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Issue No.

# BUSINESS OF FASHION

July 2019 | Volume XX // No. 7 // ₹ 100

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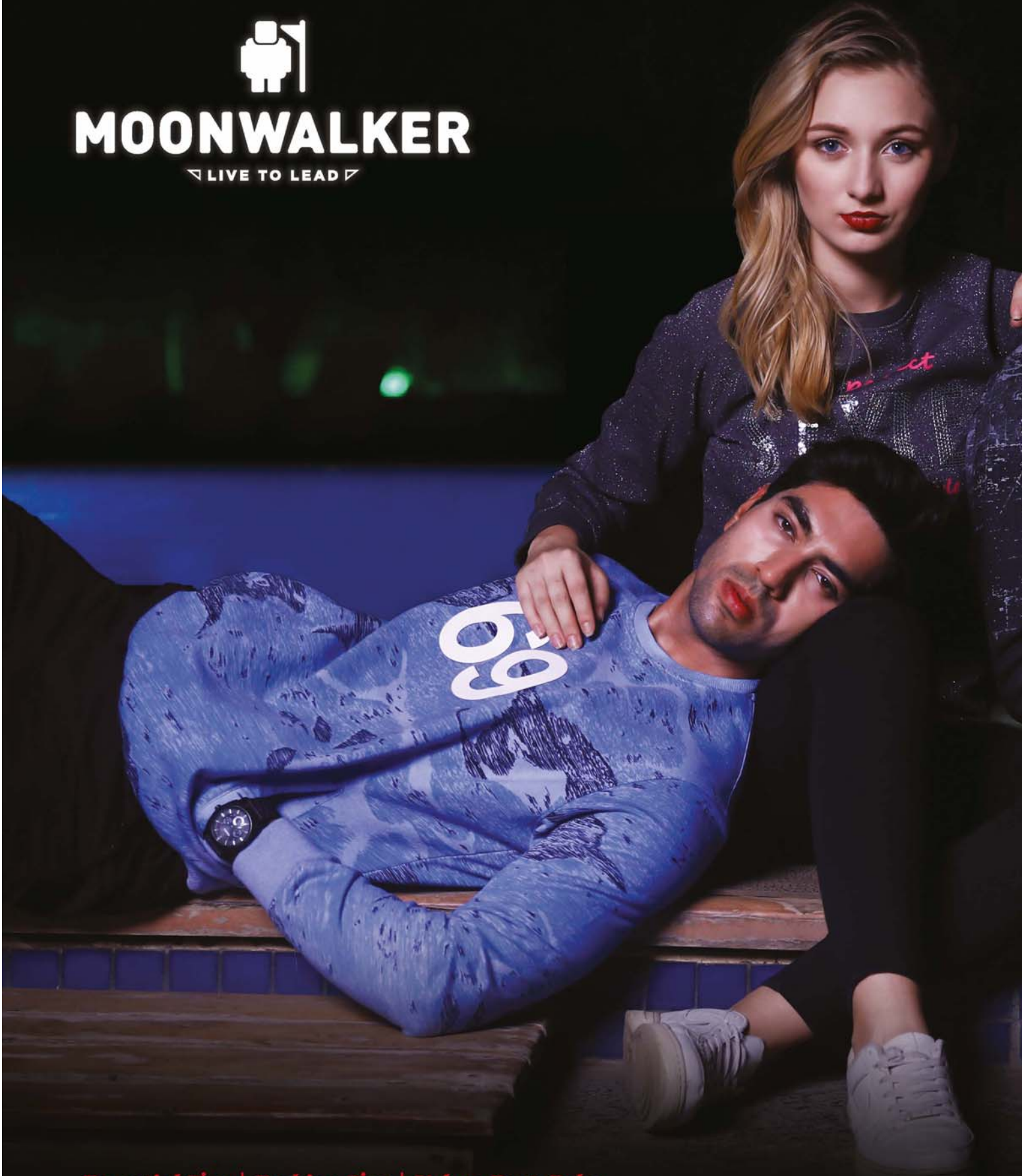


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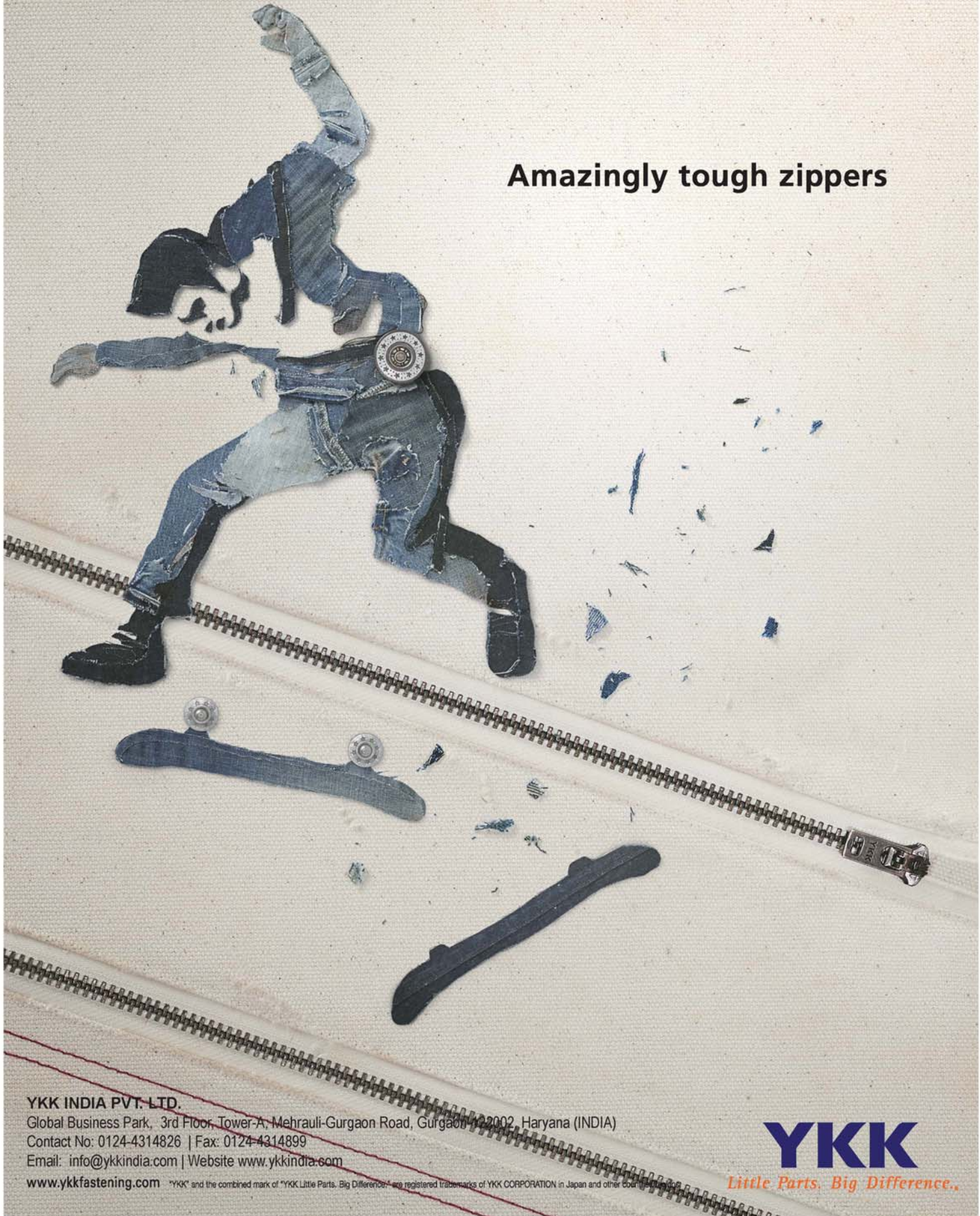


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Dear all,

Welcome to the BIGGEST and THICKEST annual edition of IMAGES Business of Fashion – The Denim Issue, which also happens to be my personal favourite. At the outset, I would like to thank and congratulate all the contributors, participants and the entire BoF team for bringing out this big, fat issue. It was an absolute delight to work with and share the work of all the committed and thoughtful people that have been associated with this month's issue.

Denim is easily one of the most iconic pieces of clothing known to mankind. The blue hued fabric has ruled the world of fashion for more than a century and continues to do so even today. This month's BoF takes a journey down memory lane – it discovers how a utility garment during the Great Gold Rush era evolved into a symbol of youth rebellion.

The fabric has become a spiritual partner of sorts to a large percentage of the population worldwide. In fact, as per Technopak, the denim market in India – which stood at an estimated ₹29,203 crore in 2018 – is expected to grow at a CAGR of 12 percent and reach ₹91,894 by 2028. In the lead research,

Technopak outlines that the Indian Denim market is dominated by the men's segment, accounting ~ 86 percent of the total market size. The research summaries how women have broken the mould in another male bastion – the denim wear market – and that the women denim segment is expected show a higher CAGR of 13 percent than the men's segment, at 12 percent.

This Denim Special showcases various features that trace the growth drivers, consumption behaviour and the prospects of the fabric in the Indian market along with current trends and consumer preferences. The issue also takes a look at the sustainability concerns around denim and how an increasing number of brands are committing themselves to both the people and the planet.

All in all, it was a lot of hard work but believe me, the entire team enjoyed every bit of it because we love jeans. After all, what could be more comfortable than slipping into your pair of comfy, used jeans, molded perfectly to your body shape?

Cheers



**Amitabh Taneja**

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# BUSINESS & INNOVATION



BUSINESS & INNOVATION



# **SKECHERS** *LAUNCHES GORUN 7, COMMITTS FUTURE TO INNOVATION, STYLE & TECHNOLOGY*

Hyper Burst technology – used to create these shoes process – creates foam with a unique cellular structure that is more durable and buoyant than the stuff found in many running shoes, making it one of the lightest and most resilient Skechers Performance shoes and is completely different than any foam Skechers Performance has ever created...

**Gurbir Singh Gulati**

Skechers, the American sports lifestyle brand, has rolled out the newest edition of their popular GORun range in India. After the success of the variants GORun 4, 5 and 6, the brand has launched the latest upgrade – Skechers GORun 7. The GORun 7 is the newest edition in the GORun family which is built with the ‘Hyper Burst Cushioning’ foam.

This new Hyper Burst technology process creates foam with a unique cellular structure that is more durable and buoyant than the stuff found in many running shoes, making it one of



---

***“The GOrun 7 is the new edition to the GOrun family and we are very thrilled about the product. We are also very proud to introduce the Hyper Burst Cushioning technology which sets a benchmark of agility, buoyancy and comfort in performance shoes. In today's lifestyle remaining fit and active is of high importance and there is no better way to maintain this routine other than running, so GOrun.”***

– Rahul Vira, CEO, Skechers, South Asia Pvt. Ltd.

***“It's great to be a part of a brand that offers so much in just one shoe. Be it comfort, fashion, durability, agility – you name it and Skechers has it for you. Being a fitness enthusiast, I like to push myself out of my comfort zone during my workout. My fitness regime is a rigorous mix of speed endurance, MMA, Parkour, cross fit and running for which, I prefer light weighted shoes and the ones that give my feet good comfort and buoyancy. Skechers GOrun 7 shoe is a perfect training running partner, not only does it help to increase speed and efficiency but also keeps me stylish.”***

– Siddhant Chaturvedi, Bollywood celebrity,

the lightest and most resilient Skechers Performance shoes and is completely different than any foam Skechers Performance has ever created.

IMAGES Business of Fashion talks to Rahul Vira, CEO, Skechers, South Asia Pvt. Ltd. to discuss the growing prospects for the brand and how it is taking on a combination of innovation, style and technology.

### **Edited excerpts from the interview...**

#### **Tell us about the new GOrun 7?**

This is the 7th franchisee in the GOrun category. This shoe comes with a new foam that we have launched globally called the Hyper Burst which is a completely new technology for the outer sole. This makes the shoes very lightweight. The upper part of the shoe is also amazing as it uses a new compression knit technology, which makes the shoe breathable. This new locking mechanism for lacing gives a snug fit to the wearer since it holds the foot perfectly. It's a perfect product for India and is extremely comfortable.

#### **What are the other innovations that the brand is working on over the coming years?**

We are working on a lot of innovations in the footwear and apparels category, some of which we have already launched. For example, we do a 360 degree stretch in our t-shirts and a two-way stretch in shorts. This innovation is called stretch knit, which provides more comfort when one is running or working out in the gym or playing a sport.

In footwear there are a lot of innovations too – there is a new line of walking shoes coming up in just a few months from now. Meanwhile, in the fashion segment consumers will see the trends from the 90s and the 80s coming back. More such innovative launches will be seen during Fall-Winter '19 and Spring-Summer '20.

#### **Tell us about your Omnichannel strategy?**

If you look at today's retail consumers, it's clear that they are not the same as they were five years ago. As a company you need to adapt yourself to changing times and evolving market dynamics. Keeping this in mind, we are working



*"The profession that I am in is all about performance and it is important as an athlete that you are allied with proper pair of shoes that elevates your performance. The Skechers GOrun 7 shoes is a perfect combination of comfort and durability and comes with a technology that helps increase the speed and efficiency helping one accelerate their performance."*

– Dutee Chand, Athlete

*"Fitness plays a very crucial part of my life and not a single day goes by without me engaging in a physical activity. You need a lot of leg power in football making it necessary to select the right shoe for your feet. A wrong footwear can do a lot of harm to your feet, knees and the lower body. I trust Skechers GOrun 7 for my daily runs because it provides me the right amount comfort, bounce and is extremely lightweight. I enjoyed wearing these shoes on both long and shorter runs."*

–Adivi Chauhan,

Captain, Indian Women's National Football Team

on an Omnichannel strategy. However, we are still understanding what an Omnichannel strategy would mean for us in the shoes category – will this help consumers who can't find a production-store to order online via a touchscreen in the store and get it delivered home? Or will this help send more consumers from the physical store to the online store? We are still trying to work out the multiple facets of going Omnichannel.

#### **Tell us about your present retail mapping?**

Skechers currently operates close to 230 stores. We are practically opening a store every fourth day in India. By the end of 2019, we are looking at close to 300+ stores in India across metros and mini-metros. Our stores are largely franchisee operated and the average size is around 1500 sq. ft., with the

biggest one being approximately 8,000 sq. ft. We are also available online through our own website.

#### **What are the technologies being used instore at Skechers?**

Aside from helping the consumer find the right product or size, we use technology which can reduce the transaction time both offline and online. The other technology that we are using is new age lighting which impacts the consumer buying cycle in a store. Giving reference to our products, a lot of kid's shoes are Bluetooth enabled. Here you can just download our app and choose the colour of the lights which you want for the shoe. If your phone is connected to music, then the beats can actually be synchronized to the lights on this shoe.

#### **How is Skechers adopting the sustainability quotient?**

I think as a brand at a larger level we are very conscious about this. At the global level there are lot of initiatives that we have taken to ensure that we are doing things that kind of help us re-generate and re-build the planet again in the right manner.

Sustainability starts with our products and its materials. If you look at the upper part of our shoes, we are choosing natural materials that are recyclable. We have launched a program where we are using ethically sourced merino-wool for our shoes. In the apparel range too, we are continuously on the move how to get more natural fabric and its usage in our collection.

#### **What are the growth aspirations for the brand?**

Skechers in India has been registering a very healthy double digit growth.



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# HEATWAVE:

## *PROVIDING HANDMADE, BESPOKE SHOES TO THE MODERN-DAY INDIAN WOMAN*



Hitesh Vaswani brought Heatwave to the Indian market after he observed a gap in the fashionable, yet comfortable, footwear category with best-in-class material, functional superiority and technical innovation which would complement the unique lifestyles of women who multi-task...

### **IMAGES Business of Fashion**

**H**itesh Vaswani, Managing Director, Saffron Tradex Pvt. Ltd., brought his brand Heatwave to the Indian market when he observed a gap in the fashionable, yet comfortable, footwear category with best-in-class material, functional superiority and technical innovation which would complement the unique lifestyles of women who multi-task. He launched Heatwave in India to fill in this gap and provide women with just what they needed for their feet at affordable price points.

Launched in India in 2018, Singapore-based footwear and accessories brand, Heatwave, has taken the Indian market by storm.

“We believe that a well-designed pair of shoes can empower the busy modern woman in her daily journey of life. Our shoes don’t just look good but feel good too. Surviving the entire day in heels is no longer a painful dream, but a beautiful reality with Heatwave,” says Vaswani.

### Product Portfolio

Covering a range of prices from mid-to-high prices, the brand houses a wide range of collection for women. It includes dainty yet sturdy sandals coupled with chic pumps, block heels, ballerinas, flats and wedges in the colours that encompass the essentials like nudes and black, along with a few shades that break the clutter like maroon, blue, etc.

Heatwave has recently introduced a bespoke category of fashion sneakers,

thoughtfully designed to meet the dynamic needs of the quintessential modern Indian woman.

Similarly, for handbags, a variety of shopper bags, tote bags, clutches, backpacks, and cross-body bags are up for grabs. "The brand caters to the free-spirited modern-day woman who knows how to juggle her many roles in her life," explains Vaswani.

### Focus Customers

Defining the brand's target customer, he says, "She is a busy, modern lady of our times. She is a dynamic woman with multiple roles to play – that of an executive, a mother, a wife, a friend and many more, which often take her places from day to night."

"She knows what quality is and is discerning in her purchases, always looking for the best value. She values her comfort, convenience and ultimately, confidence, because she knows that inner quality matters more than looks. She deserves the best of what there is to offer because she has so much to give and is looking for a companion that can take her on her daily adventures reliably and at a reasonable price,' Vaswani adds.

### Latest Collection & Theme

The brand's current Spring-Summer 2019 collection boasts of impeccable craftsmanship and a splendid combination of style, expression and sensuality. This season's colour palette is resplendent yet sophisticated, and the styles are dainty yet sturdy. The style engulf a variety of options in both footwear and handbags which have got its customers covered for various occasions, right from a high-tea or a formal business luncheon, to running errands or for casual outings.

The brand's new category of bespoke fashion sneakers are thoughtfully curated to match the lifestyle of Indian ladies while providing them utmost comfort and matchless style. The sneakers include some amazing

## Heatwave's USP

- **Flexible sole:** Each pair of Heatwave footwear comes with a unique pliable anti-slip rubber sole which is a carefully crafted blend of elastic rubber materials for providing ample flexibility to the sole along with cushioning and comfort to the wearer.
- **Well-contoured arch:** The shoes come fitted with a specially modelled, steel fitted shank which bears the weight and supports the feet of the wearer effectively.
- **Unique grooves:** The signature Heatwave wavy grooves provide a safe and an anti-slip grip.
- **Soft and supple inner sole:** Specially created to be pliable to the touch, the inner soles snugly yield to every arch and curve of the wearer's feet for them to experience well-contoured comfort.
- **Handmade with love:** All the shoes are handmade in small scale factories in Malaysia, with Heatwave staff overseeing quality control at each stage.
- **Unmatched prices, great quality:** Heatwave recognises that effective sourcing is an important way of keeping costs low and quality high. It's design team travels widely and sources quality fabrics and embellishments at the best possible rates.





***“We believe that a well-designed pair of shoes can empower the busy modern woman in her daily journey of life. Our shoes don’t just look good but feel good too. Surviving the entire day in heels is no longer a painful dream, but a beautiful reality with Heatwave.”***

**-Hitesh Vaswani,**

Managing Director, Saffron Tradex Pvt. Ltd.

features such as breathable in-soles, soft rubber cushioning, faux fur, metallic embellishments, and striking cutouts.

Vaswani says, “We have a variety of options to meet the dynamic needs of the customers, and each pair of footwear is handmade with love. Our pumps have flexible sole and unique grooves to provide unmatched comfort and an anti-slip grip to the wearer. The new sneaker range boasts of lightweight product and soft and breathable in-soles. Further, our design team travels widely and sources quality fabrics and embellishments at the best possible rates. So we’re able to provide quality products at unmatched prices.”

The brand is all set to launch a new category of fashion sneakers in footwear. Furthermore, it will be adding more SKUs in the day bags collection.

“Our shoes are handmade, so, we deploy technology in a way that it enhances quality and reduces the cost of production while maintaining the efficacy of handmade craftsmanship at the same time,” he says.

#### **Retail Reach**

Heatwave has a remarkable global presence in over 8 countries including in Singapore, Indonesia, Malaysia, Qatar and Philippines. In India, the brand has successfully launched 5 EBOs in Mumbai, Pune, Surat and Vadodara and 2 SIS in at Iconic in Ahmedabad and Pune. And with a desire to cater to ladies across the country, the brand is also selling through e-commerce platforms such as Myntra and Tata CliQ.

“We plan to expand our retail footprint in India by opening doors at 5 more cities by the end of this year. We’re aiming at Delhi and Punjab in our first phase of expansion,” says Vaswani. “This is the second year of the brand’s presence in India, and we have achieved 300 percent growth in online business for Q1 as compared to the last year,” he concludes.







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# ZOLA: A PERFECT BLEND OF FAST FASHION WITH TRADITIONAL SENSIBILITIES

Positioning itself as an elegantly creative brand in the domestic market, Zola always come out with designs that are way ahead of the times and has created a niche for itself with its authenticity and reliability...

**IMAGES Business of Fashion**

**G**rowing in multitudes since its launch, Zola has adapted itself to the changing times while keeping the needs of its customers at the forefront. Positioning itself as an elegantly creative brand in the domestic market, Zola always come out with designs that are way ahead of the times and has created a niche for itself with its authenticity and reliability.

Launched in 1991 by Pragati Fashions, Zola is a pioneer in the Indian women's fashion scene. According to **Kirti Shah, Founder & Managing Director, Pragati Fashion**, when they started out in the early 1990s, the ladies apparel market in India was virtually an unexplored territory, despite having enough scope. Shah saw the opportunity in the market and foresaw the changing behaviour of the generation and demography - the changing style of shopping, changing apparel fashion, upcoming generation's dressing consciousness, what they would look for and exactly what they would want, etc.

"I decided to launch Zola, which fit the bill perfectly, and thus came about a brand with an entire range of ladies wear," he says.



Today, after 28 years in the business, Zola boasts of a strong market share. On an average, each day, the brand produces 30,000 dresses from its 800 factories across the country carrying the legendary Zola label. About 18 fashion designers contribute to make Zola variants outstanding and acceptable by women of all regions. As many as 15,000 workers spend their time behind making Zola a perfect brand and more than 6,200 retailers proudly sell Zola brand.

### Product Categories

From ethnic wear to western formals, skirts, shirts, jeans and other casual wear, Zola's collection never disappoints its customers. The brand offers a different look to its customers be it in ethnic kurtis, western wear; both casual and formal, denims, jeggings, leggings and shirts. For kids too, the brand assures a variety of styles in ethnic and western wear. It also offers comfortable sleepwear for women and kids. "Zola is a perfect blend of fast fashion with traditional sensibilities," says Shah.

### Focus Consumers

Today, Zola is a national brand with a pan-India presence. It has a strong foothold across all geographies in the country with more significant presence in the highly quality-conscious market like Kerala.

Keeping in mind its target audience, Zola fashions creates styles that embraces one's very own personality. It is stylish without being loud. Shah says, "Women are usually more conscious about their looks than their male counterparts and hence building a brand for women that is acknowledged and appreciated by all economic classes was not easy. However, we spotted the business opportunity in the segment and went for it, and it's been a successful venture."

"In the women's apparel market, there still aren't many top-line brands that cater to the needs of the middle class. Today, these women are fashion conscious and we cater to these fashionably forward women - women who want to look smart, wear trending styles and have a unique approach to life," he concludes.



# BAABLA DESIGNER

## EXPLORING PARTNERSHIPS WITH RETAILERS AND WHOLESALERS

IMAGES Business of Fashion



L-R: Pankaj Khatri, Actress Parineeti Chopra, Vijay Khatri & Purshottam Khatri at the IPF Star Awards 2019 in New Delhi



**W**holesaler and manufacturer of women's designer kurtis, Baabla Designer is an emerging name in the women's wear market. The company was launched in 2015 by Purshottam Khatri, who holds decades of expertise in garment manufacturing and exporting. It is a family-run business, which is now operated by his sons, Pankaj Khatri and Vijay Khatri.

The product range is centered around the needs of the modern women, infusing traditional and modern innovative designs in its collections. The product line incorporates innovative and exclusive designer kurtis for women. The products – which are made from premium fabric and available in various sizes

– are extremely appreciated for their economical price range. The company plans to add an elite collection introducing catalogue style kurtis.

### Target Customers

Growing incomes and changing lifestyle patterns have seen an increased demand in the kurtis segment in the ethnic wear segment. Baabla Designer decided to tap into this consumer need and provide better options for women. The company caters to the new Gen-X and Gen-Y women, who are more conscious about looking good while managing their day-to-day routine which includes managing both home and office work.

### Production & Manufacturing

All of the company's products are manufactured in-house and

are produced from high quality fabrics including imported ones. Baabla Designer is well-equipped with manufacturing facilities and produces over 10,000 pieces a day. The company's professional and proactive management team understands the dynamics of a business that is fast-paced and challenging. Their highly skilled workers, cutting-edge technology and modern infrastructure, help them deliver exceptional products and services to their customers.

### Availability & Presence

Baabla Designer has made its presence felt across the country in all major states and cities. It is now branching out into the untapped territories as well as reaching out to the international market.



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# CRAVATEX BRANDS PARTNERS WITH VF BRANDS FOR VANS IN INDIA

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Cravatex Brands Limited (CBL) has partnered with Vans, the original action sports brand and advocate for creative expression, to operate the Vans India business. With the addition of Vans, CBL continues to add incredible brands to its portfolio which includes brands across the fashion, sportswear and wellness sectors such as FILA, Matrix, Stages, Les Mills, Ziva and Proline Fitness.

Since VF's acquisition in 2004, Vans has emerged as the global icon of creative expression in youth culture and today is an over US \$3 billion global lifestyle brand. Rooted in California since 1966, Vans has grown steadily since its acquisition with the aim to be a US \$5 billion brand by fiscal 2023 under the VF Corp umbrella. Available in over 84 countries, Vans continues to generate deep and

meaningful consumer connections around the world by celebrating creative expression through its brand pillars of art, music, action sports and street culture.

Cravatex Brands Limited is part of The Batra Group, a global Indian business founded in 1949 by Ram Kumar Batra with headquarters in Mumbai, India and London, UK. The group has operations in Europe, UK, Middle East, India, Sri Lanka, Bangladesh, Nepal and Africa.

**Rohan Batra, Managing Director, CBL** commented, "We are delighted to add Vans to our portfolio. Vans is an iconic global brand and a perfect fit for our vision at Cravatex Brands to create India's premier platform for fashion, sportswear and wellness. Our focus will be to grow the distribution of the brand through an expansion of the

retail network with a target of 50 stores in the next 5 years and partnering with wholesale retailers both online and offline. We will be investing significantly into brand building by focusing on the Vans brand pillars and focusing on creating real authentic consumer conversations that embody the 'Off The Wall' spirit."

**Scott Basham, Vice President and Managing Director, Vans APAC** stated, "Vans is committed to enabling and inspiring creative self-expression around the world, and we are very enthusiastic to partner with CBL to reinforce our commitment in India. By combining the global strength of the Vans brand with CBL's local market expertise, we are confident that Vans will forge even deeper connections with Indian consumers while expanding market share."



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## ITALIAN DENIM BRAND, REPLAY OPENS FIRST STORE IN INDIA

Leading Italian premium denim brand, Replay in partnership with Reliance Brands Limited, has opened its first store in India at Ambience Mall, Gurugram. The 1,200 sq.ft. store, combines the historical and iconic elements of the brand both for its materials, and for its furnishings.

Replay, known for its innovative flair, characteristic Italian design and the superb quality of its denim. The brand's offerings in the Indian market include a wide range of denims, casual wear, footwear and accessories for men and women.

**Matteo Sinigaglia, CEO, Fashion Box SpA**, said, "I am very excited about Replay's first store opening in India at Delhi-Gurugram. I am confident that our constant striving to deliver qualitative and innovative products will be in line with the consumers' appetite for the highest standards in denim. Furthermore, it is a real pleasure to join forces with Reliance Brands Limited

and I truly believe we are starting a wonderful journey together."

**Manu Sharma, Business Head – Replay India, Reliance Brands Limited** said, "Replay is an iconic brand and we are proud to launch the first store here in Gurgaon. We are thrilled to introduce Hyperflex+, a premium super-denim that allows complete freedom of movement. We are sure this revolutionary denim range along with the striking casuals offered by the brand, rooted in its classic, vintage styling will excite our discerning customers."

Replay's Hyperflex+ range of denims is a signature capsule that features 100 percent elasticity, super recovery and superior comfort. The brand also presents the Spring Summer 2019 Replay collection, inspired by the Silverlake neighbourhood in Los Angeles, where a mix of ethnic styles and cultures, music and sport come together allowing for experimentation of all kinds. The pre-dominant themes within the collection are:

- **Black Holiday:** This theme, inspired by nightlife, plays with shades of black, sometimes combined with white and includes t-shirts with rock prints, marble washes, leather jackets and coated denim; in the womenswear, there is also a touch of lurex.
- **Paradise Cove:** Named after the Malibu district, this part of the collection reflects a gypsy spirit and is characterized by all-over prints.
- **Sport Deluxe/Technical Fleece:** The athleisure world gets emphasis in this collection to add a sporty look. The fleece fabric is used across several lines. Completing the sporty look are unisex technical nylon jackets with logos on the back and contrasting zippers featuring the custom Replay ribbons.

The brand plans to open 3 more stores in Mumbai and New Delhi this year, with the flagship store scheduled to launch in Maker Maxity, Mumbai.



