The trend is not restricted to women. Due to the high popularity of denims, many brands are coming up with innovative products like breathable jeans made up of new fabrics and in new styles. Depending on the quality and make of the denim, the price range divides the market into the luxury, premium, mid-premium, mass, and unbranded segments. The market size for men's denim was

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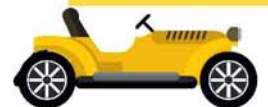
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Due to comfort choices for fabric, designs, fits – casual t-shirts have been quite popular with youth in both urban as well as rural areas. In the year 2019, the market size of women casual shirts/tops/trousers and skirts was ₹4,570 crore which is expected to reach ₹12,000 crore by growing at a CAGR of 10 percent.



₹25,000 crore in 2018 and is estimated to grow at CAGR of 13 percent to reach ₹77,800 crore by 2028. Whereas, the market size for women's denim was ₹2,700 crore in 2018 and is estimated to grow at CAGR of 15.5 percent to reach ₹10,100 crore by 2028.

T-shirts

T-shirts is considered as one of the most comfortable and dynamic categories of casual wear. Due to its soft knit fabric, fits, and the versatile use of it and is highly acceptable to a wide segment of customers. The market size for men's t-shirts in 2018 was ₹11,800 crore and is estimated to grow at CAGR of 10.5 percent to reach ₹31,500 crore by 2028 and for women the market size for t-shirts was ₹1,200 crore in 2018 and is estimated to grow at CAGR of 13.5 percent to reach ₹3,781 crore by 2028.

Casual Shirts/Tops/Trousers/Skirts

Due to comfort choices for fabric, designs, fits – this product category of casuals has been quite popular with youth in both urban as well as rural areas. In the year 2019, the market size of women casual shirts/tops/trousers and skirts was ₹4,570 crore which is expected to reach ₹12,000 crore by growing at a CAGR of 10 percent.

Key Trends and Growth Drivers

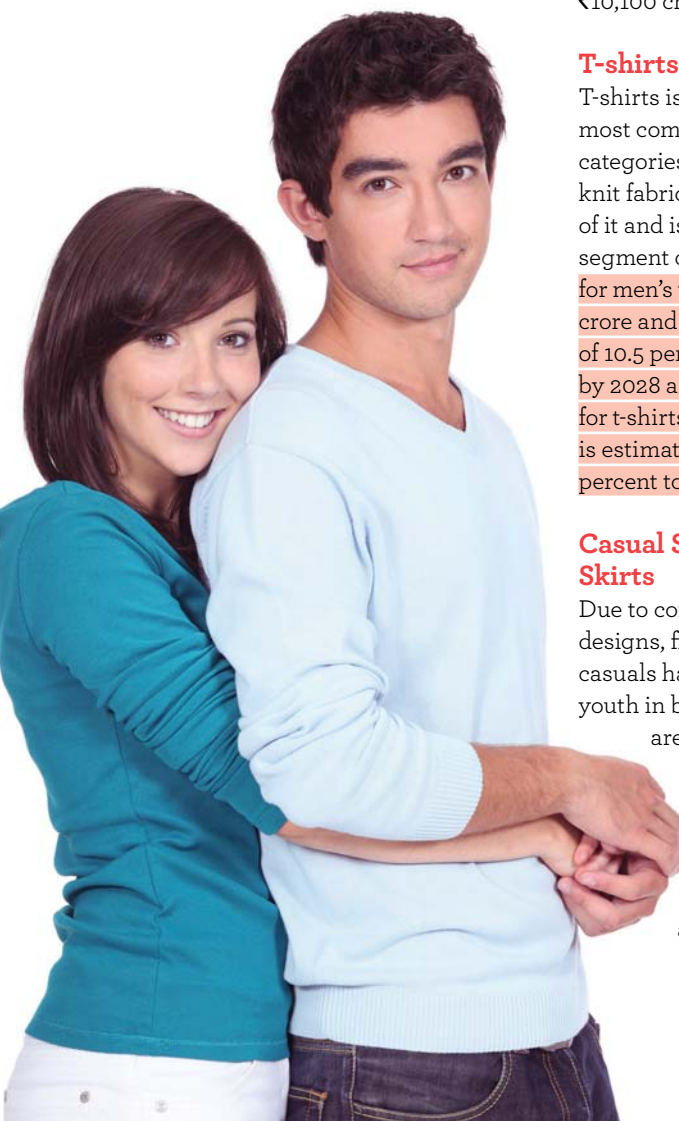
Due to abundant style options, changing life styles, growing middle class with increasing income, and increase in brand awareness and exposure to western fashion, the average Indian apparel consumer has become much more picky and aware of their fashion needs.

Increased inclination towards smart casuals

Indian corporate dressing is witnessing a transitional phase from strict formal wear to smart casuals. The steady abandonment of formal attire is reflected in the top lines of formal wear brands and shelves of retailers. The changing work culture is driving the market for smart casuals. The underlying philosophy for the acceptance of smart casuals is that being casual helps people to be more relaxed at work place promoting a culture that is not bureaucratic & hierarchical giving equal opportunity to all genders and age groups. Smart casuals have inspired new categories like treggings (hybrid of trousers and leggings), knitted blazers etc. thus providing comfort, design and styling through casual wear and smart appearance for professionals.

Innovations in Casualwear Products

The change in consumer buying behavior has also led to the introduction of many innovative



products in the Indian casualwear market. Most such innovations have taken place in the denim and activewear categories. Innovations in casualwear products are primarily related to product design, colour selection options, and fiber mix. Men's casual trousers and denims are no longer limited in terms of colours to black, navy blue, grey, and cream; instead, they are now available in red, green, sky blue, and many other variations, which have been received widely among youth. Innovation in terms of fibers and fabric properties, and application of newer finishes, will remain one of the key features of sportswear apparel.

Indian consumers have also started displaying an inclination towards environmentally-responsible casualwear products. Following the trends in European and US markets, eco-friendly fashion products have begun registering signs of growth in the Indian fashion market, including the casualwear market. The demand for casualwear products made from organic cotton, recycled apparel, etc. is growing in India. Interestingly, one of the global leaders in activewear has opened its first ever 'sustainable store'

in Bangalore. The store sells recycled casualwear fashion articles, shoes, and accessories. Built with recycled steel, the store has deployed sustainable recyclable energy management and lighting mechanisms. The company believes that sustainable stores will help them promote reduced carbon dioxide emissions, energy consumption, and use of water.

Bespoke Model for Denims

A premium tailoring segment has arisen for denims, comprising fashion designers and niche players, and dubbed the bespoke, or luxury, segment. Many companies and fashion designers have also started leveraging this premium bespoke segment. These companies and fashion designers have their own tailoring functions for high end denims that cater to the requirements of fashion-conscious, elite sections of society, and ensure that the tailored denim suits the customer's personality and social status, and occasion.

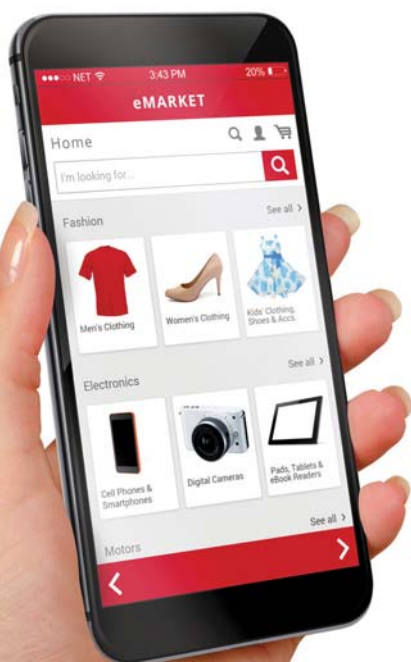
Focused Approach for E-tailing

The Indian online fashion retail industry has hitherto exhibited a great success story mainly due increasing internet and smartphone penetration, convenience of in-home shopping, aggressive promotion and pricing strategy (mainly led by discounting) by online players and easy options (cash on delivery, free return, etc.). **Online retailers like Amazon, Flipkart, Mynta, Snapdeal, Jabong, etc., are aggressively building fashion category since this category is key growth driver. Online retail helps brand reach in untapped market where brands will find it difficult to open and sustain exclusive brand outlets.** Also individual fashion designers are able to leverage online

platform for their exclusive designs. Considering the above reasons many casual wear brands and retailers are venturing into the e-tailing space. Convenient options, like cash on delivery, try-and-buy, easy returns policy, etc., are making the e-tailing space more competitive and dynamic.

The Way Ahead for Casual Wear

The Indian casual wear market is booming and the rural markets will play a pivotal role in this growth story. Factors including a growing middle class population, rising disposable income, increasing brand awareness among the consumers in terms of quality and up-gradation of service standards, rapid shift from tailored to ready-to-wear suits, the growing service sector ensure promising future for casual wear segment. There is a huge scope for product innovation within the casual wear segment. India has become a market with a plethora of opportunities and brands and retailers who understand the needs of Indian customers better are expected to leverage the opportunities to derive growth.





AN EXPLORATORY STUDY OF
***THE INDIAN CASUAL
WEAR MARKET***

With mounting western influence, the entry of global brands and a penchant for comfort, casualisation has gained unprecedented momentum in Indian fashion. IMAGES Business of Fashion takes a look at the market nuances...

IMAGES Business of Fashion

Casual wear is the modern sovereign of the global fashion world. Honestly, the fashion industry has probably not witnessed a force more unrestrained than casual wear in the past. In the last decade, casualisation has swept through global fashion sensibilities with unflinching determination and today, it has entrenched its stronghold as a wardrobe staple throughout the world. Reports suggest that more than one third of the global population has embraced casual wear in the few years and the trend exhibits no signs of waning. In fact, it is only gaining momentum with each passing year.

Analysing the Influencers

While comfort and functionality are supposedly the two most important aspects of any apparel, a look through history reveals that these words deserved little to no attention in fashion hitherto. And this is where casual wear created magic! Casual wear stresses comfort, practicality and freedom – freedom to choose how we present ourselves to the world; freedom to diminish the lines between men and women, old and young, rich and poor, etc. So, very naturally, at an age where time and attention are increasingly scarce resources, casualisation emerged as the perfect choice for consumers around the world.

Even India, a country that has always lagged behind global fashion trends, was quick to adapt to this casual way of dressing. The growth of the casual wear category in India can be better understood by co-analysing it with the key changes in the general ecosystem of the country. Changing lifestyles, higher disposable incomes, home grown brands bringing contemporary international fashion to Indian stores and well known international brands setting up business in India, etc. – a

profusion of factors have culminated to give impetus to the changing fashion sensibilities of the Indian populace. This changing fashion sense coupled with affordable prices has pushed the market for casual wear.

Moreover, due to comfortable choices in fabric, designs, fits, this fashion category has especially been successful in enjoying demand among the youth in both urban as well as rural areas.

“Indian casual wear market has grown over time with the changing lifestyles of consumers, the increase in the disposable income and the entry of international brands in our marketplace. Further digitalisation and online retail portals have proliferated the market variety and garments at a discounted rate. Consumers have started to purchase casual wear to complement their fast-paced life, along with giving them comfort, provides them with quality and style,” says Team WLS.

The casual wear market has gone through a major transformation in the last 5 years. “The biggest transformation that the casual wear market has undergone is that international trends are being adopted at a rapid pace and the major drivers of this transformation are rising affluence, quick access to information on global trends and a stronger connect with global influencers. Additionally, large corporates increasingly relaxing their dress codes is yet another important driver of this transformation,” says Vasanth Kumar, Managing Director, Lifestyle.

The concept of Friday Dressing in the corporate world has been one of the chief growth drivers of casual wear worldwide. Casual Fridays were something of a gateway drug that eventually urged an obvious but revolutionary question—Why not be casual on other days, too? Eventually,



“The entry of international brands in the country and growing exposure amongst Indians, especially the youth, have created a higher purchasing power not only in top metros but in Tier II and III cities as well. They also have easy access to many channels apart from retail stores like e-commerce platforms at the click of a button”

-Neha Shah,

Assistant General Manager - Marketing,
Pepe Jeans London



Cover Story



Westside



Westside



Westside



Westside

The past few years have seen a drastic change in the fashion industry as style and taste are not restricted to age, but an individual's personality. Gradually, the market has witnessed a welcome change with casual wear gaining popularity across all demographics, regardless of age.

On-the-go shopping has become a popular trend; consumers have easy access to variety of products online instead of physically visiting a store. Smooth browsing experience with product recommendations based on behavioral aspects is shaping the way retailers display their products online. E-commerce extends benefits like ensuring protection of personal information for online payment of purchases, easy return policies, delivery at your doorstep, etc. which creates an effortless and convenient shopping experience for consumers," says Neha Shah, Assistant General Manager - Marketing, Pepe Jeans London.



"Pop culture and exposure to the world either through social media or by taking vacations to new countries has motivated people to become more active and realise that comfort is good for the soul. The market of casual wear has more than doubled in the last 5 years and is only getting stronger"

-Umashan Naidoo,
Category Head - Men's Wear & Cosmetics,
Westside.

as the stress levels at work increased and employees were compelled to spend more time at offices, companies around the world realised that relaxing restrictions on the attire and working hours could go a long way in improve productivity and employee satisfaction. Today, a growing number of companies have called for a permanent casual dress mode.

The success of e-commerce has also contributed to this growth as has the digital boom. Retailers have been able to gain potential customers, improve their communications and messaging, track finances, implement research and improve their brand in a cost-effective manner. Digitalisation and e-commerce marketplaces have provided the retail industry with several avenues with an active consumer base that prefers shopping online, allowing them to purchase products whenever they want.

"E-commerce companies like Amazon, Mynta, Flipkart, etc., have driven the greatest change in the retail industry.

"Pop culture and exposure to the world either through social media or by taking vacations to new countries has motivated people to become more active and realise that comfort is good for the soul. This change is not only on the personal front but even in working spaces. The market of casual wear has more than doubled in the last 5 years and is getting stronger as organisations are adapting a relaxed and less formal dress code," adds Umashan Naidoo, Category Head - Men's Wear & Cosmetics, Westside.

The past few years have seen a drastic change in the fashion industry as style

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and taste are not restricted to age, but an individual's personality. Gradually, the market has witnessed a welcome change with casual wear gaining popularity across all demographics, even regardless of age. This is a clear indication that the casualisation trend has also been successful in transcending beyond the millennials and the younger generation to become a timeless trend.

"Today, the casual wear trend has gained popularity amongst all demographics. It is dominating as a wardrobe staple through all age groups as the lifestyle has undergone a lot of changes even in India, i.e., more outings, more travel, more Sunday brunches and movies, all of which require a casual yet appealing fashion formula.," says Manjula Tiwari, CEO, Cover Story.

The effect of global warming can be seen in every industry across the globe, and fashion is no exception. With general rise in temperatures, t-shirts are becoming around the year phenomenon in most parts of the country (barring a few months in the north). Also, for the time pressed consumers of today, casual wear is easy to maintain and wear; it naturally becomes a smart lifestyle choice.

IMAGES Business of Fashion

Competition from Global Brands

The gargantuan opportunities in the Indian fashion industry has attracted a long list of international bigwigs of late, all who have rushed in for their share of the market. Armed with better facilities and a strong supply chain, these brands can afford to bring latest trends very quickly to the market and offer stiff competition to domestic and home grown brands. "The competition is quite fierce. On one hand, the international brands have the advantage of better product and newer trend offerings which the domestic brands will find hard to catch up with. But on the other hand Indian brands have the advantage of better price offerings. Especially, brands like Zara and H&M are a competition to both Indian and other international brands since they have the advantage of product, trends and price in their favour," asserts Saurabh Singh.

However, a fair section of experts believe that this has also been a source for healthy competition in offering customers a lot more than domestic brands ideally would have. "Exposure to international brands is allowing Indian retailers to become more aware of trends and take inspiration to create garments suited for modern-day India's needs. Brands in India in this segment are making a mark today by exporting their creative styles by choosing natural fibres to create clothes in, innovative styles, designs, and prints," reveals Team WLS.

While the global brands have made consumers aware of global trends; they also compelled Indian brands to invest in product and design innovations but also re-align their strategies. As the game gets propelled to the game to the next level, the result is a slew of innovations aimed at standing out and attract to consumers.