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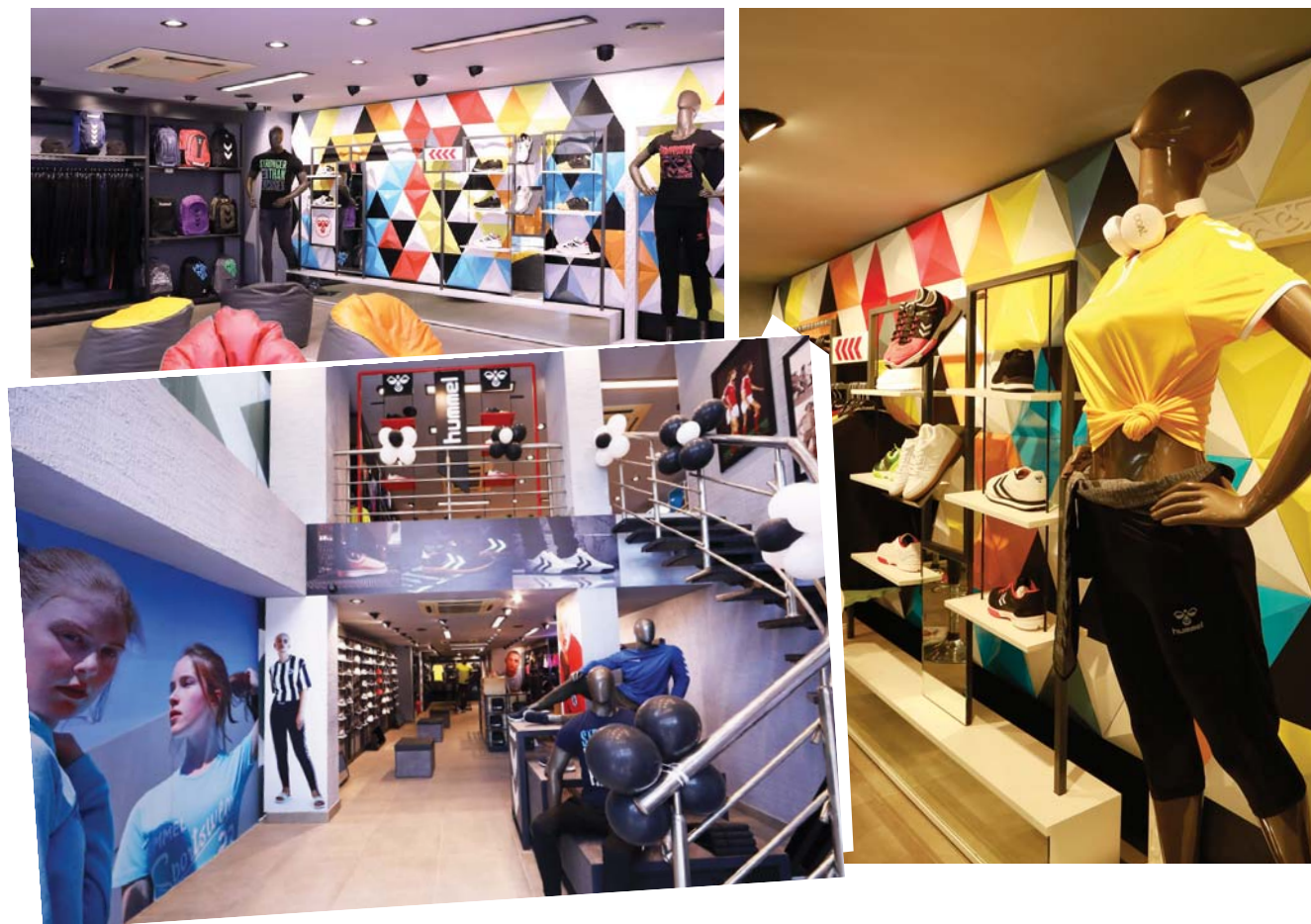
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# HUMMEL

## LAUNCHES STORE IN BENGALURU; EYES 15 STORES BY FISCAL-END

IMAGES Business of Fashion



The Danish sportstyle brand hummel enters physical Indian retail space with 5 stores in Bengaluru, Pune, Chennai, Surat and Amritsar respectively. With the launch of these stores, the company has embarked on physical retail expansion drive to cater to the millennial by offering a wide array of its high-performance, stylish and durable range of products.

hummel invited Bollywood heartthrob Kartik Aaryan, also the brand

ambassador to launch the store in Bengaluru. The store, spread over sprawling 1,700 square feet area, has a double storey design, which allows the customers to experience the versatility of hummel's style offerings.

The stores have on display, the summer 2019 collection featuring key product categories including sneakers, track pants, t-shirts, hoodies, bags, accessories and sports shoes. The patented Danish design is rooted but uber trendy, fun yet easy going –

especially targeted at the millennial. The chevrons on hummel apparel and footwear is the iconic brand symbol.

At the store opening, **Soumava Naskar, Director, hummel India** said, "Our products are retailed both online and offline at the same price points. We are targeting to open around 15 stores in the current fiscal out of which 5 are operational now. We are investing substantially to develop our backend and also on our consumer facing brand communication."



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# LENSKART ELEVATES CUSTOMER EXPERIENCE WITH THE LAUNCH OF ITS 500TH STORE

IMAGES Business of Fashion

**L**enskart, the eyewear retailer which retails eyewear, sunglasses and contact lenses launched its 500th store in Bengaluru.

Spread across a sprawling 5,000 sq.ft, the store has been curated to deliver an immersive experience for the customers with its unique offering. Not only does the store have 5,000+ styles to choose from but also offers different experiences. To further enhance customer experience the store offers Bliss, an eye massage lounge that is sure to perk-up tired eyes, Style, the make-over studio for a perfect look and Sip It Up, a juice bar to refresh customers from the scorching heat.

This is the first time such services are being provided in an eyewear space in India. At the center of the store is the Infinity Zone, an ellipsoidal seating area evocative of the brand's iconic emblem.

Speaking on the launch, **Peyush Bansal, CEO, Lenskart India**, said, "We are very excited to launch our 500th store which is also India's largest. Lenskart's focus has always been pushing the bar on customer experience and this is exactly what we have done in this store. Consumers can have an eye massage and get themselves styled for the perfect look. We have put-together a lot of

innovation and thought in the store to give our customers a contemporary experience with trendy eyewear range at an economical price range."

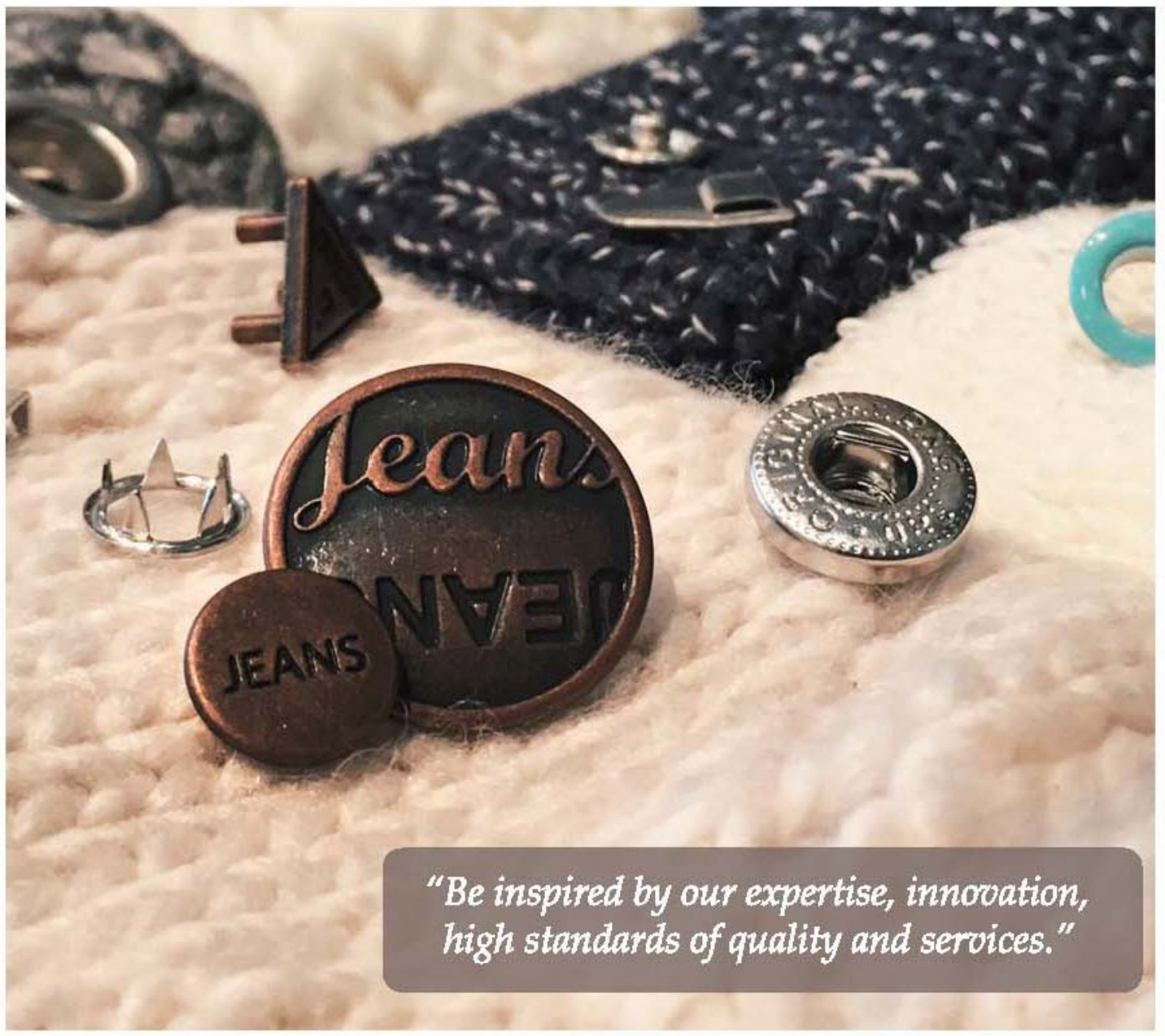
He further adds "Our aim is to not just create a mark on the eyewear industry but also provide every individual access to high-quality designer glasses".

The outlet follows a shop-in-shop concept of displaying product as per their category across Vincent Chase, John Jacobs and other brands making it convenient for the customers to choose products of their choice without any hassle.





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## MINIZMO OPENS SECOND STORE AT CYBER HUB, GURUGRAM

Minizmo's garments are tailored with handpicked, soft feel premium fabrics, sourced directly from the top manufacturers and distributors that supply to luxury brands and designers. They have 800 fabric options...

**IMAGES Business of Fashion**

After the successful launch of its flagship store at DLF Promenade last year, Minizmo, a premium menswear and accessories brand, has launched its second store at Cyber Hub, Cyber City, Gurgaon. Delving deep into the Indian roots yet retaining the uncompromising standards of international menswear, Minizmo is the perfect option for a man looking for affordable luxury. The brand is bullish about the number of categories it offers to its customers, ranging from suits, blazers, bandhgala, nehru jackets, shirts, t-shirts and chinos, with a full-fledged bespoke experience that includes made-to-measure and design assistance.

**Rohan Khattar, Director, Cloteq Apparels Pvt. Ltd., and Founder, Minizmo,** said, "Minizmo stands for effortless, distinctive and functional style. We will be standing tall at Building 8C; a space that houses exactly

## Market Dynamics

- With a market size of ₹1,24,423 crore (US \$19 billion), men's wear is the largest segment in apparel market and is expected to grow at a CAGR of 9 percent over the next 10 years.
- The various product categories of men's wear segment include shirts, trousers, suits, winter wear, t-shirts, denim, daily wear, active wear, ethnic, innerwear, etc.
- Shirts are the single largest category in men's wear, followed by trousers and denim.



our captive audience that is the working men of India. We have a very strong corporate clientele and are looking at targeting similar professionals, as we stand for luxury work-wear as a brand. We aim to open 5 more outlets in the next 2 years and build our online business which is launched.”

Commenting on the entry of the first retail brand in Cyber Hub, **Pushpa Bector, Head for Cyber Hub** said, “We are delighted to have a bespoke men's wear brand at Cyber Hub. Cyber hub being the anchor to cyber city has over 30,000 people visiting everyday. It is encouraging to see the foray of retail brands like Minizmo at Cyber Hub. Our consumers have been looking forward to interesting new retail at this iconic destination and Minizmo is an apt addition to our portfolio of brands.”



Their blazers are the bestselling category followed by shirts, suits, Nehru jackets and round neck t-shirts. With shirts starting at ₹2,499; Nehru jackets at ₹4,999; suits priced at ₹13,999; Minizmo has about 10+ categories to offer, all under one roof. They also house accessories such as ties, cufflinks and pocket squares, which starts from ₹699.

Minizmo's garments are tailored with handpicked, soft feel premium fabrics, sourced directly from the top manufacturers and distributors that supply to luxury brands and designers. They have 800 fabric options. The company uses machine washable and durable fabrics, keeping in mind the busy lifestyle of today's men promising premium products that justifies the spend.

Minizmo has given a spin to the work-wear segment by using geometric patterns, which is a refreshing change from the usual monotony. Combining traditional elements with modern aesthetics, their garments are drenched in a variety of rich colours, prints and patterns. Their collection is a mix of tropical minimalism and comfort.



# NEW PERNIA'S POP-UP STUDIO

## PACKED WITH INNOVATIONS TO ENHANCE CX



### IMAGES Business of Fashion

Pernia's Pop-Up Studio continues to expand with the opening of its 8th store in the garden city of India, Bengaluru. Located at one of the most prestigious hotels, The Leela Palace, the store is spread across 2,500 sq.ft. It offers a unique shopping experience that is completely integrated with the online shop and stocks a spectacular range of ready-to-wear ethnic and western collections for men and women.

- The store houses over 25 designers with a strong focus on emerging and advanced designers. It includes creations from designers and brands like Anamika Khanna, Varun Bahl, Anita Dongre, Deme by Gabriella, Samant Chauhan, Pranay Baidya, Vanshik, Duet Luxury and many more.
- The new studio is going above and beyond to give a unique experience



to the shoppers. It features touchscreen-enabled kiosks for customers to browse through the latest fashion on the brand's online counterpart and see it in person at the same time!

- It also promises a high level of personalisation with a tailor-made experience for visitors. Shoppers can sign up for private styling consultations and indulge in preferential treatment in the luxurious space.
- The interiors are an understated palette, featuring the brand's

signature pink. There are brass fixtures with exposed beams, which unify all the lines in the dynamic space, enhancing customer experience. The store has a modern and refined ambience created to reflect the personality of Pernia's Pop-Up Shop.

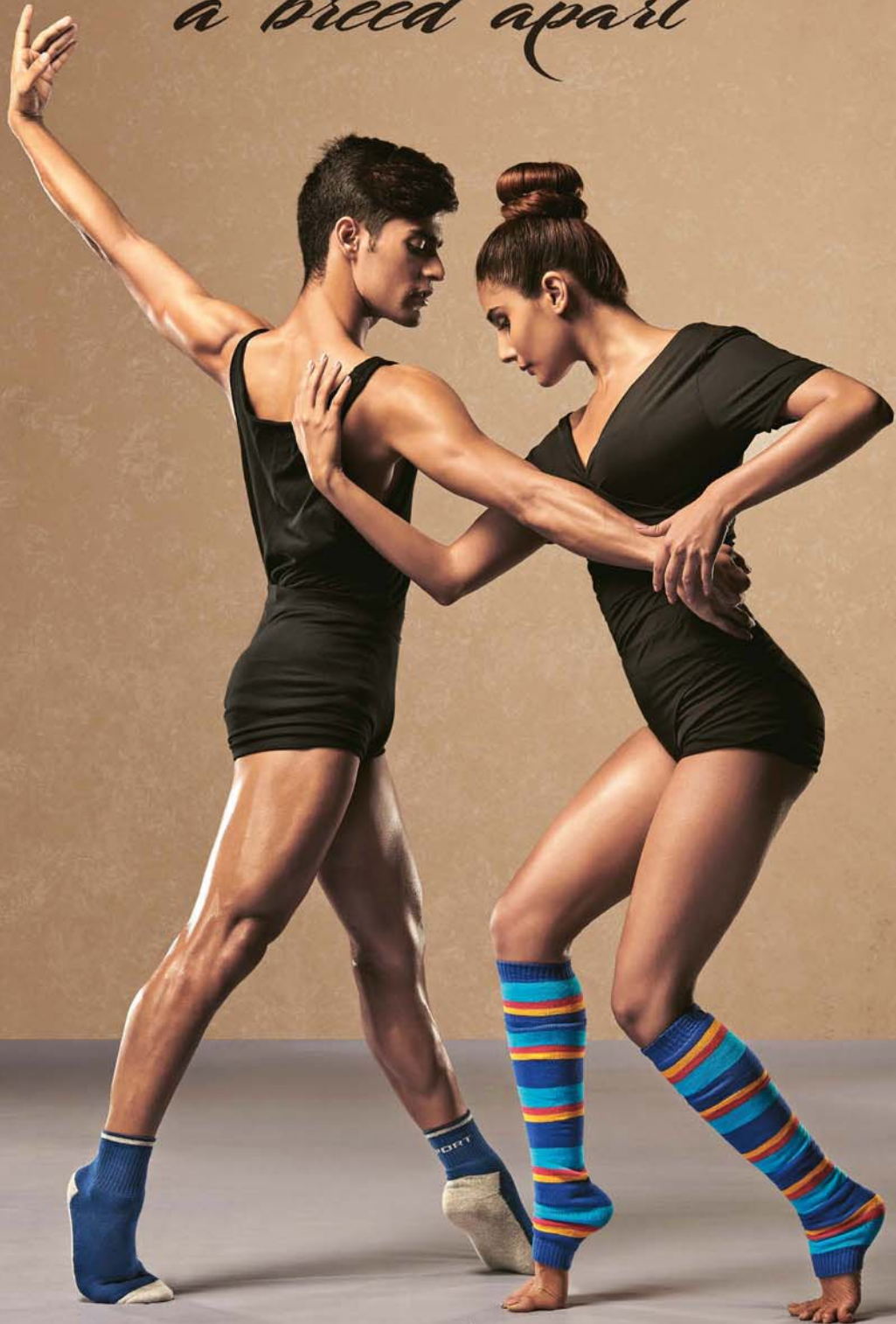
### Abhishek Agarwal, Founder, Purple Style Labs,

the parent company of Pernia's Pop-Up Shop, says, "Since the launch of our first store in Delhi, our experience has been nothing short of extraordinary. In a span of one year, we have opened eight stores across Delhi and Mumbai. The Bengaluru store launch was a significant one in the pipeline to expand the offline presence and make luxury shopping more accessible to the fashion-savvy shoppers of the city."

He confirms that stores are coming up in London, New York and Dubai positively this year.



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
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# POPxo

## SHAPES NEW OMNICHANNEL RETAIL CUSTOMER EXPERIENCE; OPENS FIRST STANDALONE OUTLET AT SELECT CITYWALK

### IMAGES Business of Fashion

POPxo, India's largest digital community for millennial women marks entry into offline retailing by opening its first standalone outlet at Select Citywalk.

The company plans to open four more such spaces across malls in the coming quarter and will retail its private label and licensed merchandise. With the introduction of POPxo shop the company is solidifying its position as a Content-Community-Commerce platform.

Armed with the data insight that millennial women are looking to buy well-designed products that express

their personality, POPxo launched its private e-commerce label last year. It sells lifestyle products designed and produced in house by the POPxo team. The trendy collection of bags, notebooks, laptop sleeves and other lifestyle products, help millennial women express their personality through what they wear and carry. The products are well priced and start from ₹299 onwards. They are launching skincare and fashion in June 2019.

On the launch opening of the first shop **Priyanka Gill, Founder and CEO, Luxeva Ltd.**, said, "We are excited to open our first physical retail space at Select Citywalk. Producing

private label merchandise is a natural progression for us as a content company. We use data and inputs from our most popular articles, videos and social memes to design products that millennials love. These products are then sold online via content to our existing user-base of millions of women. Now, with the new launch they will be sold offline as well."

POPxo raised ₹37 crore in funding in March 2018. The investment round was led by Neoplux and OPPO, with participation from existing investors IDG Ventures India, Summit Media, and GREE Ventures.



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# THE HOUSE OF RARE LAUNCHES 'RAREISM' AT VR MALL



A fashion label for the modern woman, Rareism has opened its first flagship store at VR Mall in Whitefield, Bengaluru. Rareism is for the contemporary women - for the traveler, the homemaker, the multi-tasker, and of course, the exceptional dresser! Rareism has hit the Indian market three years after the House of Rare launched its first exclusive contemporary menswear line Rare Rabbit across India.

“Rareism is an ideology signifying individuality. Our motto - Believe, Inspire, Conquer - is an ode to the journey of each woman. The brand is synonymous with what is rare and edgy in every woman. Her passion, power and personality are reflecting through Rareism designs that are versatile, comfortable, stylish, and within one’s reach. If you have a Rareism garment, you’ll always be appropriately dressed wherever you go,” says, **Akshika Poddar, Founder, Rareism.**

At the store launch, the brand also released its Spring Summer 2019 collection titled, Summer Tones. The debut collection boasts of breezy cottons, blithe linens and spirited blends that are cut and tailored masterfully into sleek silhouettes by a dynamic team of designers, technical experts and skilled seamstresses. The flowing skirts, comfortable boot-cut pants, stylish-buttoned shirts, tops and colourful scarves are designed to create the fluidity of movement for the ladies.

Rareism products are minimalistic yet subtly powerful. They don’t seek to overwhelm or outshine the wearer; they choose to compliment her in her entirety: her form and her personality. A perfect fit is as important for the brand as using the right fabric as it constantly strives to make the wearer feel as good as they look. The understated yet elegant Rareism outfit is a must-have in your wardrobe keeping you prepped for all occasions, be it a business meeting or a casual yet stylish brunch.



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Novio is catering to all segments of women in the age bracket of 16 years and above. The products are priced between 199 to 999 and available in all leading stores across India with presence in over 1500 MBO'S.



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L-R Abhay Bahugune, COO, Van Heusen & Actress Radhika Apte

# VAN HEUSEN LAUNCHES LARGEST STORE ON LINKING ROAD, MUMBAI

India's premium formal wear brand for men and women from Aditya Birla Fashion and Retail Ltd., Van Heusen has launched a new store in Bandra. The store launch was graced by Bollywood actor Radhika Apte, who is known for her distinct style. The upscale fashion store is located in the heart of the city at Linking Road. With the launch of the new store, Van Heusen now has 16 stores in the state of Maharashtra.

On the occasion of the store launch, **Abhay Bahugune, Chief Operating Officer, Van Heusen, Aditya Birla Fashion and Retail Ltd.**, said, "Van Heusen has, over the last decade, carved a niche for itself as a renowned fashion brand with a strong presence across leading cities and towns of India. Today, Van Heusen enjoys a high recall value and is perceived as a brand that provides power dressing to young professionals. We are happy to be at the forefront of the fashion revolution that

is underway in one of the largest cities in India, Mumbai. The launch of our new brand outlet at Linking Road takes our store count in the state to 27. We are delighted with the overwhelming response we have received and are confident of catering to the growing demand with the right offering."

The expansive store is spread across 2,200 sq. ft., offering an array of wardrobe options for both men and women ranging from corporate suits to fashion jackets, casual work-wear to club wear and the right accessories to complete the look. Each product reflects modern styles, along with cutting edge innovation in fabric and technology.

Taking a fresh approach towards casual menswear and womenswear, the new store hosts of collections from Van Heusen's sub-brands including VDot and Van Heusen sport. The VDot range of clothes is bold and expressive

in terms of styles and designs. The Van Heusen Sport line is constructed with knits, stretchable fabric and blends of linen, making the ensembles breathable and refreshing, and the preferred choice for both office wear and beyond.

The latest innerwear, athleisure and loungewear for men and women are a collection of new and innovative products - bearing features for best-in-class comfort and fit. Each product which has been crafted with elevated fashion and new age fabric is designed to offer a differentiated range to the various consumer segments.

As part of the celebrations, Van Heusen introduced an exciting offer for its first 100 customers who can avail a special discount of ₹1,000 on purchase of ₹2,500 worth merchandise. That's not all; the brand surprised some of its consumers with fun giveaways and rewards.







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# PROFIT @ FASHION RETAIL: OVERCOMING THE DISCOUNTING CULTURE

DISCOUNTING IS THE SECOND BIGGEST TRIGGER FOR CONSUMPTION IN THE APPAREL INDUSTRY TODAY. BUT JUXTAPOSED AGAINST RISING COSTS AND A HYPER-COMPETITIVE LANDSCAPE, HOW WOULD RETAILERS OVERCOME THE IMPOSSIBLE AND EARN PROFITS?

**IMAGES BUSINESS OF FASHION**

Changing consumer preferences and shrinking loyalty led by huge discounting in the apparel market has completely disrupted the retail industry around the globe. In a special session at India Fashion Forum 2019, a panel of retail dignitaries explicated on plausible ways of making profits while staying relevant to consumers in this age of retail disruption.

Moderated by **Mohit Dhanjal**, Retail Director, Raymond, the chair consisted of the following panelists:

- **Amin Kassam**, Chief Retail Operations, Shoppers Stop
- **Sandeep Narain**, SVP-Retail Operations & VM, Max (Landmark Group)
- **Ganesh Subramanian**, Founder & CEO, Stylumia
- **Vishal Gupta**, Director- Retail, Puma India
- **Shilpa Sharma**, Co - Founder, Jaypore

Discounting is the second biggest trigger for consumption in the apparel industry today but juxtaposed against rising costs and a hyper-competitive landscape, it is increasingly becoming onerous for retailers to keep up with profitability. "A few years ago, maybe a decade or two, we started this whole process of end of season sale with the sole purpose being liquidation of unsold inventory. It started as an annual phenomena, it was typically done for about 15 days. But in the last 10 years, things have completely changed -- today discounts are a norm in the fashion retail industry. Infact, there are companies that sell more

discounted merchandise than they sell full price products today,” said Mohit Dhanjal kickstarting the discussion.

The retail industry in India is struggling through a hyper-competitive phase. It’s not cheaper to be online than offline because drive traffic and digital promoting is almost as expensive as real estate. Moreover, if there’s a brand comes up with a compelling proposition, very soon the market will be teeming with competitors who create similar products and proposition.

Amin Kassam stated that in a recent research KPMG highlights five game-changing factors that will mould fashion retail by 2022, and discounts don’t fall under any of these five. The paper lists customer experience, artificial intelligence and rise of discerning customer as the main factors and delineates how retailing for tomorrow’s actually here now and how the retail revolution in the East is forecasted to overcome the West. “We retailers have been measuring sales by sales per square foot all along, but KPMG reckons that the new measure could be experienced by square foot. I also think there’s a lot of merit in AI, especially with the personalisation and the segmentation of one,” he adds.

### Customer Experience Vs. Discounts

In this evolutionary dichotomy, where the Indian market is getting aggressively high number of discount days, the holistic danger is that the more the discount drug is fed, the more the expectation rises. At the same time, brands and retailers can’t afford to be uncompetitive, because it will result in isolation. “So what we are focusing on, at this moment, is customer experience and customer service. I think discount is being used to drive footfall, so if

you’re getting footfall in you in your stores, the objective is to optimise conversion; it also is much healthier if you increase your conversion through good service,” asserted Amin Kassam.

“Basically, the answer to this as a whole is that, I think at some point there will be some collateral damage but how do we, as retailers, do our best to ensure that our customers get the best customer experience in our stores is what will matter the most,” he added.

A look into history will reveal that whenever a new channel of distribution comes in the market the current channel faces heat, but eventually both the channels ends up co-existing. “I remember, in a previous company I was in, we opened a full-price store. The retailers (MBO) from the same market stopped buying our product. They held that now that we have opened a store in the market, customers are not going to come to them. By the very next season, the same retailers were back, and on being asked told me that they have been experiencing increased demand for our product because of our store in the market,” said Vishal Gupta citing an example.

Puma’s advantage lies in the fact that it was among the first brands which realised the potential of e-commerce. The brand was convinced that although discounting is a staple across this medium, online is a channel that they cannot ignore. The brand set to work on segregating the line offered to both online and offline channels. “The first season we did that, the retail division bounced back but we realised that the offering on online became very sub-optimal because, obviously, price was the biggest factor influencing purchases. We then decided to give the cheaper products online, not the marquee products, because we felt that discounts would hit our offline channel. It was a very restrictive business practice and it didn’t work,” said Gupta.



**“Creating some kind of a scarcity and a shortage helps build a sense of urgency for consumers. In the online space we create previews for our customers, or there are limited edition products or may be just a window for three hours for our top 5,000 customers. These kinds of initiatives do help us generate excitement around products and minimise the need to discount”**

**-Shilpa Sharma,**  
Co-Founder, Jaypore



**“In the last 10 years, things have completely changed – today discounts are a norm in the fashion retail industry. Infact, there are companies that sell more discounted merchandise than they sell full price products”**

**-Mohit Dhanjal,**  
Retail Director, Raymond





***“Thanks to online, we have so many consumer insights available with us today and it has helped us to learn and reach out to the most valuable consumers, people who visit our stores most frequently. We try to give back to them beyond just a product offering or discount – we give them personalised offerings”***

**-Sandeep Narain,**  
SVP-Retail Operations & VM, Max  
(Landmark Group)



***“To dissect the product and the consumer similarly, everybody in the organisation plays a role. The message I want to share is that fundamental data as a culture is very important if you have to understand customer deeper and once we do that we can personalise for everybody out there”***

**-Ganesh Subramanian,**  
Founder & CEO, Stylumia

“Then we came out with a solution of taking the onus of investing in stocks on our own. So we started selling marquee products online through marketplace model, and we succeeded in controlling the problem of discounting. The online channels were left to discount the products which they were actually buying and because these products were not being sold to them, we could marry both the worlds wherein the online channels were selling the marquee products full price and the cheaper products are probably being sold on discount,” he explained.

In the current scenario both, online and offline businesses feel the need to offer discounts, the norm of retail. One reason why it is easier to offer discounts online is because on this channel there is always some stock buildup in the inventory, according to Shilpa Sharma.

“Our own metrics online are a combination of our SOR model which is our curated marketplace and combined with our private label, which is fully owned inventory where we have a certain width and depth of representation and also therefore stock that builds up over a period of time,” she said.

Brand Jaypore also endeavours to minimise the extent of discounting. “We don’t want to be seen as a brand which is selling somebody else’s work cheaper. Instead, we want curate a collection of products that we know people will like and people will want. That being said, creating some kind of a scarcity and a shortage helps build a sense of urgency for consumers. In the online space we create previews for our customers, or there are limited edition products or may be just a window for three hours which opens up to our top 5,000 customers before

it opens up to the rest of the audience. These kinds of initiatives do help us generate excitement around products and minimise the need to discount,” she added.

Today, even value fashion brands like Max feel the heat of discounting. Max now has premium brands available at 50 percent discount for six months to drive higher value. “We believe our products are already at value for money. We cannot afford to be a discounting brand – the only situations we offer discounts are to clear inventory. Thanks to online, we have so many consumer insights available with us today and it has helped us to learn and reach out to the most valuable consumers, people who visit our stores most frequently. We try to give back to them beyond just a product offering or discount – we give them personalised offerings” stated Sandeep Narain. As a brick-and-mortar retailer, Max has been able to learn from the changing standard operating procedures (SOPs) and is focusing more on customer experience. Utilising modern technology, the brand has also increased its communication with consumers to keep them well informed of new launches and fresh arrivals. This has helped it to minimise discounts.

#### **Data Mining**

Data Mining is extremely applicable in the retail industry. The large amount of data collected helps in identifying customer buying patterns and trends that lead to improved quality of customer service and good customer retention and satisfaction.

Fashion is one of the most challenging industries to predict. This leads to the challenge of clearing inventory.

“I have the firsthand experience of making products banking on consumer data and witness these products perform much better than other products. Hence, I believe data



***“We started selling marquee products online through marketplace model, and we succeeded in controlling the problem of discounting. The online channels were left to discount the products which people were actually buying. We could marry both the worlds wherein the online channels were selling the marquee products full price and the cheaper products are probably being sold on discount ”***

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Director - Retail, Puma India



***“We retailers have been measuring sales by sales per square foot all along, but KPMG reckons that the new measure could be experienced by square foot. I also think there's a lot of merit in AI, especially with personalisation and segmentation”***

**-Amin Kassam,**  
Chief Retail Operations, Shoppers Stop

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***“In the kids' section we have this Max Kids Festival held in April/May every year. The festival has registered high engagement and sales for us over the past few years. It has led to a huge connect at an emotional level with the consumers”***

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can really transform the way we make and sell products,” stated Ganesh Subramanian.

The future of brands and retailers will be storytelling rather than product selling and it will be an uphill task considering the amount of brands and clutter we have in the market today. E.g., by the second or third week, Netflix understands your entertainment requirement than anybody else and can afford to give you personalised experiences. Retailers can bank on data and replicate what Netflix is doing for its subscribers.

An average Netflix movie is tagged with 4,900 keywords. This was made possible with the cumulative efforts of sleuths from Hollywood and data scientists. “It was phenomenal work, a 90-page manual was created for experts watching the movies based on which they were tagged. Netflix dissected the product so much that even if you watched one movie they know 4,900 dimensions of you. To dissect the product and the consumer similarly, everybody in the organization plays a role – right from the person welcoming the customer to the person who's selling to the customer the person. The message I want to share is that fundamental data as a culture is very important if you have to understand customer deeper and once we do that we can personalise for everybody out there,” Subramanian added.