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CEO, Cover Story



Westside



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-Saurabh Singh,
Head of Design-Menswear,
Being Human Clothing.



“The biggest transformation the casual wear market has undergone is that international trends are being adopted at a rapid pace and the major drivers of this are rising affluence, quick access to information on global trends and a stronger connect with global influencers”

- Vasanth Kumar,
MD, Lifestyle

factor is the speed at getting the right fashion out with shorter lead times. **“Travelling globally and working with partners from around the globe, talking trend and shifts in style, having a creative team that’s always watching street fashion, social media blow ups, and design new styles that launch every month are a few ways we bring innovations in market,”** reveals Umashan Naidoo.

Westside also offers a new selection of fresh products every week. It also has been successful in bringing fast fashion in 14 days -- from concept to shop floor.

Keeping up with recent sustainability trends, WLS, as part of its new brand

Cover Story has its design studio operating out of London which itself is a fashion capital. With a team of trend forward designers and buyers the brand has been striving to bring runway trends to its stores at a much faster pace.

Lifestyle has incorporated the Kooltex and Hydroway range from Kappa which is made from a quick drying fabric that wicks away moisture and keeps the wearer cool. It also has incorporated LIVA, a high-quality fabric, in a wide range of products from various brands across key collections. Additionally, the brand offers Flex Denims from its in-house denimwear brand Forca, which has been designed to enable greater movement and comfort, capturing the strength and durability of the product.

Westside provides comfort by using stretch, quick dry and anti-bacterial in Activewear, and 360 Degree stretch in denim. For AW19, the brand’s X



identity, will be creating garments that are made of 100 percent natural fibres. Everything from the collars to labels and button will be made out of natural material so as to ensure that it does not affect consumers’ well-being and the environment negatively.

Pepe Jeans has also introduced a range of environmentally conscious denims. The Tru-Blu range of denims is >





Being Human

Casual wear is one of the fastest growing categories in the retail industry and it will continue to perform well in the future. India's large population of educated youth that will join the mainstream workforce in the coming years, is one of the biggest opportunities moving ahead for the category

created using technology that utilizes zero chemicals in the wash process thereby dramatically reducing water consumption.

Percolation into Tier II, & IV Markets

Trendy casual wear is no longer the prerogative of the urban masses today but has also penetrated the semi urban towns and Tier II and III cities of India. The population of these cities today is far more aspirational and demonstrative and showcases a higher propensity to buy 'brands' in the casual wear space.

"The market response is very big in these markets since they all have a large youth population. Also what we have seen so far is that, as far a brand consciousness is concerned, the people with high disposable income in these cities are far more brand conscious than their counterparts in other bigger cities. E-commerce has played a big role is making available branded products to these places where earlier it was very difficult to get them as not all the brands had their presence in these cities," admits Saurabh Singh.

"The entry of international brands in the country and growing exposure amongst Indians, especially the youth have created a higher purchasing power not only in top metros but in tier 2 and 3 cities as well. They also have

easy access to many channels apart from retail stores like e-commerce platforms on a click of a button. Consumers are constantly challenging the industry to evolve and innovate," says Neha Shah.

The proliferation of casual wear in the remote corners of the country can be chiefly attributed to m-commerce and the whole digital retail revolution as a whole. "Digitalization and in particular social media played a big role is connecting maximum number of people and also making them aware of all the developments that are happening in fashion and lifestyle and which now they want to follow. M-commerce made it possible for people from every nook and corner of India to be able to buy things which were earlier not available to them locally," says Saurabh Singh.

Fast Growing Category

Casual wear is one of the fastest growing categories in the retail industry and it will continue to perform well in the future. India's large population of educated youth that will join the mainstream workforce in the coming years, is one of the biggest opportunities moving ahead for the category. However, as the competition intensifies, brands would have to work harder on their promotion strategies and digital presence to maintain sustained levels of brand recognition.

"The market opportunity in India is very large and every brand, be it domestic or international, caters to specific consumer segments and specialises in offering products that are true to their brand. Therefore, creating a strong value proposition is the need of the hour and both international and domestic brands are working towards catering to the fashion needs of Indian consumers across segments," concludes Vasanth Kumar.



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COOL COLORS

Brand: **COOL COLORS** | Company: **BAFNA CLOTHING COMPANY PVT. LTD.**
Year of Launch: **1979** | Headquarter: **BENGALURU**

With over 35 years of experience in the retail fashion industry, Cool Colors, the retail wing of Bafna Clothing Company, has become one of India's fastest growing brands. A 9001 certified company, they have made their presence felt across the country, with Bengaluru as its headquarters, and has driven the business to greater heights and achievements.



Core Customers

Cool Colors provide unique collections of shirts with its standout designs to men across the age group of 25 to 45 years. Operating with the mid-segment market, its products are manufactured and priced to fit in well with the Tier II and III cities' customers.

Product Portfolio

The menswear brand offers a complete range of plain, stripes,

checks, prints and linen shirts. It has seen a high demand for checks and printed shirts in the market compared to other products.

Latest Collection & Theme

Cool Colors' latest collection is inspired by the global traveler, with a keen sense of colours and styles. The brand has recently launched its Autumn-Winter collection. The collection offers a wide variety of colour and introduces a set of interesting washes and finishes in plains, checks, stripes and prints.

Most Innovative Product

The brand has recently launched its collection of blazers and t-shirts. This includes its collection of printed shirts along with new patterns.

New Product Range/Category Expansion

Each season provides an opportunity to recreate a product range and Cool

Colors works hard towards developing new styles that set them apart from the rest. Currently, it has launched its collection of striped shirts in the market.

Primary Markets

At present, the brand has a strong presence in Tier II and III cities. It has also entered international markets such as Singapore and the Middle East.

Retail Presence

The brand is present in over 2,200 MBOs across India and has taken pride in partnering with large format stores like Reliance and Brand Factory.

Exploring New Markets

Casualwear has seen an uptake in demand in the past few years, with a need for variety as well. To meet this demand, Cool Colors has launched its range of t-shirts and blazers in exciting designs and ranges, which the brand expects will receive a positive response in the market.

Progress Through Online Retail

Having presence on portals such as Myntra, Limeroad and Flipkart, the brand is witnessing an upward trend in its online business with a growing demand for casualwear.

Turnover

The brand has been showing a steady Year-on-Year growth of 30 percent.



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COURTYARD

Brand: **COURTYARD** | Company: **ARTEX CREATION**
 Year of Launch: **2015** | Headquarter: **KOLKATA**

Specifically designed for men, Courtyard by Artex Creation offers denim as well as cotton bottomwear, and Kraburs was launched for women customers. Launched in 2015, the brand started with manufacturing a few pairs of jeans but now manufacturers over 1,000 pairs in a short span of time. Today, it offers a complete range for all denim needs. Its products have been well appreciated in the market among dealers, retailers and the end consumers.

Core Customers

The brand targets people in all age groups focusing primarily at customers in the age group of 16 to 30 years, who prefer sober designs with the best in quality at reasonable prices. Catering to upper and middle class customers, its products are designed to meet the demands of high-end customers as well as commoners. The range of products are affordable to suit all.

Product Portfolio

The present product portfolio comprises jeans, cottons, chinos, trousers, corduroy, jackets, suits and blazers. Jeans is the brand's top selling product followed by its wide range of shirts.

Latest Collection & Theme

The latest collection consists of shirts, which are a newly introduced range. It comprises both casual and formal wear collections. For bottoms, denims with lace and towel wash is in demand, while high waist jeans is a must in its collection for young girls.

Most Innovative Product

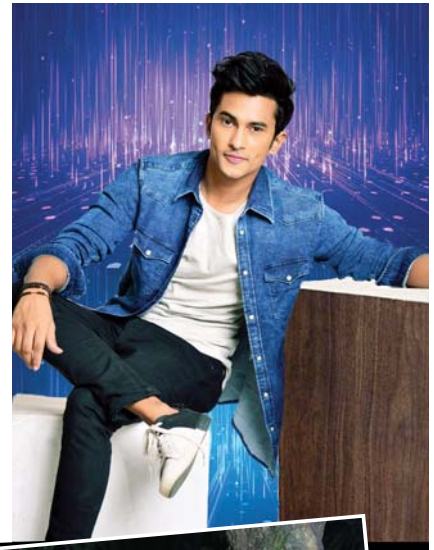
Unique bottom designs with lace and finely crafted accessories are an attraction this season.

New Product Range Or Category Expansion

Having recently expanded its range from bottoms to shirts, the brand at present plans to focus on these categories for some time.

Retail Presence

The brand currently retails through 2 EBOs and multi-brand stores in the country.



Exploring New Markets

India is a huge market and reaching every consumer is a challenging task. The brand has been making its presence felt through mobile SMSs, Whatsapp, Emails, magazine ads, hoardings, etc. Social messaging and online sales is a revolution and has a huge impact on its sales.





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PARX

Brand: **PARX** | Company: **RAYMOND APPAREL LTD.**

Year of Launch: **1999** | Headquarter: **THANE, MAHARASHTRA**

Casual men's wear brand, Parx addresses the complete fashion and lifestyle needs of millennial men. From its inception in 1999, Parx has been the preferred casual wear brand offering continuous innovations infused with international trends and styling. It is positioned to meet the consumer.

Core Customers

Parx is directed toward the tech-savvy globally connected youth who has trendy sense of style. The brand reflects the persona of the energetic 22 to 26 years old male who is outgoing, trendy and dynamic.

Product Portfolio

Parx offers all day casual wear solutions aimed for young audience. Shirts are the top selling brick for the brand followed by knits, denims and trousers. Denim wear contributes to about 10 percent of the overall product category of the brand.

Parx also undertook an innovation overdrive across all product lines by rolling out new lines such as Parx Denim (premium denims), Parx Play (fun, playful options and active wear), Black Stag (evening wear) and suits/jackets.

Latest Collection & Theme

The latest SS'19 collection from Parx is titled 'Cyber Surf'. A collection of hyper modern casuals with novel concepts of Cool, Smart, X-Fit, Eco and Chrome, it combines the best of function and fashion.

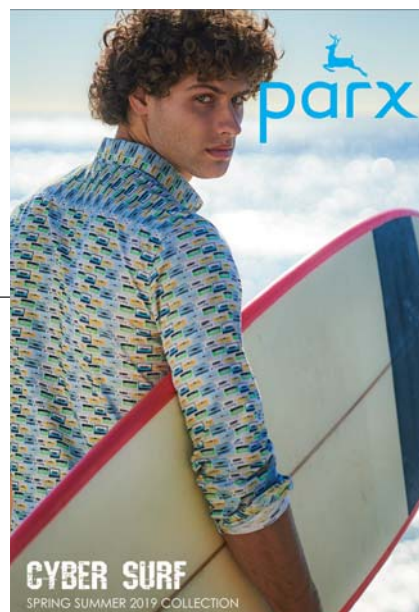
COOL: The 'cool' collection series from Parx is the best fix for summer heat. Offering garments in cool finishes and engineered fibers to keep you cool, it is available in shirts, trousers and denims. Its unique technology helps to spread body heat rapidly and seep up sweat diffusion that maintains body temperature at 37.5 degrees.



ECO: A collection for the future, Eco fashion combines natural elements and provides solutions to the changing dynamics of the environment.

SMART: Smarten up the wardrobe with various performance fabrics and finishes offered to you across all categories by Parx smart range.

X-FIT: Parx presents X-fit fabrics in 2X (2 way stretch) and 4X (4 way stretch) to let you live your life to the fullest.



CHROME: Offered with reactive and sulphur dyeing techniques, chrome is a fresh new take on summer denim.

New Product Range

Parx has launched its women's wear range 'Parx Woman' with the AW'19 collection, which will hit the floors from July-August 2019 onwards. The collection would offer the latest in women's wear fashion trends in all casual wear categories like causal tops, dresses, knits, pullovers, outerwear, trousers and pants.

Retail Presence

Parx is retailed through 820 The Raymond Shops, 650 MBOs, 237 LFSs, 28 EBOs and 5 online partners. Also a few pop up shops were launched for the brand in high traffic areas.

Exploring New Markets

Parx is aiming to open around 20 EBOs in FY' 2019-20 under FOFO model in Tier II and III cities.

Turnover

For the financial year ended March 2019, Parx posted ₹262 crores in revenue, and logged in a consistent revenue growth of 23 percent YoY.



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SHERIFF

Brand: **SHERIFF** | Company: **C K INTERNATIONAL**

Launch of the Year: **1985** | Headoffice: **KOLKATA**

Menswear brand Sheriff was established in 1985 with the basic aim to dress men at affordable prices, using high quality fabrics and stitching. Sheriff has made its name as a one-stop-shop for menswear in the East. The brand's biggest turning point came in 2009 when it opened its first retail store in Agartala (Tripura). It received excellent response due post which it expanded to 4 stores in the same city. Sheriff's biggest strength lies with its customers and employees, without whom it wouldn't have been the brand it is today. Sheriff is going strong with 15 stores and many more in the pipeline.

Core Customers

Customers who have a taste for quality, variety and affordability form the brand's main target audience.

Product Portfolio

Sheriff offers t-shirts, denims, trousers, blazers and suits.

Latest Collection & Theme

Geo Prints, Sheriff's latest collection is inspired by patterns and luxurious plains made to perfection. The new collection is simple yet well styled. It offers classics with a twist in bright and pastel hues.

Category Expansion

The brand is launching SJCo, a collection for boys between the ages of 4 to 14.

Retail Presence

At present, the brand has 15 exclusive brand outlets and is retailed through 400 multi-brand outlets in the country.

Exploring New Markets

Sheriff is all set to expand in the markets of Uttar Pradesh, Bihar, Jharkhand and Maharashtra. The brand is also working towards launching an online store soon.

CAGR

The brand is growing at 25 percent year-on-year.





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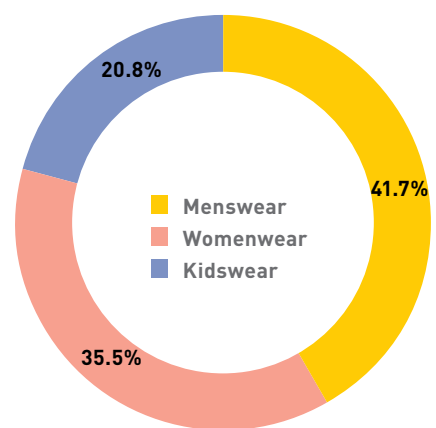
CASUALWEAR MARKET IN INDIA & ITS FUTURE DYNAMICS

Technopak research states that the Indian fashion retail market is worth ₹3,61,160 crore (US\$ 54 billion) and will grow at a promising CAGR of 8.1 percent for the next 10 years to reach ₹7,88,532 crore (US\$ 118 billion) by 2028...

**Ryan Fernandes: Head of Marketing & E-Commerce,
Pantaloons**

The casual wear market in India has been growing steadily over the last decade. It has kept the Indian consumer satisfied and engaged with constant re-invention from existing brands and launch of several new local and international brands. Casual wear offerings include an assortment across categories and verticals in fashion. Even the staples of casual wear are available in countless variations.

The basics now include style details like cold shoulder tops, fit and flare dresses, acid washed jeans, slim fit shirts, cropped trousers and much more. Customers are further spoilt for choice with more segmentation into different looks. Outdoor casuals, Sports casuals, Smart casuals, Indo-western etc. are some of the looks which allow the consumers to not just buy a product but embrace a new identity.

SHARE OF INDIAN APPAREL MARKET 2018

Source: IMAGES Business of Fashion Report 2018

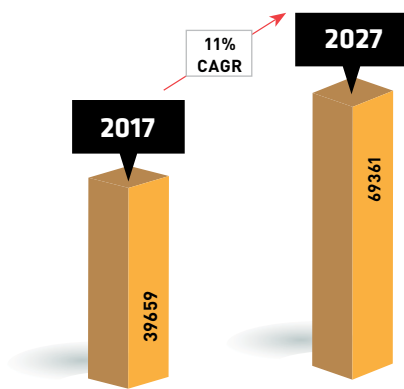
The popularity of fashionable casualwear picked up steam around 2010 with an increased exposure and awareness of the younger consumer. According to research by Livemint.com in 2011, the Indian apparel market was estimated to be ₹190 crore, growing at an annual average growth rate of more than 9 percent. The changing consumer demands have led to an exponential growth of the apparel industry over the years. Technopak research states that the Indian fashion retail market is worth ₹3,61,160 crore (US\$ 54 billion) and will grow at a promising CAGR of 8.1 percent for the next 10 years to reach ₹7,88,532 crore (US\$ 118 billion) by 2028. As per the IMAGES Business of Fashion Report 2018, menswear held 41.7 percent share of the Indian apparel market followed by women at 37.5 percent and kids wear at 20.8 percent.

The Indian apparel industry owes its growth to the burgeoning middle class, change in consumer choices and an

increased disposable income. Boom in rural markets is another essential factor in this expansion narrative. The growth story has led to India becoming a focus market for the global fashion industry. In order to cater to the growing demands of the consumers, apparel companies have to be nimble and constantly increase productivity.

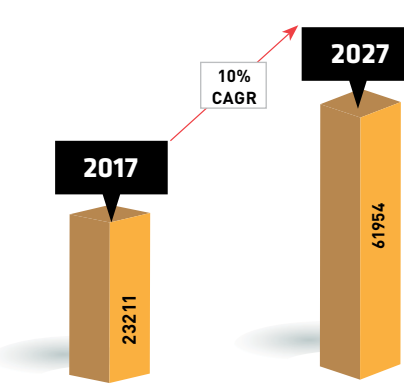


PROJECTED GROWTH RATE OF THE INDIAN SHIRT MARKET (INR CR)



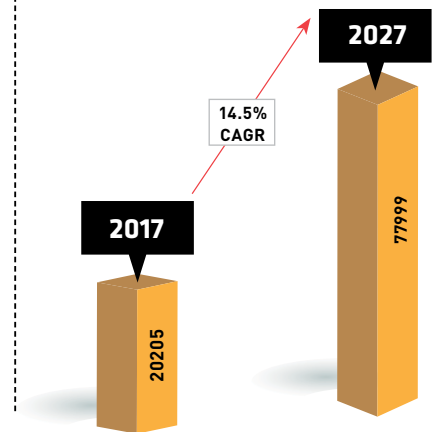
Source: indiaretailing.com

PROJECTED GROWTH RATE OF THE INDIAN T-SHIRT MARKET (INR CR)



Source: indiaretailing.com

PROJECTED GROWTH RATE OF THE INDIAN DENIM MARKET (INR CR)



Source: indiaretailing.com

Important Categories of Casualwear

Shirts: An article in IMAGES Business of Fashion states that in 2017, the domestic shirt market was estimated at ₹39,659 crore, and it is expected to grow at a CAGR of 6 percent to become ₹69,361 crore by 2027. Shirts accounts for 12 percent of the total apparel market in India. This growth is driven by the choice available in shirts category. Shirt is an item that is taking the fast fashion industry by storm. This category has gone beyond the boundaries of formal wear. Casual and semi casual shirts are available in a variety of fits, styles, patterns and prints. Fashion awareness of this silhouette has given impetus to international and domestic brands to personalize styles based on the consumer preferences. Shirts are now a wardrobe essential for men as well as women.

T-shirts: The size of the t-shirt market in India is estimated to be at ₹23,211 crore which is expected to grow at a promising CAGR of 10 percent over the next decade to reach ₹61,954 crore by 2027. This fashion essential has grown from basics to an instrument of personal expression. Slogan tees are worn to reflect an attitude and make fashion statements while all over prints and stripes can be seen sported with blazers for a semi-formal look AKA



‘Friday Dressing’. T-shirts are ageless and are preferred for their easy care, comfort and affordability. A Credence Research report from March 2018 says that India is set to register the highest growth rate for t-shirts sale in the Asia-Pacific region in the next five years.

Denim: Denim category has been growing 15 percent annually for the last five years and is expected to be worth ₹54,600 crore by 2023, according to experts. Denims are the largest growing segment globally. Today, denim collections in stores can be seen in an array of fits, wash, and distress details. All Indian and global brands such as Pantaloons, H&M, UCB, etc. have expanded the denim offering to cater to the diverse

needs of their consumer. While the millennials demand a more washed out and distressed look, the middle aged consumer prefers to keep it classy with cleaner washes and tapered fits. And we as Pantaloons ensure that we have the right options for both these segments. Awareness around sustainability has positively influenced the denim sector. Brands like Numero Uno, Gap and H&M have been collaborating with Arvind Ltd (a leading denim manufacturer) to make sustainable denims. Experts from Arvind Ltd say that it takes 70 litres of water to make a pair of jeans from denim. The use of innovative technologies will help reduce the water imprint by 95 percent. This revolution in Denim will serve the evolved

consumer who is aware of the dangers to the environment caused by the wash processes of making jeans.

Other Categories: In addition to the above categories, brands are offering the consumers a choice of identity through various curated looks such as Athleisure, Smart Casuals, Ethnic Chic and so on. Many brands have launched in-house labels to cater to the Athleisure look. At Pantaloons, we serve this segment through our brand Ajile. With the popularity of outdoor lifestyle sports like skate boarding, dance styles like hip-hop and also the rap culture this trend can be seen sported in many small towns as well. Millennials identify with youth icons and aspire to replicate their style. This look typically includes oversized or cropped tees, joggers and ankle high shoes.

Professionals today sport smart casuals in contrast to suiting up as more workplaces in India are accepting a more relaxed dress code. This shift is to keep the millennial workforce happy as well as to be in sync with the weather of India. During Mumbai summers for example, men would prefer a linen blazer over a woolen blend. Women may opt for a cotton t-shirt layered with a cropped jacket paired with a skirt or trousers. The young working population in metros are more open to experimenting with different fabrics and shades. On the other hand, consumers in smaller cities like Kanpur and Coimbatore may place a little safe but will still want to remain stylish.

The ethnic chic look is a rather new but an important trending style statement. Brands like Global Desi have tapped into this trend by infusing western silhouettes with traditional fabrics. Akkriti by Pantaloons is bringing these looks to our consumers too.

Plus Size Clothing: It's another growing segment of the fashion industry. A credence report states that the global plus size women's clothing market



stood at US\$ 165.2 Bn in 2017 expanding at a CAGR of 4.4 percent during the forecast period from 2018 to 2026. Asia Pacific dominated the market and is expected to display similar trend in the coming years. Multiple brands in India like Pantaloons Rangmanch Plus, Westside's Gia cater to this segment.

Many brands cater to this segment with styles offered in larger sizes. The scope for growth increases as the consumers embrace their bodies and become more fashion conscious.

Influencers in India

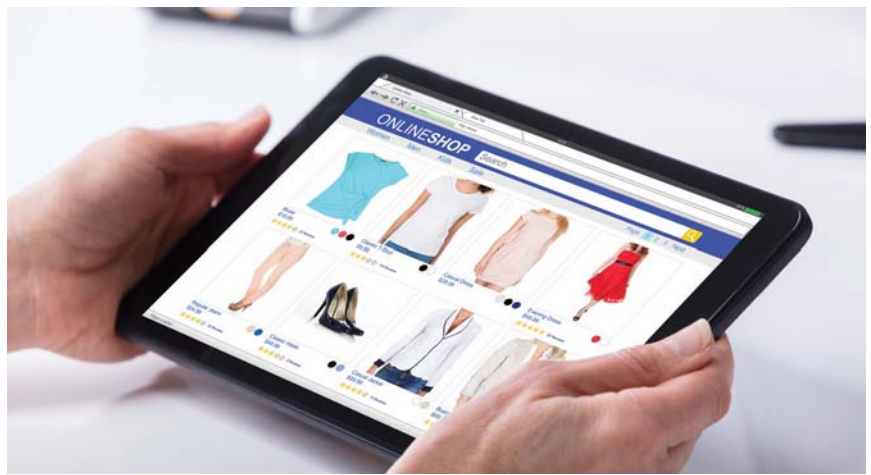
Technology and globalisation will be one of the most important influencers in India in the years to come. And the same truth extends to fashion industry too. Millennials are the game-changers of fashion industry and as youth becomes the key decision maker, a shift in the fashion paradigm is inevitable. For the fashion conscious population accessibility to stylish casualwear is important. They enjoy making a style statement every day which is evident from #ootd (Outfit of the day) posts on Instagram. The access to various social media platforms and fashion blogs enables them to keep pace with the latest trends. Frequent wardrobe update is the new normal and brands must remain on point with latest trends and affordable pricing.



The growing reach of the internet, social media and e-commerce now allows fashion players to reach consumers in smaller towns. The growth in e-commerce is driven by access to cheap data, increasing comfort with online shopping and brands offering best in class service on their web selling platforms. According to experts, ten years ago, technology was for the few, with just five million smartphones in a country of 1.2 billion people and only 45 million Internet users. These figures have since increased to 355 million and 460 million, respectively, in 2018, and they are expected to double by 2021, when more than 900 million Indian consumers will be online. Omni-channel and assisted e-commerce will contribute to the growth of fashion brands. A quick purchase journey and check-out is essential for the shopper with a reduced attention span and the desire for a minimal click process. The plethora of new brands as well as established companies offering casualwear via e-commerce must ensure a smooth online shopping experience.

A Consumer Centric Approach

Indian apparel companies are becoming more and more consumer centric in their approach. They are proactively creating engagement opportunities rather than just working on solutions to problems. Consumers are growing increasingly impatient as they want to have first access to new trends which they discover. Traditional brands are seen 'self-disrupting' their



Traditional brands are seen 'self-disrupting' their business models to keep pace with the surge in new brand launches, to cope with plummeting brand loyalty and to satiate the customer's growing appetite for newness



Papin Lab / Shutterstock.com

business models to keep pace with the surge in new brand launches, to cope with plummeting brand loyalty and to satiate the customer's growing appetite for newness. The former 4 season fashion cycle namely spring, summer, autumn and winter is gradually inching towards a 12 season cycle, where there will be something new every month.

The old-age business mantra "Customer is King" couldn't be more relevant than it is today. Consumer centricity has led to innumerable loyalty programs launched by retailers in India. Personalization and customer service is crucial to a brand's popularity as consumers prioritize shopping experiences and satisfaction.

International brands are paying careful attention to the needs of the Indian consumer. It is crucial for brands to understand the Indian market and the cultural identity of its consumers. The shift from conspicuous consumption to more value-driven purchases is extremely evident in today's aspirational buyers of high-end brands. As the global brands enter, consumers expect more from store design, visual merchandising, product pricing, product designing, marketing, etc.

×



ABOUT THE AUTHOR:

Ryan Fernandes: Head of Marketing & E-Commerce, Pantaloons

Ryan brings with him more than 18 years of rich experience across sectors ranging from Cellular, FMCG, Financial Services & Retail, across 3 continents – Europe, Asia & Africa. He has worked with Aarons Credit Capital, Nestle, GSK Consumer Healthcare, Nokia, Microsoft and HMD Global. In his last role, he was the Global Head – e-Commerce & Go-to-market for Nokia Phones based out of Dubai. Over the years, Ryan was leading the digital transformation agenda- D2C e-Commerce across Europe & India, building marketing capability globally, launching product innovations. Ryan is a graduate from the Indian Institute of Management, Calcutta.



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THE SWING TOWARDS

CASUAL WEAR

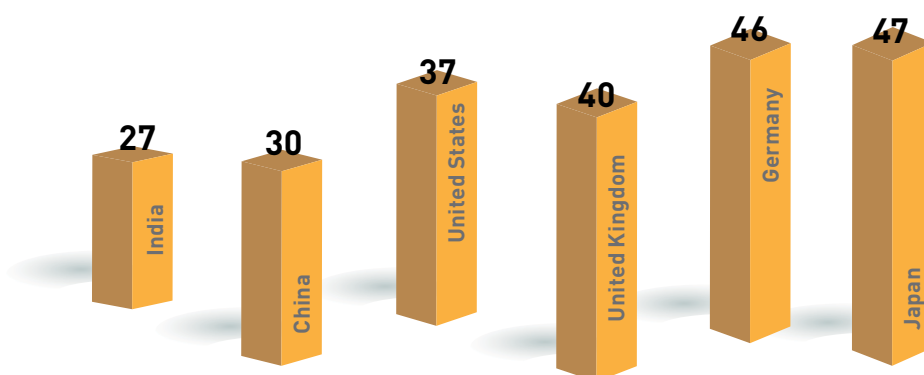
Casual and unstructured clothing, with a mix and match across products, has become a global phenomenon. People from New York to Tokyo and anywhere in between, are being driven by convenience and comfort when it comes to dressing themselves. Old rules of dressing up are being re-written and consumer segments are driven by casualisation, inclusivity and active lifestyle, giving rise to athleisure, genderless and modest wear...

**Baqar Iftikhar Naqvi, Business Director-
Wazir Advisors & Samir Soni, Associate
Consultant - Wazir Advisors**

Over the years, formal structures across various facets are being broken and new fluid ways are emerging as winners. Be it interpersonal relations, lifestyles, careers and job roles etc. this trend is visible all across. The new generation is iconoclastic and does not want to be ruled by 'structures and definitions' of the past. The trend is extremely visible in not just our attitudes and behaviour, but also in our dressing.

Casual and unstructured clothing, with a mix and match across products, has become a global phenomenon. People from New York to Tokyo and anywhere in between, are being driven by convenience and comfort when it comes to dressing themselves. Old rules of dressing up are being re-written and consumer segments are driven by casualisation, inclusivity and active lifestyle, giving rise to athleisure, genderless and modest wear.

Casualisation is mostly driven by millennials, who are now buying individual items that appeal to them, such as T-shirts, jackets, sneakers, denims etc. and then mix and match them to create a

MEDIAN AGE FOR TOP 6 ECONOMIES (IN YEARS)


Source: Statista



personal statement. Many brands are buzzing the market by catering to these young consumers, mostly through the power of social media and celebrity push, which are acting as a newsfeed for brands and giving a sense of urgency to fashion trends.

As markets in US are saturating and uncertainty revolves around European economies, the global stronghold for apparel and casual wear sales will no longer be derived from the west. With leading global economies having the bulk of the population in the middle age bracket, the main growth geographies for casual wear are going to be emerging markets like India and China, where the median age is around twenty-seven and thirty years respectively. With growing economies and higher disposable income, apparel sector has been evolving expeditiously in these emerging markets.

In India, growth in casual wear is again catalysed by the changing preferences of consumers, who are more refined and aligned to global on-trend fashion. Earlier, Indian consumers had a very limited wardrobe choice, but now they have proliferated variations and segments available to them. Also, given that India has the largest Gen Y population in the world, there can be seen a meaningful evolution in the shopping and buying behaviour of Indian consumers.

What Constitutes Casual Wear?

Smart Casuals: An informal attire such as round-neck T-shirts, denims, printed & check shirts etc.

Business Casuals: It is one of the recent additions to traditional business attire and includes Polos, Chinos, Cords, half sleeve shirts etc.

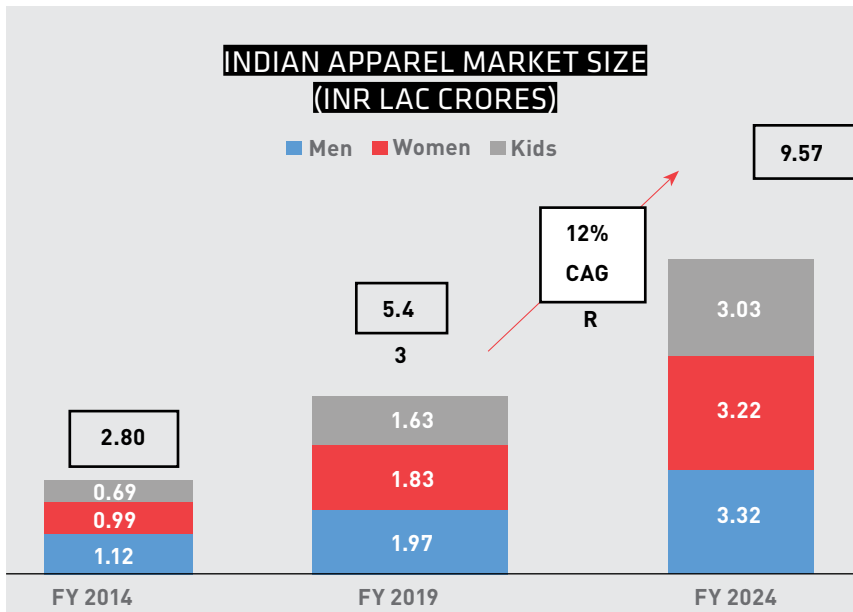
Athleisure: This category includes apparel made for exercising and playing sports like tennis, football etc. Lately, more and more people are inclined towards these apparel for casual outing purposes too. Athleisure is not about playing a sport, but more about comfort of the wearer. Athleisure generally includes - track pants, jeggings, sweatshirts, hoodies, jackets etc.