Brands like Max are already in the transitional phase changing the narrative from just being a transaction led interaction to storytelling and weaving emotion into the whole customer experience. “In the kids' section we have this Max Kids Festival held in April/May every year. The festival has registered high engagement and sales for us over the past few years. It has led to a huge connect at an emotional level with the consumers,” added Sandeep Narain.

Shoppers Stop's personal shopping initiative now contributes to a big chunk of the brand's revenues. The brand started out with understanding the DNA of their successful personal shoppers. “When we first analysed our top 20 personal shoppers in India we found out that their personal sales was about ₹5.5 crore a year – that's the level our top personal shoppers. Our top personal shoppers were people who have grown within our business -- they were in customer service desk, they were cashier, etc., and their interaction with customers is very strong DNA. Going to the top 10, we found that they were genuinely and nice humble individuals,” says Amin Kassam.

As a whole, it is important to have clear consumer insights to build a strong product as well as brand proposition. It is equally important to build a culture of data so that brands and retailers can work their way forward with the vision of actually knowing their consumer deeper and sharper.



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# HOW PEOPLE WILL SHOP DIFFERENTLY BY 2020

IN A SESSION HELD AT INDIA FASHION FORUM 2019, PUNEET DUDEJA, SALES DIRECTOR - WGSN, SOUTH ASIA DISCUSSED THE THREE GLOBAL DRIVERS THAT WILL DISRUPT CONSUMER BEHAVIOUR ALONGSIDE THE MAJOR PRIORITIES AND PROFILES THAT WILL EMERGE IN 2020...

**IMAGES BUSINESS OF FASHION**



While retail has undergone a seismic change in the last decade, the consumer has evolved drastically too, and is still a step ahead. Over the years, a profusion of factors has culminated to accelerate the rate at which the consumer is evolving. Modern consumers are more aware and more informed than ever before and have been successful in ensuring that the retail template as a whole is effectively moving into an experience economy with paramount emphasis on customer journey.

In an India Fashion Forum 2019 session powered by WGSN, Puneet Dudeja, Sales Director - WGSN, South Asia discussed the three global drivers that will disrupt consumer behaviour alongside the major priorities and profiles that will emerge in 2020.

“We have analysed approximately 50 data reference sources, white papers and economic forecasts, along with results across more than 50 countries to put forward these three trends of mass consumer adoption” stated Dudeja.

## **Mobile Commerce is Here to Dominate**

By 2020, M-commerce will constitute about 50 percent of all online purchases globally, with experts pegging it at an estimated US\$ 250 billion. Asia is expected to lead this revolution with Japan and South Korea at the forefront and China and India following suit.

### Crowd Based Capitalism

The sharing economy's explosive growth in the recent years have been successful in astounding market sentinels worldwide. As digital and mobile technologies make it ever easier to access goods and services on-demand, sharing economy has transcended beyond Millennial preference to become a part of modern society today.

"Just to give you a sheer estimate, by 2025, the global peer-to-peer market is estimated to reach 335 US\$ billion. It's a relatively new concept in India,

having gained popularity only in the last few years, but this economic model will have a long standing popularity. Especially for a country like India that is plagued by economic uncertainties, sharing economy presents an opportunity for a steady income and a different industry all together," Dudeja explained.

The sharing economy will also open gates to myriad partnerships and collaborations. Brands and retailers must be a part of this movement because on-demand services will be the next buss word in consumerism.

"At the same time, we also have to be aware of modern consumer priorities like anti-anxiety, responsible technology and analogue activism. In the near future, these priorities will herald a complete different set of consumer profiles including, the Imperfectionists, the Augmentalist and The Localvists," he adds.

Mental health awareness has become a huge issue India in India at the moment. As per Google trends, the keyword searches including the word anxiety has doubled in the last two in China, Hong Kong, South Korea and India. "As brands and retailers we need to tackle issues like this too. Globally, we are in mist of a different political ecosystem with lack of jobs, issues related to affordable housing, etc. These do alter the way people think and shop. As an example of how this anxiety factor is important for fashion stakeholders, we can consider the wellness tourism market now which is slated to reach about US\$ 1,000 billion by 2020," said Dudeja.

### Types of Consumers

**The Imperfectionists:** The key to living a better life through a more balanced state of mind is what consumers are seeking right now. "People need to focus on things that they can control. It also means that we want to accept imperfections. That leads



## RULES OF ENGAGEMENT

### HOW DO GLOBAL AND NATIONAL BUSINESSES PREPARE FOR LOCALVISTS?

- Be part of a solution and don't ignore the problems.
- Forget fluffy messages and "taking the customer on a journey", this group doesn't want storytelling. They want action.
- Companies need to make a true commitment to the local community.
- Consider taking a hard line on an issue that will rally Localvists to vote with their dollars.

us to the first consumer profile -- the Imperfectionists," he added.

The drive for perfection is now witnessing a huge consumer backlash. These days the practice of self-love is a social expectation and the celebration of our bodily 'flaws' a rite of passage with the acceptance of imperfection the newest beauty zeitgeist. This cohort of consumers being self-aware is rapidly increasing and will constitute a huge base of our consumer base in the years to come. Brands have to consider that they no longer can sell happiness and fulfilment through the pursuit of perfection but rather through the acceptance of imperfection.

The second consumer priority after anti-anxiety is responsible tech, something that has been rapidly catching momentum in the last couple

of years. Nowadays data storage is primarily on computer systems. With the advent of internet technology the world has become interconnected and data can be accessed remotely by those who are otherwise unauthorised to do the same. Information is a source of strength and, hence, is also linked to social and political relations and thus the ethical aspects of how information is used is getting important by the day. Responsible technology is important for delivering a fairer internet experience, and a positive future where tech is useful, trusted and trustworthy.

Also, with the increasing speed of changing technology, electronic waste or e-waste—discarded computers, cell phones, iPods and other electronics—is a growing concern. Globally, only 20 percent of electronic waste are recycled, and the rest ends up in

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***"For every million cell phones recycled, we can extract 16,000 kgs of copper, 350 kgs of silver, 34 kgs of gold and 15 kgs of other precious metals. So it is a pressing need for brand, retailers and consumers alike to take this as a priority,"***

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landfills. Toxic components in these devices, which may include mercury, lead and cadmium, can leak and contaminate the environment if disposed of improperly.

“For every million cell phones recycled, we can extract 16,000 kgs of copper, 350 kgs of silver, 34 kgs of gold and 15 kgs of other precious metals. So it is a pressing need for brand, retailers and consumers alike to take this as a priority,” said Dudeja.

**The Augmentalist:** E-waste is a major concern for the second type of consumer profile that is expected to emerge in the near future – the Augmentalist. The Augmentalist is responsible in their technology usage, they are aware of e-wastes and institutions around the globe to be equally responsible. “Tech reliance is a cultural trait of the modern world. Technology is something that we cannot do away with but the Augmentalist expects the reliance to be controlled. The number of these kind of people are on the rise and we as brands and retailers need to understand the fact that these people will soon constitute a large part of their consumer base by 2020,” explained Dudeja.

**The Localvists:** Analogue activism, the third consumer priority, refers to inclination among modern individuals to be part of a social activism movement. “By 2020, activism would be an expected standard, a norm. People will be transforming their feelings of anxiety into fighting for their beliefs. So brands and retailers will have to consider this and work on arming themselves to face consumer profile in the future, because this one of the fastest growing cohorts of consumers, which we call Localvists,” says Dudeja.



***“By 2025, the global peer-to-peer market is estimated to reach 335 US\$ billion. It’s a relatively new concept in India, having gained popularity only in the last few years, but this economic model will have a long standing popularity. Especially for a country like India that is plagued by economic uncertainties, sharing economy presents an opportunity for a steady income and a different industry all together”***

**-Puneet Dudeja,**  
Sales Director - WGSN, South Asia

For Localvists, community and sustainability are the main priorities. While community and sustainability are priorities for this cohort, there’s one thing snagging local attention and action: money. As people feel that nation states and governments no longer have the trust/power to run our modern world, citizens believe that cities and metropolitan regions are in charge of their own futures.

“Since they care about money for their livelihoods and they totally despise anything against the society or its norms. For them, the trust in banks and government is always on a decline, For them the threat of automation is real. These are people who want to keep money in their communities and make it stronger than it was earlier. Their activism is not about patriotism but for the survival of the community,” said Dudeja.

This also has led international brands to localise themselves. A Boston Consulting Group report reveals that 60 percent of the people surveyed are willing to shell out more for a locally made product.

### **Engaging The Future Customer**

For the Imperfectionists, seamless psychographic services that target micro consumer segments will gain market share in 2020. Those who are attracting decision averse and time strapped shoppers need to especially work on the technology front because Imperfectionists are adopting technology because for them, it’s the ease that matter the most.

Also, imperfect ads are embracing unattainable standards with dark and subversive humor, a much needed reprise from the same visual targets. These kind of ads are slated to gain more popularity by 2020.

The Augmentalist will look out for next generation interfaces and experiences around products that stay on the forefront of innovation. They will also be attracted to immersive economy -- on demand brand immersion, brand experiences, visual and voice search, search optimization, etc.

Localvists prefer context over content, so companies need to make a true commitment to local communities and take hard line on local issues to main a successful business. These cohorts will not care for wealth care, price discounts and bundles, what they will value most will be the values of the company. Also, as global trust in mainstream financial institutions wanes, Localvists are trialing new payment and finance plans, including local cryptocurrencies.





# ENHANCING SUPPLY CHAIN CAPABILITIES FOR A GREAT CUSTOMER EXPERIENCE

BRANDS TODAY WORK HARD TOWARDS DETERMINING STRATEGIES AROUND SUPPLY CHAIN, INVENTORY AND LOGISTICS FOR DRIVING SALES, DEMONSTRATING THAT THE SUPPLY CHAIN IS READY FOR THE NEXT PHASE OF RETAIL REVOLUTION BOTH FROM TECHNOLOGY AND RETAILERS' END IN INDIA...

## IMAGES BUSINESS OF FASHION

While most retailers understand the importance of providing a consistently positive customer experience, many struggle with legacy systems that fail to address customer experience needs. To successfully serve today's Omnichannel demands and in the future, retailers must recognise and accept that changing market dynamics which necessitates adjustments to the old ways of doing things. As customer behavior is evolving in the Omnichannel environment getting the right fashion products to the right sales channels can be a highly complex process.

In a session held at India Fashion Forum 2019, a distinguished jury composed of time-honored luminaries from the retail supply chain and logistics industry deliberated on exploring the awareness and emotional engagements with a brand to determine strategies around supply chain, inventory and logistics for driving sales. The objective of the session was to demonstrate how the supply chain is ready for the next phase of retail revolution both from technology and retailers' end. The session was moderated by **Gaurav Kapil**, SVP & Head-CX, Ops, Marketplace & Supply Chain, Craftsvilla and the panel consisted of following eminent retail leaders:

- **Tushar Ahluwalia**, Co-founder and CEO StalkBuyLove.com
- **Manoj Krishnan**, President-IT, Landmark Group
- **Rajul Jain**, CEO & Co-founder, INCREFF (Incredible Efficiency)
- **Surendra Nayak**, Head- Sales & Marketing, Logic ERP Solutions



Gaurav Kapil kickstarted the session by highlighting the achievements of the panel in the supply chain and design industry, focusing on the competitive landscape and disruptions happening in the industry. Before getting into the mainstream problems of how to enhance the supply chain, he threw around some numbers to sort the context of the discussion.

“All of us are into online as well as offline shopping and as everything is moving towards becoming Omnichannel, the customer expectations have evolved like never before. The expectation to evolve at the speed of light and is slowly becoming a tough nut to crack on a daily basis for retailers. The supply chain industry faces maximum heat. As per a report, 68 percent of the consumers expect the delivery to take place on the same day or next day of the online shopping. Around 45 percent of consumers are shopping on the multichannel platform and even they are expecting the same, and all credit goes to the Omnichannel process. Keeping this in mind, retailers seriously need to think about evolving their supply chain in order to match the level of demands and customer experience. As we talk about the customer experience being the next battlefield, the supply chain is the key driver and value generator for the companies. The evolution of the supply chain will be a key differentiator in the crowded marketplace,” he said.

### Major Disruptions & Emerging Trends

According to Tushar Ahluwalia, supply chain is a second tier aspect of his company. “As we are a fashion-oriented brand, our first focus is on the changing trends. In our segment, customer requirements evolve so fast

that we need a new assortment every week. Solving the inventory, getting good designs, creating new stocks and maintaining it in the crunch time is our priority. We actually think that lean time and inventory are important for the gross profit margin. We actually hit on the gross profit margin as we produce in proximity and by doing so, we can really observe what is getting sold. We conduct research and use the data to improve the assortment making our pattern evolve across the country,” he stated.

“There are certain parameters which are influencing and deciding the change, which the industry is going through. First is technology, where we have cloud, mobile and the Internet to influence everything and bring all aspects of retail under one roof. Next is the availability of multichannel platforms, the third being the huge impact created by e-commerce and social commerce. There are many companies which have reached profit level extremely fast due to social commerce – Myntra and Flipkart being examples of two companies which hit profit levels in 5-7 years. Government policies have also been helpful, including the implementation of GST, which has resulted in a constant increase of customer segmentation. These inputs are forcing the supply chain to evolve and as a result, the procedure is becoming fast and easily accessible,” added Rajul Jain.

Giving Landmark Group’s viewpoint, Manoj Krishnan said: “One of the trends we’re noticing is the new type of customer and his expectations. To accommodate him, the supply chain needs to evolve, become more flexible. Today the customer has the option to choose the type of delivery of his purchase. He can either pick it from the store or can get it delivered to an address of his choice. Delivering the



**“Retailers seriously need to think about evolving their supply chain in order to match the level of demands and customer experience. As we talk about the customer experience being the next battlefield, the supply chain is the key driver and value generator for the companies. The evolution of the supply chain will be a key differentiator in the crowded marketplace”**

**-Gaurav Kapil,**

SVP & Head-CX, Ops, Marketplace & Supply Chain, CraftsVilla



**“The challenge is not to come up with a new set of technologies; the challenge is how to integrate with the mainstream. For big business, the challenge is even bigger. Retailers need to change their mindset since the rules of success are definitely changing”**

**-Manoj Krishnan,**

President-IT, Landmark Group





***“These warehouses are more transparent in approach as well. From the distribution chain point of view, things are a bit different. Retail brands have a different point of sales be it e-commerce and physical retail store outlets, therefore the distribution network consisting of dealer distribution, stall selling, store numbers, is taken care separately”***

**-Surendra Nayak,**  
Head- Sales & Marketing, Logic ERP Solutions



***“Looking at the interplay-commerce will not remain the big thing in the industry for a very long time, as technology and digital commerce are slowly taking over everywhere. Online does allow us to capture data way more than we can offline and have a more pointed assortment”***

**-Tushar Ahluwalia,**  
Co-founder and CEO StalkBuyLove.com

product on a given time slot always remains a big challenge. The success of every brand depends on that. Secondly we need to take into account fault tolerance. The fault tolerance of the supply chain has to be enhanced. If the retailer is trying to create a system with promised service level agreement (SLA) of delivery meeting 99 percent and above, then he must be ready to take care of unaccounted for variables. The retailer's backend should be capable enough to rectify this error and ensure the product delivery on time.”

Surendra Nayak of Logic ERP Solutions stated that with the implementation of GST, the fashion brands are now into creating robust warehouse management equipped

with comprehensive technology, space management abilities and functionalities. “These warehouses are more transparent in approach as well. From the distribution chain point of view, things are a bit different. Retail brands have a different point of sales be it e-commerce and physical retail store outlets, therefore the distribution network consisting of dealer distribution, stall selling, store numbers, is taken care separately. Here the changes done are specific to the requirements of the retailers and brand. It doesn't get consolidated and is utilised on the basis of the investment, stores number and the distribution point. Physical warehouses, which are robust, are in trend.”

### **Seasonality Holds the Relevance**

As per Kapil, the supply chain is all about being futuristic and planning in advance and his company always plans inventory and new merchandise for the

next 10-12 months.

“Fast fashion has a negative quantization despite the fact that we have an extreme crunched supply chain management. We pay our labour extremely well and therefore are able to maintain a high quality of production and supply chain. We create 300 styles every week in our funnel and upload 200 of them on the website. So, 100 of them are killed before hitting the website. We have been into operations for 4 to 5 years and till date have produced 60,000 different SKUs, despite not being a big company. Seasonality is not a concern for us. We are spending into the Omnichannel offerings and offline touch points,” explained Ahluwalia.

Jain added to this, saying, “Traditionally, the supply chain was totally driven by weather. Due to weather conditions restrictions, the physical supply chain has always been dependent on two or four seasons and supply chain execution itself used to suffer a blow due to the seasonal



disruptions. However, emerging trends in the industry are slowly breaking the seasonal myth. The supply chain today is becoming dynamic and is not dependent on the two or six months' supply theory anymore. The only thing holding disruption is the physical manufacturing of fabric garment and its physical delivery to warehouses. With the introduction of robots, slowly this will get disrupted too.”





**“There are certain parameters which are influencing and deciding the change, which the industry is going through. First is technology, where we have cloud, mobile and the Internet to influence everything and bring all aspects of retail under one roof. Next is the availability of multichannel platforms, the third being the huge impact created by e-commerce and social commerce”**

**-Rajul Jain,**  
CEO & Co-founder, INCREFF  
(Incredible Efficiency)

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**“Traditionally, the supply chain was totally driven by weather. Due to weather conditions restrictions, the physical supply chain has always been dependent on two or four seasons and supply chain execution itself used to suffer a blow due to the seasonal disruptions”**

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Nayak had a slightly different point of view, saying that seasonality still was a concern for the supply chain industry. “The lifecycle of the product in a supply chain cycle has been reduced from eight months to three months now. Winter is a three-way process and it delays the production by a large extent. No one can have the capacity to complete the production in a 10-daytime period, so they plan their product distribution and production as per season. Even structure of the warehouse is directly influenced by seasonality. The utilisation of space, procurement and manufacturing is also impacted by seasonality.”

Krishnan however, said that the concepts of seasons and seasonality was being questioned very seriously especially since some styles and trends don't even last for a week and keeping stock for the entire season in the warehouse is a huge loss for a brand.

“For a classic supply chain theory, it is wise to assemble the order as per demand rather than stocking it. This shift is emerging which results in increasing the hits of the product in the season. Hence, constant supply chain is prompted to be closer to the demand rather than decide what is going to be,” added Krishnan.

#### **Influence on Offline Retail**

Globally, as well as in India, most transactions do not happen online, as per Tushar Alhuwalia. “Looking at the interplay of commerce will not remain the big thing in the industry for a very long time, as technology and digital commerce are slowly taking over everywhere. Online does allow us to capture data way more than we can offline and have a more pointed assortment. For us, online helps build a community and lets us know what works for us and what doesn't, and we can liquidate accordingly,” stated Tushar.

Jain agreed, adding, “As far as the ‘offline vs online’ battle is concerned, online will continue to grow, but will not take everything. There will be a plateau which will act as a merger between offline and online. One fundamental difference between offline and online is the age of the people running the platform. The people currently running online platform are young and more tech-savvy, whereas the offline platform runners are the traditional ones. The age has restricted offline players to react. In future there will be more online companies who will be getting into the offline thing and disrupt the industry totally with



technology and tools which usually are used in the online platform, Lenskart is best example for this, as they are known to create and implement technology in-house.”

Talking about mobile penetration, Krishnan said that the traditional view is separately linear. “If penetration is going up, then the addressable market also goes up. As a result, the reach of the online channel is widening. Certain associated things with the development of regional content – for example language – can add more value and worth to the mobile penetration revolution. In the end, the product is the king and when merged with the right technology, increases many folds. Sometimes, it is e-commerce and on other occasions, it is about human potential, but the right product finds a market for itself. It is a social revolution to find a market of their merit in a much faster and simpler manner than we were used to in the past.”

Surendra Nayak stated that offline and digital retail were here to stay and simultaneously at that. “More and more e-commerce companies are going to have their brick-and-mortar stores, and consumer experience and emerging trends on shopping will evolve around this. There are certain threats and opportunities in context to this which will be sorted out as per the requirements. More retailers are looking for a supply chain management system which has the benefits of being integrated, robust and transparent for the visibility of the information.




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***“The most critical success factors will be how we assimilate new technologies, new processes and new mindsets into the existing mainstream business dreams. The challenge is not to come up with a new set of technologies; the challenge is how to integrate with the mainstream”***

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This strategy is the same for all, be it a veteran old retailer or a new start-up company.”

“Companies switch platforms to be successful. When they are unable to reach the expected growth point they look for other platforms. This can be a switch from offline to online rvice versa. For some, these platforms complement each other,” Jain added.

#### **Supply Chain & Customer Experience**

Ahluwalia stressed on hygiene being an important factor in the supply chain is concerned. He said factors like delivery timeline and quality consistency were important. Then there was hygiene in the offline world too – like in-store experiences, location strategies, mannequins at the front door and rent revenue ratios.

“No justification would cover up the loss if retailers fail to address these challenges,” stated Kapil.

According to Jain customer segmentation is dramatically increasing in India. “Some customers will ask lower price points, some will look for variety, some experience and there will be brands/companies responding to all of these demands. Everybody will have their own USPs, but one thing is clear, whatever you have to achieve can only be achieved through technology in the future.”

“If we need to deliver in a consistent manner, we need to focus on evolving customer services. The most critical success factors will be how we assimilate new technologies, new processes and new mindsets into the existing mainstream business dreams. The challenge is not to come up with a new set of technologies; the challenge is how to integrate with the mainstream. For big business, the challenge is even bigger. Retailers need to change their mindset since the rules of success are definitely changing,” concluded Krishnan.



# Leebas

ETHNIC WEAR



**DEEP GARMENTS** 9, Desh Udyog Industrial Estate, Caves Road, Near Bank of Baroda, Jogeshwari east, Mumbai 400 060.  
Email: [leebas\\_garments@rediffmail.com](mailto:leebas_garments@rediffmail.com), [leebas.garments@gmail.com](mailto:leebas.garments@gmail.com) | Tel: 022 28361414/ 022 28241414 | Web: [www.leebas.com](http://www.leebas.com)

# BRANDS & MANUFACTURERS LEVERAGE TECHNOLOGY FOR AUTOMATION, INCREASED SPEED IN THE SUPPLY CHAIN MARKET

IN A FRAGMENTED VERTICAL LIKE THE FASHION RETAIL INDUSTRY, BLUEKAKTUS, A STATE OF THE ART TECHNOLOGY BASED SPECIALISED APPLICATION BUILT SPECIALLY FOR THE INDUSTRY, PROVIDES FLEXIBLE, SCALABLE AND INTUITIVE SOLUTIONS THAT ARE EASY TO USE AND QUICK TO IMPLEMENT...

## IMAGES BUSINESS OF FASHION



In today's hyper-competitive market, companies and manufacturers must strive on a daily basis in terms of efficiency and productivity as customers continue to demand shorter lead times. The apparel industry, in particular, faces a big challenge to ensure its supply chain is responsive and is able to meet quick turnarounds. Growing competition is leading to lower prices, which in turn forces huge pressure on the bottom line – increasing cost pressures, rising staff salaries of staff are problems that need

to be dealt with order to keep pace with the competition.

In such a fragmented vertical comes BlueKactus, a state of the art technology based specialised application built for the apparel industry. BlueKactus is a flexible, scalable and intuitive solution that is easy to use and quick to implement. It not only helps in timely tracking of activities by sending real time alerts and notifications, but also implements a quality module. The module helps

in inspecting, tracking and keeping a check on the supply chain process. It reduces manual workload by automating most of the processes like order entry, data capturing, along with suggesting best fit costings etc. It also ensures seamless collaboration and communication between internal and external stakeholders by automating the routine and clerical tasks through AI and ML-based tools. At the India Fashion Forum 2019 held in Mumbai, Gunish Chander Jain, MD, BlueKactus talked about how his brand leveraged

## ABOUT BLUEKAKTUS

technology for automation and improving speed in the supply chain market in a bid to make things easy and convenient for retailers. In a seven-minute presentation, Jain presented the insights of technology benefitting the retail businesses.

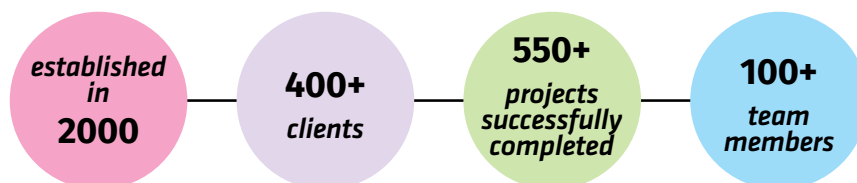
**Ideation**

Being from the fashion background and garment trading, Jain empathized with the role and impact of growing technology in the retail industry, especially problems related to the backend platform. He decided to leave his kidsweare brand and started the tech company BlueKaktus. Today, over 400 manufacturers and brands use BlueKaktus' solutions to sort out problems related to the supply chain.

"Everywhere in retail and in various for a, the focus is always on the frontend as brands zero in ongoing digital and enhancing customer experience. The problem in the Indian Fashion Retail Industry is that while the front end has been digitized, the back end is still analog. An increase in inventory levels in the industry is resulting in a lot of cash flow being stopped or affected. At

BlueKaktus, our aim is to help companies improve the speed to the market. We help in improving the speed of operations and getting things done in a shorter amount of time with the help of

technology. The motto of our brand is 'enabling future ready fashion companies and helping them to

**The Team:**

The BlueKaktus team consists of technology specialists with more than 250 man-years of experience between them, all of whom are passionate about bringing a radical change to the fashion industry. They help in bringing about next gen business software solutions to drive breakthrough results in cost management and productivity enhancement.



become more lean and nimble to become future ready," explains Jain.

**USP& Services**

BlueKaktus' key services include:

- >> Deep Industry Expertise
- >> AI/ML Embedded Tools
- >> Focus on Apparel 4.0
- >> Industry-Centric Solutions

**Objective**

The objective of the BlueKaktus is to make fashion retail companies future ready. Their advanced features include:

**Outstanding Customer Service:** It is imperative for future-ready fashion retail companies to provide customised services as their customers are becoming more demanding, evolving.

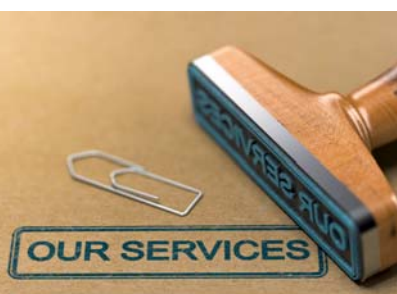
**Make Companies Nimble & Agile:**

Smart fashion companies need to be nimble and be able to quickly pivot as fashion trends continue to become increasingly unpredictable. Say for example, green shirts are in fashion, and in demand, then retailers will stock green shirts. However, there is no assurance of till when the trend will last – it could be a few months or a few weeks. Therefore, creating a nimble organization by leveraging technology is must to deal with challenges.

**Right Product at Right Time:** The survival of fashion retail companies is tough if they don't have the right product at the right time. BlueKaktus ensures that such a situation doesn't arise.

**Internet 'Enabled' Companies:**

Online is disrupting seasons, and no one fashion trend can rapidly catch on. However, there is a downside to being Internet-enabled, which is that a 2-season cycle – the theory on which the supply chain used to work – will no longer work. Retailers sell whatever is in demand. BlueKaktus helps companies in staying on top of this new business trend to succeed.





# # 1 BUSINESS APP

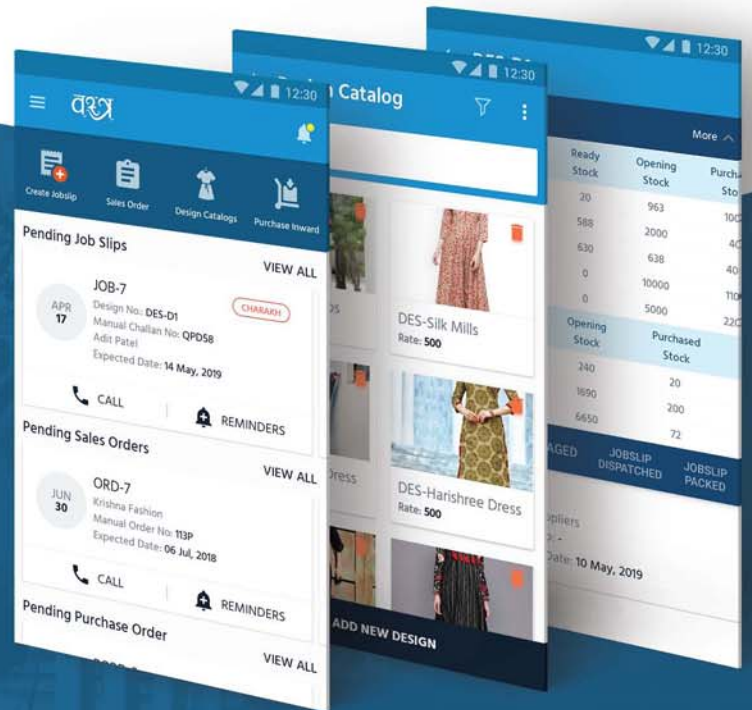
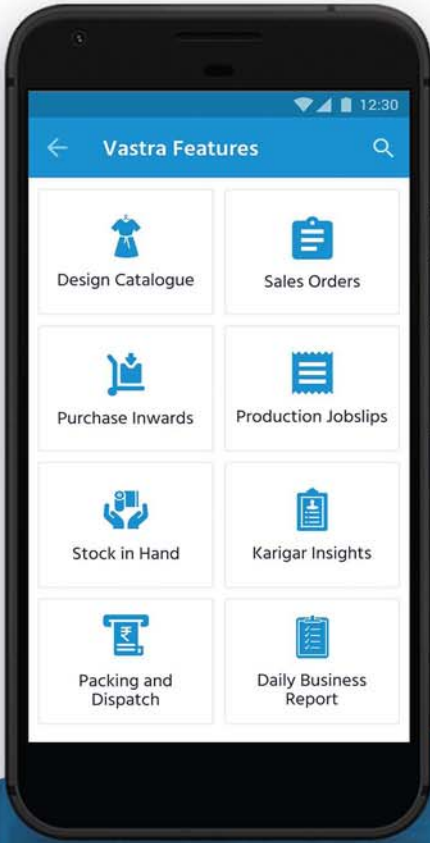
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  - Mumbai
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- and many more...



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-  Reduce Deadstock
-  Stop losing ₹ 2-20 lakhs due to inefficiency
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# CASE STUDIES: MOST EFFECTIVE TECH IMPLEMENTATION BY BRANDS & THEIR TECHNOLOGY PARTNERS



A DUET PRESENTATION BY BRANDS AND RETAILERS  
ALONG WITH THEIR TECHNOLOGY PARTNERS OF THE MOST  
SUCCESSFUL EXECUTION OF RETAIL TECHNOLOGY IN THE  
YEAR 2018 ACROSS THE COUNTRY...

## IMAGES BUSINESS OF FASHION

The India Fashion Forum 2019 session titled 'Most Effective Tech Implementations' aimed to highlight the most successful execution of retail technology in the year 2018 across the country. A duet presentation by brands and retailers along with their technology partners, the session was judged by a bench of jury consisting of:

- **Amit Bahl**, Global IT Leader
- **Anil Menon**, IT Innovation, Tata Starbucks
- **Arun Gupta**, Managing Partner & Director, Ingenium Advisory
- **Kiran Komatla**, VP-IT, Burger King
- **Meheriar Patel**, Group CIO, Jeena & Company
- **Ranjit Satyanath**, CIO, Infiniti Retail (Croma)
- **Krishna Dhumal**, Dy. Director - IT, GJEPC
- **Rajiv Rajda**, CIO, All Time Plastics

## IN-STORE TECHNOLOGY ADOPTION – LEVI'S AND OMUNI

OMUNI, India's largest Omnichannel retail enablement platform, faced a slew of new challenges. "The first challenge was that Levi's POS was VPN based and there was no direct integration with ERP. Moreover, as an international brand, it has various international mandates," explained Gerard Khan, Sr. Manager, Arvind Internet.