Outdoor Casuals: Though still not in the realm of performance sportswear, these garments are for more outdoor and adventure activities like cycling, hiking, trekking etc. These include shorts, cargos, capris, jackets etc.

Key Trends Driving Consumption of Casual Wear in India
Casualisation of Indian Apparel Industry

Currently, apparel industry in India stands at ₹5.43 lakh crore in FY 2019





Source: Industry reports

Women’s apparel market currently pegged at ₹1.83 lakh crore, is estimated to grow to ₹3.22 lakh crore by FY 2024. Casual Wear is estimated to grow at a faster pace than the Ethnic Wear between FY 2019 and FY 2024. Growth in Casual Wear is largely driven by athleisure, which is followed by Denims and T-shirts categories.

Further, a woman’s western casual wear segment is much more versatile than man’s. A woman’s western casual wardrobe typically comprises of chic skirts; blouses and shirts made out of georgette/satin/linen/denim etc; Various kind of bottoms - culottes, flared pants, jeggings, treggings, denims of varied colours and washes; jackets made of leather/denim etc.



In FY 2019, casual wear as a category accounted for 36 percent in the total apparel market for men and women in India. It is further expected to grow at a CAGR of 16 percent from ₹1.37 lakh crore in FY 2019 to reach ₹2.84 lakh crore in FY 2024. Thus, casual wear category will account for 43 percent of the total apparel market for men and women, by FY 2024.

Currently, ~75 percent of the casual wear market in India is dominated by

and is expected to reach ₹9.57 lakh crore in FY 2024, growing at 12 percent CAGR. As of FY 2019, Men’s Wear and Women’s Wear account for 36 percent and 34 percent respectively, of the total apparel market in India.

Within Men’s Wear, casual wear has a 51 percent value share, while it is 20 percent for Women’s Wear, in FY 2019. Further, while men’s casual wear is estimated to grow at 14 percent CAGR, formal wear will grow at 9 percent CAGR between FY 2019-24. Thus, the share of casual wear is progressively increasing.

SHARE OF INDIVIDUAL CATEGORIES IN MEN’S WEAR (RS CRORE)				
	Share	Market Size (INR lakh crore)	Share of Casual Wear	Share of Formal Wear
Shirts	29%	0.57	60%	40%
Trousers	23%	0.45	30%	70%
Denims	12%	0.24	100%	0%
T-Shirts	7%	0.14	100%	0%
Winter Wear	7%	0.14	70%	30%
Suits	5%	0.10	65%	35%
Ethnic Wear	7%	0.14	-	-
Innerwear	7%	0.14	-	-
Others	3%	0.06	-	-
Total	100%	1.97	1.01	

Source: Industry reports

Note: Formal shirts are styled and coloured conservatively. They generally have stiff collars which is useful to withstand neckties below them and suit jacket lapel above them. Formal trousers are creased and are largely non-cotton based.

Share of individual categories in Women's Wear (INR Crore)				
	Share	Market Size (INR lakh crore)	Share of Casual Wear	Share of Formal Wear
Western Casuals*	10%	0.18	100%	0%
Winter Wear	4%	0.07	90%	10%
T-Shirts	3%	0.05	100%	0%
Denims	3%	0.05	100%	0%
Western Formals**	2%	0.04	0%	100%
Sarees + Blouses	47%	0.86	-	-
SKD***	18%	0.33	-	-
Innerwear	8%	0.15	-	-
Others	5%	0.09	-	-
Total	100%	1.83	0.36	

Source: Industry reports

*Western Casuals include trousers, shirts, leggings, jeggings, treggings, skirts, shorts, jumpsuits etc.

**Western Formals include shirts, trousers, western suits etc.

***SKD: Salwar Kameez Dupatta

Men's Wear, which stands at ₹1.01 lakh crore in FY 2019. This is expected to grow at a CAGR of 14 percent to reach ₹1.95 lakh crore in FY 2024. Though women's casual wear seems to be a smaller market in comparison to men's, it is expected to grow at a CAGR of 20 percent to reach ₹0.89 lakh crore in FY 2024 from ₹0.36 crores in FY 2019.

Global Apparel Brands Tapping Growing Indian Aspirations

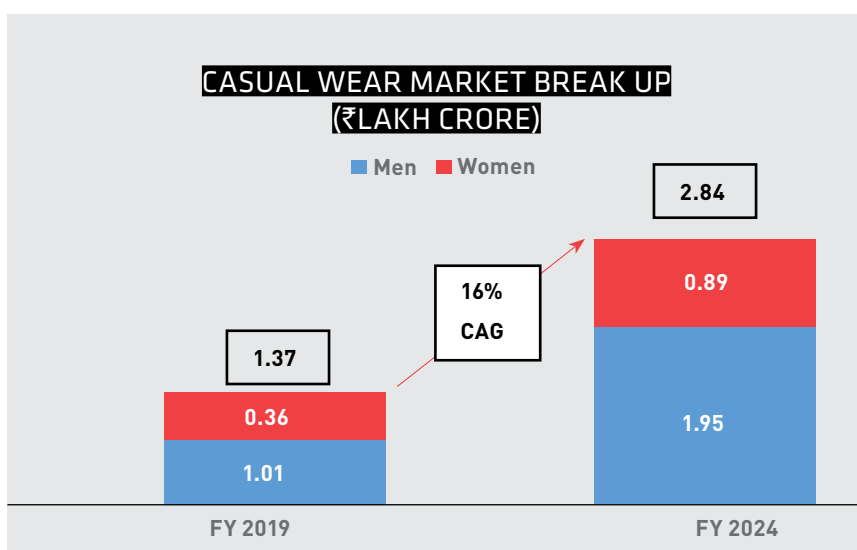
Consumers, especially millennials, consider fashion as a form of self-expression. They consider it as a reflection of their personality and status. Increasing number of global brands in India such as H&M, GAP, Aeropostale, ZARA, etc., focussed on young and trendy streetwear and casual wear are catering to this demand, and further fuelling the market.

Brands like Zara, H&M, etc., are the fastest growing brands in the Indian market. Success of these brands, coupled with more relaxed FDI regulations in retail, catches the fancy of other large global fashion brands to enter India. Following is the list of brands that have entered India in last five years, most of whom are targeting the casual wear segment in Indian apparel industry:

Inclusion of Casual Dress Codes at Work

In the last two decades India has emerged as a strong service sector driven economy. Further, there has been a trend towards entrepreneurship and self-employment. These trends along with growing economy have also fuelled the casual wear sector.

Employment in the Government & Semi-Government sector and those that require more formal clothing has not been increasing at the same pace as that in sectors like IT/ITeS, Retail, etc., where casual wear is the acceptable office dressing. Many start-ups like Ola, Flipkart, Zomato, Swiggy, Policy



Source: Industry reports

Note: The above market for casual wear excludes kid's wear, however it largely comprises of casual wear only.

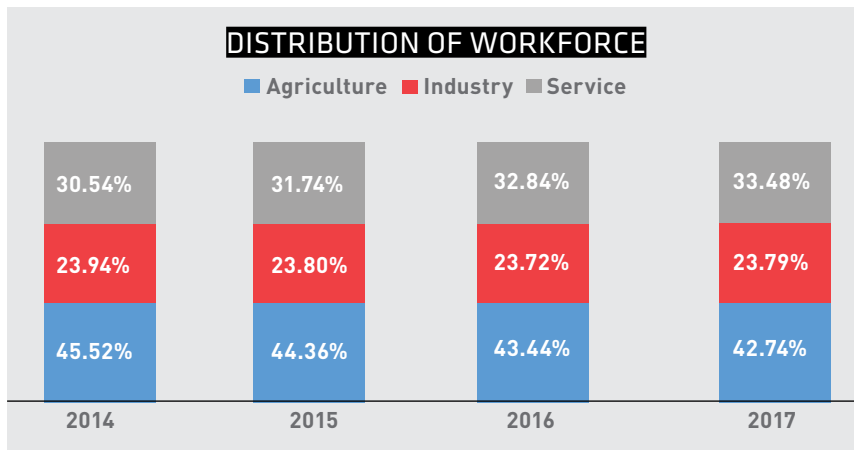


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S.No.	Brands	India Partners	Physical Retail Presence (EBOs)	Expansion Plan
1.	H&M	Wholly owned subsidiary	41	Add one EBO per month
2.	GAP	Arvind Lifestyle	16	4 new EBOs by CY 2019
3.	Mango	Myntra	10	30 new EBOs by FY 2022
4.	Scotch & Soda	Reliance Brands	8	NA
5.	Massimo Dutti	Trent	3	NA
6.	Kate Spade New York	Reliance Brands	2	NA
7.	Under Armour	Wholly owned subsidiary	1	9 new EBOs by FY 2019
8.	Esprit	Myntra	Present through SIS in LFS	15 new EBOs by FY 2024
9.	Aeropostale	Arvind Lifestyle	Present through SIS in LFS	Rs. 500 crore business by FY 2022

Source: Company Websites, Industry reports
 SIS-Shop in shop, LFS-Large format stores
 Besides the above, early entrants like Benetton, Levis, Tommy etc. continue to grow. Together these brands are exponentially growing the overall casual wear market.



Source: Statista

Bazaar, etc., have propped up which have led to the creation of newer job profiles and work cultures. Backed by investor funding and aggressive expansion plans, these companies continue to grow aggressively and employ large number of Gen Y population. Being dressed in casuals in these new age jobs is considered to be more relaxed, non-bureaucratic and the new normal. It is not considered out of place anymore to wear a denim or coloured chinos or experiment with similar combinations that allow for greater inclusion of casual wear.

Formal work wear, on the other hand, is being classified as boring and needing a re-interpretation to make it contemporary, fashionable and stylish. Thus, even the jobs where strictly formal clothing was necessary, today one sees inclusion of 'smart casuals' or 'semi-formals'. Creative informal dress codes are slowly and steadily replacing traditional formals such as 'sari', 'business formals' and 'suits'. Across most sectors today, there are no guiding principles or dress codes anymore, the only aim is to offer a productive, comfortable and enabling work environment.

Given the above swing towards casual wear, many of the leading formal wear/office wear brands like Louis Philippe, Van Heusen, Arrow, etc., have also launched their sports/casual wear lines. These lines now contribute anywhere between 40-60 percent of the revenue of some of these brands.

Emergence of Athleisure as a Segment

Athleisure as category that is an amalgamation of utility, comfort and sporty style is growing by leaps and bounds. As India's fashion preferences are bound to make a shift towards comfort, the concept of athleisure has evolved. As of FY 2019 active wear segment, which forms the part of casual wear, has the market size of ₹0.42 lakh crore and is further expected to continue growing at a CAGR of 25 percent in the coming years. With target customers being in the age group of 20-40 years, athleisure is perfect for millennial consumers, who are always looking for options that bridge the gap between sportswear, gym wear and casual wear. As athleisure is considered to be worn both in gym, playing sports as well as for casual meets or even parties, this enables today's working millennial population in switching effortlessly between these day to day activities.



category contributed up to 20 percent to the overall sales for Van Heusen. Due this phenomenal response, Van Heusen is targeting 7,000 sales point by the end of FY 2020 from 2,000 sales point in FY 2019.

Way Ahead for Casual Wear Brands

Based on the above mentioned trends, it can be concluded that an impressive growth is expected in casual wear market over the next five to seven years, thereby creating a huge demand and opportunity for various players in the market. Further, more international brands and retailers are seen entering the Indian market and focusing on casual wear. In order to win the casual wear market in India, brands will need to combine quality with a unique mix of fashion quotient and trendiness.

Further, brands need to integrate fashion with aspects like convenience, affordability, innovation and sustainability. Lastly, it is important for brands to understand the fact that these preferences of Indian consumers should not be considered as passing trends anymore, as they are now part of Indian consumer's fashion psyche. New age Indian consumer are as aligned to global fashion trends as anywhere else in the world.



Along with changing preferences mentioned above, consumers in India are also getting inclined towards health and well-being. Millennials, who are more into building a healthy lifestyle for themselves, are creating a tremendous demand for active wear in India. This is creating a huge opportunity for various global and domestic brands to enter this burgeoning athleisure segment in India.

Another growth driver that is giving a forward push to the athleisure segment is the celebrity push. The athleisure airport and gym looks of celebrities, becoming viral through social media is driving a whole new trend towards this category. Celebrities riding the wave, are not only embracing athleisure look but are also launching their own private labels. For example, Mojostar

partnered with actor Tiger Shroff and Jacqueline Fernandez to launch their own brands, Prowl and Just F respectively. Other celebrities like Virat Kohli, Hrithik Roshan, Shahid Kapoor etc. have introduced their own clothing lines in athleisure category (Wrogn, OneX, HRX, Skult). HRX, in joint venture with Myntra, has seen 110 percent growth in their sales since its launch in FY 2016.

Several non-sports brands too have started offering athleisure ranges, like Van Heusen which has ventured into this segment in FY 2016 by introducing premium and innovative athleisure ranges for men. According to the brand, its product offerings received phenomenal response from consumers across the country. As of FY 2018 the



ABOUT THE AUTHOR:

Baqar Iftikhar Naqvi

Baqar is a seasoned retail professional and entrepreneur with over 15 years of experience in retail strategy and operations, covering sectors such as Fashion & Lifestyle, Food & Grocery and Consumer Goods. He specializes in retail startups and driving growth, having been involved in eight retail startups in India and internationally, including those in the e-commerce space.

Samir Soni

Samir, an Associate Consultant with Wazir, has been involved in advising multiple brands across consumer facing sectors on entry strategy, growth strategy, go-to-market strategy and market opportunity assessment, which involves trade research, consumer research and analysis. His areas of expertise include understanding the business requirements of clients and assisting in developing customized solutions.



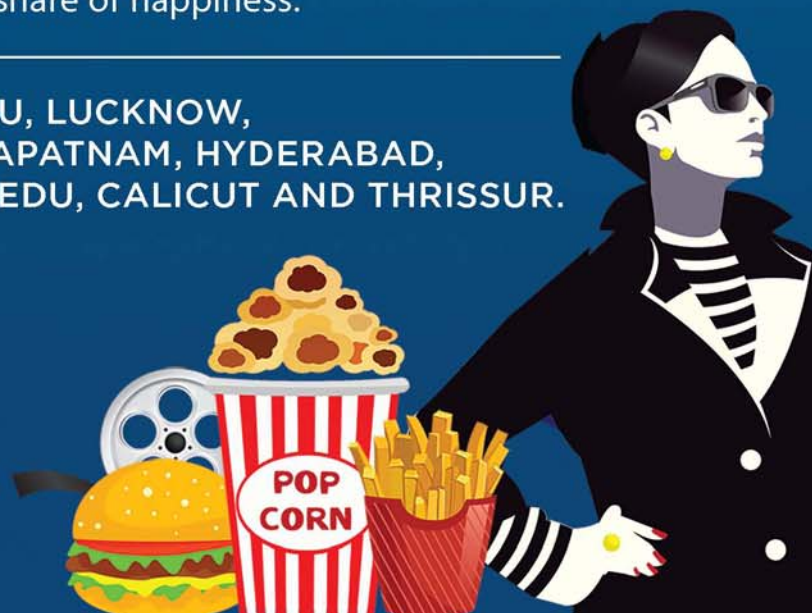


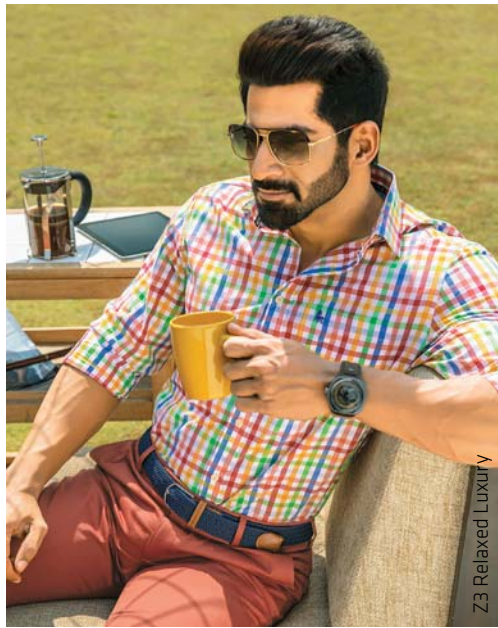
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INNOVATION & SUSTAINABILITY RULE **THE INDIAN CASUAL SHIRTS CATEGORY**

Casual dressing in workplaces is boosting the consumption of casual shirts among men. A lot of brands are exploiting this emerging market opportunity with innovative product ranges and novel, eco-friendly fabric blends...