"Levi's operates with a multiple franchisee model and the brand wanted a sourcing logic that ensured that if an order was placed by a franchise, then the technology should first look to other franchisees in the same city for fulfillment, then at franchises within the same state, then within the same region and finally, if none of these manage to fulfil the order, only then move to a different franchise. And all of it has to happen within seconds without the customer having to wait. So that kind of a sourcing logic had to be created," Khan said.



On November 16, 2018, OMUNI commenced roll out with 6 stores in Bangalore. It started with winning over the store leadership (store managers, etc.) and exercising rigorous skill building sessions within each store. Eventually, it was scaled to 50 stores in a few months.

Elucidating on the revenue that comes from Omnichannel, Khan shared that it's about learning and improve implementing them. He went to explain how a store that had received 42 orders in a single day. "It was 42 opportunities lost converted into sales in a single day. Managing Director - South Asia, Middle East & North Africa, congratulated the store and invited himself to a meal with them. Executive

leadership stepping in and endorsing performance helped us transform Levi's story," he added.

**OMUNI enabled:**

- >> Levi's' promos
- >> Endless Aisle
- >> Helped set up kiosks

The implementation also witnessed improved tracking, brand score cards for overall and regional review, monitoring device data along with increased app adoption, and 70 percent plus orders from mobile and tabs.

Currently OMUNI has successfully implemented Omnichannel in ~200 stores with 180 percent L2L Omni-revenue.



***"The first challenge was that Levi's POS was VPN based and there was no direct integration with ERP. Moreover, as an international brand, it has various international mandates"***

**– Gerard Khan**  
Sr. Manager, Arvind Internet

## IN-STORE TECHNOLOGY ADOPTION - LANDMARK GROUP

**M**anoj Krishnan, President - IT, Landmark Group presented two used cases -- the Mobile POS Billing Counter at Pacific Mall and the Self-checkout Counter at Pacific Mall, Delhi.

In the existing format of Lifestyle stores, if a customer buy a piece of cosmetic, the consumer is handed a slip which he/she has to submit and pay at the main POS queue. Then the customer has to take the bill back to the cosmetic counter and get the product. "There was a drop of about 2 percent between the cup and the lip, so to say. So we utilized mobile POS billing to help us out," stated Manoj Krishnan.

Mobile POS Billing allows customers to scan barcode and pays at the cosmetic counter itself via debit and credit cards. This ensures that transactions are completed at counter itself and saves time and effort.

In its furniture format, Home Centre, the mobile POS billing technology was an instant hit. "Normally, a single order takes about 45 minute to bill, because customers also enquire about exact delivery date, which means we need to check the location of the warehouse that the product is available in. All these things have been integrated in the mobile POS," he said.

Lifestyle realised that the billing speed is one of the main factors of customer dissatisfaction. So, it invested and rolled out a self-checkout mechanism through which customers can bill their products in three in 3 easy steps. Although the technology is not fully rolled out, it has been implemented in the top 20 stores of Lifestyle. The brand has already noticed a 5 percent increase in the NPS score. Lifestyle is currently working on RFID to tackle the issue of tag removal.



***"Normally, a single order takes about 45 minute to bill, because customers also enquire about exact delivery date, which means we need to check the location of the warehouse that the product is available in"***

**– Manoj Krishnan**  
President - IT, Landmark Group

## IN-STORE TECHNOLOGY ADOPTION - LOGIC ERP AND PAL DEPARTMENTAL STORE



***“Our footfall has increased from 4,000 to 8,000 per day. Before Logic’s ERP we had different software for accounts, inventory and payroll. We wanted one software to handle it all and Logic’s ERP is just perfect”***

**– Varun Kapur**  
Pal Departmental Store

Pal Departmental Store is a business chain of departmental stores with built up area of more than 15,000 sq. feet per store, each store having 8-10 billing counters located in Ludhiana. As the store count increased, the company was plagued by lack of purchase management and challenges in reviewing purchase cycles. It need technology support to find plausible solutions for customer relationship management, payroll, reports and user rights.

Finally, Pal Departmental Stores enlisted Logic ERP Solutions to streamline its operations. Logic ERP was implemented through a centralized location to manage all the existing retail outlets. Real time connectivity was defined through RF links and Lease Lines whereas warehouses were managed from the central location. The solution also helped it to deploy payroll separately to manage a strength of 500 employees.

Post implementation of Logic’s solutions, operations became seamless as the company was armed with purchase and inventory control and a customisable CRM module. Moreover, a vast range of reports, in depth user control and integrated payroll module resulted in the following:

### **Seamless Operations**

- >> Improvement In Billing Cycle
- >> Better Manpower Management & Productivity
- >> Accurate Stock & Data
- >> In Depth Analytics
- >> Multi Location Master Control

“Our footfall has increased from 4,000 to 8,000 per day. Before Logic’s ERP we had different software for accounts, inventory and payroll. We wanted one software to handle it all and Logic’s ERP is just perfect. The best part is that, all we need is a tab or a smartphone and we can bill from anywhere,” explained Varun Kapur, Pal Departmental Store.

## IN-STORE TECHNOLOGY ADOPTION – CIPHERCODE TECH. SOLUTIONS



Products are the first touch points between consumers and brands. Digitising products enables brands to digitally communicate with the consumer at the micro moments. Ciphercode Tech. Solutions’ Brandwise platform provides innovative solutions to connect the unconnected products with the digital world and provides an unique digital identity to each product through unique QR codes for each product.

This patent pending technology enables consumer to authenticate products and facilitates them with the brand’s online store access without any dedicated app

installation on consumer phone. For the brand, Brandwise gives a detailed analytics of consumer behavior that can potentially help businesses to take key decisions. It also helps brands with analytics and dashboard solution to get the ground reality

The solution was specifically curated to not losing walk-in customers to other shops due to lack of stock. It also helps to promote walk-in customers to a brand’s online store. E.G., if the required size of the apparel was not in stock, consumer can directly reach to that specific product page and order the same for door delivery if stock is not in

store. This wins consumer satisfaction, sale conversion and provides relevant analytics for long term business strategies

A unique digital certificate injected to each product at production in the form of QR code. Scanning this code with a smartphone opens many options. Consumer can authenticate brand name and product origin. Clicking on certain links on the first web page (landing page) scanner opens will lead to various consumer digital experiences such as:

- >> Access online page of that specific product
- >> Share product and its details to social media network, which proliferates consumer reach
- >> Experience current offers from the brand
- >> One touch feedback to business

“Investment is close to ₹5,00,000 and the ROI time period is 6 months. The implementation envisages 10X growth in customer education and online store awareness drive,” stated Venkat Terugu, CEO, Ciphercode Tech. Solutions.



**“Investment is close to ₹15,00,000 and the ROI time period is 6 months. The implementation envisages 10X growth in customer education and online store awareness drive”**

– Venkat Terugu  
CEO, Ciphercode Tech. Solutions

## IN-STORE TECHNOLOGY ADOPTION – DELOPT

**A** deep insight of footfall count is indispensable for every retailer to get a true representation of how the business is performing. Traditionally, it has been a manual process and there were a plethora of challenges like:

- >> Issues pertaining to accuracy and manual errors.
- >> No records maintained and representation of a vital and huge data.
- >> Growth, dip or any kind of variations were not known by number and percentage. Which are the peak or lean footfall hours.
- >> How to decide on manpower for facility.

But now, with advancement in technology, retailers can now depend technology providers like DELOPT to automate the process. DELOPT’s Robovision 3D People Count Systems is a high accuracy 3D people count systems for retail and other applications that feature sensors with proprietary algorithms of 95 percent and above. DELOPT focuses on the design, development and production of

Embedded Systems and Electro-optics Systems for military and civilian applications. For retail applications, the company provides the following service: Footfall Counting System: Accurately captures visitor count and sends to reporting software DELBI. RV3D+1 sensors use the latest 3D Vision technology for classifying adults, children and group count.

**Demography:** Helps retailers to know visitors gender and age classified data.

**Dwell Analysis:** Helps offline retailers to measure their zone based performances based on number of customers and average time spent.

**Heat Map:** A quick and easy indicator of a stores holistic traffic movement behaviour. Customer movement is visually represented with color patterns on the store layout.

**WIFI Analytics:** Used in advanced models of people counting to gather consumer information beyond count data.



**“The company’s latest and the largest implementation is with the Reliance Group. DELOPT exercised almost two years of pilot to show Reliance the accuracy of their counting”**

– Kumarswamy Hiremath  
Head Marketing, Delopt

**Queue Management:** Timely alerts to store manager to reduce queue lengths and increase customer delight.

“The company’s latest and the largest implementation is with the Reliance Group. DELOPT exercised almost two years of pilot to show Reliance the accuracy of their counting,” stated Kumarswamy Hiremath, Head Marketing Delopt.

## OMNICHANNEL TECHNOLOGY IMPLEMENTATION - WILDCRAFT AND OMUNI



In June 2018, OMUNI went live with Wildcraft with OMUNI's in-store technology solution OMUNI.one, which mitigates opportunity loss. While the implementation was started with only two stores, the store count crossed 100 stores in 3 months.

OMUNI.one is a powerful product suit that can power every brand's LTP roadmap. "Seeing the early success, Wildcraft was encouraged to explore our entire product suit. The suit has everything from AI to marketplace integration, websites and consumer apps and call centers for ground operations. In November 2018, we launched the new website [www.wildcraft.com](http://www.wildcraft.com) in place of the existing [www.wildcraft.in](http://www.wildcraft.in), Wildcraft has seen fantastic results -- 3X sales, store

fulfilment of orders and enabling all Omnichannel journeys," stated Gerard Khan, Sr. Manager Arvind Internet.

Wildcraft has also signed up for Arvind Internet's analytic space managed services, retail marketing services and loyalty program. Arvind Internet has also helped Wildcraft launch its app in March 2019.

"What we are building with Wildcraft is a single view of the inventory, a single view of the customer, and single view of their business. Today, we have been successful in helping the brand restructure their business so that they are Omnichannel ready for the customer who already is Omnichannel," concludes Gerard Khan.

## OMNICHANNEL TECHNOLOGY IMPLEMENTATION - LIFESTYLE GROUP

Lifestyle launched [lifestylestores.com](http://lifestylestores.com) and [maxfashion.in](http://maxfashion.in) in January 2016. Initially, the group started with [landmarkshops.in](http://landmarkshops.in), but in line with their strategy, it was segregated into dedicated e-shops for Lifestyle, Max Fashion and Home Centre. "We did this because, all these brands had excellent brand recall. People might not know Landmark, but they knew each of these brands," said Manoj Krishnan, President - IT, Landmark Group.

Taking through the brand's technology development in the fiscal 2018-19, Krishnan revealed that Landmark started off with a single view of the inventory for the warehouses. "We saw that when the warehouse inventory was exposed, we saw some traction



in terms of the availability. This year, we have gone live with the single view of inventory for the stores, another milestone for us," he said.

Also, to enhance the Omnichannel experience in stores, the brand also uses an employee productivity app called Stylus, that employees use to send shortened URLs in case a specific

size or color is not available in store. The shortened URL then takes the customer to the online store where the required size or color is available. The Stylus app is also used as front end for delivery from stores.

The brand also exercised a massive Omnichannel campaign orchestration. Market campaigns were orchestrated based on consumers purchase behaviour both online and offline. Landmark's loyalty programme, Landmark Rewards helps the company analyse and link consumer purchases both online and offline, based on which campaigns are triggered. Landmark is also using Google Near Me extensively, sharing the physical inventory with Google.

## CUSTOMER EXPERIENCE TECHNOLOGY IMPLEMENTATION - LIFESTYLE GROUP

**A** heightened customer experience that enables personalization is the call of the hour for every retail in today's age. In line with this, Lifestyle launched its new customer engagement app, Buddy, that helps the company to create personalized in-store experiences for its customers. The platform uses AI and IOT with the sole aim of increasing customer

engagement, improving customer experience, increasing customer conversions and purchase value and enabling data enrichment for more personalized recommendations. The solution is IOT based and leverages QR codes, NFC, Missed Call and Wi-Fi to enable customer adoption and engagement for the app.

"The app comes loaded a slew of features including LMR information, exclusive offers and style and beauty tips. The app has registered significant increase in basket size and categories purchased and enhanced customer satisfaction leading to increased retention," said Priya Mehrotra, Marketing Operations, Lifestyle and Akash Mathur, Manager Lifestyle.

## CUSTOMER EXPERIENCE TECHNOLOGY IMPLEMENTATION - MOBIQUEST

**T**he m'loyal Mobile Loyalty Platform is a unique Omnichannel platform that encompasses all aspects of the customer lifecycle in retail from customer acquisition to rewards and engagement. It automates the customer journey through configurable business rules that help in sending out meaningful, relevant messages to the consumer, at the right time and place.

The platform not only automate consumer communication on the basis of insights, it connects all touchpoints/channels including EBOs, MBOs, e-commerce, mobile, social, partner and print.

"The main aim is to create the largest automated precision/digital marketing

ecosystem and trigger personalised offers to millions of consumers from one brand to another complimentary brand consumer, based on well-established purchase, frequency and demographic patterns," explained Chandra Shekhar Executive VP, Mobiquest.

The Branded/customizable Mobile app for consumers allows the consumer to:

- >> Receive personalised updates
- >> Get Exclusive relevant offers
- >> Get news and latest information Updates about the program
- >> Choose rewards from the inbuilt m'loyal Reward Store™
- >> Share offers/updates with friends
- >> Locate the closest store



*"The main aim is to create the largest automated precision/digital marketing ecosystem and trigger personalised offers to millions of consumers from one brand to another complimentary brand consumer"*

– Chandra Shekhar  
Executive VP, Mobiquest

## FASHION GARMENTS TRADE FAIR (B2B)

For the first time in Chennai, Yellow Rider Events – a company formed by 4 garment enthusiasts – is organising the Fashion Garments Trade Fair. The mission of the company is to bridge the platform between the garment manufacturers and retailers through this event. The event will bring a mix of some of the best men, women and kids brands under one roof.

**Date: 6th to 8th August 2019**

**Venue: Holiday Inn, OMR IT Expressway, Thiruvanmiyur, Chennai**

**Eminent Personalities Like Sri S. Pothiraj (Pothy's Group) will attend the event.**

**Other elite retailers will also attend including:**

### Chief Guest:

Sri Pachaiyappan Prabhu,  
Pachiyappa's Silk, Kancheepuram

### Kuthuvilakku By:

Sri Venugopal, Cotton House, Chennai  
& Sri Madhan Kumar, Maghalakshmi  
Plaazaa, Villupuram

### Guest of Honour:

Sri Rajendiran,  
Rajendira's, Puducherry



# ADITYA BIRLA FASHION AND RETAIL FORAYS INTO BRANDED ETHNIC MARKET; ACQUIRES JAYPORE

IMAGES Business of Fashion

**A**ditya Birla Fashion and Retail Limited begins a new chapter in its growth story with 100 percent acquisition of 'Jaypore'; an Indian online and offline retailer, that offers curated collections of handmade, handwoven and handcrafted apparel, jewellery, home textiles and accents, based on craft forms, from all over India.

The Board of Directors of Aditya Birla Fashion and Retail Limited (ABFRL) have approved the signing of Share



Purchase agreement to acquire Jaypore. The business comprises online and offline operations.

The proposed acquisition is subject to necessary statutory approvals and signing of definitive agreement(s).

Commenting on the deal, **Ashish Dikshit, Managing Director, ABFRL** said, "Ethnic wear is the largest segment in the Indian fashion apparel market. While ABFRL has built a diversified portfolio of brands across different segments, ethnic wear space is currently under-represented in our bouquet of offerings to consumers. The proposed acquisition is, therefore, a great strategic addition to our portfolio and gives us a strong footing in a segment that is growing in double digits. Jaypore is a brand with strong equity and with a differentiated offering of products based on Indian crafts. It provides a great platform for us to build a strong presence in the Ethnic segment and in accessories and home segment. This acquisition will further strengthen leadership position of ABFRL in the branded fashion space."

Apart from this, Aditya Birla Fashion and Retail is also acquiring TG Apparel & Decor Pvt. Ltd.

The board also approved entering into a share purchase agreement with the existing shareholders of TG Apparel & Decor Pvt Ltd, which retails ethnic fashion, both online and offline.

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# APPLEEYE: "NEW BORN TO 16 YEARS" THE LIFESTYLE CHOICE OF YOUNG GENERATION

Owned by Stitch Fab India Pvt. Ltd., a leading manufacturer and exporter of kids and ladies wear, Appleeeye mainly focuses on infants, toddlers and even teenagers. Our aim is to deliver quality products which are at par with the international standard. Combining the elements of imagination and functionality, we aim to produce high-fashion garments which are affordable but are at the same time appealing to the young fashion-conscious mother of the millennial generation. The brand desires to be in the wish list of all the young mothers who love to keep with the latest trends when it comes to dressing her kids. The latest range of Appleeeye is globally acclaimed for contemporary style, comfort and impeccable quality.

The brand desires to be "the apple of every parent's eye"; our trendy apparels and accessories are designed to meet the lifestyle choices of the young generation. One can see a subtle hint of adventure in the innovative creations of Appleeeye. Our products are exciting and colourful, a fresh addition to the kids wear segment; we craft the trendiest apparels and accessories to match the ever-evolving tastes and needs of the younger generation. We always take feedback from our clients about their needs and wants and focus on creating products which cater to their needs.

Appleeeye is currently the leading brand in the kidswear industry with 8 EBO's and more than 2000 MBO'S across India and over 100 MBO'S abroad. Our extensive range of products includes t-shirts, shirts, denims, frocks, dungarees, leggings, yoga pants, jeggings, loungewear and gowns.

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# KARL LAGERFELD ANNOUNCES COLLABORATION WITH COVER STORY TO LAUNCH WOMENSWEAR COLLECTION IN INDIA

IMAGES Business of Fashion



Vytautas Kizaitis / Shutterstock.com

*"We are honored to collaborate with Karl Lagerfeld and share the brand's trademark Parisian aesthetic with Indian consumers,"*

– Manjula Tiwari, CEO of Cover Story.

"As the Karl Lagerfeld business expands globally, we are constantly working to bring our iconic styles to new territories and regions," said **Pier Paolo Righi, CEO of Karl Lagerfeld.**

"Expanding into India, through our partnership with Cover Story, is an exciting opportunity to engage with new consumers and inspire them through the World of KARL experience," Righi added.

"We are honored to collaborate with Karl Lagerfeld and share the brand's trademark Parisian aesthetic with Indian consumers," said **Manjula Tiwari, CEO of Cover Story.**

"We feel deeply privileged to have commenced this partnership prior to Karl's passing earlier this year. The collection will celebrate his trademark aesthetic that's timeless and sophisticated with a rock-chic edge," Tiwari added.

Cover Story is India's first fast-fashion brand with a design office based in London. It is known for bringing global fashion and trends to the Indian market, with a mission to deliver new collections every week.

**K**arl Lagerfeld and Cover Story, the international fast-fashion label from Future Group, will introduce a special-edition collection of women's ready-to-wear and accessories for FW19 and SS20, exclusively in India.

Available at select Cover Story stores across the country, the collection will feature a range of looks for weekdays at the office and weekend evenings out.



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# AMAZON AI TO HELP CUSTOMERS SHOP FOR CLOTHES WITH STYLESNAP

## IMAGES Business of Fashion

Amazon has introduced StyleSnap, an AI-powered feature, that helps customers shop – all they need to do is take a photograph or screenshot of a look that they like.

Announcing the feature at the re:MARS keynote, **Consumer Worldwide CEO, Jeff Wilke** said, “The simplicity of the customer experience belies the complexity of the technology behind it.”

To get started, all customers have to do is click the camera icon in the upper right hand corner of the Amazon App, and select the ‘StyleSnap’ option; then simply upload a photograph or screenshot of a fashion look that they like. StyleSnap will present them

with recommendations for similar items on Amazon that match the look in the photo. When providing recommendations, StyleSnap considers a variety of factors such as brand, price range, and customer reviews.

StyleSnap uses computer vision and deep learning to identify apparel items in a photo, regardless of setting. Deep learning technology also helps classify the apparel items in the image into categories like ‘fit-and-flair dresses’ or ‘flannel shirts’.

While StyleSnap allows customers to discover inspiring fashion finds by simply taking screenshots of the looks they like, it also helps fashion influencers expand their communities. In addition, fashion influencers who

participate in the Amazon Influencer Program are also eligible to receive commissions for purchases they inspire.

Similar to shopping in the Amazon online store, at Amazon Go, or Whole Foods, StyleSnap is the latest example of how Amazon leverages artificial intelligence to make a real-world difference in the lives of customers.

“We are highly innovative and customer-obsessed, and we will continue to create new experiences for customers to discover the products they want and love. We are incredibly excited about StyleSnap and how it enables our customers to shop visually for Fashion on Amazon,” said Jeff Wilke.

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## HRX BY HRITHIK ROSHAN LAUNCHES

# INNERWEAR WITH 'ACTIVE TECHNOLOGY'

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**H**RX, India's first home grown fitness brand, co-owned by Bollywood heart-throb Hrithik Roshan and Myntra, launched 'HRX active innerwear' collection. The new range includes vests, underwears and more for men and is designed to offer high comfort and durability during intense physical exertions, such as running and training.

The HRX active collection uses advanced technology to comfort and boost endurance levels during workouts, with special product features that helps users sustain a higher degree of exhaustion and strain. This has been made possible with Rapid Dry technology that quickly absorbs moisture or sweat, keeping the innerwear dry during rigorous workout sessions, ridding the user of discomforts associated with dampness in the innerwear.

The products also use high stretch polyamide fabric that is extremely flexible and anti-microbial, while incorporating flat seam technology to make it abrasion resistant and avoid chafing, adding to the comfort of the user.

Speaking on the launch, Bollywood sensation and the man behind HRX, Hrithik Roshan, said, "The new range of active innerwear from HRX is designed to take fitness to a new level as it facilitates greater comfort and mobility with advanced materials and design implications that enables users tide over sogginess and slackness during rigorous training regimens. It is extremely important to feel at ease during workouts and the collection very well caters to this need. I am extremely excited about this launch and look forward to more people taking up and enjoying fitness."

The new range of high intensity workout innerwear for men will be available on Myntra and Jabong at a price range between ₹349 and ₹849. The launch is also being supported by a campaign, featuring Hrithik Roshan.



# DENIM WEAR STUDY



Pic courtesy: Spykar Gym Jns



# INDIAN DENIM WEAR MARKET \*

*With new technologies, trends and higher market reach, the denim sector has promising growth potential. Ashish Dhir, Associate Vice President, Fashion - Textile & Apparel and Saima Nigar - Associate Consultant, Fashion- Textile & Apparel, Technopak, map the status of denims in India today.*



Indian retail market is estimated to be worth ₹53,06,400 crore (USD 792 billion) in 2018 and is expected to reach ₹1,50,68,300 crore (USD 2,249 billion) by 2028, growing at a Compound Annual Growth Rate (CAGR) of 11 percent. It is envisaged that the current fashion retail market worth ₹3,61,000 crore (USD 54 billion) will grow at a promising CAGR of 8.1 percent for next ten years to reach ₹7,88,500 crore (USD 118 billion) by 2028.



**DENIM WEAR: MARKET SIZE AND GROWTH**

Indian apparel industry, which is the second largest contributor in the retail industry after food and grocery, is seeing some major shifts. Entry of international brands, changes in preferences from non-branded to branded, the fast growing economy, large young consuming population in the country has made India a highly lucrative market. India has the world's largest youth population, which is becoming fashion conscious owing to mass media and social media penetration. This has opened unprecedented retail market opportunities. The promising growth rate of 8.1 percent makes Indian fashion industry prominent in the retail sector.

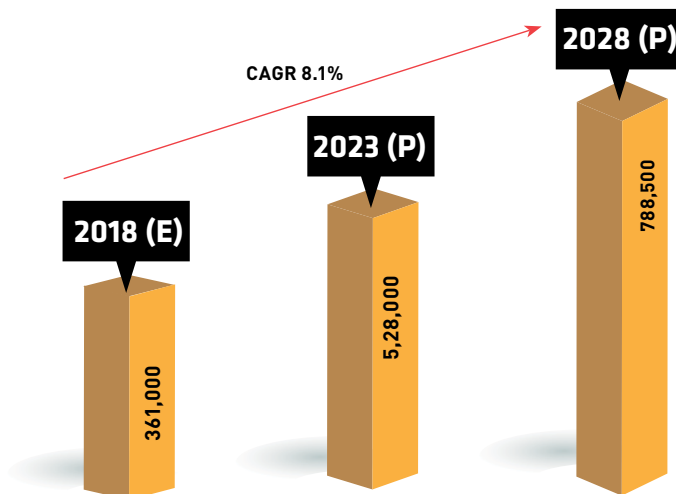
The Indian denim market is exhibiting continuous growth over the years. With new technologies, trends and higher market reach, this sector has promising growth potential. Even in rural areas, denim is becoming highly fashionable with most men and teenager girls opting denim wear over traditional outfits.

Denim wear market is estimated to be ₹29,203 crore in 2018. Denim wear market is expected to grow at CAGR of 12 percent and reach ₹91,894 crore by 2028. The market in India is dominated by men's segment, accounting ~86 percent of the total market size. However, women denim wear segment is expected show higher CAGR of 13 percent than men's segment (12 percent).

Denim is a high growth category as it is fashionable and comfortable, and enhances style quotient. The value growth within the denim wear owes to

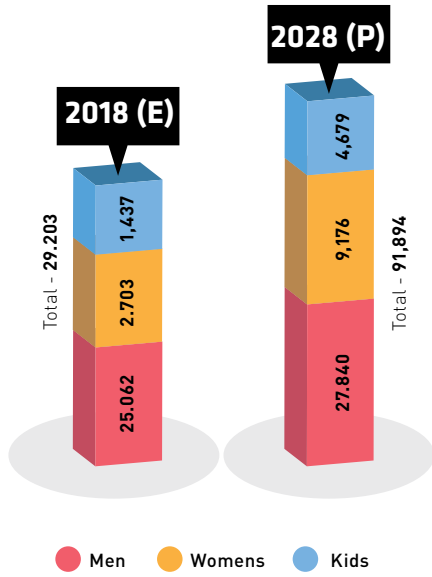
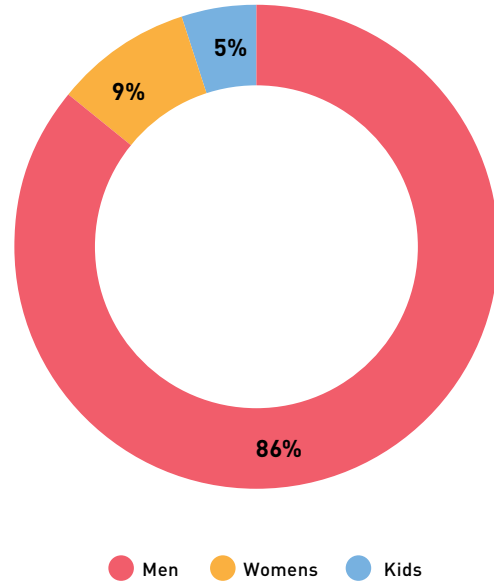


**TOTAL APPAREL MARKET (INR CR)**



Source: Secondary research, Industry reports, Technopak Analysis



**DENIMWEAR MARKET (2018)**

**DENIMWEAR MARKET SHARE (2018)**


Source: Technopak Analysis

Within the overall Indian apparel market, the denim wear market has evolved significantly over the last couple of years. The industry has witnessed rapid growth, triggered by increasing usage of western wear by fashion conscious youths.

increased demand for stretch and light weight fabric, varying colours, styling and detailing. This trend is emerging across all categories (men's, women's and kids).

As of 2018, 40 percent of the denim market is branded. However, there is pricing gap in the branded market with most of the branded offering is across mid to premium due to which brands are not able to cater significant needs of the market. The unbranded share is 60 percent of the total denim market and is marked by fragmented nature of supply. So, there is an opportunity for the private label play in the denim market in the value segment. Hence, value fashion retailers such as fbb, V-Mart, Max fashion can grow by plugging the need gap in the value denim market.

### GROWTH DRIVERS AND TRENDS IN DENIM WEAR IN INDIA

Within the overall Indian apparel market, the denim wear market has evolved significantly over the last couple of years. The industry has witnessed rapid growth, triggered by increasing usage of western wear by

fashion conscious youths. The change in classification of consumer wardrobe has acted as a growth driver for denim wear in India. Denim wear brands are growing across all segments of the Indian market (premium, medium and value for money). International denim brands like Pepe Jeans, Levi's, Wrangler and Flying Machine etc have witnessed rapid growth over last few years.

Certain factors which are contributing as key growth drivers of denim wear in the country are enumerated below:

#### YOUTH AS A GROWTH DRIVER:

Youth (15 to 29 years old) who comprise 26 percent of the consuming population, are a key growth driver of denim wear in the country. Increasing disposable income, comfort, quality and brand consciousness are major reasons behind increasing acceptance of denim wear among this young population.

#### INFLUENCE OF INTERNATIONAL BRANDS

The entry of the international brands in the country is one of the biggest



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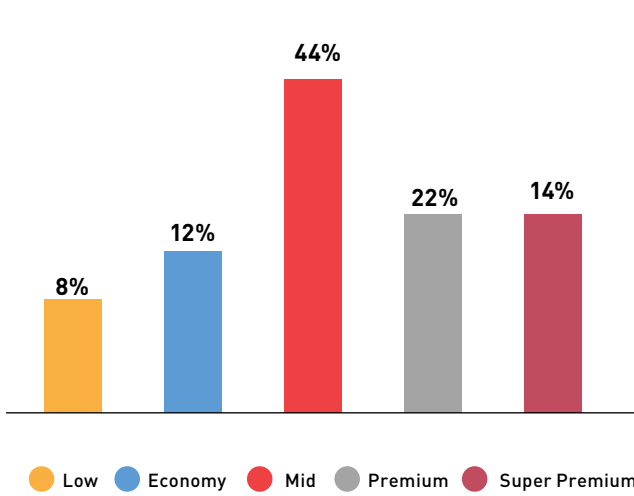
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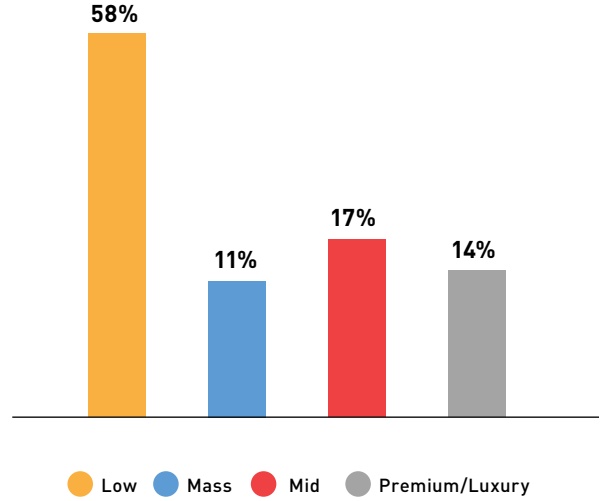
SPLIT OF THE WOMEN'S DENIM MARKET BY PRICE SEGMENTS - FY 18

DENIM MARKET SPLIT (PRICE AT INR)



SPLIT OF THE MEN'S DENIM MARKET BY PRICE SEGMENTS - FY 18

DENIM MARKET SPLIT (PRICE AT INR)



Source: Secondary research, Technopak Analysis

The value growth within the denimwear owes to increased demand for enhanced product attributes: fashion quotient, stretch and lightweight fabric, varying colours, styling and detailing. This trend is emerging across both men's and women's segments.

drivers of denim wear. Their entry has widened the perspective of consumers which in turn has resulted in higher acceptability of new trends, styles in the market. With the increasing exposure to international fashion trends, the Indian consumer today is aware of global trends and has given him more variety to choose from. The value growth within the denimwear owes to increased demand for enhanced product attributes: fashion quotient, stretch and lightweight fabric, varying colours, styling and detailing. This trend is emerging across both men's and women's segments. The aforementioned factors shall combine to drive relatively higher levels of growth of the Mid Premium and Premium/Luxury segments.

### INCREASED RURAL SPENDING

Rural areas are developing at a rapid pace and so is their purchasing power. With the percolation of mass media, people in rural areas are also aware of fashion trends. Their inclination towards western trends is another reason for the growing demand of denims in rural areas. The mid-value segment of denim wear, characterized by quality, value-for-money, and increasing styling quotient, is the preferred choice of people from rural areas.

### CASUALIZATION OF FASHION

The Indian casual wear market has evolved significantly over the years. Casual wear categories such as denim, activewear, casual shirts, and fashionable skirts are outpacing the growth of formal wear in India. This is reflective of the changing consumer trend and increasing usage of casual wear in offices as well as home. This shift in consumer's wardrobe towards casual wear has acted as a growth driver for the denim wear in India. The casualization of fashion is not unique to India and is driven by global phenomena.

**Alternative retail channel:** Alternative apparel retailing is evolving in India in a rapid pace; jeans are no exception to this trend. Direct selling, home shopping and e-tailing are gaining momentum in the market.

### RISE OF PRIVATE LABEL

Branded penetration in the market has a skew towards mid to premium price points and there is very limited offering in the value price points leading to pricing gaps in the market. These gaps in the market have provided an





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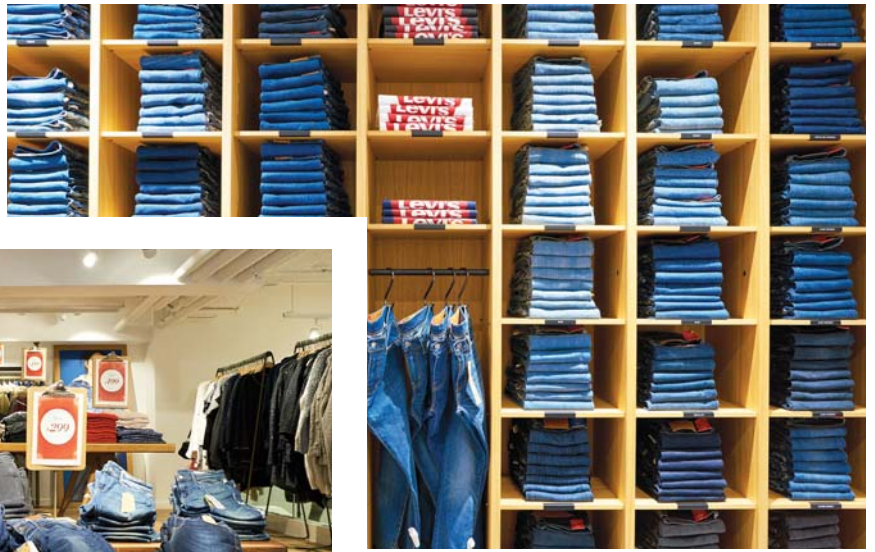
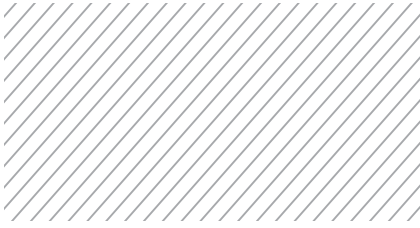


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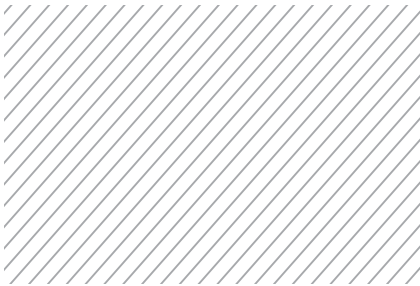
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opportunity for retailers to launch their private label in the value segment. Private label led players such as FBB, Max and VMart have identified these gaps and have launched products in the value fashion segment.

Private labels are win-win solution for both big retailers and value for money first time consumers as these labels ensure that a certain minimum quality and image. Young population from middle class India is becoming image conscious and is a significant contributor to the western wear market.

### **SUPER PREMIUM JEANS HAS EMERGED AS THE BEST PERFORMING CATEGORY**

Increasing popularity of luxury international brands coupled with rising income has resulted in making super premium jeans, one of the best performing categories. Increasing workforce resulting in rising income among the youth has led to increased demand of super premium and premium jeans among the youth.

Increasing penetration of the global brands in non-metros has provided ample options to the non-metro

dwellers thus, resulting in widening the consumers of premium denim wear.

### **CROPPED OR FOLDED HEMS CONTINUE TO BE FASHIONABLE AMONG WOMEN**

Women's jeans continued to record strong current value growth in 2018, while also still being considered far from saturation. Over the decades female acceptance of Western apparel such as jeans has risen, with these now being a standard part of a woman's wardrobe.

### **CONCLUSION**

With growing penetration of online channels, brand recognition and quality consciousness; there is huge opportunity for growth in denim wear. The large youth population, infiltrating urbanization and growing preference towards western wear in semi-urban and rural areas are acting as a boost to denim industry.

With right knowledge of consumer preference, opting for online channels, Omni-channel retailing and global best practices, denim wear brands can exploit the available growth opportunities in domestic denim wear market.





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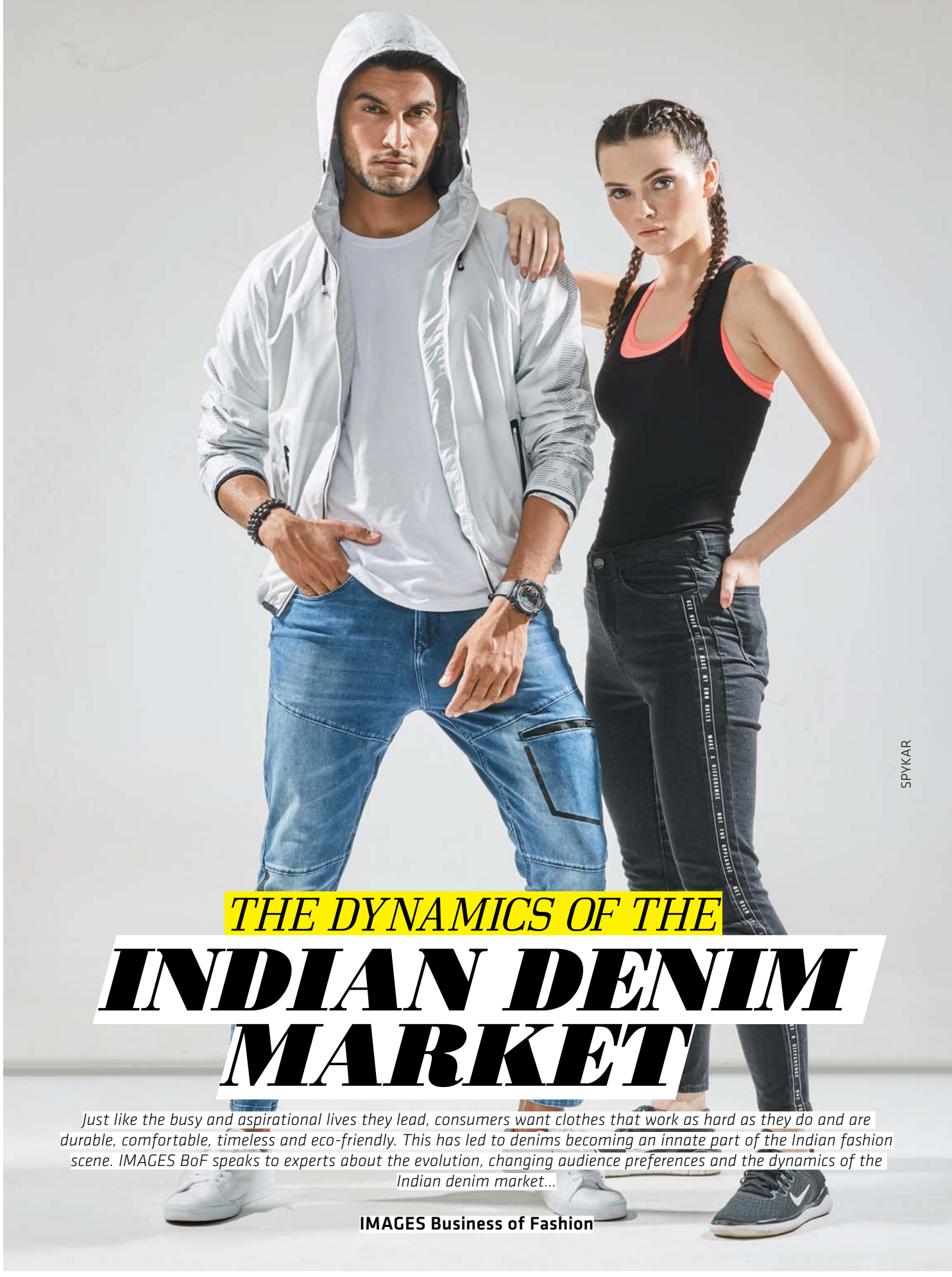
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SPYKAR

**THE DYNAMICS OF THE**  
**INDIAN DENIM**  
**MARKET**

*Just like the busy and aspirational lives they lead, consumers want clothes that work as hard as they do and are durable, comfortable, timeless and eco-friendly. This has led to denims becoming an innate part of the Indian fashion scene. IMAGES BoF speaks to experts about the evolution, changing audience preferences and the dynamics of the Indian denim market...*

**IMAGES Business of Fashion**

Denims are now an innate part of the Indian fashion scene. From metros to the most remote of small towns, this blue fabric is all-pervasive today. It has become the go-to fashion preference of individuals across all walks of life – irrespective of gender and age. Considering India's proclivity to adhere to its cultural heritage, the popularity and wide usage that denim enjoys today in India stands as a testimony to this fabric's timeless appeal.

### Changing Preferences

Over the years, and more so in recent times, India has opened up to the western world and the inclination towards the western style of dressing – which has always persisted in the country – has grown exponentially. The shift towards denim has been witnessed due to various reasons, including the growing youth population and pop-culture influence – some of the main factors behind the country's fashion revolution.

One of the biggest triggers for this shift in trends was the introduction of satellite cable television in India in the early 90s, which brought mainstream western entertainment and news to India which primarily influenced the youth of the time most. "Three decades later, the information revolution that has taken place with the internet, smart phones and social media brought along western ideas. Western fashion is no more alien to the majority of people in India and jeans in a way is the most iconic indicator of this shift,"

*India's proclivity to adhere to its cultural heritage, the popularity and wide usage that denim enjoys today in India stands as a testimony to this fabric's timeless appeal.*

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

As mobile devices continue to permeate deeper into smaller cities and towns, the nation has increasingly been exposed to the western world and this is ushered in a change in both perceptions as well as preferences. This has definitely turned to denim's advantage. "I think the openness to adapt to change among people comes more from the western culture, movies, celebrities, social media influencers, etc. People want to look good and feel good," says Neha Shah, Assistant General Manager - Marketing, Pepe Jeans.

Denim has always been known for its fashion quotient. What makes denims a popular choice over any other bottoms is the comfort it brings coupled with a style statement. "The versatility of this clothing item makes it possible to dress casually, formally, or for an occasion by simply changing what you pair it with and how you style it. The comfort, durability and versatility of denims are unmatched, which again contributes to its growing popularity," says Siddhartha Master, Denim Head, Spykar.

"Denim's use as an all-weather and evergreen piece of apparel for all (men, women and even children) helped it get attention and created a large market which had never happened for any other piece of clothing earlier.



Another reason for its meteoric rise in popularity has been its durability and maintenance in the long run which actually turns out cost-effective for all," adds Kewalchand P Jain, Chairman & Managing Director, Killer Jeans.

### Comfort Over Style

Fashion, traditionally, has been more about style than comfort. However, times are rapidly changing with the opposite being true today. Fashion is becoming next-level functional, with consumers seeking comfortable, fuss-free styles that adapt to the moment and can be used while traveling anywhere. Just like the busy and aspirational lives they lead, consumers want clothes that work as hard as they do and are durable, comfortable, timeless and eco-friendly.

Parallel to the growing preference towards comfort, jeans are now acceptable office garb even in smaller towns in India. This is another major factor that has propelled denim into wardrobes across the nation. "The start-up culture and the companies which

*“Domestic brands are fast catching up with their international counterparts where design, innovation and adoption of technology is concerned. The domestic brands who used to be behind west in offering fashion by more than a season are now following same trends as the west”*



— MANJULA GANDHI, Chief Product Officer, Numero Uno



Numero Uno

are evolving to meet the employees comfort needs has immensely led to making denims acceptable attire at work, adding to more number of trouser to denim conversions,” admits Siddhartha Master.

“Gone are the days when people’s perception of work wear use to be ‘what you wear is what you do’ wherein professionalism was always symbolised by a suit and tie/formal wear. People have evolved and are opting smart casuals for business meetings which also include smart denim wear, as business no longer happens only in boardrooms but at café shops, business events, etc.,” adds Neha Shah.

**The Digital Boom**

E-commerce and social media have dramatically boosted the growth of denim in the country, especially in the organised category. While the access to brands and discounts has opened up a new arena for consumers, it has also been instrumental in providing brands with a robust platform that promises both exposure and penetration to remote locations.

“E-commerce companies drove the greatest change in the retail industry. On-the-go shopping has become a popular trend; consumers have easy access to variety of products online instead of physically visiting a store. Businesses have been using social media platforms as a promotional tool

as they are the most convenient and cheapest means of communication. They focus on increasing consumer involvement on an emotional level through content marketing stories. Influential marketing has also been helping brands create a buzz around their products and services and will continue to do so,” says Neha Shah.

“Digitalisation and e-commerce has led to increase in awareness and product accessibility. Also, the return policies offered by e-commerce giants have helped increase trials. Denim is primarily about fit, quality and durability – once people know a particular brand meets their needs, it becomes easier for them to buy online. The stickiness is high in this category. With the advent of Omnichannel, the buying process is even more friction less,” states Siddhartha Master.

The digital boom has also been a positive player for brands in terms of capturing newer avenues. “Brands have been able to gauge the taste of the customer through e-commerce and set up physical presence in remote locations,” says Kewalchand P Jain.

**A Highly Competitive Market**

Denim is a high growth category among the domestic apparel market. The Indian denim market is exhibiting continuous growth over the years. With new technologies, trends and higher



Pepe jeans



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Manufacturer & **WHOLESALE**R OF **KURTIES**



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The Brand **Baabla Designer** started its journey into the garment industry in the year 2015. Their expansive experience in this very industry since a period of over 100 years and four generations has led them to create benchmarks in this field by way of their top notch garments.

The entrepreneurial trio of **Purushottam Khatri** and his sons **Vijay** and **Pankaj Khatri** took over this brand with a vision to provide the best designer womenswear to women from all over the country at competitive prices and a high emphasis on quality.

Our product range is centred around the needs and styles of modern women and are a fusion of tradition and modernity with attractive designs, modern silhouettes and a wide variety of prints and embroidery inspired from India.



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Pepe Jeans

market reach, this sector has promising growth potential. Even in rural areas, denim is becoming highly fashionable with most men and teenager girls opting denim wear over traditional outfits.

So very naturally, the sector is compelled to accommodate a swath of brands, each with their own forte. This makes the denim market in India very competitive. Moreover, the denim wear market in India is extremely fragmented, which has further led to increased competition.

**“Domestic players have to up their game when evaluating consumer preferences and insights and have a faster turnaround of their collections**

***“People have evolved and are opting smart casuals for business meetings which also include smart denim wear, as business no longer happens only in boardrooms but at café shops, business events, etc.”***



— NEHA SHAH, Assistant General Manager - Marketing, Pepe Jeans

in order to gain the attention of style conscious Indians. Price points will inevitably be a major concern as more and more new brands enter, the customer will look for style and function in one at a specific price point. Another prominent development is the rise of private labels that are eating into the share of the already cluttered market,” says Neha Shah.

India’s promising consumer ecosystem over the past few years has opened its gates to some of the biggest brands in the denim world and their success has continually enticed others to explore the opportunities in the calmer Indian waters. But do these brands which pose competition to the domestic brands with their often higher quality in terms of fabric and design aesthetic? Let’s hear it from the experts.

“The competition is stiff between the global brands and domestic ones but there are distinctive advantages as well which sets them apart. In the premium and super premium segment, the global brands have an advantage, and which almost makes it impossible for domestic brands to break into these price segments while at the lower and mid segment domestic brands have an advantage with their larger retail presence across the country. The real competition or disruption comes from the large fast fashion retail chains which pose a challenge not only to the



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more at [celio.in](http://celio.in)

originally french

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*“Denim’s use as an all-weather and evergreen piece of apparel for all (men, women and even children) helped it get attention and created a large market which had never happened for any other piece of clothing earlier. Another reason for its meteoric rise in popularity has been its durability and maintenance in the long run which actually turns out cost-effective for all”*



— KEWALCHAND P JAIN, Chairman & Managing Director, Killer Jeans.

domestic brands on the price front but also to the global brands,” says Saurabh Singh.

It also has to be mentioned here that India is a value conscious market. Hence, premium and super premium serve a very niche audience here.

Currently, the Indian consumers are at par with their global peers. They are a lot more evolved with their shopping choices and are constantly seeking novelty in experiences. So in order to cater to these discerning consumer base, home grown brands are compelled to ante up their game. “Domestic brands are fast catching up with their international counterparts where design, innovation and adoption of technology is concerned. The domestic brands who used to be behind west in offering fashion by more than a season are now following same trends as the west,” says Manjula Gandhi, Chief Product Officer, Numero Uno.

“The global brands as well as the domestic brands are becoming equally competitive with regards to launching new products fashion quotient, stretch and light weight fabrics, varying colors, styling, detailing, etc. Domestic brands are also matching up to their foreign competitors with new kinds of innovations in design, pattern, stitches and colors as per consumer choices,” asserts Kewalchand P Jain.

### **Innovation is a Compulsion**

In line with changing preferences of consumers towards comfort, brands have started making innovative materials, keeping in mind softness, weightlessness, stretchability, flexibility, durability, etc. This has excited college goers, business travelers, daily commuters, holiday travelers and outdoor enthusiasts, as people are looking for multitasking apparels that can take them through morning to night without compromising on comfort or style.

“Over the years, denim has become seasonless and very versatile in terms of its wearability and comfort. With massive developments in technology, denim is no more restricted to its ruggedness. Today a pair of denims

Killer store



Killer store



can look classy with a bit of sheen, feel supple to give you that feather touch feeling, can look rugged but can be super flexible, can behave like knits and still look and wash like denim. The market today has been updated with revolutionary denim products almost routinely,” says Manjula Gandhi.



Many brands are now re-positioning themselves in terms of prices too, so that they can cater not only to Sec A but also to the mid-level segment. Brands are introducing denims across all price segments to cater to a wider audience.

avoid waste or spoiling of resources, recycling non-renewable resources like water, conserving energy and reducing the usage of harmful toxic chemicals during washing processes. **“All this comes at a cost but that is our chosen path and the way forward to save the planet. We will continue to enlarge our portfolio of sustainable denim collections in future and will educate and encourage our customers to buy more of these,”** assures Manjula Gandhi.

Also to stay relevant and carve a niche, brands in the denim segment are compelled to exercise rigorous innovations. As an environment friendly brand and a responsible manufacturing corporate, Numero Uno focuses on creating sustainable fashion denims without compromising on the aesthetics. The brand adheres to strict principles that direct it to

**Big Business in Small Towns**

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



Spykar Gym Jns

***“The information revolution that has taken place with the internet, smart phones and social media brought along western ideas. Western fashion is no more alien to the majority of people in India and jeans in a way is the most iconic indicator of this shift”***



— SAURABH SINGH, Head of Design - Menswear, Being Human

“Big and small brands are now heading to these smaller cities with multiple formats. Retailers have started leveraging e commerce which would enable them to spend less money on real estate while reaching out to more customers in Tier -II, -III and -IV



## INNOVATION IN THEIR JEANS

- As an innovation-driven brand, Killer Jeans has acquired 20 patents in the field of patterns and stitches, the largest for any denim wear brand to have acclaimed. The brand also has on board 40 international designers from international design backgrounds to bring creativity and international design aesthetics into the brand's fold.
- Spykar uses the latest technology and material innovations for product development. Apart from making trendy products, the team focuses on ethical sourcing and sustainable developments. All Spykar products are made using environmentally responsible processes from the sustainably sourced natural raw materials. "Recycled cotton, less water washes and technological dry processes such as use of laser techniques are some of the modern techniques found in our collections. Minimal waste production is of great focus at Spykar. Utilising raw material to the fullest and reducing waste is another initiative taken by product development team," explains Siddhartha Master.
- Pepe Jeans was the first brand in India to introduce a denim customisation service that allowed customers to step into the design seat and personalize their denim in a few easy steps. Pepe Jeans' service empowers the customer with the opportunity for personalisation; and therein lies a powerful tool that will revolutionise denim fashion in India.
- Pepe Jeans' environmentally conscious denim range, Tru-Blu, is created using technology that utilises zero chemicals in the wash process, thereby dramatically reducing water consumption. The True-Fresh range of denims uses a revolutionary technology that neutralises odour-causing bacteria on contact, in turn keeping denims fresh for longer. Denims treated with this technology can be worn more often without washing.
- Moreover, the brand's Powerflex range of revolutionary denims come in a unique fabric with a dual-core technology – Lycra and polyester yarns – that are spun together to create a higher elastic fabrication with a minimum 60 percent stretch. "It boasts of an impressive recovery rate so that it stays in perfect shape and the wearer gets ultimate comfort through this versatile and special elasticity. Powerflex denim is thermo-fixed to increase the stretch for better comfort and the denim is crafted from unique fabrics that use the latest weaving technology," says Neha Shah.

story, as majority of the domestic customer base is concentrated here.

"The Tier -II, -III and -IV markets are developing at rapid pace and likewise is the demand for fashion apparel from these emerging markets. With increased availability of internet and penetration of mass media there is an increase in awareness of prevailing fashion trends. An overall increase in demand for western wear by youth has led to a growth in demand for denims in these markets. Basic mid-value denims characterized by quality and style quotient is the preferred choice of such customers," asserts Manjula Gandhi.

Especially for the denim segment these small towns hold immense potential. Traditionally, these places were dominated by the unorganised sector. As exposure grew over the years, consumers have exhibited a high inclination towards brands. "Thanks to Internet penetration – the fashion exposure of the lower tiers is growing exponentially. The limited access to brands makes them even more aspirational towards lifestyle products. The market here is not saturated unlike metros. The demand is huge here – hence, we see brands expanding in these regions. In denims, the unorganised market has a larger share here. However, things are changing with more brands setting up their stores here. The pride of association with the brand is high here. With the versatility, comfort and the style statement the denims offer – owning a branded piece of this apparel is more assuring to the evolving lower tier customer," says Siddhartha Master.

cities making it easily accessible in these cities. Similarly, the marketing strategies also have to play a big role, when it comes to targeting customers in these regions as well as creating awareness for the brand. It is essential to be aware of these cities that are gaining momentum because of real estate development; it's only a matter of time till investors understand the market dynamics and returns they generate; thereby making them the future of retail," says Neha Shah.

The Tier -II, -III and -IV cities and towns have been equally fashion conscious and demanding from brands as their counterparts in other towns and cities. If a brand needs to grow it needs to cater well and become an all-encompassing brand in the Indian scenario to achieve a long-term growth

The big unorganised market poses as the biggest challenge in the denim wear sector in India. "In my opinion, the two major challenges that play a hindrance to the growth of denim wear in the country are the unorganized players in the denim

Being Human Clothing





Being Human Clothing



segment and the discounting they and other brands offer to the customer. Being a major roadblock, they have actually not let this segment get the growth it actually deserved and therefore, the compromise on quality and other crucial aspects which a brand needs to take into account while being in the market. The unbranded denim products constitute to about 70 percent of the market share and this trend needs to change with regards to domestic market," says Kewalchand P Jain.

### The Road Ahead

In this globalised era, the denim wear segment in India, like many other traditional product segment, is undergoing an astounding change of perception as well as evolution. With India's expanding economy, booming consumption, urbanizing population, and growing middle class income,

denimwear has a huge potential and opportunity to grow.

Until a few years ago, denim was popular in the urban cities only, however, it has now gradually become popular in the semi-urban and rural markets also. Growing awareness and an increasing affinity for global fashion have led to this development. "Visible shift towards western wear in the Tier -II, III and -IV markets is a key growth driver of denimwear in India. Large youth population with rising disposable income and awareness towards fashion will catalyse the growth of denim wear in the country," says Manjula Gandhi.

Denim is evergreen! It holds a bright future in India in the years to come. But competition is high in this sector and innovation is a compulsion. Brands will need to constantly innovate with technology and the fabric for comfort, durability and sustainability. Easy accessibility, variety and maintaining a competitive pricing point is crucial to be on top of minds. It is also critical for brands to study the evolving market, changing consumer preferences and patterns and incorporate this insight when working on the larger brand growth strategy.

*"The versatility of this clothing item makes it possible to dress casually, formally, or for an occasion by simply changing what you pair it with and how you style it. The comfort, durability and versatility of denims are unmatched, which again contributes to its growing popularity"*



— SIDDHARTHA MASTER, Denim Head, Spykar





- > Company: **SIDDHIVINAYAK CLOTHING**
- > Year of Launch: **2007**
- > Headquarter: **AHMEDABAD**

# AFOX

## *The art of perfect fit and finish*

**L**aunched by Siddhivinayak Clothing in 2007, Afox started by offering basic denim and cotton trousers throughout almost all of Gujarat as well as many other states. Gradually, the brand ventured into designer cotton trousers and in 2010, it launched a new product line of designer denim and cotton trousers. Over the years, the brand has been experimenting consistently on its products and has received a lot of recognition. Its experiments comprise playing with different fabrics and mastering the art of perfect fit and finish.

### Core Customers

Afox taps the middle segment consumers with the best quality products. It targets customers in the age bracket of 18 to 50 years with dedicated offerings for different age groups.

### Product Portfolio

Afox's product categories include fancy cotton trousers, formal trousers, basic denim, fancy jeans and corduroys. Cotton trousers make up for the brand's top selling range.

### Latest Collection & Theme

For this season, Afox has initiated an experiment with various fabric blends in enchanting colours. The brand has launched its collection of smart casual trousers in 25 different colours. Meanwhile, focus on product

fit has been always considered of utmost importance and this time its collection has got the fresh touch of smart details and value added accessories.

### Retail Presence

Afox is retailed through more than 700 multi-brand outlets, pan India.

### Exploring New Markets

The brand has plans to expand its operation in South India and on online retail platforms.

### Turnover & Growth Rate

Afox's current turnover recorded is ₹25 crore, which it aims to increase to ₹35 crore in the next 2 to 3 years. It has been consistently growing at 15 to 20 percent over the last 3 years.




N

*If breaking the rule makes me a rebel*


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- > Company: **FOX CLOTHING CO.**
- > Year of Launch: **2007**
- > Headquarter: **AHMEDABAD**

# ASTARK

## *The right amount of style*

**A** sub-brand of Afox, Astark is a daily go-to wear casual attire for men. Launched recently, the brand focuses on bottom wears for men. The team aspires to deliver the right amount of style and comfort in cotton wear.

### Core Customers

The brand targets middle class youth between the ages of 20 to 40 years. It aims to make cotton wear accessible to all. The emerging middle class inspires the brand to keep up with the trends and incorporate innovative ideas into designs.

### Product Portfolio

Currently, the product portfolio includes lining prints, structure, double cloth, knitting and a variety of different cloth material in cotton. Since, the brand targets the middle class, the price range begins from ₹999 and goes up to ₹1,299.

### Latest Collection & Theme

Being launched in the market recently, Astark maintains to keep a significant variety in the manufacturing of its trousers. The brand has tried to keep all its trousers collection distinctively different by introducing and constantly updating fabrics and perfecting designs. It aims to incorporate state-of-art technology in its manufacturing to make sure that the finish result have been fabricated the way it's designers had portrayed it to be.

### Most Innovative Products

In order to offer innovative

collections, the brand has attempted different types of patterns in double cloth material. Double stitching offers durability to trousers, which tend to last longer without any wear and tear.

### Primary Markets

Relying primarily on distributors at present, the brand has a strong network in almost every state and the distributors take the responsibility of supplying products to all local shops and markets.

### Exploring New Markets

Astark aims to make its products available to all reputed small towns and cities. Keeping middle class consumers in mind, the brand aims to make its products available to smaller retailers in these towns and cities as well, retailers who seek quality and style and then proceed to high-end stores in reputed cities.

### Turnover

A startup, the brand has not registered a turnover yet, but is confident it will register a turnover of ₹6-7 crore this financial year. In the next 2-3 years it aims to cross the ₹20 crore mark.

×





## CANMAC-06



#-III

#-II

CADDIX

Z. BLACK

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DEEP-DNX

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907

9010

WHITE(N)

905

902

9013

901

904

903

9011

# BLUE BUDDHA

## Passion for fashion



- > Company: **ZEDEX CLOTHING PVT. LTD.**
- > Year of Launch: **2008**
- > Headquarter: **AHMEDABAD**

Originally from London, Blue Buddha was acquired by an Indian company - Zedex Clothing Pvt. Ltd. - and launched in Indian markets in 2008.

The brand is known for unique and fast fashion offerings, with a focus towards youth. Passionate about fashion, the brand churns out creative combinations of the finest fabrics and designs to an overall brand experience at the right price.

### Core Customers

Blue Buddha targets customers in the age group of 18 to 35 years, the young generation of the country, who are glamorous, yet intelligent, who have hopes and dreams but are wise, with the shimmering power in them.

### Product Portfolio

The brand offers a denim range that comprises jeans, shorts, joggers and shirts in prints, solids, strips and checks. The non-denim range includes chinos, shorts, cargos, joggers, t-shirts (polo & round neck) and sweatshirts.

### Latest Collection & Theme

This year, the brand aims to redefine its basic collection and play around street fashion, giving it a more smarter approach. The collection will see more of Sulphur and indigo dyes, structured denims and spandex products.

### Most Creative Products

The brand's most creative range is its casual trousers, with five big pockets

that look like denim and feel like chinos. In shirts, value added fabrics like grindles, and mélanges have been introduced.

### New Product Range

Come AW 19, Blue Buddha is launching a formal collection in a variety of cotton and blended fabrics.

### Primary Markets

In the India, Blue Buddha is present in Ahmedabad, Aurangabad, Bhavnagar, Rajkot, Surat, Vadodara, Amreli, Anand, Ankleshwar, Bardoli, Bharuch, Bhuj, Bodeli, Chikhli, Dahod, Dholka, Gandhidham, Gandhinagar, Godhara, Halol, Jamnagar, Junagadh, Kalol, Mehsana, Morbi, Nadiad, Navsari, Palanpur, Porbandar, Surendranagar, Valsad, Vapi, Indore, Pune and Aurangabad.