Rosy Sharma with inputs from Gurbir Singh Gulati

The casual shirts segment is the fastest growing segment in Indian apparel market, owing to the changed consumer preferences. According to Frost & Sullivan, the men's shirts market in India is valued at ₹371 billion, and it is the largest category among men's apparel accounting for about 28 percent of the total men's wear market. Around 40 percent of the men's shirt market currently is constituted by formal and semi-formal shirts. In comparison, women's shirt category in India gets a much smaller share of the pie (~2 percent) in the overall women's apparel category, which is still dominated by ethnic wear. It is still a relatively new segment at nascent stage of penetration and expansion in the country, albeit estimated to be growing at a fast rate of about 14 percent CAGR, owing to increasing women's participation in the country's workforce, and growing interest for western wear among women in India, especially in metro and mini-metro cities.

Indian men are increasingly embracing the concept of 'fashion' seriously as a means of true reflection of their persona, and not just a high-end purchase. The per capita expenditure on apparel stood at ₹3,100 in 2015 and is expected to reach ₹8,000 by 2025. The total Indian apparel consumption expenditure is expected to grow to ₹11.7 lakh crore (US\$ 180 Billion) by 2025.



Success

Moreover the influx of global brands has induced domestic players to significantly improve their own consumer experience and build brand loyalty by producing innovative designs and adopting international best practices in retail, service, visual merchandising and processes. The focus is on developing new and exciting formats, similar to international trends and practices, which would yield more consumer comfort and delight.

According to **Prashant I Bhatia, Managing Partner, Cambridge**, with the changing work culture 'business casual' dressing is more acceptable than ever. "Hence, you will see more men dressed in smart or business casual attire even at work now," he says.

Pragati Srivastava, General Manager & Brand Head, Parx adds,

"With casualwear trending today and the acceptable shift from formal to casual wear, the shirts category has been on an all-time high. Shirts have become the first preference for people when on casual outings, with trends like resort shirts and bright stripes becoming popular. Consumers are open to the latest trends in prints, colours, patterns and silhouettes."

"Domestic casual brands are receiving cutthroat competition from global mid-segment brands namely Zara, H&M, Jack & Jones, etc., both in price and variety," says **Rajnish Sethia, Director, Success**.

Prashant I Bhatia expounds on this saying, "The competitions is intense in this category since it is fashion focused and price sensitive. A lot of international brands command

loyalties because they offer discounts throughout the year to clear their inventories and hence are more popular compared to the Indian brands."

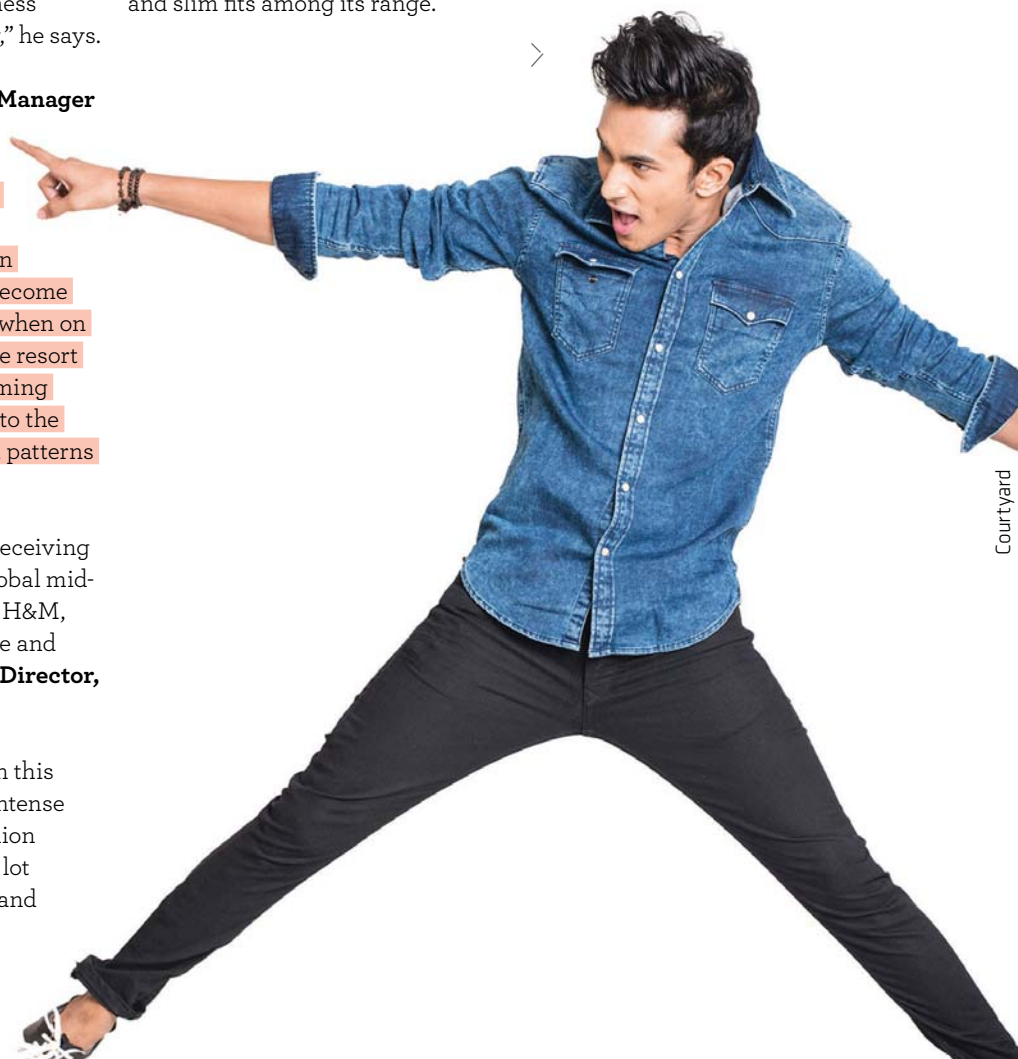
Innovation in Designs & Fabric

Brands today are recognising the value of superior products and so are the consumers. Consumers want the best their money can buy and don't mind spending a little extra for the same. "Fabric innovation has been a prime reason for the growth of the shirt category in Parx," says Pragati Srivastava. She explains that shirts that allow good stretchability with Lycra and spandex content, and that allow body heat regulation with coolmax fiber, and that prevent body odour with micro-encapsulated aroma finishes have all been game changers. She adds that Parx offers short collars and mandarin collars casual shirts which witnesses quite a good demand. During high summers, it promotes resort shirts and slim fits among its range.



"A lot of international brands command loyalties because they offer discounts throughout the year to clear their inventories and hence are more popular compared to the Indian brands"

-Prashant Bhatia,
Managing Partner, Cambridge



Courtyard



“Fine cotton, twill, linen are the most preferred fabrics for making shirts. Apart from this, poplin and oxford fabrics are also preferred. Eco-friendly recycled fabrics will be used in the near future too”

-Amit Dhelia,
Proprietor, Courtyard



“With casualwear trending today and the acceptable shift from formal to casual wear, the shirts category has been on an all-time high. Consumers are open to the latest trends in prints, colours, patterns and silhouettes”

-Pragati Srivastava,
GM & Brand Head, Parx



“Solids in poplin are preferred in making designer casual shirts. Beside solids there are printed, checkered, striped fabrics. There are even reversible fabrics with checks in one side and print on the other”

-Rajnish Sethia,
Director, Success

While Cambridge is renowned for fabrics and washing variations, key differentiating factors over the years have been the double packets with flaps, roll-up sleeves with loops and the adoption of kurtas with variation in length. Similarly, the two-way shirt has been a super hit with Courtyard – a brand from the East – which can be worn both ways. Contrasting colours on collars, cuffs and on buttons is a hot favourite from the brand as well.

“Also, solids in poplin are mostly preferred in making designer casual shirts. Beside solids there are printed,

checkered, striped fabrics. There are even reversible fabrics with checks in one side and print on the other. There is hosiery fabric which is very much in and we assume it has immense potential,” says Rajnish Sethia.

Fabric & Blends

While cuts and details often change with present day trends, fabrics haven't seen too much of a change – that is until now. Blends give a fabric a differentiating factor at the core level. “Fine cotton, twill, linen are the most preferred fabrics for making shirts. Apart from this, poplin and oxford fabrics are also preferred. Eco-friendly recycled fabrics will be used in the near future too,” says **Amit Dhelia, Proprietor, Courtyard.**

Cotton blended fabrics too are seeping in this category since price is critical to this segment. Any new age eco-friendly yarn blended with cotton that can last longer and come at attractive price point has the potential to sell more. For example, along with 100 percent cotton fabric, new age fabrics like tencel and bamboo from Parx have been



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“Gen Green is today actively seeking out eco-friendliness in every product and is willing to go all out to embrace these products. Sustainability is a major choice with this generation when it comes to purchases, brands today are happy to trigger new mindsets towards this belief”

-Salman Noorani,
Managing Director, Z3 Relaxed Luxury



Courtyard

Linen has always been a consumer favourite, be it any weather and any occasion. Linen can absorb up to 20 percent of its weight in moisture and still feel dry to the touch which is why it always feels fresh and cool even in humid weather. Blended linen has more potential to sell during festivals, weddings and summer periods

thoroughly appreciated by the people for its soft hand feel, natural antibacterial properties and good drape.

Linen has always been a consumer favourite, be it any weather and any occasion. Linen can absorb up to 20 percent of its weight in moisture and still feel dry to the touch which is why it always feels fresh and cool even in humid weather. Blended linen has more potential to sell during festivals, weddings and summer periods. “100 percent pure linen has a set of loyal customers, there are linen cotton blends too. The segment has been strong for us in summer,” says **Salman Noorani, Managing Director, Z3 Relaxed Luxury.**

Sustainability Vs. Fast Fashion

According to Noorani, for a generation growing up on Twitter feeds, hashtags, multimedia messaging on social media and an overdose of trivia, environmentalism is a top concern. He says, “Gen Green is today actively seeking out eco-friendliness in every product and is willing to go all out to embrace these products. Sustainability is a major choice with this generation when it comes to purchases, brands today are happy to trigger new mindsets towards this belief.”

“At Parx, the concept of sustainability is embraced on all levels of yarns, finishes and washes. Recycled cotton, organic cotton, BCI, miDori finishes and eco-washes are incorporated into the shirts category,” says Pragati Srivastava.



Most fashion retailers now are doing something about sustainability and have some initiatives focused on reducing fashion’s negative impact – carbon emission, water use and land use. Mitigating the sustainability impact of the fast fashion business will likely require action across the industry.

Considering the above trends, the casual shirts category is still poised to grow stronger. The demand would continue growing backed by a large youth population that has the disposable income and aspiration. “As more and more office spaces become tolerant and open to casual dressing, the future of this category seems bright,” concludes Prashant I Bhatia.



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T-SHIRTS

Bringing in Casual Style & Comfort to the Traditional Indian Shirts Market

T-shirts are emerging as a huge category in the casual wear segment in India. The varied colours, styles and affordability make them a popular category as does the fact that it is accessible across every segment of the market. The global t-shirt industry has evolved, driving fashion trends in the form of plain t-shirts, personalised t-shirts, graphic t-shirts, vintage t-shirt designs, etc. While the Indian market is yet to reach this level, brands and retailers are working hard to evolve to the next stage the category...

Rosy Sharma with inputs from Gurbir Singh Gulati

Traditionally India has been a shirt wearing nation since workplaces in the country have been strict about dress codes, limiting to formal dressing. Then in came Friday dressing and changed the way Indians dressed, creating a market demand for t-shirts. Today, most companies - Indian and global - allow casual clothing, in turn stimulating demand for casual apparel, especially t-shirts.

Worldwide, t-shirts enjoy special popularity amongst the youth. In a young country like India with a median age of 27 years, this segment harbours immense opportunities for brands and retailers alike. Indian youth seek comfort and style in their clothing, which is better met by t-shirts as compared to woven shirts.

According to **Hetal Kotak, CEO, Lee Cooper (India)**, the growing influence of hip-hop and sneaker culture, pop subculture communities, new age workplaces, Bollywood too has helped this shift. Another influencing factor is the growth of athleisure wear owing to rising inclination towards fitness and overall athletics. "T-shirts arrived as a humble alternative to smart-formal shirts. Today, a crew neck tee is as casual as a tartan check shirt," he says.

T-shirts are preferred over woven shirts due to comfort, stretchability and easy breatheability built within the knitted fabric structure. "People are wearing t-shirts 3 to 4 days in a week - a time frame which was earlier dominated by shirts," says **Bobby Arora, Director, Status Quo**.

Ranjiv Ramchandani, Director, Tantra says if you scan any old picture (>20 years) of an Indian youth, chances are that they will be seen wearing a (woven) shirt, and not a (knitted) t-shirt. The skew gets even more prominent when moving from urban to semi-urban cities. "Why? Because woven shirts are built to last. That is why we Indians love it. We are a 'value-for-money' race," he says. "However, the last decade-and-a-half has seen a rapid 't-shirtisation' of India."

"Mark Zuckerberg, the original poster boy of the digital world wears it all days of the week, not just Fridays. It's cool to be yourself," he states.

Aashray Thatai, Co-Founder, PostFold says, "The eco-system and work culture in general have become more informal after the plethora of start-ups." He added that this trend has been growing over the years. Polos, classic or basic t-shirts have become a Friday norm and in many places casual clothing is official dressing on Fridays.

"Initially, t-shirts were only accepted at advertising/communications firms, but soon tech giants opened the concept of Friday dressing and now, besides a few banking and hardcore corporate law firms, the t-shirt is not a blasphemy in corporate firms," says Hetal Kotak.

"As clothing oneself becomes more of an art, the onus to dress for the best has become more relaxed. Here, the shift has emerged from staid power dressing to cool, Friday dressing. Friday dressing constitutes of breezy designs and print, perfect for the Friday bent of mind, where t-shirts play an important role in conveying a cooler style," states **Rishabh Oswal, Executive Director, Monte Carlo**.

T-shirts have been steadily gaining market share due to their competitive pricing and unlimited offering as far as



"As clothing oneself becomes more of an art, the onus to dress for the best has become more relaxed. Here, the shift has emerged from staid power dressing to cool, Friday dressing"

-Rishabh Oswal,
Executive Director, Monte Carlo



Lee Cooper



Monte Carlo

PREFERRED RANGE

- **Monte Carlo:** Elderly people and most office-goers prefer polo t-shirts. Polos are considered the new age formal these days. On the other hand, round neck t-shirts and Henley t-shirts are preferred by youth and commonly considered for casual dressing.
- **Lee Cooper:** Consumption of round neck t-shirts is the highest, followed by Polos, Henley and V-neck t-shirts.
- **Status Quo:** Consumption of round neck t-shirt is the highest, followed by Polo, V-neck t-shirt and Henley neck.
- **PostFold:** Polos are the most sought after, followed by V-neck t-shirts and Henley neck.

creativity to take over as he chooses a t-shirt matching his personality, style and attitude.

As Aashray Thatai explains, “T-shirts have become quirkier and customers want them customised to their needs, be it with prints or embroidered surfaces. T-shirts with one’s favourite character’s quotes or even occasion specific ones like a family gathering or a company meet give it a huge prospect of being personalised. Even the kind of fabrics and techniques available for printing and surface embellishments are limitless – making unique designs in the humble silhouettes an interesting design process.”

product options are concerned. There’s a wide variety in terms of colouring, pricing, quality and even personalised aesthetics. For example, one can choose to pick a shirt that is reminiscent of their favourite book or series while shirts do not offer this luxury.