### Retail Presence

The brand is being retailed through 55 exclusive brand outlets.

### Plans for Exploring New Markets

This year, Blue Buddha plans to expand its presence and set up multiple stores across Maharashtra and Madhya Pradesh.

### Online Retail

Blue Buddha is committed to providing a unified experience across online and offline channels, and in keeping with this, its customers can order online and chose 'pick up from store' or 'home delivery'.

### Growth Rate

The brand is growing at approximately 15 percent year-on-year.



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- > Company: **CELIO\* FUTURE FASHION PVT. LTD.**
- > Year of Launch: **2008**
- > Headquarter: **PARIS**

# CELIO\*

## *The mark of the cool and elegant city dweller*

**A** French clothing brand, Celio\* is serving the needs of à La mode men since 1978. The brand brings a breath of newness to the Indian fashion sphere with its chic and relaxed range of men's wear. Present in 60 countries with more than 1,140 outlets, the brand aims to expand its fashion footprint, and develop style-conscious clothing for generations to come. The premium menswear brand launched its first store in New Delhi in 2008. Following the quick success of its first store, Celio\* crossed 100 doors in India by 2011 and has today expanded to about 300 stores.

### Core Customers

The primary target group is 24 to 29 year India male from SEC A. The brand is targeting the conventional style seekers while also appealing to the progressive consumers. These people might be working, self-employed professionals or businessmen. They are socially connected, style conscious and spend time on leisure.

### Product Portfolio

Celio\* has men's casual wear, smart wear, club wear and essentials represented through various categories like jeans, shirts, t-shirts, polo, pants, shorts, jackets, outerwear, innerwear and accessories.

### Latest Collection & Theme

The brand's latest collection is sports influenced and is inspired from Anglo French university of yesteryears. It is represented well with vibrant colours. The range also includes innovations

and newness across categories e.g., non-iron shirts, never fading denims, down jackets for winter, etc.

### Most Innovative Products

Celio\* offers a lot on innovations like soft touch denims, powerflex denims, which have multi-dimensional stretch, and stay denims which don't fade quickly. It also has non-iron and anti-stain shirts.

### Retail Presence

With a presence across all retail formats and online platforms, Celio\* is present on a national scale. The brand has plans to expand to more regions. At present, the brand is in expansion mode and new markets are being considered and tapped.

### Online Retail

Strategically, Celio\* is working around ways to have this channel contributing higher in full price sales.

### Growth Rate

Celio\* is growing fast and boasts of a high double digit growth.



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- > Company: **DARE FASHION PVT. LTD.**
- > Year of Launch: **1995**
- > Headquarter: **MUMBAI**

# DARE JEANS

## Exploring formal, casual & denim wear

**P**aresh Dedhia, a complete newcomer to the field of garments, put in all his energies and ventured into garment manufacture in 1992. He made a humble beginning with just three people but soon realised the immense scope for branded garments and thus launched his very own bottomwear brand, Dare in 1995.

Dare does complete justification to the men's bottomwear category as it explores formals, casuals and jeans. To ensure the best quality, the fabrics are sourced from reputed mills such as Raymond, Arvind Mills, Vardhaman, Bhaskar LNJ, etc. Standing by its service, ready stock and quality principles, Dare has developed a wide network.

Taste, Art & Fashion — these words are the epitome of creativity that communicates the brand's identity. It enjoys being creative in colour and fit.

### Core Customers

The brand's core audience lies in the age group of 30 years and above. The target consumer is one who has a family and is a well-settled, working professional.

### Product Portfolio

The company manufactures bottomwear products for men comprising denims, cotton trousers, blended trousers, etc.

### Latest Collection & Theme

Dare has recently launched a new range called, 'Work Wear' that offers

easy-to-fit styles in denims and trousers. The collection is made from 100 percent cotton fabric.

### Most Innovative

Known for innovative fits, the brand is most renowned for its narrow fit jeans and trousers. It is working to manufacture denims with more clean and sophisticated looks. It plans to offer bright colour tones with different blends of indigo.

### Primary Markets

Dare has strong foothold in Maharashtra, Tamil Nadu and the states of North India. In near future, the brand aims to expand its business to the eastern region of the country.

### Retail Presence

At present, Dare Jeans has presence in 21 states. It is being retailed in more than 1,000 MBOs in all major cities across the country.







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# DEAL JEANS

*Express your innate desires*

**D**eal Jeans is that fashion empowerment a woman uses to bring out the most defining aspect of her personality. The brand started with formal wear and gradually shifted its focus to designer denims, which were rare and not focused on by any brand in those days. Post this, owing to increased consumer demand, the brand introduced denims for girls (kids) and on gaining encouragement it further launched tops for both ladies and girls in 2008. Since then the journey of Deal Jeans has been moving ahead and growing stronger.

- > Company: **DEAL GLOBAL FASHION**
- > Year of Launch: **2000**
- > Headquarter: **MUMBAI**

### **Core Customers**

The brand's core target audience includes women in the age group between 18 to 35 years, and girls in the 6 to 16 years age group. The target group are mainly fashion seekers with a lot of style, attitude and flair.

### **Product Portfolio**

Deal Jeans' product portfolio ranges from capris, jeans, pants, dungarees, shorts, jeggings in bottom wear and ponchos, blazers, tricots, shrugs, cardigans, jackets, shirts, tops, sweaters, quilts, sweatshirts, dresses, long dresses in top wear. Having a strong hold on craftsmanship of denim wear, 32 percent of their collection comprises designer denims.

### **Latest Collection & Theme**

Denims have innovations in designs with laser-and-embroideries, appliques, studs-and-gel-embossing making a fashion statement this season. Indigo, blue-and-black shades have been replaced by pastel shades to add vibrancy to the collection. The latest patched and distressed denims would be undoubtedly the trendsetters for their designer aspects.



### Most Innovative / Creative Products

From interesting finishes and unconventional cuts to modern, size-inclusive labels, the denim segment in India is in an exciting place right now. There's a lot of variety and creativity in the industry. Side stripe jeans are making their return from the early ages, frayed and uneven hems are adding that perfect amount of edge to the casual pair, AOP embroidery and laser printing is trending with tearing-and-grinding effect ruling denim trends this season.

### New Product Range / Category Expansion

The brand's core strength lies in beautifying the product range with every season. It already has 20 product categories in seasonal collections, which it may consider expand in the coming years.

### Primary Markets

With presence majorly in Tier II and III cities through EBOs, Deal Jeans intends to explore untapped cities across the country and cater to audiences there.

### Retail Presence

Deal Jeans considers itself a leading fashion apparel brand with an exclusive positioning in high fashion markets. Currently, the brand has presence in more than 1,200 MBOs across the country along with over 100 large format stores partners and 18 EBOs including international stores in Nepal, Lebanon and Botswana.

### Exploring New Markets

The brand is largely looking at expanding its presence through standalone stores pan India and international countries in the fiscal year 2019-20. It is also looking to expand in the online space to help establish itself as a brand much faster, especially since online has no geographical boundaries.

### Online Retail

Deal Jeans reaches its customers in the online space through Myntra, Jabong, Ajio and Flipkart. Its online presence has helped it establish itself much faster, making it more visible and easily available to potential customers at the click of a button. The brand has recorded a growth of 100 percent this year as compared to the last financial year and the brand foresees a huge growth in revenue through online space.

### Turnover

The brand is expecting to achieve ₹101 crore for the FY 2018 - 19 and is expecting a growth of 40 percent as compared to the last financial year.

### Growth Rate

Deal Jeans' CAGR over the last 3 financial years is 6.18 percent and it aims at 25-30 percent growth over the next 2-3 years.





**F**ocus Jeans was launched over a decade ago for sheer passion – the passion for inimitable style, superlative finish and perfection. From a humble beginning to being present in more than 3,000 outlets across multiple stores, Focus Jeans is today seen not only as one of the most contemporary and stylish brands but is also at par with major international brands. The brand delivers great value for money.

Focus Jeans is probably one of the very few brands in B2B segment that brings in a professional approach to brand building and advertising. This generates pull and easy acceptability towards the brand making sales easy for distributors as well as retailers.

# FOCUS JEANS

## *Focusing on its passion*

### Core Customers

The brand targets women who are young and young at heart as well. They fall between 18 to 36 years of age but more concentrated between the age group of 22 to 32 years. They are both brand conscious and quality conscious, are in tune with the latest fashion and seek good value for money.

### Product Portfolio

The entire range is classified into 6 different categories as per style and price segments. The categories are classified as Classics, TrueBlues, Premium, Jeggings, Cottons and Hotties (Capris). The brand has more than 150 different styles, shades and fits to cater to each and every need and taste of a woman. The product line consists of basic jeans, trendy jeans, ankle lengths, capris, shorts, jeggings and cottons.

### Latest Collection & Theme

Apart from the entire range of classic jeans – that is probably one of the largest range available in the market – Focus also launches a new collection every season that captures the flavour of the season and the rising new trends. It's experienced stylists have indulged and played with amazing shades, washes and fabrics to create some of the best-looking jeans of this season.

### Primary Markets

The brand's primary markets include metros (suburbs and satellite townships), mini metros, category A and B towns.

### Exploring New Markets

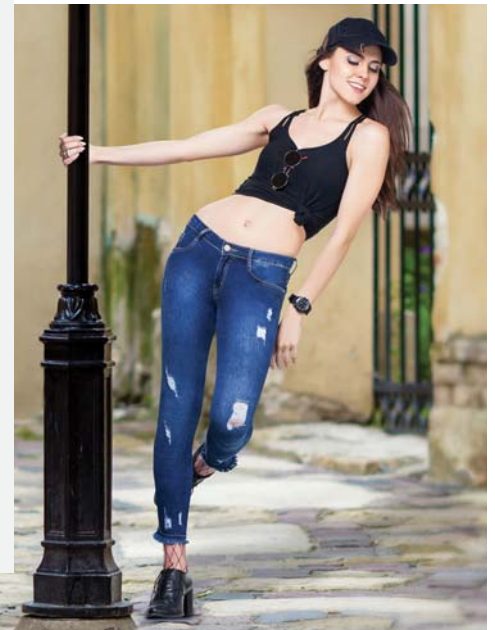
There is no limitation to a geographic expansion and the brand believes in expanding and exploring new markets. It is open to partnering with more distributors and retailers who share the same long-term vision and zeal like them.

### Online Retail

The brand's strategy is heavily skewed towards empowering its distributors and retailers, as it strongly believes that they understand the markets better. As a result the brand does not intend to reach out to its consumers directly.



- > Company: **B ENTERPRISES**
- > Year of Launch: **2001**
- > Headquarters: **MUMBAI**





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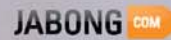
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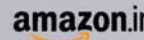

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- > Company: **IRONY CLOTHINGS PVT. LTD.**
- > Year of Launch: **1994**
- > Headquarter: **MUMBAI**

# IRONY

## *Quality and innovation at heart*

**I**rony had humble beginnings when it started out with manufacturing cotton trousers for its customers. Initially being called Terminator, it targeted the economy and mid-segment consumers. The brand was relaunched in 1999 as Irony and was targeted at the premium segment market. It is today, well-recognised for its quality and innovation. The director of the company, Venkatesh Yedidha, has further helped in accelerating the working of Irony Clothing with his vast experience.

### Core Customers

Irony targets fashion conscious men of all ages. It's target age group includes teenagers, youngsters and professionals.

### Product Portfolio

The brand manufactures casual and fashion trousers, basic and fashion denims, joggers, polo shorts, etc.

### Latest Collection & Theme

Irony has launched an excellent collection in modern stripes and new shades. Its range of striped trousers are always in demand and its most popular product.

### New Product Range / Category Expansion

This season, Irony is introducing colour denims under its exclusive fashion casual trousers. It has also added new designs, patterns and colours to its regular categories. Apart from this, it has developed new styles in regular trousers, fashion trousers, party wear collection and wash

denims. Importantly, Irony's team strives to provide the best quality products to its customers.

### Primary Markets

Every year, the brand aims to reach to maximum customers. At present, it is available in all leading and reputed stores in all major cities and states of India, covering all of West, South and North regions of India.

### Retail Presence

Irony is present across 500+ MBOs across the country. It also supplies to the Middle East markets.

### Online Retail

The brand is present on Myntra, Jabong, Snapdeal, Flipkart and many more premium e-commerce portals.



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# LEE COOPER

## *On expansion mode*

**A**uthentic British denim wear brand, Lee Cooper was founded in 1908 by Morris Cooper. The brand started out as a leading maker of workwear, providing uniforms for the British Troops in WWI and WWII. Soon it emerged as the preferred denim brand in the UK wherein 8 out of every 10 denims sold were Lee Cooper. Over the years, Lee Cooper has emerged as a brand catering to the youth and their celebrity icons. Creating specialist cuts and innovative styles has always been at the core of the brand thereby it generated a great fan base across the globe.

### Core Customers

Lee Cooper target consumers are youth and people with a youthful mindset primarily in the age group of 18 to 30 years. They want relaxed and easy going looks. They need classic well cut clothes, want to look cool but don't want to try too hard at the same time.

### Product Portfolio

The brand's focus has been on creating products that are trendy, comfortable and affordable. The current Lee Cooper men's wear portfolio has denims, joggers, shorts, jackets, t-shirts, shirts, knitted blazers and sweatshirts. In women's wear, the brand covers denims, shorts, dungarees, jumpsuits, dresses, t-shirts, tops, sweaters and sweatshirts. Also the kids' wear range has exciting styles for boys and girls inclusive of denims, shirts, t-shirts, tops, jackets, dungarees, jumpsuits, etc. Denims is at the heart of the brand; however the brand offers a holistic lifestyle proposition for its customers.

### Most Innovative Products

Athleisure inspired denim from the latest season collection is one of the most innovative products the brand has launched. It is the perfect balance

- > Company: **FUTURE SPECIALTY RETAIL LTD.**
- > Year of Launch: **1908**
- > Headquarter: **LONDON**



of comfort and style offered to the customers. Designed for the generation who is always on-the-go with an elevated style quotient, the product is just right to take them from college to workouts to casual hangouts or fun meet-ups. The brand believes that with the perfect mix of fashion, quality and sharp pricing, it will easily connect with the younger audience on stronger grounds.

#### **New Product Range**

Lee Cooper always aims to upgrade its current collection by incorporating latest trends and styles. At present, the brand is working on launching knitted blazers, 4-way stretch jeans and performance denim (that need less washing and stay fresh for a longer period). It's proposition is to be the means for the consumers to express themselves.

#### **Primary Markets**

While Lee Cooper is present across the country, cities like Mumbai, Hyderabad, Bengaluru, Delhi and Kolkata are the top 5 markets for the brand. Even cities like Pune, Bhubaneswar and Ahmedabad are exciting markets.

#### **Retail Presence**

Lee Cooper has expanded a firm foothold in the retail market with presence across formats like Central, Lifestyle, Shoppers Stop, Reliance Trends, fbb, Hypercity and Brand Factory, including online portals like Myntra, Amazon, Jabong, Flipkart and Koovs. Today, Lee Cooper is present in more than 200 cities, retails out of more than 1,800 PoS and spread across 800 doors.

#### **Exploring New Markets**

The brand is planning to open 5 to 8 flagship Lee Cooper stores in Hyderabad in the next 8 to 10 months. It has plans to add 10 to 15 exclusive brand outlets in Andhra Pradesh and Telangana. It also has plans to expand its presence across key large format stores and department stores and add around 200 to 300 points-of-sale in the next 16 to 18 months.

#### **Turnover**

Lee Cooper registered a turnover of around ₹700 crore last year and aims to cross the ₹1,000 crore milestone in the next 2 years.

#### **Growth Rate**

The brand has grown with a CAGR of around 18-20 percent in the last 3 years and plans to accelerate the growth to more than 25 percent in the next 3 years.





**M**exico is a family-owned company producing quality denim for men and women for nearly a decade. The brand was launched when basic jeans were ruling the market and the concept of fashion had just entered the category. At that time, jeans were produced mainly in blue with a few in black. There were just three fits available – comfort, slim and straight. The brand quickly caught up with international fashion trends and started releasing new fits, fabrics and innovative washes to consumers. Today, Mexico is a must-have for those who demand the perfect fit.

IMAGES Business of Fashion

# MEXICO

## For that perfect pair of jeans

### Core Customers

Mexico caters to men between the ages of 18 to 35 years. Through its basic range, it targets male consumers in 35 to 70 years. The brand makes 60 percent fashion denims and 40 percent basic denims in men's range.

In the women's segment, the brand targets the age group of 16 to 30 years under its fashion denim range and the age group of 35 years and above in its basic denim range. The brand produces 50 percent fashion denims and 50 percent basic denim products.

### Product Portfolio

The brand makes fashion and basic denims for men and women. The men's range is priced between ₹899 to ₹1,999. The women's denim starts from ₹999 up to ₹1,499.

### Latest Collection & Theme

Fashion plays a dominant role in Mexico's theme and concepts, which is reflected in the brand's latest collections. It has launched a whole new set of vintage-look denims. The basic collection has also been designed with a subtle tint of fashion.

### Most Innovative Products

Mexico basic denim holds a substantial share in the denim wear market. The product gives a wide spectrum of ranges in around 25 to 30 colours. The brand takes pride in the fact that it is the only brand in the country which gives such a wide array of colours and range in the basic category.

### Primary Markets

The brand is well placed in Tamil Nadu, Delhi, Uttar Pradesh, Maharashtra, Andhra Pradesh, Kerala, Assam, Himachal, Haryana, Jammu & Kashmir and Punjab.

### Retail Presence

Mexico is present in over 800 major multi-brand stores across the country.

### Exploring New Markets

Mexico is exploring the markets of Gujarat and Karnataka, where it will ensure a similar business strategy as that in other states is followed. It plans to improve its efficiencies while adding new markets.



- > Company: **MEXICO CLOTHING COMPANY**
- > Year of Launch: **2004**
- > Headquarter: **MUMBAI**



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# ONLY

## ***Defining the rules of fashion***



**A** global women's denim wear brand, Only is sold in more than 4,500 stores worldwide. Turning its success into know-how and in-depth experience, the brand has augmented its retail and wholesale business.

The Only girl always looks amazing in an effortless way. Fashion is her passion – a creative space where she can experiment with different attitudes, feels and looks. She's not defined by a certain style, but by her playful attitude, take on life and fashion and by her love for denim.

### **Core Customers**

The primary target is 'youth' – the fashion focused millennials and Gen Z. They are aware of global fashion and like to experiment with new trends and styles. Denim is a core part of the brand's DNA and resonates with young consumers.

### **Product Portfolio**

Staying true to its mission to denimize the world, Only's collection houses an irresistible range of silhouettes, shades and washes that give denims a whole new meaning. Denims with a hint of embroidery, doodles, patch and badge work are very popular among shoppers as they give a very distinct touch to the overall look. Denims with open and unfinished hems continue to gain popularity. Jackets, shirts, shorts, dungarees, skirts, tees, dresses, etc., are also regular favourites.

### **Most Innovative Products**

Denim trends are reinvented on a regular basis. Culottes, denims with a small waist and wider legs, denim footwear and accessories, leather finish denims are on their way to be the next big thing. Extreme laundry and acid-bleach techniques and enzyme washed denims are extremely popular among shoppers across age groups. Also, high waist and boyfriend jeans





continue to be quite popular with consumers. The brand therefore continues to retain these classic styles while giving it a fashionable twist for the season.

#### Retail Presence

Only has a pan India presence. At present, it is retailed through 54 EBOs and 289 shop-in-shops spread across the country. It also has a strong online presence via [www.only.in](http://www.only.in) and is also available across leading e-commerce sites.

#### Exploring New Markets

The brand is constantly exploring new opportunities in Tier II and III cities.

#### Online Retail

Only has a very strong online presence, owing to the brand's website as well as by being a part of partner e-commerce sites. It has been able to reach out to a wider audience across metropolitan cities, Tier II and III markets and meet their ever-evolving needs.

The strategy at Only is to not focus only on urban markets. Fashion is not only an industry it is a lifestyle and the brand aspires to bring this lifestyle to as many cities and people as possible.

#### Latest Collection & Theme

The themes that the brand offer are free-style, retro classic, country calling and glitter funk for Autumn-Winter 2019.

- **Monochromes:** They are classics and this style can be incorporated for any day-to-night look.
- **Checks & Plaid:** This is a classic and always performs well in the Indian Market.
- **Typographic based repeats:** Globally, this trend is very popular, and the brand has incorporated leggings, crop tops, jackets, etc., in this trend.
- **Cinched waistline:** This silhouette gives a perfect hourglass figure to a woman. The brand has included mid length and short length skirts with statement hemlines.
- **Cosy texture:** Moving towards the winter fashion, the brand has included pieces that are easy to style yet make a statement when one steps out. Few styles like knit tops, long pullovers, cardigans, etc., would be seen in the A-W'19 collection.





- > Company: **FINESSE FASHIONS PVT. LTD.**
- > Year of Launch: **2009**
- > Headquarter: **MUMBAI**

# ROOKIES

## Launching athleisure

The brand originated from a collective thought from its promoters after noticing a gap in the domestic market for a good pair of aspirational men's denim wear brand. They proved this thought right with the launch of Rookies in 2009 and have its subsequent success. The brand has grown in width and length and today competes with the best known denim brands in India.

### Core Customers

Rookies caters to the youth. Its customers are those who aspire to wear international trends. As a denim wear brand, its current focus is also to cater to all categories of denim consumers irrespective of fashion. The range has also expanded to basic and core categories and have made inroads into major stores with core brand profile.

### Product Portfolio

Denims form the core of the brand's product range followed by non-denims like shirts and t-shirts. It has also introduced athleisure range for Autumn-Winter 2019 to cater to the diversifying needs of the new generation.

### Latest Collection & Theme

The latest collection is more about young fashion. The collection comprises denim jackets, shirts, t-shirts, cargoes, athleisure, etc.

### Most Innovative Products

As a denim-centric fashion brand, its jackets have really taken off well in the past three winter seasons.

### New Product Range

The athleisure range promises comfort and cool looks. The new range will offer a wide collection in bottom wear and jackets.

### Primary Markets

The brand is more prominent in urban and semi-urban territories. It's gradually venturing into the interiors backed by its distributors' business knowledge and goodwill.

### Retail Presence

Rookies is being retailed through 3 exclusive brand outlets, more than 200 shop-in-shop formats and over 750 points-of-sale. It has also partnered with Lifestyle and is available at 64 of their outlets. Internationally, it has launched its first flagship store in Dhaka (Bangladesh) and has introduced the brand in Nepal through shop-in-shop formats.

### Exploring New Markets

The brand has plans to expand its presence through shop-in-shop formats and is also all set to launch new exclusive brand stores in key cities.

### Online Retail

The e-commerce platform is yet to be explored by the brand though it is present on all major e-commerce portals.

### Turnover

Rookies recorded a turnover of ₹35 crore in the last fiscal and is aiming to double its turnover in the next two years.





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**S**pykar is India's leading jeanswear brand for the youth. The brand is synonymous with the 'Young & Restless' generation of today.

Established in 1992, Spykar has expanded its portfolio to become a one-stop-shop for casual wear ensemble for both men and women – available pan India across all sales formats. In 2014, Spykar became a part of the Lord Bagri promoted Metdist Group, a diversified portfolio of companies.

#### Core Customers

The brand targets men and women in the age band of 18 to 35 years, who are fashionable, outgoing and bold with their choices. These millennials like to explore their own passions and form their own opinions and choices

# SPYKAR

## For the young and the restless

without being a part of the herd. They are also willing to pay a fair price a premium quality product a brand offers.

#### Product Portfolio

Spykar offers tees, shirts, vests, blazers, jeans, trousers, shorts under its men's range. The women's range include tees, tunics, dresses, dungrees, jeans, shorts, skirts, etc. The brand's accessories range comprises backpacks, deodorants, perfumes, socks, belts, wallets and boxers (undergarments).

#### Latest Collection & Theme

Spykar's latest denim launch – Gym Jns – incorporates four-way super stretch denim fabric. With ergonomic pattern and construction, the product provides extra flexibility and comfort to the wearer.

#### Most Innovative Products

Spykar recently ventured into athleisure category with an innovative range – Spykar Gym Jns.

With a '4-way dynamic stretch' and 'ergonomic construction' these jeans offers the user unrestricted freedom of movement, making them an ideal clothing for gym and outdoors.

#### Category Expansion

For Spykar, womenswear is going to be a sizeable business from now on. The brand is also looking at expanding its product portfolio in accessories, undergarments, footwear and grooming segments.

#### Primary Markets

Mumbai, Pune, Hyderabad, Lucknow, Vadodara, Surat, Rajkot, Raipur, Jaipur, Kota, Patna, Delhi, Ranchi, Guwahati, Odisha, etc., form the brand's primary markets.

#### Retail Presence

Spykar is retailed through 240 exclusive brand stores in 140 cities, over 900 multi-brand stores in 350 towns and across 5 national large format stores such as Pantaloons, Globus, Central, Lifetsyle, Shoppers Stop in 110 cities in India. The brand is also available in all key fashion portals and its web store.

#### Plans for exploring new markets

The brand aims to add 30 to 40 standalone outlets each year and plans to have presence in 200 towns in the next 2 to 3 years. With respect to SIS and MBOs reach, it plans to be across 500 towns in a similar span.

#### Online Retail

Spykar is ramping up its online share of business and looking at a 10 percent contribution to the revenue this year.

#### Turnover & Growth Rate

Last fiscal year, the brand's turnover was ₹670 crore. It is looking at progressing with a CAGR of 25 percent for the next 2 to 3 years.



- > Company: **SPYKAR LIFESTYLES PVT. LTD.**
- > Year of Launch: **1992**
- > Headquarter: **MUMBAI**

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# SUNNEX JEANS

## Denim industry pioneer

**E**stablished in 1980, Sunnex Jeans is one of the pioneering brands in the denim industry in India. It has grown steadily over the years and has a strong foothold in the markets of South, West and Central India. The brand has a dominant presence in the gulf region and claims consumer loyalty leadership in countries like UAE, Oman, Qatar, Bahrain, Saudi Arabia, Kuwait, etc.

### Core Customers

The brand targets discerning men in the age group of 20 to 45 years.

### Product Portfolio

It offers fashion denims, basic denims, cotton trousers and shirts.

### Latest Collection & Theme

The brand's latest collection is the continuation of its much appreciated and successful denim series called, GadgetPro jeans. The collection offers a wide fashion range of denims in various washes, fabrics and styles as well as cotton trousers.

### Most Innovative Products

Today's customers are very savvy and mobile. They carry gadget like smartphones/tablets constantly with them. Keeping this in mind, the brand launched a denim collection, GadgetPro, where the denim has a specific pocket to their gadgets and freeing other pockets. This also makes the denim more comfortable to wear.

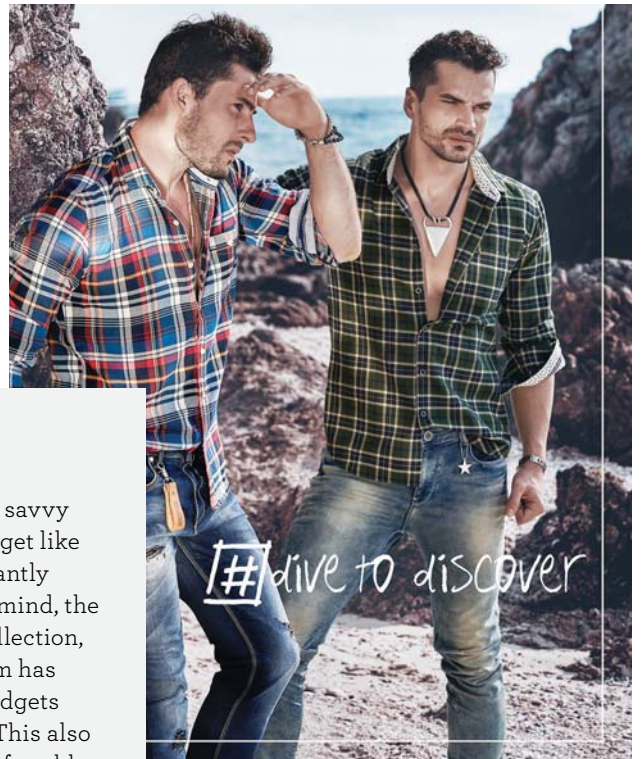
The market response to this denim collection was tremendous. Dealers as well as customers appreciated the product.

### Category Expansion

Sunnex is actively exploring categories that fits the brand profile, and it may venture into t-shirts, activewear categories soon.

### Primary Markets

The brand has a strong presence in over 16 states in the country. Globally, it is present in countries such as UAE, Oman, Qatar, Bahrain, Kuwait, Saudi Arabia, etc., in the Middle East region and Malaysia in South East Asia.



### Retail Presence

Sunnex is retailed through 4 exclusive outlets, over 1,200-1,400 multi-brand stores and through prominent large format stores.

### Exploring New Markets

On an expansion spree, Sunnex Jeans is exploring markets in the states of Odisha, Jharkhand, West Bengal in the East and some parts of the northern states.

### Online Retail

The brand believes that online retail is a potential source to grow and recognising this fact, it has formed partnerships with the major online fashion retailers like Myntra, Jabong, Flipkart and Amazon.

Going forward, the brand is in talks to introduce special collections that shall be available only on online on these very platforms.



> Company:

**ANNAPURNA APPARELS LTD.**

> Year of Launch: **1980**

> Headquarter: **MUMBAI**



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- > Company: **DETAIL CLOTHING LTD.**
- > Year of Launch: **1992**
- > Headquarter: **MUMBAI**

# TEXAS JEANS

## ***A story of fits & fashion***

Incepted in 1992 by Detail Clothing Ltd., Texas offers the best in lifestyle fashion, with products ranging from denims, trousers, shorts and casual shirts. The brand has, in a short span of time, made its products available in 15 states with more than 900 multi brand outlets across India.

### Core Customers

The brand offers a plethora of fits and styles, which can be worn by an 18 year old college student to a 60 year old grandfather.

### Product Portfolio

Denim being the core product of the brand, it's product basket comprises jeans, trousers, shorts and casual shirts, made from the finest fabrics.

### Latest Collection & Theme

For the coming season, the brand has, apart from the regular blue jeans and plains, worked on some of the finest prints in cotton fabrics. In a plethora of styles and colours, the new collection has been designed in such a way that it will give the look of a cotton trouser but the fitting and comfort of your favorite pair of denims.

### Most Innovative Products

The brand has planned to introduce two new fits called, Super Skinny Fit and Easy Fit denims. The Super Skinny Fit as the name suggests will offer slim and fitted look that every young boy loves and enjoys wearing. While, the Easy Fit will be a crossover between narrow fit jeans with the comfort of a regular fit jeans.

### Category Expansion

The brand plans to enter the plus-size category, where it will offer sizes from 48 to 50.

### Primary Markets

Texas Jeans has a strong presence in the states of Kerala, Andhra Pradesh, Goa and Rajasthan, with presence in almost all high-end shops.

### Retail Presence

It is retailed through 9 exclusive brand outlets and over 890 multi-brand stores across the country.

### Exploring New Markets

With an appropriate collaboration, the brand wishes to expand in the markets of the North-East of India in the forthcoming years.

### Turnover

The brand has recorded a turnover of ₹15 crore in the current fiscal year.



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- > Company: **FAMOUS FASHIONS PVT. LTD.**
- > Year of Launch: **2009**
- > Headquarter: **MUMBAI**

**L**aunched in 2009 by Famous Fashions, Wert Jeans was started with a mission to offer stylish, trendy and value for money clothing. Its quality assurance ensures the best merchandise at the various levels of productions. The sole aim behind the launch was not just sell clothes but to create a cult of style trendsetters.

IMAGES Business of Fashion

# WERT JEANS

## *Launching semi-casual shirts*

### Core customers

The brand targets young consumers, within the age bracket of 18-45 years who are fun loving, energetic and somewhat rebellious.

### Product Portfolio

The prime focus is on men's denims/ cotton trousers.

### Latest Collection & Theme

Innovative washes, exemplary fits and exclusive fabrics play a key role in offering a differentiated value proposition to its customers.

### Most Innovative Products

The brand's most innovative products are its core denim range comprising Luxury, Shine, Delux, Vegas and Superfast. It is also the highest selling range followed by mid-fashion and hi-fashion products.

### Category Expansion

The brand has plan to venture into semi-formal shirts.

### Primary Markets

Since its launch, the brand has been successful in dominating the denim market in the South India followed by Mumbai in Maharashtra. Recently, it has started gaining a strong foothold in the North markets too.

### Retail Presence

Wert is being retailed through 1,000+ leading multi-brand stores. It is also available at Globus stores.

### Exploring New Markets

The brand expands to new territory and markets every year wherein it feels the product range can do well.

### Online Retail

The brand is focused on various digital marketing strategies to create brand awareness and very soon would have a presence in the leading online portals.

### Turnover

Wert's turnover for the last fiscal year stands at ₹24 crore. The brand aims to touch ₹40 crore in the next 2 to 3 years.

### Growth Rate

In the last three financial years, Wert has been growing at an average of 20 percent. It now aims for 25 to 30 percent in the coming years.





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**L**unched 2007, X mex is a manufacturer and retailer of plus size clothing for men and women. The brand currently operates from 7 locations and churns out classy casual and semi-formal wear in plus sizes.

With the foremost belief that everyone is beautiful no matter the size, colour, creed or gender, X mex is committed to provide its customers with new innovative and trendy apparel. The brand offers an expansive range of plus size clothing and has a dynamic team of researchers and fashion designers, who formulate products that follow current trends, demands and preferences of the customers.

#### Core Customers

Specialising in plus size clothing for both men and women, the brand provides apparel for the fashion savvy, the curvy and groovy upper class and niche customers.

# XMEX

## Plus size clothing for all

#### Product Portfolio

The brand offers kurtis, leggings, jeggings, tops, tunics, t-shirts, palazzos, shrugs, tracks, dresses, gowns, midis, etc., under women's wear; and jeans, trousers, tracks, shirts, t-shirts, kurtas, jackets, blazers, hoodies and shorts in men's wear.

#### Most Creative Products

The brand's stylish jackets and blazers for men, and trendy party wear dresses for women are a hit with its customers.

#### New Product Range

The brand aims to introduce made-to-measure clothing. It wants to start 'choose from home', where customers can buy merchandise worth ₹5,000 or else they can just pay ₹500 as visiting charges purchase anything. It also plans to launch unstitched suits, swimwear, winter jackets and scarves for the discerning customers.

#### Primary Markets

At present, its primary markets are metropolitan cities, such as Delhi, Chandigarh, Lucknow, Mumbai, Bengaluru, etc., with a presence in prime malls.

#### Retail Presence

The brand has extensive presence in Maharashtra, in cities like Mumbai (Kandivali, Andheri, Bandra, Irla, Thane) and Pune; and Gujarat (Surat). X mex is retailed through 20+ multi-brand stores in Indore, Rajkot, Chennai, Bengaluru and Kolkata to name a few.

#### Exploring New Markets

X mex engages in B2B exhibitions held across India to explore new markets to expand its business.

#### Online Retail

Being in a niche segment, the brand's online growth has been steady. However, in plus size buying, the customers prefer to try products to ensure the fit and feel of the products and hence sales from the online medium are slow.

#### Growth Rate

The business was static due to demonetization. However, it is now picking up and aiming to achieve 50 percent growth year-on-year.



- > Company: **XMEX CLOTHING PVT. LTD.**
- > Year of Launch: **2007**
- > Headquarter: **MUMBAI**



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# PREMIUM INDIAN BRANDS LEAD THE COUNTRY'S DENIM RACE

Despite the number of brands entering the space, the denim market – especially in India – is very oligopolistic in nature, with just a few category leaders enjoying their premium position...

**Zainab S Kazi**





Killer Store

A pair of jeans can be found in practically everyone's wardrobe – from a hardcore ethnic Indian wear patron to someone who has a collection of trousers in practically every colour. Life without that pair of jeans is unimaginable something which has fuelled the imagination of the fashion retail industry for decade now. In fact, the apparel industry across the globe has been unanimous in positioning denim bottoms as the king of all apparel, leading to a plethora of brands entering this category, specially so post the e-commerce revolution. However, despite the number of brands entering the space, the denim market – especially in India – is very oligopolistic in nature, with just a few category leaders enjoying their premium position.

IMAGES Business of Fashion speaks with key players of denim wear in India to find out what they are doing to remain relevant in a field which sees a new brand s with new designs entering every day.

### Tracking the Growth

Denims have become a lifestyle statement in India, a wardrobe staple that the Millennial and the Gen-Xer can't do without. The revolution has been so complete that even Baby Boomers have become denim connoisseurs, building up their jeans

wardrobe with different shapes, cuts, washes and finishes according to what they want to wear on a daily basis.

But, what make denims relevant in India, a country which takes pride in its rich Indian wear? Explaining the relevance, Sanjay Vakharia, Chief Executive Officer, Spykar Lifestyle says, "As we all know, India is a country with a population that has relatively meager resources, and hence to them, it is important that retailers provide solutions which are more value for money and relatively long lasting and ones which need low maintenance. On all these attributes, denims score very high. They need not be washed as much and as many times; they never die, just fade, and last really long. And in recent times, the category and the industry has also initiated multiple initiatives to conserve resources and contribute to a healthier and less polluted planet. It seems that jeans are here to stay, due to the versatility they offer."

This point of view holds strong ground especially since a pair of denim jeans is a wardrobe essential for all – irrespective of class, caste, region and sex. In India, the denim revolution isn't old – just a 3-decade journey – but the fabric's influence on the wardrobe has grown phenomenally, especially so in the last decade post the online revolution which has made jeans accessible to people in the remotest location in India and at price points that suit their pockets.

*"With the advent of new work culture taking to our cities, comfort is the key and what could be more comfortable than a pair of denims which has also become a semi-formal wear and the other trend that is being observed is one person owning several pairs of jeans"*



—KEWALCHAND P JAIN, CM & MD, Kewal Kiran Clothing Limited



## INNOVATIONS BUY BRANDS

### PEPE JEANS:

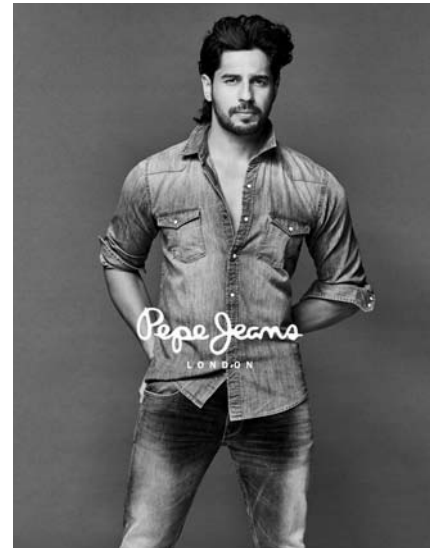
- **POWERFLEX Denims:** These come in a unique fabric with a dual-core technology – Lycra and polyester yarns; that are spun together to create a higher elastic fabrication with a minimum 60 per cent stretch. Boasting an impressive recovery so that it stays in perfect shape, wearers are treated to the ultimate comfort through this versatile and special elasticity. Powerflex denim is thermo-fixed to increase the stretch for better comfort and the denim is crafted from unique fabrics that use the latest weaving technology.
- **GYMDIGO Denims:** A technology that combines joggers' comfort and jeans' performance – Stretch gymdigo denim. It is suitable for the athletic, sporty and outdoor enthusiasts.
- **Athleisure Wear:** The rise of the 'fit' customer is a trend that has fueled the demand in athleisure and activewear. There is a cultural shift towards sports including running as part of a growing emphasis on fitness, especially among the urban population. This has led us to introduce a special athleisure line that combines comfort, functionality and style
- **Wiser Wash:** The USP of these eco-friendly denims is that it minimizes water consumption and does not compromise on the overall look and feel of the denim.

### SPYKAR

- **Gym Jns:** An innovation of its kind in the category, this is a versatile 24\*7 pair with 4 way dynamic stretch and ergonomic patterns.

### KILLER

- **Easies Trouser Denim:** The brand has uniquely experimented with a new fabric which is both denim and cotton used for making these trousers for young professionals. 20 patented stitches denims like organic and wire stitch



“As more international brands foray into the country and move to Tier II & III cities, a growing preference is seen among consumers in those towns as it comes with a ‘tag’ that is the brand name as well as the aspirational value. India is a big market and is continuing to grow year-on-year at an increasing rate. Denim is an ever growing market which refuses to die,” she states.

Talking about the factors which influence growth of the category, Neha Shah, Assistant General Manager – Marketing, Pepe Jeans India Limited says, “Owing to westernisation, urbanisation and various other factors such as new technologies, styles, finishes, looks and trends, denim as a category has captured not only the cities, but also Tier I & II towns. Denims are widely accepted not only because of their functionality but also due to their versatility. Economic factors also have a role to play. Disposable incomes, young population, job growth, the online penetration of denims and increasing popularity of engineered or distressed pieces, indirectly contribute to consumer spending and in turn impact the fashion industry.”

Contrary to what popular belief, that it is only in Tier I cities and towns that brand consciousness exists, the branded market is favoured not just in urban areas, but in the hinterland as well, says Neha Shah.

Kewalchand P Jain, Chairman & Managing Director, Kewal Kiran Clothing Limited adds, “Denim is the versatile apparel with multiple applications like casual wear, work wear and everyday use. It has come a long way from being a modest piece of apparel to being an indispensable apparel for everyone’s wardrobe. With the advent of new work culture taking to our cities, comfort is the key and what could be more comfortable than a pair of denims which has also become a semi-formal wear and the other trend that is being observed is one person owning several pairs of jeans.”

Jain reveals that men’s denim wear accounts for largest share and is poised to grow at a high CAGR of 12.7 percent over the next decade. “Organised/branded sector has been the biggest beneficiary of this with its presence all across and also varied offerings for all from men, women and even children,” he cites.



*The acceptance and growth of denims can be attributed to the advent of new clothing like pants, jeggings and athleisure collection which have had a played phenomenal role in driving the growth for the denim segment.*



### Leading By Way of Category Innovation

To keep pace with the growing demand, it remains imperative for the leaders to keep tabs on the changing demand dynamics which call for category expansion. The credit for the acceptance and growth of denims can be attributed to the advent of new clothing like pants, jeggings and athleisure collection which have had a played phenomenal role in driving the growth for the denim segment.

“People want to look good and feel good. Denim is becoming more about comfort with style. Brands have identified this trend and have started innovating with the material, keeping in mind softness, light weight, great stretch, flexibility, durability, etc. that has excited college goers, business travelers, daily commuters, holiday travelers, outdoor enthusiast, etc. as people are looking for multitasking apparels that can take them through morning to night without compromising on comfort or style,” Shah points out.

“The stretch jeans and slim jeans that uses stretch fabric is the closest match to sportswear due to its durability and comfort besides being an all-weather apparel and the recent launch of new athleisure, it has altogether redefined and also played a crucial role in reinventing the use of denims which has had a complete makeover. We have over the years seen demand for stretch jeans escalate over others due to their comfort and durability as a sportswear,” says Jain.

On the rise of brand consciousness, Vakharia adds, “The inclination

### ‘CATCH THEM YOUNG AND WATCH THEM GROW’ - AN INITIATIVE BY SPYKAR TO FORGE A STRONG BOND WITH THE YOUTH

- **Early Engagement with the Youth:** At college festivals, youth festivals across India. Around 50 colleges per annum.
- **Association with Iconic Properties:** Sponsored the IPL team Rising Pune Supergiant for two seasons. A strategic win for Spykar - The energy, exuberance, youthfulness was at par for the brand and the team. Partnered with Global Citizen India, a social action platform that wants to solve the world’s biggest challenges - in sync with Spykar’s vision to mobilize youth and support sustainable developmental goals.
- **Artist Association:** Collaborated with Brodha V, an acclaimed rap artist, to create a Young and Restless anthem for the Brand that embodies the spirit of the generation that lives life at their own terms. Set in a catchy, snappy and melodious tune, the song is a mix of rap and melody, appealing to all music lovers. Fast meets Festive youth content creators and collaborators.
- **Ongoing Advertising:** Consistently creating recall and capturing the young and restless vibe in the communication.
- **Digital presence:** Using social media for engaging and sustained communication with the digital natives. Likewise maximizing on relevant OTT platforms.



towards branded denims is increasing among consumers. Buyers are getting quality and style conscious. We also see increased penetration of denims happening in the lower tiers of the country, due to rising aspiration levels.”

### Dealing With Competition

Market leaders have before them the tough task of maintaining their leadership position. This includes having to constantly innovate and acting swiftly to market research reports on changing trends. Vakharia and his team ensure that their focus is on a young audience who is looking for global fashion, great quality and attractive price points. On dealing with competition, Vakharia shares, “Competition helps you to be on your toes. The customer is spoilt for choice, but in a category like denim, stickiness is high. Once the buyer is comfortable with the fit, quality, design and price offered – largely stays with the brand.”

He adds that what makes Spykar stay ahead of competition is be their undisputed forte in denims. “The fabric and the garment need high precision and technical skill sets compared to many other categories of clothing. There are fewer vendors in the country who have the same. The success of jeans solely depends on how it fits you. This expertise of creating the right fit for each different torso is with again a few. In context to India, Spykar is one of the few who have always got this right. Besides the fact that we have been the best and most premier manufacturers for the last 27 years, of denims, in India, Spykar has developed fits only for the Indian subcontinent consumers and hence rated very high in appreciation of its fits. The processing or popularly termed washing, of the denims is again one of the most demanding skill sets



**“As more international brands foray into the country and move to Tier II & III cities, a growing preference is seen among consumers in those towns as it comes with a ‘tag’ that is the brand name as well as the aspirational value. India is a big market and is continuing to grown year-on-year at an increasing rate”**



—NEHA SHAH, AGM, – Marketing, Pepe Jeans India Limited

and our processing is most admired even by our strongest competitor,” he says.

Talking about the plan of action that is put in place at Pepe, Shah reveals, “Keeping in mind the on-going trend and needs of the customer, Pepe jeans constantly innovates, is easily accessible and offers variety in order to be on top of minds. Through market research, we look at what data is telling us and accordingly rely on our insights to determine the best course



**It is also critical to study the evolving market, changing consumer buying preferences and patterns and incorporate this insight when working on the larger brand growth strategy.**

of action. It is also critical to study the evolving market, changing consumer buying preferences and patterns and incorporate this insight when working on the larger brand growth strategy. Pricing has been a crucial point when it comes to a customer's purchase decision. Price sensitivity continues to exist in the Indian market. However, many brands have identified this behavior and are now repositioning the brands in terms of prices so that they can cater not only to sec A but also to the mid-level segment. Brands are introducing denims across all price segments to cater to a wider audience. Pepe Jeans too has denims starting from ₹1,799 for the e-commerce partners where the customer is more price sensitive. Denims at our stores go from ₹1,799 to ₹3,499."

Using pricing as one of the differentiating factors, Jain states that his brand does not believe in selling products on discounted rates as it dilutes the brand and does not add value. "A majority of brands in the market became discount brands by offering discounts throughout the year. Kewal Kiran Clothing's denim brands Killer, Integriti, LawmanPg3 and Easies



have protected its brand proposition by remaining as full price denim. Majority of the brands in the market have been focussing on growing sales and not making sufficient profits to sustain in the long run, whereas Kewal Kiran has been focussing on profitability of more than 20 percent EBIDTA and more than 12 percent at PAT level and maintained these in the last three decades of its existence as leading denim brand," he explains, adding, "To keep up in the face of competition we would still want to work on innovating new designs, patterns, devise marketing campaigns to launch our new theme based products, reaching out through large format stores and MBOs through interesting concepts like Shop-in-shop where the customer would actually get feel of the product before purchasing it."

The reach of the brand too has a lot to do with its success. Spykar for example has a pan India reach across



Spykar Gym Jns

**"India is a country with a population that has relatively meager resources, and hence to them, it is important that retailers provide solutions which are more value for money and relatively long lasting and ones which need low maintenance. On all these attributes, denims score very high. It seems that jeans are here to stay, due to the versatility they offer"**



- SANJAY VAKHARIA, CEO, Spykar Lifestyle






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***Competition does not mean sabotaging the competitor, but it entails ensuring that no stones are left unturned in moving ahead and this is the mantra that the leaders in this category have stuck to.***

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all sales formats by being present in 350 cities across 240 exclusive brand outlets, 1200+ multi-brand touch points, marketplace and their own webstore. Killer too has a strong distribution network spread across 29 States and 209 cities in the country.

In addition to having a stronghold on the fit and fabric, Spykar retains and lures patrons by means of designing attractive offers and premium quality freebies. Vakharia shares, “Our loyalty program keeps the members engaged with privileges which are far better than the cheap thrills.”

One of the prominent initiative undertaken by Pepe to stand out from its competitors would be that of launching the Custom Studio concept. Elaborating on this, Shah says, “We were the first brand in India to introduce a denim customization service that allowed the customer to step into the design seat and personalise their denim in a few easy steps. First, pick a laser print to be tattooed on the denim. Next choose the fastenings - be it buttons, rivets or tacks. Then select the brush of the garment and where exactly you want it. Lastly, choose the colours you want your print to be in. Pepe Jeans’s customisation service empowers the customer with the opportunity for personalization; and therein lays a powerful tool that will revolutionize denim fashion in India. This service can be availed at our flagship stores in Mumbai, Delhi, Gurgaon, Bangalore and Kolkata.”

One cannot leave behind the power of social media in brand building. Shah highlights, “Social media is one of the best ways to connect with today’s youth as they are highly active on various social platforms like Instagram, Facebook and twitter by creating engaging content, run contests where winners get gift vouchers to drive them to the store and other various initiatives like influencer marketing that is a current trend.” She further adds, “We try to sync our offline styles through online promotions through our social media pages by creating engaging content through contests where winners get gift vouchers to drive them to the store, we advertise through billboards, SMS, mall activations, drop downs at malls, print ads, etc. to ensure steady footfalls at the store.”

### **Moving Ahead**

Competition does not mean sabotaging the competitor, but it entails ensuring that no stones are left unturned in moving ahead and this is the mantra that the leaders in this category have stuck to. If we look at the work done by players like Pepe Jeans, Spykar and Killer, it comes to the forefront that despite growing competition, especially so from the lesser known brands and those from the unorganized category, they have remained stuck to their core competence and brand philosophy. To conclude, being innovative and keeping tabs on market demands without compromising on the essence on which the brand is built is what keep the leaders ahead in the game.

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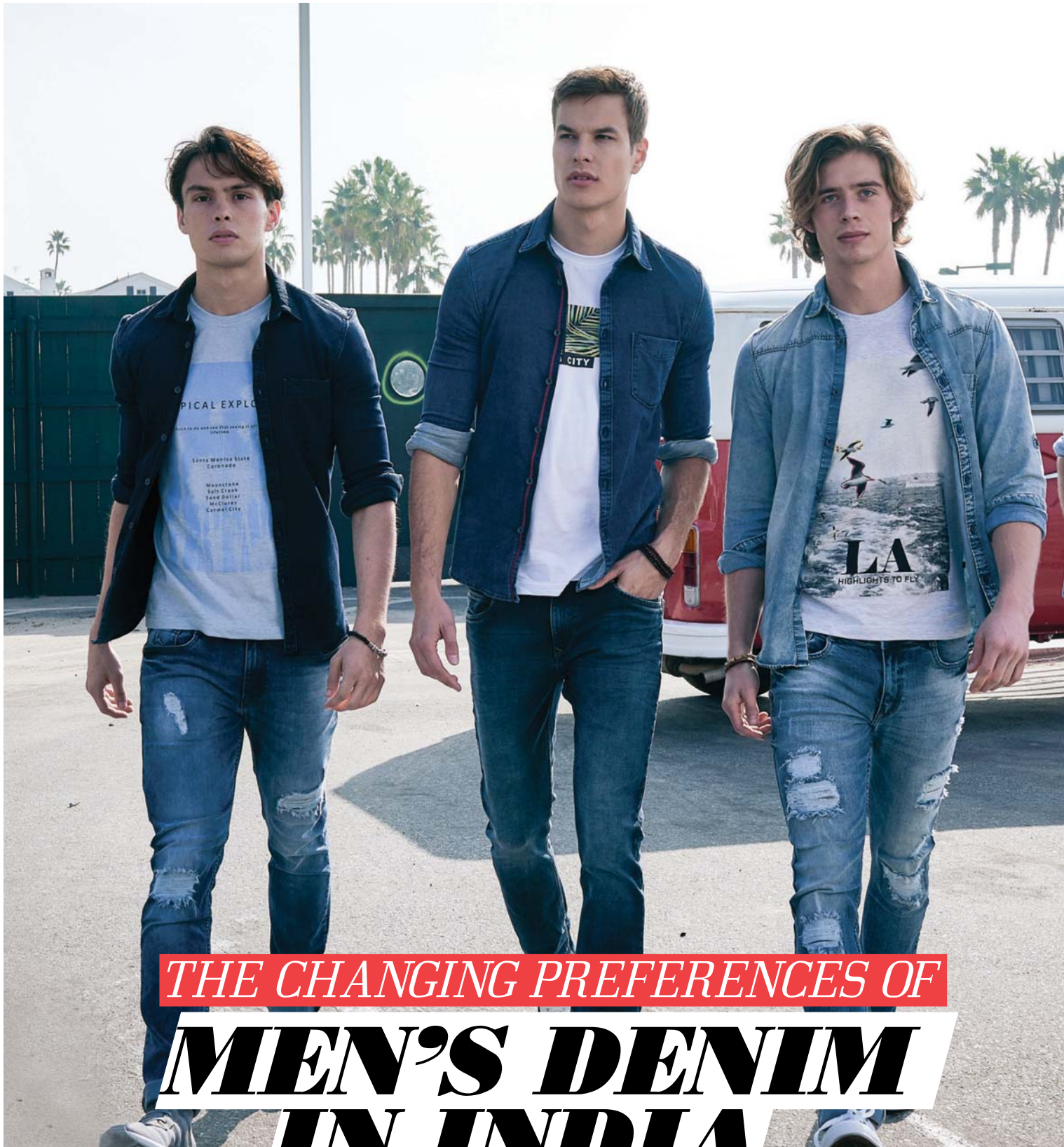


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*THE CHANGING PREFERENCES OF*

# **MEN'S DENIM IN INDIA**

*Over the last 150 years, denim's evolution trajectory has been acutely ephemeral, yet what has stood the test of time is its growing popularity and consequently, the burgeoning market share across the globe. IMAGES Business of Fashion takes a look at the changing dynamics as well as the current trends in the men's denim segment in India...*

**IMAGES Business of Fashion**



Parx

What could be more masculine than a pair of jeans? Sturdy, utilitarian and yet classically stylish, over the last century denim has become the new 'trousers' of choice for men around the world. It's surprising though, how a simple piece of fabric could set off such a lasting cultural impact around the globe – from being the badge of the rebel to the mainstream wardrobe staple that it is today.

Denim looks cool, is comfortable and requires less maintenance, hence it naturally became the go to fashion statement of men around the world. Over the last 150 years, denim's evolution trajectory has been acutely ephemeral, yet what has stood the test of time is its growing popularity and consequently, the bludgeoning market share across the globe.

#### The Indian Scenario

Denim is one of the biggest segments in the Indian fashion industry. According to India's leading management consulting firm Technopak the denim wear market in India is dominated by the men's segment. Of the total market share

of ₹29,203 crore in 2018, the men's segment accounts for ~ 86 percent and is growing at a CAGR of 12 percent YoY.

"The men's denim wear segment is the fastest growing segment. Men's denim wear accounts for largest share and is poised to grow at a high CAGR of 12 percent over the next decade. Branded sector has been the biggest beneficiary of this with its presence all across and also varied offering in men's wear," says Hemant P Jain, Managing Director, Killer Jeans.

Earlier, denim was a prerogative of the affluent and urbane men. But eventually, the trend caught on and demand for denim started to rise. Today, denim enjoys equal demand throughout the length and breadth of the country – right from upscale metropolitan metrosexuals to the blue collar working men from the country's rural hinterlands. "Until a few years ago, denim was only popular with men in urban cities but gradually it has got its acceptance in semi-urban and rural markets as well and the factors which have led to this growth is growing awareness of and increasing affinity for global fashion. Now, denim is considered as the most versatile fabric for men with multiple applications over work wear, casual wear and everyday wear," says Rishabh Oswal, Executive Director, Monte Carlo.



*"Innovation being the key factor with the introduction of laser machines, e-flow and ozone machines, the industry has started focusing on the eco-sustainable alternative to the hazardous chemicals. Even eco-friendly trims have slowly started replacing the conventional trims"*



— PRAGATI SRIVASTAVA, GM & Brand Head, Parx

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***“New technology helps reduce water and chemical consumption. There are denim fabrics made using post-consumer waste like recycled pet bottles, etc. Laser finishing technology and better wet processing technology helps substantial reduction in water consumption”***

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— VINIT DOSHI, Head – Product, Sourcing & Retail Planning, Celio\*

### **Changing Rules of the Game**

Over the years, consumers have evolved tremendously. Fashion consciousness has accelerated across demographics as a result of the changing lifestyles, increasing incomes, wider penetration of the media in the country and percolation of the internet as a whole. Growing trend and brand awareness stemming from international travels and the growth of social media has led to increased consciousness and more awareness of global fashion trends, resulting in a much more aware and demanding consumer.

“Denims have changed tremendously over the years. And all this entails rigorous innovations done in the styling, fits, wash, etc. Now denims give a neater and fitter look than they used to be earlier. Even the fabric is improvised to make it comfortable, durable and fashionable. We at Monte Carlo have recently launched anti-odour, water repellent and temperature control denims,” says Rishabh Oswal.

The need for sustainable production has become an imperative over the past years in fashion. This holds especially relevant to the denim segment, considering the incredible amounts of water and toxic dyes used in manufacturing jeans. In line with this, denim companies are now compelled to embrace greener methods and are also making effort to develop new

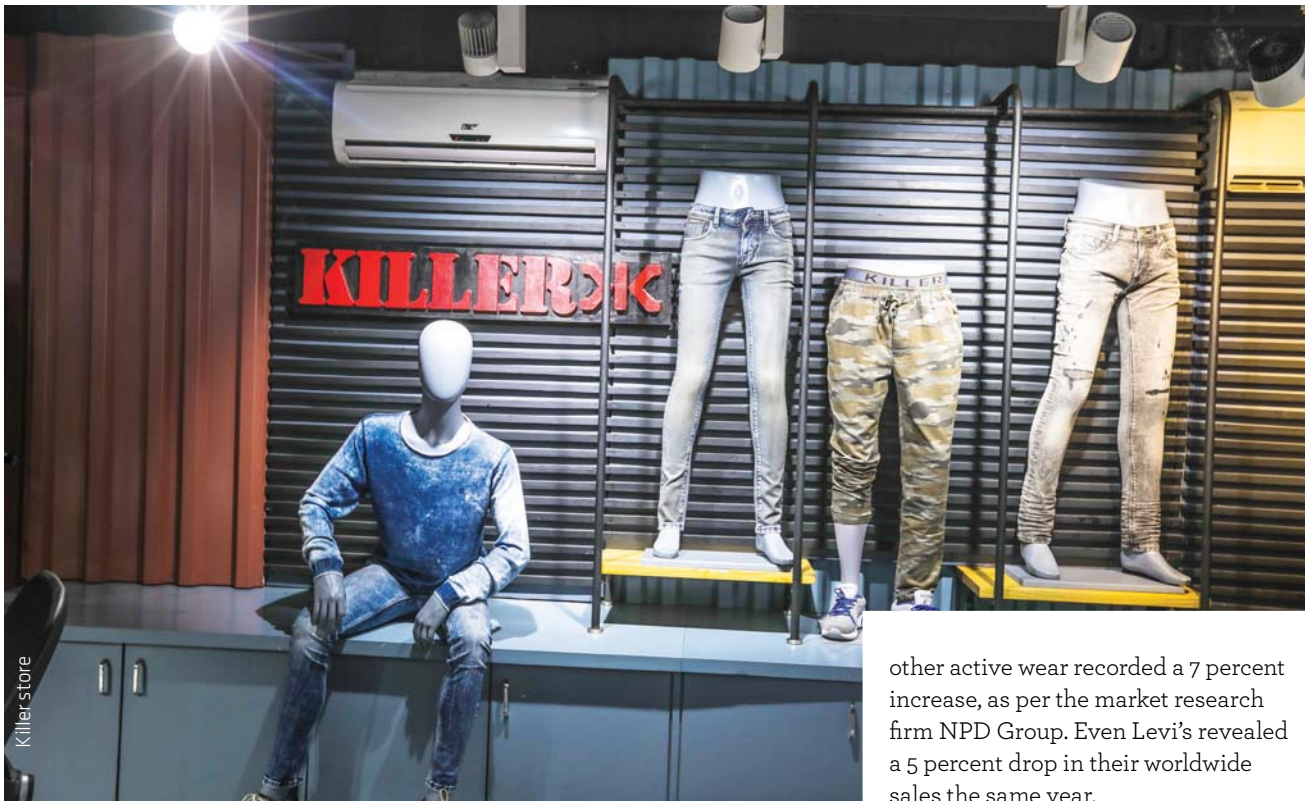


techniques of producing jeans, as a part of their business strategies to protect the environment as well as connect to the consumer.

“There have been conscious efforts from brands, manufacturers and category leaders in developing and adopting innovative technology for sustainable and as environmental friendly options. New technology helps reduce water and chemical consumption. There are denim fabrics made using post-consumer waste like recycled pet bottles, etc. Laser finishing technology and better wet processing technology helps substantial reduction in water consumption,” says Vinit Doshi, Head – Product, Sourcing & Retail Planning, Celio\*.

Emphasising on how brands and manufacturers in India have caught on the trend of sustainable production in the recent years, Pragati Srivastava, GM & Brand Head, Parx states, “Indian denim manufacturing in recent times has been constantly upgrading and





Killer store

other active wear recorded a 7 percent increase, as per the market research firm NPD Group. Even Levi's revealed a 5 percent drop in their worldwide sales the same year.

evolving like never before. Innovation being the key factor with the introduction of laser machines, e-flow and ozone machines, the industry has started focusing on the eco-sustainable alternative to the hazardous chemicals. Even eco-friendly trims have slowly started replacing the conventional trims."

#### **Influence of Sportswear**

In the recent years, as comfort and practicality started gaining attention among the liberated millennials, the demand for sports inspired casual fashion grew. The trend was so viral that it started making dents on sales of denim across the world. In 2014, sales of jeans in the U.S. fell 6 percent to \$16 billion, whereas sales of yoga pants and

Denim manufacturers were quick to pick up on the cue and the result was a more comfortable and sporty variety of denim that was fit for everyday use. This also resulted in the invention of stretch in denims, making it super comfortable and stylish to wear.

"Denim used to be only 100 percent cotton and did not allow for a lot of movement. With sportswear and athleisure coming into the fashion spectrum, we see a lot of innovation in the denim fabric itself, where elastane and polyester are blended with cotton to allow for more flexibility and provide greater movement," says Manu Sharma, Business Head, Replay.