Innovations & New-Age Designs

T-shirts are specifically targeted towards the young population. One of the main reasons behind the popularity among youth is that t-shirts strike a chord with the creativity hidden inside each individual. An individual has the flexibility to choose every element of their t-shirt including colour, design, garment, logo, etc., which allows their

T-shirts have certainly come a long way- from their earlier tropes of being easy-to-wear apparel, to modern cutting-edge creations fit for the denizens of fashion. While classic designs still remain in fashion, cutting edge designs combining various materials, with washes, have come into the picture. Some of the current trends in design innovation categories are anti fits, athleisure, performance and sustainable fashion.



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“T-shirts have become quirkier and customers want them customised to their needs, be it with prints or embroidered surfaces. T-shirts with quotes or even occasion specific ones like a family gathering or a company meet give it a huge prospect of being personalised”

-Aashray Thatai,
Co-Founder, PostFold



“T-shirts are a very creative medium. There's language involved (slogans), graphic art (visuals), and sometimes both, in a heady and humorous combination”

-Ranjiv Ramchandani,
Director, Tantra

Take for example Status Quo. The brand has introduced an exclusive traveler's collection consisting of two and four ways t-shirts, which can carry a headphone and a space for keeping passport, iPad and other important things. And when planning to take a nap they also have an eye mask!

“T-shirts have remained the same in silhouettes. A basic crew neck tee across a high-street label to an ultra-luxury brand will remain same. However, designs have definitely changed. They are more agile and receptive to the topical conversations, for example, slogan tees on feminism, characters from Marvel, Star Wars, Game of Thrones, etc., have quicker rotation and are feasible on t-shirts,” explains Hetal Kota.

Ranjiv Ramchandani also feels that the basic template of the t-shirt has not changed much over time. “It was loose and baggy once. It is more fitted and slim now. The shape is dictated by the fashion trends of the day,” he says. The basic premise of a t-shirt is whether it is interesting – design/art/made-ups – to wear? Or is the brand a fit with the wearer's personality?

Market Size

According to the latest reports from India's leading management consulting firm Technopak, the size of the t-shirt market in India is estimated to be at ₹23,211 crore which is expected to grow at a promising CAGR of -10 percent over the next decade to reach 61,954 crore by 2027. In the present scenario, men's wear holds a key share in the market, followed by women's wear and kidswear. At the same time, the women's segment is registering a faster growth that experts attribute to the comparatively lower base of market size and increasing acceptance of casual clothing among women.

Also as per Credence Research's report, the Indian t-shirt market is estimated at ₹5,400 crore. According to the report, a whopping 83 percent share of that is generated by the men's segment alone. Even though it's a sizeable and growing market, it is not one of the world's largest by a long way. It is projected that the market will grow over with highest growth rate in the Asia-Pacific region over the next five years. The women's segment is also said to see a growth of 17 percent which will eventually grow and come almost at par with the men's segment in the coming years.

As for the per capita spend, we are a country that largely resides in rural areas and still relies on traditional neighbourhood stores for our needs. Western apparel like t-shirts, thus, doesn't have a huge per capita spend. In 2015, per capita apparel consumption in India was just US\$ 45 compared to US\$ 172 in China. It is expected to go up to US\$ 125 by 2025 which still wouldn't be anywhere close to those of developed economies.

Existing Challenges

The overall Indian t-shirt market comprises large number of international as well as local players, making the market highly fragmented in nature. Additionally, due to presence of high number of vendors in the



PostFold



market, the market has emerged highly competitive in nature.

“The high level of fragmentation has resulted in an extremely competitive market where product price become the core basis for competition. At the same time, t-shirt manufacturing is also highly fragmented yet concentrated, in knitting clusters such as Ludhiana and Tirupur. Smaller manufacturers are grappling with issues of quality management, colour consistency, effluent discharge, marketing etc.,” shares Hetal Kotak.

Aashray Thatai adds to this saying, “Key challenges that the segment seems to face are durability and longevity of this segment. Quality t-shirts are hardly available and the few players that are trying to push for quality are facing stiff competition. India is a price sensitive economy so, unfortunately, price mostly takes precedence over quality. Most of the customers would rather buy a t-shirt for ₹500 and wear it for one season only instead of one that is superior in quality, lasts longer and has a lesser detrimental impact on the environment.”

According to Bobby Arora, the overall segment is growing and Status Quo being amongst the organised players in this category faces challenges from

the unorganised segment which holds a bigger share in the market today. Despite this, it is important to note that the organised market is growing at a fast pace, faster than the unorganised market. Brands take brand building exercises seriously, specialising in t-shirts, and aim to create aspirational brands which have an edge over the competition.

Global vis-à-vis Domestic Players

Global brands have helped t-shirts become an essential part of a wardrobe. International players offer ‘out of the box’ fashion tees, which is one of the primary reasons that trends flow from the international market to domestic market. The Indian t-shirt market is yet to develop to its full capacity as a fashion category across brands. For example, core tees, graphic tees, striped polos are still the big-ticket items. International brands like Lee Cooper have expanded their t-shirt categories with elevated fabrics, silhouette manipulations, style elements and wash techniques.

“Internationally, the positioning of t-shirts as a fashion must have or fashion statement (the way we domestically portray denims or footwear) is commendable,” says Hetal Kotak. Citing examples of H&M, Gap, etc, Aashray Thatai says, “Global

PREFERRED FABRIC

- **Monte Carlo:** Fine cotton, poplin, twill, linen and flannel. The most sought after properties are comfort, fit and experience.
- **Lee Cooper:** The preferred fabrics for t-shirts are 100% cotton for comfort, cotton-spandex 95/5 for stretchability, and cotton-polyester 70/30 for durability. The most sought after properties are quick dry, anti-microbial, stain/soil resistant, etc.
- **PostFold:** Knits are the most suitable for t-shirts and the most preferred due to their comfort factor. The only thing that varies is the content of the fabric which is going back to pure cotton like Supima® from polyester blends.





“In India, all domestic and international players have created their brand positioning respectively. Competition is helping all to keep innovating and delivering the best to the customers”

-Bobby Arora,
Director, Status Quo



“T-shirt designs today are more agile and receptive to the topical conversations, e.g., slogan tees on feminism, characters from Marvel, Star Wars, Game of Thrones, etc., have quicker rotation”

-Hetal Kotak,
CEO, Lee Cooper (India)

“India has an internet users base of about 475 million as of July 2018, which is almost like 40 percent of the population. T-shirts are a staple part of wardrobes across the globe and the e-commerce has helped it to grow enormously,” states Rishabh Oswal. “An e-commerce store prefers t-shirts because they are cheap to source, have universal appeal and are relatively simple to customise.” On the contrary, Hetal Kotak shares very often they have also seen a desire of customers to experience the products in a brick-and-mortar stores. “Eventually all channels enable the ability of brands to service customer better,” he shares.

Aashray Thatai also says that online made it easier for the customer to access a huge variety from many different brands. “They can choose to buy ethically manufactured or even sustainable t-shirts from smaller brands easily with the ease of accessibility that e-commerce gives,” he further shares.

Ranjiv Ramchandani opines, “Online marketplace is a huge catapult, hauling unknown entities into the glare and spotlight of incremental sales. Provided the person behind the product / brand is offering quality / uniqueness at an acceptable price point, the brand is destined for online success. However, digital marketing needs a whole new tool-kit and financial staying power to operate successfully.”

brands have stolen vanity away from the local players and also offered better quality at competitive prices”

“Global brands have now been in India for long but all domestic and international players have created their brand positioning respectively. Competition is helping all to keep innovating and delivering the best to the customers,” says Bobby Arora.

Ranjiv Ramchandani adds to this saying, “With respect to ‘Global Vs. Desi Brands, the challenge is often on price points, and on the Indian consumer’s acceptance of the inherent brand value of the global brand.”

Online Boost

The rapid penetration of e-tailing in the fashion space had created a positive impact on the fashion industry in general. It has given the customers a plethora of options to choose from. The t-shirt category, especially custom-print and designed, has exhibited a higher acceptance for e-tailing.

The Road Ahead

With leading fashion brands embracing t-shirts as an influencing category, the future outlook appears positive for the market. The Indian t-shirts market shows a huge opportunities for industry players due to increasing penetration of the category into rural areas and youth. Bobby Arora feels,



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Vinit Doshi, Head - Product, Sourcing & Retail Planning, Celio* on t-shirts as a category in India, and their positioning and pricing in the Indian market...



How have t-shirts made a mark in the market today in terms of product category, positioning and pricing?

With lifestyle patterns changing and consumers having access to large number of International & Domestic brands, there is a change in way people spend on this category. It can be easily divided into 4 sub-categories - tees, polo's, stylized tees and active wear. Every sub-category has grown to an extent that it can sustain by itself.

Also with more organisations going easy on the dress code, this category - especially Polos - have become a 'must have' for the working class while crew neck is popular with the younger generation. This change has also helped in extension of prices in the premium segment. The round neck tees on the other hand can be still bought at entry level price points. Stylised tees have become good casual wear options while graphic tees complements jeans wear.

What difference have global brands made to the t-shirts category vs. the domestic players?

Global brands have opened the market for different occasions e.g. sports inspired t-shirts, casual t-shirts, office wear etc. They have also brought about premiumisation of t-shirts and some global brands are entering the market with t-shirts as their core strength.

What are the key challenges restricting the growth of the segment?

The price value equation for t-shirts is still considered little lower than shirts - this is one of the main challenges

Has the e-commerce boom helped the t-shirt category grow in India?

Yes, because of the low entry price point of this category it connects very well with the e-commerce platform which drives a lot of impulse purchases and where the average buy value tends to be a bit lower as compared to in physical stores. We have seen a strong demand for products which appeal to the youth in this space.

manufactured with long lasting quality and craftsmanship. This helps reduce the amount we end up contributing to the fast fashion garbage dump." He shares that the sourcing of fabrics and the content should be sustainable whether it is repurposed fabric or organically grown cotton and believes that people are gradually becoming more mindful of these choices and this is definitely something the garment manufacturers and retailers should embrace as well.

Meanwhile, owing to the low entry price points and trend-centric appeal, t-shirts have a lower life span - both at the retail shelf and in the wardrobe and are discarded in no time. Hetal Kotak says that sustainability is an issue with a product category like this.

"The growing concerns regarding global warming and increasing wastage of earth resources has ushered in the sustainability factor in t-shirts too! Current international scenario is that of encouraging re-utilisation of fibres, going organic, converting organic waste to fabric, converting used poly products to fabric and using process's that utilise less water and dyes and emit lesser carbon footprint," he says.



"In a growing market like India, there is enough scope for all the brands and retailers. But as the market starts moving towards maturity in the coming years, it is expected to witness cutthroat competition. Manufacturers, brands and retailers, those who could innovate and cater to consumer needs with business prudence, are expected to lead the t-shirts market in the future." Another important factor regarding t-shirts is the fact that they are basics and thus timeless too. Aashray Thatai says, "T-shirts can be worn season after season, provided they are

"T-shirts are a very creative medium. There's language involved (slogans), graphic art (visuals), and sometimes both, in a heady and humorous combination (infact, we creatively embellish our polo's too!)," sates Ranjiv Ramchandani. "The challenge, thus lies in the ability to surprise and be inventive! The other challenge is (initial) resistance by the trade/dealer; or, as Jean Marie Dru says in his cult book 'Disruption', "the penalty of leadership", or simply being ahead of the curve," he concludes.

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MIEN'S BOTTOM WEAR MARKET COMING OUT ON TOP

The trouser category has had its fair share of increased patronage in India and the credit for this goes to category expansion which includes khakis and chinos that can be worn both casually and formally.

Does it then look like trousers will convince men to retire their jeans for good? Here's a quick look at the market trends and demand for trousers in India...

Zainab S Kazi

When it comes to bottom wear for men, it's usually a tug of war between trousers and the good ol' pair of jeans. Where jeans as a category has always been witnessing a substantial growth owing to the 'casual' tag attached to it, the trouser category too has had its fair share of increased patronage. Credit for this goes to the category expansion which includes khakis and chinos that can be worn both casually and formally. Does it then look like trousers will convince men to retire their jeans for good? Here's a quick look at the market trends and demand for trousers in India.

Citing the emergence of ready to wear trousers and its growing acceptance, **Sangeet Kishore, Brand Head – Blackberrys Casuale** says, "A few years ago, the trouser market was dominated by local tailors; given the diversity in height and girth, Indian men opted for custom-stitched trousers primarily for their fit and, needless to say, their price and wearability. But today, however, there has been a marked shift in trends as

younger consumers seeks alternatives for trials and dull, tailored looks which are better in quality and save a lot of time and capital involved.”

Kishore attributes the growth to the hard work put in by the “smart and organised players”, stating, “They have played an important role in converting consumers from preferring tailor-made to readymade trousers by giving a plethora of options in terms of fits and colors.” Citing numbers to accentuate the size and growth of the category, Kishore states, “Today, menswear is the biggest segment within the apparel market and is estimated to increase at a CAGR of 9 percent to reach US\$ 39.6 billion by 2023. The trousers market in India is growing annually at around 30-35 percent; it is expected to grow at a CAGR of 8 percent, from ₹23,290 crore in 2013 to ₹50,730 crore in 2023. India’s domestic apparel market is expected to grow at a compound annual growth rate (CAGR) of 9 percent.”

On the market dynamics of casual trousers in India, **Akash Manwani, Assistant Vice President, D’Cot** by Donear aptly explains, “The casual trousers market in India has witnessed

many fashion trends and fashion fads in fabric, style and design. Trends have shifted cyclically back and forth over time from regular fit to baggy fit, skinny fit, pleated trousers, chinos, corduroys, flat front trousers with no turn-ups etc. Also in tandem with the global trend of casualisation, the Indian apparel market is also expected to witness higher growth in casual wear compared to formal wear. Consequently casual trousers have started demonstrating higher growth rates compared to formal trousers.”

He points out to a shift being witnessed in the Indian casual trouser market which is now seeing many changes like washed effects having an increased demand. Highlighting another interesting trend, **Pragati Srivastava, General Manager & Brand Head, Parx**, says, “The market has witnessed demand for trousers in non-traditional colors like red, green, yellow etc. Khaki will remain an essential part of the trouser color way, But the ratio of the same will not be growing drastically rather following a steady flow for the upcoming seasons.”

Accentuating comfort being a major factor in men’s casual trouser market, **Praveen Mutha, Managing Director, Bafna Clothing Company Pvt.**



“Men are now also open to exploring different colours and styles, as compared to a few years back”

-Praveen Mutha,
Managing Director, Cool Colors



Blackberrys Casualle



Blackberrys Casualle



Blackberrys Casualle



D'Cot

Ltd. says, “Men are now also open to exploring different colours and styles, as compared to a few years back.” He bets big on khakis since according to him, khakis are an evergreen product and they never go out of style. “They may see a wider audience this year, but much depends on external influences.”

Trending Trousers

While Bollywood superstar Ranveer Singh may make it seem like multi-colour silk trousers are the in-thing, the reality is that men want to stick to basic colours and fits while picking up their pair of trousers – formal or casual – although they are opening their wardrobes to a larger number of chinos and khakis.

Kishore says clean-cut cotton trousers for work wear are the in-thing today. “People at work do not mind sporting chinos.

Jeans are yet not accepted but chinos enjoy a huge fan base.

Both chinos and smart casuals, are showing significant growth.

However, the cotton trousers led by chinos have shown a higher degree of growth.”

Talking about the trending trousers at Blackberrys, he adds, “Khakis are one of our highest selling products.”

Manwani highlights the growing trends of utilitarian trousers stating that they are a big hit in the international market owing to the fact that they are a perfect amalgamation of fashion and function, resulting in utility-based trousers with multiple pockets, secret seams and many more special features.

“Currently, the ‘Relaxed or Wide Leg’ trouser style is trending across the globe, because the ‘baggy’ or ‘capacious’ look is totally ‘in’. Pinstripes and plaids are the popular ones in terms of prints. In India, along with the ‘Relaxed or Wide Leg’ and ‘Utilitarian’ trouser, the current trends also include - ‘Multiple Pleats’ because the vintage look is back in fashion, Printed Trousers (florals, chevron etc.) and Athleisure trousers,” he says.

Samresh Das, Design Manager, Numero Uno

is quick to state that, “Though chinos, cargos and cropped trousers are doing well, the category which is catching up is the Performance Trousers category with features that include flexibility, anti-odour, anti-creasing, anti-stain etc. Chinos and cargos are the most favorite and hot selling due to their versatility and timelessness. They have always been there no matter which fad comes and goes.” According to Kishore, in the international market, trousers that come with features like wrinkle-free, durable press and flexible waistbands are doing well. “In India



“In India, along with the ‘Relaxed or Wide Leg’ and ‘Utilitarian’ trouser, the current trends also include - ‘Multiple Pleats’ because the vintage look is back in fashion, Printed Trousers (florals, chevron etc.) and Athleisure trousers”

-Akash Manwani,
Assistant Vice President, D'Cot



“The category which is catching up is the Performance Trousers category with features that include flexibility, anti-odour, anti-creasing, anti-stain etc. Chinos and Cargos are the most favorite and hot selling due to their versatility and timelessness”

-Samresh Das,
Design Manager, Numero Uno

the current trends and styles of casual trousers in the Indian market include baggy fit trousers for a casual look, skinny fit for a sharp look, pleated trousers, khaki trousers/chinos, corduroy trousers, striped trousers, check trousers, twill chinos, trousers with mid-rise and slim fits and trimmed trousers.”

Manwani adds, “Flat front is the most selling style while 5 pockets casual trousers are gaining momentum as they are available at attractive price points and also offer a denim feel with the comfort of a trouser. Consumers who want the look of denim and still want to try other product, for them the 5 pocket casual trouser fills that gap.” According to him, in terms of fit, the ‘loose fit’ look will continue throughout for most of the year until winter where the ‘straight fit’ will then witness a rise in demand. In terms of fabric, he shares, “Sustainable threads, tie-dye fabrics, pastel colours along with innovations like moisture-absorbent fabrics, bio-fabrics, textiles made out of food items like recyclable coffee, vegetables etc. shall be trending.”

According to Das, over dyed trousers, micro printed trousers, linen and linen blends, regular light weight twill and heavy twill trousers are doing well internationally, he adds, **“In India twills and dobby structures are doing great. Micro printed trousers are also doing well along with fashion colored trousers which are a craze in the Indian market.”** He further points out the growing spread of athleisure seeping in the trouser category, “It is something which is engulfing every category in fashion. So we would see lots of hybrid styling in terms of fabric innovation and silhouette as well. The look is a mix of sports-casual fusion.”

Srivastava shares her take on the trends stating, “Though finishes like



wrinkle-free treatment, durable press, water resistance, water repellence, etc., have been in the market for a long time, there has been continuous improvement in all these finishes over time. At the same time the market has witnessed the introduction of new finishes like breathability with superior moisture management characteristics and exceptionally good comfort properties. Trousers with flexible waistbands have also started gaining commercial traction.

The Denim Desire Story

The denim story is here to stay and there can be no two thoughts about it. No matter how wide the bottom wear category grows, the charm of position on denims can never be undermined.

Explaining the reason for the size of the denim market which overrides the other categories in bottom wear, Manwani shares, “It is important to understand that denim comes under the casual wear market. Given its versatility, it is popular as a choice for casuals as well as formals. In terms of casual trousers and denims, the latter has a bigger market share because of several reasons which include the fact that denim is worn by men, women, girls and boys – across all age groups. It is a perfect clothing choice for everyone, unlike casual trousers. Secondly, denims have a pan region appeal where people prefer denim because of





“The market has witnessed the introduction of new finishes like breathability with superior moisture management characteristics and exceptionally good comfort properties”

-Pragati Srivastava,
General Manager & Brand Head, Parx



“Consumers in super premium and premium category segments tend to have an association with the brand image and that is what makes them willing to pay a price for their desired quality”

-Sangeet Kishore,
Brand Head, Blackberrys Casuale

makes them willing to pay a price for their desired quality. However mid and economy segments dominates the market.”

“The share of ready-to-stitch in these price segments is higher compared to that for shirts in the similar segments. This is because consumers consider fit to be a crucial element in trousers.” Singh further talks about a growing rise in demand for private labels stating, “The consumer is increasingly seeking value for money,” he further adds.

According to Mutha, with expanding demand for semi-casual office wear in India across various income brackets, the market is witnessing the mid segment range well.

Adding Features that Boost Demand

A little more is always good. So trousers with additional features find interest amongst their target audience and industry experts unanimously agree that these help boost sales as well. Manwani shares, “When it comes to apparels, or any product as such, performance features always increase its value in the consumers’ minds. While wrinkle-free and wrinkle resistant and stain-resistant clothing are a boon for office goers, the water-repellent, sweat control and other factors are athletes’ first choice. Wrinkle free, wrinkle resistant & stain resistant contributes to 60 percent of casual trouser sales.”

Kishore explains, “Men today seek trousers that are stylishly comfortable to keep them focused and looking impeccably crisp at all occasions.” He quickly points out to their fashion innovation from Blackberrys Casuale, the travel inspired casual wear brand called Knitalia, which he claims is India’s first 100 percent Cotton Knitted

its durability, comfort and suitability in terms of occasions (since it can be worn as a western outfit or even paired with traditional ones). It is popular in urban and rural regions whereas casual trousers enjoy major market share in urban regions only. Affordability too plays an important role as denims are easier on one’s pockets as compared to casual trousers, be it in stores or on e-commerce portals. Coupled with easy accessibility, it becomes an ideal combination of factors for consumers to take into considering, before making their final purchase decisions.”

Market Segmentation

Like it stands for other categories, in trousers too there are 4 major categories – super premium, premium, mid and economy. Where the super premium and premium have a select clientele, the mid and economy segment is where the major chunk of business lays. Talking about the super premium and premium category, Kishore shares, “Consumers in these segments tend to have an association with the brand image and that is what



There is a dire need to understand that there is a huge scope for product innovation within the casual wear segment which can boost the category to much greater heights

drive the casual trouser wear category in India in terms of volume, while the need of quality wear clothing shall drive the value market. "Many new brands entrants on regional or local space will play in the economy segment who would offer value for money trousers that consumers could trust for quality. The national and international brands will continue to strengthen their position in super premium, premium and mid price segments and it is interesting to see that many of them have already started their product offering to economy segment of smaller cities as well," he says. He also minces no words when he states that the future growth of casual trousers in Indian market shall depend on brands ability to offer innovative products at right price points and their ability to expand their reach beyond the metros and Tier I towns.

Das, meanwhile, says that that the top performing place in trouser are smaller cities where fashion aspirations are stronger and thus experimentation.

Srivastava's forecast for the next 5 years is high on the value market. "The need of higher quality shall drive the value market. The economy segment will also witness entrance of many strong local and regional brands who would offer value for money trousers that the consumer could trust for quality. On the other side the national and international brands will continue to strengthen their position in super premium, premium and mid-price segments of the market; many of them are expected to extend their product offering to economy segment of smaller cities," she concludes.



range of Khaki, shirts, trousers and apparels. Adding further, he states, "Knitalia aims to bring out the best of comfort, stretch, sweat absorbance and breathability factors to the wearer. Apart from this, Blackberrys Casuale Khaki trousers are another performance packed product, which is hugely popularly among consumers."

The Road Ahead

Taking a peek into that the future holds for this category, Kishore highlights the growing demand from non metros and rural markets. "These markets will play a pivotal role in the growth of Casual wear market in India. Other factors including a growing middle class, rising disposable income, increasing brand awareness among the consumers in terms of quality and upgradation of service standards, rapid shift from tailored to ready-to-wear trousers, the growing service sector ensure promising future for casual wear segment," he says, while adding that there is a dire need to understand that there is a huge scope for product innovation within the casual wear segment which can boost the category to much greater heights.

Manwani is optimistic of a strong growth being registered from the rural and Tier II, III and IV markets. According to him, these markets share



WOMEN ENTREPRENEURS IN CASUAL WEAR & LINGERIE RETAIL

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Charu Lamba with inputs from Gurbir Singh Gulati

The women's casual wear category in India has broadened from basic salwar-kameez and jeans and T-shirts to designer wear with emphasis on styling and comfort. With rising incomes, passion for fashion and need for comfort, this segment has evolved greatly over the last few years and is poised to grow even more in the near future.

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-Geeta Singh,
Founder, Chic Woman

CHIC WOMAN

Geeta Singh started her career in 1980 with Hindustan Diamond Company. Soon, she left the job to join the family business - A Klass Fashions. She introduced Chic Woman in 1987 and since then there has been no looking back. Slowly and gradually, the brand started gaining strength in the market and it was the only brand that offered women 100 percent cotton lingerie.

Her role as a leader, motivator and visionary has been very pivotal to the brand. Apart from this, she also designs the products for the brand.

Presence of The Brand: Chic Woman has a presence pan-India. It has dedicated dealers in cities like Mumbai, Hyderabad, Delhi, Chennai, Ernakulum and Bengaluru.

Now, it is looking forward to expanding its presence in Tier II and III cities.

USP: The USP of the brand is that its products are made keeping in mind the 24-hours comfort for consumers. It is known for its full-size fit innerwear.

Product Innovations: Keeping comfort levels in mind, the brand uses soft inner elastic near waist and legs and it further helps in keeping synthetic material away from the skin.

Revenue Targets: This fiscal, the brand is eyeing a revenue jump of at least 10-15 percent.





-Ayushi Gudwani,
Founder and CEO, FableStreet

FABLESTREET

Ayushi Gudwani holds an MBA degree from IIM Calcutta (Silver medalist) and a BE in Electronics Engineering, from NSIT. She has worked previously at McKinsey & Co for over 7 years, in India and South East Asia, consulting various global organizations on strategy and scale up, before starting FableStreet. Her interests include reading and dancing and she has recently ventured into fitness and cross-fit.

Presence of The Brand: FableStreet primarily sells online through their website (www.fablestreet.com) and deliver to 10,000+ pincodes within India and all countries worldwide. The brand has a strong customer base in US, Australia, UK, Dubai and Singapore.

It is looking to rapidly expand now. In terms of categories, it has just launched accessories and plan to add more apparel categories i.e., evening wear, maternity work wear, and adjacent categories like shoes etc. Further, it is looking towards expanding the presence in online marketplaces along with entry into multi-brand outlets, guide stores, shop-in-Shops, and more. It also plans to enter into the offline retail space via exclusive concept stores which will enable consumers to experience FableStreet.

Product Innovations: FableStreet approaches product development through R&D on fabrics, fits, strength, etc., (in addition to design) which enables its garment to fit well, look great on customers and last longer.

USP of the brand are:

- **Custom Fits with 3 measurements only:** By using a 'three-body measurement' algorithm (chest,

waist, hip) along with height, each product is made-to-order and personally curated to fit the needs of every body type. It has more than 10,000+ body measurement data, which enables it to extrapolate 20+ garment measurements using 3 body measurements only.

- **Style, Comfort & Fit in one garment:**

In contrast to other brands that have offer either of three components in a garment; it offers them all as package since it understands that it is a basic need for the customer.

- **Feminine & Stand-Out Cuts – Collections:**

offered by other professional wear brands take inspiration from the male dominated work wear industry. FableStreet understands that men and women perceive work wear very differently and thus the designs incorporate that.

- **3-Day Delivery of Bespoke Fits:** It has built strong back-end operations that enables it to scale and deliver bespoke fits in three-four days, unlike other bespoke brands that ideally take two to six weeks for delivery.

- **Designer Work-Wear:** It is the first brand to introduce and build designer work-wear as category in the Indian market.

- **Personalised Customer Experience:** It curates unique personalised shopping experience for all the customers (even giving styling tips when needed).

- **Revenue Targets:** In terms of sale, it is growing 3x every year over past 2 years. For the current fiscal, it intends to grow the revenue 3-4 times and widen the range of categories available. In addition, by end of the year, it will be available in offline and online channels both on their own website and marketplaces.





-Neerja Lakhani,
Founder & Director, Inner Sense

INNER SENSE

An entrepreneur with more a decade's worth of experience in the fashion industry, Neerja Lakhani is a creative powerhouse with a keen sense of contemporary aesthetics, business acumen and retail strategy.

She strongly believes that a great business is one that offers a solution to a problem. While pursuing her passion for creating exceptional brands, she observed that the market is full of products that are trying to retail trends, but at the base of trend-based clothing is the hard reality of sweat-shops and exploitation of labour. And the product is still missing key ingredients like hygiene in inner wear. She wanted to bridge this gap by embracing sustainability and an eco-friendly ideology and gave India its first hygienic intimate apparel brand - Inner Sense.

Presence of The Brand: Inner Sense services around 19,000 pin codes in India via its own e-commerce website innersense.co.in and various other online platforms.

The physical presence of the brand as of now is in 100 MBOs spread across Northern India and plans to grow by 25 percent month-on-month. The expansion plans also include opening 25 stand-alone stores all across the nation in the next three years.

USP: Inner Sense is a disruptive healthy, organic anti-microbial lingerie brand addressing the highly underserved eco-friendly female innerwear products category. The products have natural bacteria inhibiting and anti-odour properties, have 3x more wicking than the counterpart cotton with no pesticide or carcinogen used in the production process. The brand creates a bridge between hygienic, eco-friendly and fashionable lingerie.

Online & In-store Innovations: The brand is working on a very exciting innovation which offers a solution to one of the most gruelling pain points of online shoppers. It will be activated in the next quarter.

Product Innovations: Most brands carry product lines based on strict category demarcations like everyday wear which is usually dull and boring or extremes like high trend styles which may go out of style very quickly. Inner Sense has innovated to provide products that fall in the sweet spot between these extremes. So, it can be said that they are comfortable enough to be worn everyday but stylish enough not to get dull or monotonous.

Inner Sense is also the unsaid leader in the maternity category with the highest number of styles available.





-Suchi Mukherjee,
CEO and Founder, LimeRoad

LIMEROAD

The power behind India's first online social discovery platform, LimeRoad.com, Suchi Mukherjee is the first Indian to receive the Cambridge Commonwealth Trust Scholarship for studying Economics at Cambridge University in 1994. She graduated from St. Stephen's College, Delhi University and procured her Master's in Finance and Economics from the London School of Economics where she won the British Chevening Scholarship.

Even after staying away from India for 15 years, she came back with a trust that India has immense potential to nurture a transformational business. She conceived the vision of LimeRoad after the birth of her second child while reading a magazine during her 'me-time'. She was passionate about creating a social discovery platform for people to find affordable products in a fun and easy way. She envisaged LimeRoad, also to give power to small sellers and enable them to enter the mainstream commerce.

Presence of The Brand: LimeRoad opened its first store in Surat in March 2018 which turned profitable in less than 5 months. The brand went ahead and opened its second retail store in Panipat, Haryana.

LimeRoad aims to open 3,000 offline stores in the next 3 years with the vision to take high street fashion to every town in India. The brand plans to open 20 new stores in the next 3-6 months, primarily in the northern and eastern belt.

USP: LimeRoad has a supplier network of 10,000+ manufacturers who inject fast fashion into the system that goes from design to live to site in less than 30 days, with winning styles getting established in 48 hours. Every user gets a completely personalised experience –

the app changes for each person every minute, powered both by large-data-driven algorithms and the community of stylists. Users, therefore, discover fast fashion unlike anywhere else in India.

Data to show which styles are winning – within 48hrs – ensures that smaller manufacturers can decide which styles to invest in, therefore dramatically reducing inventory pile up.

The brand launched the India Design Centre – to bring together the highly capable designers from across the country to pump unique and cutting edge designs with excellent fits, which can benefit sellers who do not have access to good designs

In a data-starved nation, the LimeRoad app is the lightest of all apps in the country, at ~3MB.

Online/ In-store Innovations:

LimeRoad stores have a clear focus on design. The stores use modular fixtures that can accommodate the change of collections and display of merchandise rapidly and effectively.

LimeRoad, has disrupted the entire online fashion industry with its exclusive 'Scrapbooking Community' consisting of 4 lakh active members who express their sense of style using LimeRoad's proprietary 'Scrapbook' tool. This feature gives customers the unique proposition of marrying listings with content allowing customers to match clothes, accessories, handbags and shoes to create their own looks. The community churns out nearly 1 million looks every month presenting multiple options to consumers. These personalised style options are then pushed every 30 seconds on the app by a powerful algorithm.





-Tanvi Malik & Shivani Poddar,
Co-CEO and Founder, FabAlley & Indya

FABALLEY & INDYA

Tanvi Malik is an Economics graduate from Delhi's Lady Shriram College, followed up with an MBA in Brand Management from MICA Ahmedabad. Her interest in branding and marketing led her to Titan, where she was a Brand & Product Manager for high-end watches before quitting to start her dream project, an inclusive, accessible and fashion-forward brand for Indian women – FabAlley, and later Indya. She spearheads design, marketing, product and communication for the company.

Shivani Poddar completed her graduation from Hindu College and did an MBA from Faculty of Management Studies, Delhi. After graduating from FMS, she was a part of the leadership program at Hindustan Unilever and specialized in the Commercial and

owned stores which were launched in the last 12 months. These EBOs are PAN India and today the brand has presence in Delhi, Mumbai, Bangalore, Pune, Ludhiana and many more cities. The plan is to take this number up to about 40 stores till the end of this year. It is also present in large format stores like Central, Globus, Ethnicity and has recently been launched in Lifestyle. The plan to spend about Rs 6-8 crore on store expansions in the next 12-18 months.

In the next few years, the brand has plans to set a strong foothold in international expansion. The strategy for international expansion is two-pronged – online and offline. In terms of the online market - the website currently delivers to approximately 30 countries apart from India. About 35-40 percent of their orders on their own e-commerce portal are from countries such as Canada, US, UK, UAE and Saudi Arabia. The plan is to divert more marketing spends over the next few months to these countries and cater to the large NRI base in these countries. The brand has also been recently launched with Amazon US and UK.

In terms of offline, the brand is currently working with a few resellers based out of Mauritius, Dubai and Sri Lanka. It is exploring further like-minded partners and is planning to add 3-4 more key international accounts during the upcoming fiscal.

USP: An array of design differentiated, trendy with a twist and slightly quirky products ensure that the brands resonate with girls who have strong points of view when it comes to fashion. Below mentioned is the USP of both the brands which makes them unique in the market:



Supply Chain function. Post HUL, she worked with Avendus Capital as a part of the Investment Banking team. At HSE, Shivani has been responsible for setting up sales and distribution, sourcing and manufacturing processes, financial systems, and fully integrated supply chain techniques.

Presence of The Brand: Indya is an Omnichannel brand and has 19 brand-

Indya:

- The brand is making Indian-wear relevant, versatile, trendy and glamorous, without resorting to the standard negative stereotypes attached with the category
- Updating Indian wear from a bygone generation's 'cultural costume' to the modern Indian milieu by creating a differentiated product in the market
- Adapting global trends and Indian runway styles to create a (previously non-existent) high street for Indian wear
- Exploring the duality of Indian women's style by designing lines that keep her western experience and Indian heritage pride in mind with East-Meets-West silhouettes

- Eliminating opaque, unorganized boutique shopping by providing fuss free ready to wear occasion wear

FabAlley:

- Every design on FabAlley is created on the basis of what is current and on-trend at this very second
- Affordability lies at the core of FabAlley's DNA
- Unlike International brands, the designs incorporate the Indian women's body types and cultural ecosystem
- Fully integrated supply chain ensures rapid turnaround of design into collections
- Data-led forecasting and meta-detailed historical analysis
- FabAlley has been built on the tenets

of inclusiveness, keeping in mind that the designs are not only size agnostic but also fashion forward and on-trend

Online & In-Store Innovations:

The brand has recently introduced digital tabloids and screens in the stores where customers can browse through lookbooks, new collections and moodboards. This provides the user a more detailed outlook towards the brand and a sneak-peak into the upcoming collection.

Product Innovations: For FabAlley, the focus is on product innovation with a premium line and expansion of their plus-sized line Curve.



-Richa Kalra,
Founder, Candyskin

CANDYSKIN

Richa Kalra, a post-graduate in Fashion Brand Management from Istituto Marangoni, Italy, has worked with quite a few international brands in London and Milan. She also had a small stint working with Madura Industrial Textiles, followed by her passion project, Candyskin.

She says, "There's nothing more beautiful than a woman to feel comfortable in her own skin. We possess the most unique styles which are created with our exquisite tastes following international trends and forecasts to cater to the Indian market."

With her brand, Candyskin, she looks forward to reinventing the category in India by giving it an international feel. The brand stands for luxury and comfort at its finest.

Presence of The Brand: Candyskin is available pan India, through its distribution and sales network of around 240 point of sales.

The brand is looking forward to the region-wise expansion and to capturing a considerable amount of market share in the lingerie segment.

USP: The brand's core strength is that they are not partial when it comes to sizing unlike a lot of other lingerie products in the market.

Online & In-Store Innovations: As fit is an important part of the brand, it conducts an interactive detailed size test quiz for every customer to provide them the best fit.

Product Innovations: The brand has recently launched compression shapewear, these garments have targeted power zones that help slim and shape customer's stomach, hips and thighs. These are skin-tight apparels that stimulate blood circulation and stabilise muscles by exerting pressure at certain parts of the body. This technology helps in squeezing and squishing excessive fat making the body appear slimmer and feel better leaving smooth and slender lines under any outfit.

Revenue Targets: The brand, that is working towards 100 percent growth, is eyeing a ₹12 crore turnover.





-Neha Kant,
Co-Founder & CRO, Clovia

CLOVIA

Before donning the entrepreneurial hat, Neha Kant was pivotal in setting up and growing the e-commerce engines for the India Today Group and had a short stint as Head of Digital Marketing for Business Verticals of Smile Group.

She started her career with ad agency FCB ULKA where she got to learn the tenets of building brands. After a decade of experience in corporate India, she decided to start on her own to address the absence of peppy, spicy, sexy yet comfortable wear in the Indian innerwear market.

With Clovia, she wants to redefine the Indian lingerie market and help customers choose beyond standard cuts, shapes, and colors. Her mantra – lingerie is a critical part of your wardrobe and it doesn't need to be drab and boring.

She was behind setting up of production units of Clovia. Today, the brand offers more than 100 fresh styles every month and no inventory is more than 45 days old.

Presence of The Brand: The brand serves almost 20,000 pin codes across India and has a physical presence in metros, Tier II-III cities which include Delhi NCR, Punjab,

Haryana, West Bengal, Jammu, Gujarat, Maharashtra, Karnataka, Telangana, Tamil Nadu, Assam, Uttar Pradesh, Andhra Pradesh, and Madhya Pradesh.

Today, the brand is operationally profitable in all sales channel post-marketing. The idea is to continue the growth, accelerate on offline channels of sales, which have been responding tremendously well to the brand. In the next 5 years, Clovia intends to be the largest lingerie brand in India. While it is steadily on that path, it is also encountering a host of organic/

inorganic opportunities to grow internationally, which it is exploring and in the next 4-5 years, Clovia is expecting its presence in at least 4 more geographies.

USP: Clovia is a full stack lingerie brand, which controls every part of its supply chain from mind-to-wardrobe. The brand procures raw material, design in-house, manufacture in third-party facilities working exclusively for them, ensure their own 4 level quality controls and sell through a host of direct sale channels. Every product that Clovia creates is first made in small quantities, monitored via a state-of-the-art backend technology, which predicts future sales (based on sales patterns and customer feedback) and recommends what further quantities should be produced. This leads to a true fast fashion brand that is low on cost (as the middlemen are cut out), high on consumer appeal and super-efficient on inventory, leading to better margins and cash flows even in a high number of SKUs/ sizes business.

Online/ In-store Innovations: Clovia has introduced 'Clovia' a Fit test - their proprietary algorithm - that asks a woman 5 questions about her body type and then recommends the right bra. They have a very high customer satisfaction score here.

Product Innovations: Period panties is one of their recent innovation. This range has been designed with soft and breathable cotton fabric that incorporates an in-between layer of stain-resistant and leak-proof lining. The unique hipster fit also gives high coverage and snug fit making sure that the sanitary pad stays at its place. These panties are also reusable and machine washable.

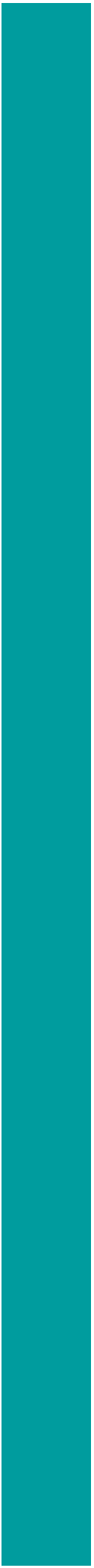
Revenue Target: The brand is eyeing 200 percent growth on annual run rate.



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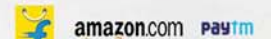


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CROCS

LAUNCHES LATEST LITERIDE COLLECTION

The latest collection is aesthetically inspired for customers on the go lifestyle, the collection provide foam insoles that are super soft, incredibly lightweight and extraordinarily resilient...

IMAGES Business of Fashion

Global footwear brand, Crocs has launched a new range of Crocs LiteRide collection. The latest collection is aesthetically inspired for customers on the go lifestyle. There foam insoles are super soft, incredibly lightweight and extraordinarily resilient. Croslite foam outsoles provide durable, all day support and comfort. This innovative comfort is perfect for warm-ups, cool-downs and more.

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With its unique brand awareness and break-through product innovations, Crocs is progressing towards becoming India's top non-athletic casual footwear brand. Other than its EBOs, Crocs asserts its strong presence in MBO channels through which its overall offline reach extends to more than 150 cities via 1,500+ points-of-sale. Additionally, it caters to 20,000+ pin codes translating to 400 cities via its e-commerce presence.

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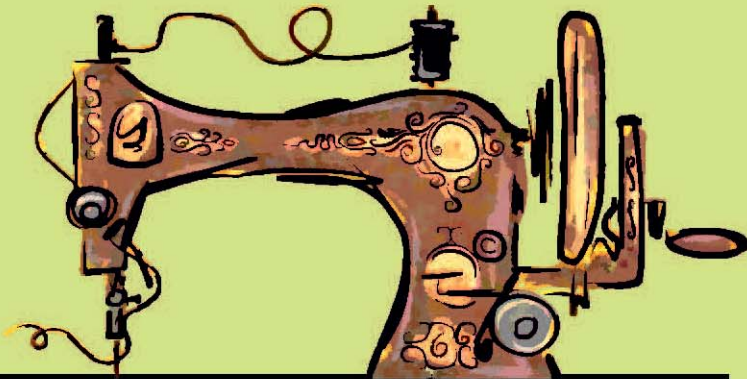
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LULU FASHION WEEK 2019

Helped up sales & footfalls

Prominent brands at LuLu Fashion Week 2019 showcased the latest trends in western wear, casual wear, ethnic wear and active wear along with new and trendy bags and luggages.

IMAGES Business of Fashion

Curated by LuLu Fashion Store, LuLu Fashion Week 2019 was the biggest exhibition of the season's most eye-catching Spring-Summer fashion trends and styles by leading brands with fascinating fashion shows.

LFW 2019 returns for a fourth year with a mission of creating a national platform to promote the global trends in fashion. LFW 2019 presented by Blackberry's in association with GAP was a 5-day celebration with a series of Runway Shows, Fashion Forum, Fashion Awards and Live Entertainments.

The event kick-started on April 24 with the season's trendiest and stylish collections by 50 leading brands with 28 fashion shows spread across five days from April 24-28. The presenting sponsor of LFW 2019 was Blackberrys, and was powered by Oxemberg, Peter England, Lee, Sin and One8.

The fascinating fashion shows from LuLu Fashion Week 2019 showcased the latest fashion trends from twenty-eight ready to wear international and national brands. The first day of LuLu Fashion Week looked promising with fashion shows from Pepe Jeans, Indian Terrain, Van Heusen, Urban Touch and Caprese. The remaining days of LuLu Fashion Week showcased fashion shows from brands like Breakbounce, Ruff, Desi Belle, Basics, American Tourister, River Blue, Sin, Van Heusen, Peter England, Identiti, Monte Bianco, Wrangler, Lee, GAP, Vie Life, Delsey, Beat London, Indigo Nation, Scullers, Levi's, Oxemberg, Allen Solly and Blackberrys along with LuLu's exclusive brand 'Kashavi', launched at LFW 2019. All the brands for LFW 2019 were exclusively selected on the basis of their performance at the platform of LuLu Fashion Store.

LFW 2019 was presented by LuLu Fashion Store with an intention to introduce the ready to wear Spring Summer 2019 collections of leading brands to public. Brands can easily reach the right audience through these live experiences matched with the right talent creating a backdrop which is a very powerful place where they can connect with the customers.



entertainment industry with coveted titles of Youth Icon of the Year, Style Icon of the Year, Pride of Kerala and Crossover Star of the Year awards. LuLu Fashion Awards were also given to the most preferred brands in different categories during the grand finale.

In the brand awards section, Levi's was awarded with 'The most preferred denim brand', BlackBerry's won 'The best emerging men's wear brand'. Peter England won 'The most preferred men's wear brand' and Van Heusen became 'The most preferred women's wear brand', Allen Solly was awarded 'The best emerging women's brand', Oxemberg - 'Fast growing apparel brand' and Break Bounce - 'The most innovative fashion brand'. 'Fashion sustainability award' was given to Sin. Jockey won 'The most preferred Men's essentials' and V-star, 'The most preferred women's essentials' award. 'Fashion accessory of the year' was awarded to Caprese. 'The best emerging Kids wear brand' award was bagged by GAP and 'The most preferred kids wear' award was given to Ruff.

through public hoardings and translite boards on metro pillar's across Kochi along with exclusive media campaigns. Campaigns were also promoted by the celebrity showstoppers through social media platforms. Promotions were carried out extensively throughout LuLu Mall in the form of installations, easel boards, column branding and light boards.

Fashion Forum was another added attraction of the event, an exclusive talk show on 'Global Trends Vs Indian Fashion Trends' by eminent personalities from fashion and retail industries, which was attended by more 100+ students from leading fashion institutes on of April 26. The panelists of the fashion forum included, Kabir Kondaniyil, Design Head, Blackberry; Abhishek Sengupta, AGM Sales, Kazo; Namrita Kabra, President, Instituti Callegari Milano, Mumbai; Suvir Jaggi, VP & Regional Head (South), Images Multimedia Pvt Ltd; and Hari Anand, Veteran Fashion designer.

The stylist portion of the show is centered on the ways how brands bring out innovation in fashion shows. LFW 2019 experienced the innovative looks live on the runway with brands showcasing the latest spring/summer trends in clothing without compromising on creativity and expression. Prominent brands at LuLu Fashion Week 2019 showcased the latest trends in western wear, casual wear, ethnic wear and active wear along with new and trendy bags and luggages.

Fashion weeks like LFW will benefit brands and serve as a platform for the brand to generate appeal, recognition and loyalty.



With plenty of fashion-focused visitors in town and the media talking about the latest trends in fashion, LuLu Fashion Week 2019 played a significant role in wooing customers to the mall and also provided a boost in sales at LuLu Mall, over the course of the event. The average footfall per day during the Lulu Fashion Week 2019 at Lulu Mall was between 80,000-1,00,000, when compared to 65,000-80,000 the previous month.

The fourth edition of LFW 2019 was aggressively promoted both through online and offline media. Extensive print campaigns were carried out all across Kerala, followed by radio campaigns and outdoor branding

LuLu Fashion Week also recognized the exceptional contributions by the eminent personalities in the fashion and



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Innerwear Special

HIGHLIGHTS OF THE NEXT MEGA ISSUE

JULY 2019 DENIM SPECIAL ISSUE: The July issue of IMAGES BoF is the BIGGEST issue of the year — The Denim Special. As always, we will take an in-depth look at denim market in India and weed out the trends and opportunities that brands and retailers can safely bet on in 2019.

KEY HIGHLIGHTS OF THE ISSUE

- Denim Market
 - By Product:** Jeans | Jackets | Shirts | Dresses;
 - By Segment:** Mass Market | Standard | Premium;
 - By Consumer:** Men | Women | Children;
 - By Distribution Channel:** Specialty Stores | Department Stores | Hypermarkets & Supermarkets | Online | Exclusive Stores
- Innovations in Denim Fabric
- Prospects in Blended Denim-Khadi Denim, Silk Denim, etc.
- Customization in Jeans
- Denim and Sustainability

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