The influence of sportswear can also be seen in denim styling, with the introduction of products such as joggers and jeggings. Usage of sporty taping on jeans is also in trend to give denims a more athleisure look and feel. And this succeeded in breathing new life into the world's favourite blue fabric and also ended up bolstering the growth of the segment as a whole.

"The impact of sportswear has been phenomenal in driving the growth

*"Denims no longer are restricted to blue or black colours. The trending colours and most in demand colours in this segment are grey, brown, green and even white. The market is also welcoming experimental colours and designs"*



— HEMANT P JAIN, Managing Director, Killer Jeans.



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***“Fashion denim is dominating trends because in today's era people opt for better choices in terms of washes and designs. They don't want basic design in denim anymore. Various designs that are eye-catching and have cuts and embellishments have taken denim to another level”***

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– **RISHABH OSWAL**, Executive Director, Monte Carlo.

of the denim segments. The stretch jeans which uses the stretch fabric is the closest match to sportswear due to its durability and comfort besides being an all-weather apparel and the recent launch of new athleisure, it has altogether redefined and also played a crucial role in reinventing the use of denims which has had a complete makeover,” says Hemant P Jain.

#### **What's Trending**

While basic jeans will always have a cult following, fashion jeans are the call of the season. The growing consumer awareness with regards fashion runways and trends has been a catalyst for the denim brands to become design

and fashion oriented. A hot favourite especially among the youth of the country, fashion denim is what Hemant P Jain calls the ‘need of the hour for all denim brands’.

“Fashion denim is a dominating trend because in today's era people opt for better choices in terms of washes and designs. They don't want basic designs in denim anymore. Various designs that are eye-catching and have cuts and embellishments have uplifted denim to another level,” states Rishabh Oswal.

But if experts were to be believed, this has not hampered either the sales or demand of basic denims. Denims enjoys a large consumer base; apart from the youth it also enjoys unsurpassed demand among adults and senior citizens alike. This section mainly looks for comfort and fabric rather than fashion. Therefore, it can be safely vouched that basic jeans is not likely to go out of the fashion scene any time soon.

“Basic denims will always form the core of a denim brand's portfolio. These are the denims that brand loyalists and denim lovers come back for. They last for multiple seasons and are the jeans that people live in,” asserts Manu Sharma.

Traditionally, black and blue were the staple denim colors in the Indian market. But the consumers of today are willing to experiment with newer colors and shades. “Denims are no longer are restricted to blue or black colors. The trending colors and most in demand colors in this segment are grey, brown, green and even white. The market is also welcoming experimental colors and designs,” says Hemant P Jain.

Pastel jeans are also a big trend in the Indian market today with popular colors like teal, aqua marine, etc., along with Sulphur based colors.





## TRENDING NOW

**Colors:** Khaki | Olive | Grey | Brown | Teal | White | Aquamarine | Sulphur Based Colors

**Fits:** Slim | Skinny | Straight | Mid Waist and Low Waist

**Washes:** Whiskers | Spray Effects | Laser Finishes | Stone Wash | Smoke Wash



“Black and blue jeans are considered an essential item in most wardrobes, which can be paired with a wide range of colours. Brands do introduce new colours for jeans but these colour stories tend to be seasonal or theme based. In the coming season, we will see a lot of metallic tones,” asserts Manu Sharma.

In terms of fits, skinny fit and cropped length denims have been trending for

quite some time now and are expected to continue being in vogue. “Boyfriend fits and anything that is slightly baggy, bootcut and jeans with extra flare are currently in trend. Low waist jeans are coming back along with hyper high waist jeans,” explains Manu Sharma.

Denim brands are also focused on achieving different hues of blue by bleaches or other agents that affect the denim colour and washing the fabric

*“With sportswear and athleisure coming into the fashion spectrum, we see a lot of innovation in the denim fabric itself, where elastane and polyester are blended with cotton to allow for more flexibility and provide greater movement”*



— MANU SHARMA, Business Head, Replay.

in certain dyes. The new denim fabric washes that are in trend these days are dark indigo, faded blue/vintage/aged, stone wash and distressed look.

“In the coming years, we expected strong growth in the premium denim segment, mostly because the young Indian consumer is well-travelled, more brand-savvy and has a higher disposable income,” states Manu Sharma.

### The Road Ahead

Denim’s acceptability has transcended metropolitan cities. There is an increasing acceptability of denim amongst all sections of the Indian society. As one of the most popular men’s fashion apparel in the country, the market is expected to witness huge growth in the coming years. With the country’s ever-expanding economy, booming consumption, urbanisation, and growing middle class purchasing power, denim wear has a huge opportunity to grow in the country.

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



# **WOMEN'S DENIM SEGMENT:**

**MARKET TRENDS, GROWTH DRIVERS & INNOVATIONS**

*Denim is among the fastest growing categories in women's casual apparel segment in India. It is versatile, fashionable and comfortable, with vast choices available in fabrics, finishes, looks, fits, colours and functionality. IMAGES Business of Fashion talks to renowned denim wear brands in the country who share their observations on the women's denim wear market...*

**Rosy Sharma with inputs from Gurbir Singh Gulati**



India is the fifth largest destination in the global retail space, making the Indian apparel industry the second largest contributor in the retail industry, and according to industry statistics, denim is the single largest leading segment in the fashion industry.

Somewhere in the mid-90s, the apparel industry in India began to get more organised. During this time there was a radical shift in fashion and men and women both became more experimental with their choices. The shift from formal wear to the more casual denim was gradual but firm. Growing awareness among the educated, working class and an increasing affinity for global fashion were the chief factors which led to this change over. As the popularity of denim among the younger population, the fabric became a symbol of modern culture.

Today, denim is considered one of the most versatile fabrics, with multiple applications over casual wear, work wear and everyday wear, and the Indian denim fashion industry is at an exciting place with huge growth opportunities ahead.

While the men's denim category enjoys the largest share of the retail pie and is poised to grow at a high CAGR of 14 percent over the next decade, the

**Women across different age brackets and spanning all shapes and sizes prefer denim over other fabrics owing mostly to the fact that it is comfortable, functional and durable.**

women's denim category is not far behind, with the segment expected to grow the fastest at the CAGR of 14.5 percent over the next 10 years to reach ₹39,651 crore by 2021, and ₹77,999 crore by 2026.

Akhil Jain, Executive Director, Madame, says that while women's denim started in India as a fashion trend, but now is considered a daily essential.

Women across different age brackets and spanning all shapes and sizes prefer denim over other fabrics owing mostly to the fact that it is comfortable, functional and durable. The fabric is also gaining popularity in the women's athleisure category owing to the comfort provided by stretch denims. Sameer Patel, Founder and Chairman, Deal Jeans, says that women - especially and those who come from traditional backgrounds in smaller towns - have taken to wearing jeans by pairing them with ethnic Indian kurtis. "This mix-n-match style is likely to further fuel the growth of the women's denim wear segment."

He further states that western lifestyle and western fashion has accelerated the trend of casual dressing across the globe. "This trend has boosted the consumption of casual fashion apparel like denims, dress shirts, tees, casual shirts among both men and women



consumers in all the developing countries including India," adds Patel.

Another reason for the growth of the category is the strong and technically sound production foundation that has evolved through the export base of garment manufacturers. Also, the design sensibility of Indian brands is at par with international brands and the ability to produce well-designed denims at affordable prices, the strength and forte of Indian brands. These brands are exploiting the available opportunity and positioning themselves in the middle of the consumption pyramid spanning across metros, Tier I, II & even Tier III towns to gain scale - something that premium brands continue to struggle with in India.





Vero Moda

come from the women's and kids denim wear market.

According to Sameer Patel, the value share of denim market is skewed in favour of mega metros and metros which account for almost half of the total denim market share at 49 percent. "Though the markets of other urban areas and rural India contribute high in volume, their combined share in market value is only 51 percent. As the penetration of denim category and the awareness of denim quality increases in the cities and rural India, their share in market value will start increasing with more number of consumers



***"Today the average Indian consumer is well-travelled and aware about international trends. The acceptance of denim at the workplace has definitely led to denim becoming a quintessential item in every woman's wardrobe. Tier II cities are aspirational in nature and consumers are equally receptive to the trends that are popular in urban metros"***

– SPOKESPERSON, Vero Moda

### **The Indian Denim Market**

Denim has always been one of the leading segments in the apparel industry. Factors like young population demographics, rising disposable incomes, high spending power, booming Internet retail and the growing influence of Western trends in the country is fueling the growth of this segment.

Currently the denim market of India is worth ₹30,000 crore and in the current scenario is expected to grow at a CAGR of 15 percent by 2023 amounting to approximately ₹54,000 crore, where the men's denim contribute 84 percent to the denim market and the remaining 10 percent and 6 percent contribution

willing to pay premium for the quality, design and fit," he says, adding, "the Indian market is believed to be one with lot of untapped potential for women's denim segment."

Akhil Jain agrees saying that the sale of denim in smaller cities is still a big challenge for brands in India, where as the sale of denim is much higher in metropolitan cities. He adds that India is price sensitive and consumers are always looking for quality and quantity at the cheapest rates. "Most good denim brands are expensive which is

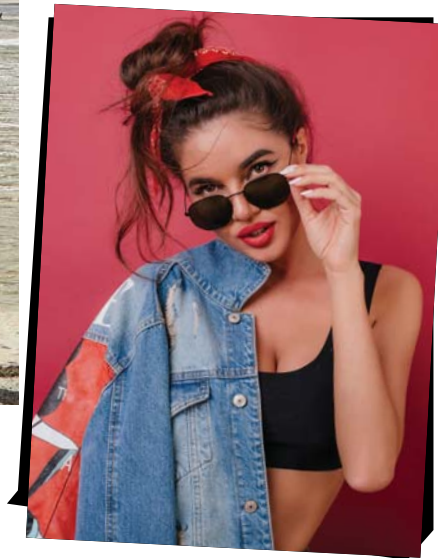


Deal | Jeans

an issue and creating a specialty brand in women's denim is difficult. One way to deal with that is to introduce jeans for different occasions – casual, formal, occasion-based.”

### Denim Trends

Blue denims have been a wardrobe staple and a fashion essential for decades. The denim market in India is on a roll due to ever-evolving fashion trends and urbanisation. For majority of Indian youth, denim is not just casual wear but a fashion statement as well.



In India, global denim wear brands Only and Vero Moda offer a wide range of denim essentials across various product categories thus catering to different requirements of women including which are staple for women to the ones that are trendy and in vogue.

Since their launch in India, Only and Vero Moda – a part of Bestseller – have become synonymous with contemporary fashion and designs, which young women across the world desire. The brands offer a range of fits, textures and washes when it comes to jeans, so that their consumers have an ideal option to choose from for various occasions-right from casual wear to work wear.

“In India today, women are moving toward experimenting with new styles and trends. Denim being an essential piece of clothing in women's wardrobe, they look at stocking up styles that are new and add the freshness to their personality. Only being a leading European brand in the market, we look at adding new styles every season off the global street style for easy access to the consumer in India. The flared and boot cut denim are the best example of the global styles which was well received in the Indian market,” says the spokesperson of Only. “Be it work wear to casual wear, Only ticks the box for every women looking for different styles. Today Indian consumer is well travelled and is aware of international trends. The acceptance of denim at the workplace has definitely led to denim becoming a quintessential item in every woman's wardrobe. Tier-II cities are aspirational in nature and consumers there like to add the trends that are popular in urban metros to their wardrobes.”

*“Indian brands aren't at par with their global counterparts, but domestic brands are surely getting closer. While a lot of people in India do wear denim, most people think jeans when they think denim. I feel Indian players should start making some more styles of denim wear – like jackets, skirts, etc.”*



—AKHIL JAIN, Executive Director, Madame

Apart from classic jeans and popular skinny fits, a lot of women today are experimenting with different styles and cuts. Various washes right from deep





indigo, to acid washes, to stone wash jeans are high on trend. This season, Only has added a few new styles to their collection which can be worn for both work and casual events.

A key trend in Vero Moda's upcoming Autumn-Winter 2019 Collection of casual denim wear is the indigo story. This collection is inspired by Japanese trends like Indigo washes and patch prints like Japanese crane motifs and serpent skins. Right from Schifflis (machine made lace) and embroideries to different washes and textures, the brand includes all denim essentials to kick start the season.

“Denim is a classic fabric. While jeans have always been a staple denim wear product, other product categories like denim jackets are more seasonal in nature. Product categories like shirts, dresses and skirts are trend inspired categories,” says the spokesperson of Vero Moda.

### DEAL JEANS

- Basic and trendy washes and unconventional cuts
- Side stripe jeans are making their return from the early ages
- Frayed and uneven hems are adding that perfect amount of edge to the casual pair
- AOP embroidery and lazer print is trending with tearing and grinding effect

### ONLY

- **Leather finished jeans:** These are a kind of jeans which are in the form of denims with a touch and feel of leather to it.
- **Flared jeans:** The demand for flared denims has grown over last season. These are well fitted at the top and flares up from the knee to the bottom.
- **Skinny-fit jeans:** These jeans are a staple style that accentuates a women's curve like no other jeans. These are well fitted from top to a narrow fit at the bottom.
- **Statement jeans:** These jeans have a fit of the boyfriend denim or straight-fit denim with either a statement texture or colour to it.

### VERO MODA

- **Skinny jeans:** A tight fit around the hips and slightly relaxed below the mid-calf
- **Super skinny jeans:** Fits the body from the waist down including all the angles that flatter a figure
- **Push-up skinny jeans:** Specially designed at the butt area to give it a push and define contours to accentuate the shape
- **Classic jeans:** A snug fit till the mid-thigh and relaxed from the mid-thigh down
- **Wide leg jeans:** Fits on the hips and flares from below
- **Girlfriend jeans:** Relaxed around the hips and wider at the ankle

“In recent times fashionable fits such as boot cut, flared and slim-fit jeans are stocking out soon along with basic light and distressed washes are complimenting fits. Essentially



*“We have seen a substantial rise over the last few years in the women’s denim category. Typically, women would choose from a variety of styles over staples but the scales on that have tipped since the influx of international brands offering uber stylish denims. The category has gained momentum and is sure to rise even higher”*

— SPOKESPERSON, Only



Again, Indian brands aren’t at par with their global counterparts, but domestic brands are surely getting closer. While a lot of people in India do wear denim, most people think jeans when they think denim. “I feel Indian players should start making some more styles of denim wear - like jackets, skirts etc.,” states Akhil Jain.

### The Future

Despite the lack of styles, Jain feels that there is immense scope of growth in this category if efforts and styles are improved. Patel too says that the denim wear market in India is expected to witness very impressive growth over the next decade. With India’s booming economy, expanding consumption, urban population and growing middle class income, denim wear has a huge opportunity to grow.

“Millennial today are inclined towards and opt to purchase branded denim. Denim has become a wardrobe staple and consumers are purchasing denim products not only across the classic jeans category but also experimenting with other denim product categories like jackets, shirts, skirts, etc. This category shows great potential and we at Only continue to explore new markets in Tier II and III cities,” the spokesperson of Only concludes.



the fabric nowadays preferred is light weight and comfortable wear considering the much flustering lifestyle and weather conditions. Hence fabric is which is sweat repellent and comfortable for long hours is most searched for. One of recent trends such as crop length flare jeans has taken a turn to every wardrobe,” states Sameer Patel.

*“From style statement to comfort clothing, denim has found permanent place in women’s wardrobe in India. Women across different age brackets and spanning all shapes and sizes prefer denim over other fabrics owing mostly to the fact that it is comfortable, functional and durable. The fabric is also gaining popularity in the women’s athleisure category owing to the comfort provided by stretch denims”*

— SAMEER PATEL, Founder and Chairman, Deal Jeans



# PEPE JEANS

## WORKS TOWARDS UNDERSTANDING YOUNG CONSUMERS

Denim has always been at the core of what Pepe Jeans does. The global denim wear brand constantly focuses on reinventing fits and introducing innovations in the category - from introducing a new washing system to reduce energy consumption and waste to venturing into innerwear to foraying into the kids' wear segment...

### IMAGES Business of Fashion

There has been a lot of 'big-name' noise in the global kids' denim wear space in recent months with brands like Superdry, Calvin Klein Jeans and G-Star Raw entering the segment, and Jack & Jones and Aeropostale planning to foray into the segment.

So, when in 2016, Pepe Jeans entered the kids' wear segment, it was the most prudent move that the brand took - cashing in on the sunshine market at the most opportune time.

Catering to children from 4 to 12 years of age, as well as teens from 14 to 16 years, Pepe Jeans simply widened its consumer base when they forayed into this segment.

The brand offers a wide array of kids' wear, which include stylish denim





jackets, jeans and cool printed t-shirts and shirts for boys; and cute denim shorts and skirts, bright coloured jeans, playsuits, tops and dresses for girls.

The design team uses its global experience and rich heritage to introduced tailored products that best suit the local market. With over 100 to 1,000 design variations for customers to choose from, the team analyses consumer preferences, market trends and identifies key styles that are likely to be a hit in the next season.

Assistant General Manager - Marketing, Pepe Jeans, Neha Shah talks to IMAGES Business of Fashion on the Indian kids' denim wear market, its discerning consumers and how the market is delivering.

### EXCERPTS FROM THE INTERVIEW:

**Tell us about the kids' denim wear segment in India? How has**



**Neha Shah**  
Assistant General Manager -  
Marketing, Pepe Jeans,

### it developed over the years in the branded sector with players taking up this category seriously?

As per industry reports, the kids' denim wear comprise only 6 percent of the total segment. This is the smallest segment in the domestic market at the moment but is expected to grow at a high rate in the years to come. Market potential for kids wear has attracted many global brands into India. Brands have started to adapt the line specifically to the Indian audience. The kids denim wear industry is definitely a blooming and promising category which has huge potential in the years to come.

*"The opportunities within the kids' denim wear market are definitely positive but having the right understanding and tapping these require high level of commitment and well-formulated strategies."*

### Despite its popularity, leading denim makers are still wary of entering the kids' denim segment. Why?

Despite the interesting growth story of kids' denim wear segment, a lot remains to be accomplished in this market. The opportunities within the kids' denim wear market are definitely positive but having the right understanding and tapping these require high level of commitment and well-formulated strategies.

Also, brands and retailers have to ensure better penetration beyond urban pockets and cater to the price-sensitive kids' segment in semi-urban and rural India. Some of the kids denim wear brands have struggled in terms of planning store expansions with adequate far-sightedness and analysis and thus have been forced into rolling back plans or have got entangled in high debt traps and unwarranted business litigations. New entrants could shorten their own learning curve by learning from the challenges and roadblocks faced by the early entrants as well as existing players.

The ability of brands and retailers to address the specific requirements of children as well as their parents and to offer fashion solutions rather than mere products will be critical for their success.



**Which is the bigger market for kids' denim brands – metros or smaller cities? Why?**

The kid's denim wear market is well established in Tier I cities and is now emerging into the Tier II and III cities as well. With growing purchasing power, style consciousness and international brands pouring in, one cannot ignore the opportunities these markets present. Big and small brands are now heading to these small cities with multiple formats.



*Kids have the capability to influence the buying decisions of their parents and exert significant buying power. Favourite TV characters or celebrities, movies, TV serials, peers, etc., are various factors that attract, and influence kids purchase decision.*

A simple way to understand growth in the smaller markets is that it allows you to expand your customer base, with its lower real estate cost and most importantly visibility to the brand.

Also, retailers have started leveraging e-commerce, which enables them to spend less money on real estate while reaching out to more customers in Tier II, III and IV cities making brands/products easily accessible.

Similarly, the marketing strategies also have to play a big role, when it comes to targeting customers in these regions as well as creating awareness for the brand. It is essential to be aware of these cities that are gaining momentum because of real estate development; it's only a matter of time till investors understand the market dynamics and returns they generate; thereby making them the future of retail.

**What are current trends and styles in kid's denim in the international market? What about India?**

India is not far in catching up with international trends. We see that the children's fashion industry has evolved and begun to imitate the adult fashion industry with miniature versions of different denim styles like ripped jeans, glittered jeans, studs, tassels, etc. Parents have become concerned and conscious about their children being "on-trend". Kids have the capability to influence the buying decisions of their parents and exert significant buying power. Favourite TV characters or celebrities, movies, TV serials, peers, etc., are various factors that attract, and influence kids purchase decision. Brands have created their marketing strategies and merchandising around this preposition to create the want and desire among kids. Brands have also started innovating with natural, hygienic and flexible fabrics to suit their comfort.



**bad  
Boys**



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# CDF COLUMBIA

## Core heavy denims for men

**S**tarted in 1990, CDF Columbia quickly assessed the huge gap in the market for a basic range of denims and that is where it started its journey - by manufacturing core heavy denims for men. A rapid growth has ensured a stable journey for the brand, which later also introduced casual shirts and cotton trousers in its product portfolio.

### Core Customers

The brand targets men in the age group of 30 to 45 years.

### Product Portfolio

Today, it offers a full-fledged men's wear range comprising jeans, shirts and cotton trousers.

### Latest Collection & Theme

The brand, in its latest collection, is giving an exclusive 4-way Lycra fabric developed by Arvind especially for CDF Columbia for its new line of denims. In shirts it is giving a whole

new line of basic shirts in cotton and linen. In trousers too it has developed a new basic range.

### Most Innovative Products

The brand is following all international environmental norms in manufacturing denims. It is a strong believer of sustainability.

### New Product Range

The brand has introduced a new product range in poly-based Lycra at affordable prices for its core items.

### Primary Markets

Karnataka, Andhra Pradesh, Maharashtra and Tamil Nadu are the brand's primary market.

### Retail Presence

The brand is present in over 430 MBOs and 34 shop-in-shops format.

### Exploring New Markets

CDF Columbia has planning to target the markets of Madhya Pradesh and Kerala in its second phase of expansion.

- > Company: **SHIVA APPARELS**
- > Year of Launch: **1990**
- > Headquarter: **MUMBAI**



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- > Company: **SPARK CREATIONS**
- > Year of the launch: **1983**
- > Headquarter: **INDORE**

# SPARK KIDS

## ***A Creative Spark in Denim designs***

**E**stablished in 1983, Spark Kids is a highly recognized Indian fashion brand for kids. Manufacturing poetic clothing and novelties for boys of different age groups, the brand seeks to stimulate and uncover creativity through its clothing range. The prime aim of Spark Kids is customer satisfaction, quality and comfort of garments.

The brand tries to go that extra mile to win the trust of parents in order to increase the number of its loyal customers.

### **Core Customers**

Spark Kids caters to children in the age group of 1 to 14 years. Though kids are the end customers, parents are the major influencers in the buying process. This makes it extremely important for the brand to provide all varieties in the segment under one roof.

### **Product Categories**

The brand offers a wide range of clothing for boys including t-shirts, shirts, shorts, denims, chinos, boys sets, dungarees, etc.

### **Latest Collection & Theme**

Each collection by the brand is a living gallery – a gallery on fabric. The brand combines art and clothing

to make each of its products a masterpiece. The latest collection is created upon the idea of young fashionistas and rockstars who explore the world as their playground.

### **Retail Presence**

The brand is available through 400 MBOs and 10 large format stores across the country. It has presence in Delhi, Mumbai, Chennai, Bengaluru, Hyderabad, Amritsar, Ludhiana, Udaipur, Kanpur, Jaipur, Cochin, Coimbatore and Calicut. Internationally, the brand is present in Gulf countries including UAE, Bahrain and Kuwait.



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- > Company: **SPARK CREATIONS**
- > Year of Launch: **2015**
- > Headquarter: **INDORE**

# BUTTON NOSES

## ***A passion for denim***

**B**utton Noses is a venture of Spark Clothing along with its flagship brand Spark Kids. After the success of Spark Kids in gaining customers through remarkable designs, fashion and quality, in every market it has entered, its promoters launched Button Noses in 2015. The brand came-up with an entire line of girls products on popular demand by its customers. It offers a complete range of premium denims with all new washes, fabrics and a whole new version in denim accessories.

Today, Button Noses is a one-stop fashion destination for boys and girls in the age group of 0 to 14 years. With a passion for denims and appreciation for new fashion, the brand aims at bringing international denim trends to the Indian market.

### **Focus Customers**

Button Noses offers an entire line of chic clothing for infants and girls up to the age of 14 years.

### **Product Portfolio**

With a passion for denims and appreciation for new fashion, the brand manufactures an entire range of girls sets, dresses, dungarees for infants and tops, leggings, jeggings, dresses, sets, loungewear for girls aged between 1 to 14 years.

### **Retail Presence**

Button Noses is available through 400 MBOs and 10 large format stores across the country. It is present in Delhi, Mumbai, Chennai, Bengaluru, Hyderabad, Amritsar, Ludhiana, Udaipur, Kanpur, Jaipur, Cochin, Coimbatore and Calicut. Internationally, the brand has presence in the Gulf countries including UAE, Bahrain and Kuwait.





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- > Company: **LITTLE STREET CREATIONS**
- > Year of Launch: **2017**
- > Headquarter: **LUDHIANA**

# LITTLE STREET

## *Expanding rapidly with latest fabrics*

**L**aunched in 2017, Little Street is a Ludhiana-based kidswear brand. The brand started out with just 15 machines and is now manufacturing 4 lakh pieces per annum. Manufacturing garments for kids in the age group of 2 to 14 years, the brand offers cotton rich fabric with bio-wash and silicon wash.

### Core Customers

Focusing on kids in the age group between 2 to 14 years, the brand caters to families who believe in keeping their children fashionable and trendy.

### Product Portfolio

Little Street provides a wide range of t-shirts for boys with lots of features like colour sinker, washed and indigo. The brand uses fabrics such as Lycra and dry-fit to add value to its range.

### Latest Collection & Theme

The brand is manufacturing 2-thread and 3-thread fleece with bio-wash and silicon wash t-shirts available in round neck, full zipper, collar with full sleeves. It will also introduce pre-winter range in loop knit and Lycra t-shirts as well as sinker fabric.

This winter season, the brand will launch cod fabric in kids t-shirts with three button full sleeve and full zipper.

### New Product Range

This summer season, the brand is focused on designer t-shirts and textile bottoms.

### Primary Markets

Little street available in 17 states in India. This year, the brand will focus on further penetration in these states.

### Turnover

In the last fiscal year, the brand recorded a turnover of ₹7 crore. This year it is hopeful to grow by 40 percent.





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21<sup>st</sup> Garments Fair is again a continued effort by GMWA to provide a platform to interact with the trade and showcase the latest trend in Fashion. Since 1998 GMWA, Hyderabad has been providing an organized environment for the Garment Industry in the state of Telangana, Andhra Pradesh, Karnataka and Maharashtra. The members of this organization have benefitted immensely in conducting their business within the state and adjacent states also.

It is an opportunity for the manufacturers to display their goods, get mileage and it is also an opportunity for dealers to find out different manufacturer's variety of goods of their choice. It is a business boosting opportunity for dealers, distributors and manufacturers.

### **Highlights of Fair:**

- ◆ Free entry for all retailers on producing their shops visiting card.
- ◆ **Pick-up and drop facility will be provided to all retailers from Ramgopalpet, Koti and Divan Devdi**
- ◆ Promotion of Garment industry in the states of Telangana and Andhra Pradesh (Expecting more than 5000 retailers)
- ◆ Fair Venue is having different zones fully air conditioned. Signature Stalls - Brand Wagon - Gold Wing Premium - Gold Wing
- ◆ Few Rooms are available at Venue. Participant can avail room facilities at their own cost.

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# **ATHLEISURE:**

## **RIDING HIGH ON INNOVATION & TRENDS**

*Lately, the shift in consumer lifestyle towards sports and health have led to the birth of athleisure, where people want more flexibility in what they wear to gyms and to the streets. For India the adoption was fast due to a predominant youth population which is in tune with the latest developments in fashion owing to the Internet and digital connectivity. IMAGES Business of Fashion has all the details...*

**Rosy Sharma with inputs from Gurbir Singh Gulati**

When Bollywood actor Shilpa Shetty Kundra recently launched the holistic wellness app, Shilpa Shetty App – which features yoga and meditation programmes including daily nutrition charts – it was highly anticipated by fitness freaks all over India. Shilpa's fitness journey started a decade ago when she initiated awareness towards health and fitness with her yoga DVDs with her philosophy 'Swasth Raho Mast Raho'.

Browsing through the app, fitness enthusiasts will find that being 'fit and healthy' is not limited to just wellbeing and diet. One can find Shilpa sporting the choicest of relaxed wear and inspiring fashion fanatics as well. The actor has been the poster girl for fitness for long along with her contemporaries Kareena Kapoor Khan and Malaika Arora. They are embracing athleisure while doing yoga, in Pilates classes or while working out at the gym. As Abdon Lepcha, Creative Director, Fila India puts it: "Celebrities, influencers and social media are displaying athleisure as their lifestyle which has prompted fans to adopt their lifestyle. This has ushered in an athleisure cult, with activewear being worn on runways, streets, home, offices, airports as well as gyms."

India is rapidly converting into a sports and fitness conscious country which was not the case 5 to 10 years ago. The fact that India has started recognising and promoting sports other than cricket has given rise to sportsmen representing the country in international stages and becoming inspirations to the millions, who aspire to be like them, act like them, dress like them.

Lately, the shift in consumer lifestyle towards sports and health have led to the birth of athleisure, where people want more flexibility in what they wear to gyms and to the streets. For India the adoption was fast due to a predominant youth population which is in tune with the latest developments in fashion owing to the Internet and digital connectivity.

"With the burst of social media, influencer driven styles and trends have picked pace. Being a millennial-

### SUSTAINABILITY IN THE AGE OF FASHION

- As a company and a brand, Fila is highly focused on the sustainability quotient. The brand is currently working on reducing the usage of plastic packaging and ink dyes on packaging materials. They are incorporating sustainable improvements and changes in their production, manufacturing, sourcing and supply chain management. This is one step at a time to bring about a bigger change for better days ahead.
- For N1 Active, sustainability is a big conversation today with brands and consumers, with the latter demanding more transparency and honesty. Numero Uno too is doing its bit by continuously taking conscious steps to reduce environmental impact through investment in technology and product innovation. By introducing eco-friendly laundry processes they have reduced water consumption and use of harmful chemicals leading to zero affluent discharge and worker welfare. Waterless denims and recycled fabric denims form an important part of their denim collection today and contribute to a better environment

driven trend, athleisure being one of them. It can be about casual dressing for a day out, airport looks for a comfortable travel, athleisure as a trend is spotted across influencers and India's young generation looks out for convenience and comfort," states Rahul Vira, CEO, Skechers South Asia. "And there is nothing more important than comfort, and athleisure gives you clothing that's comfortable, relaxed and stylish versatile dressing. This has led to the evolution of the concept of athleisure."

Skechers had launched its apparel collection which has done really well in terms of generating revenue in the past 8 to 9 months. The brand is now planning a full-fledged launch of athleisure. "In India active lifestyle demands a whole new way of dressing. >





***“Athleisure is all about causal, comfort and easy to wear and the best part about this trend is that there is no specific age group”***

– **Abdon Lepcha**, Creative Director, Fila India



***“Trends are constantly changing, and people are instantly adapting to them as is the case with athleisure. The future of athleisure lies in the subtle fusion of comfort and style”***

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

In today’s era well-being is vital and Millennials are all about achievements and fulfilling passions and dreams, making every single day count. As sports, work and travel lines blur, the calling is about being agile, flexible and adaptable in both functionality and mindset. It’s the junction where fashion meets fitness,’ says Manjula Gandhi, Chief Product Officer, N1 Active.

“The second stage of development happened when this trend was taken up by fashion brands and they adopted athleisure staples for purely aesthetic reasons and ushering in athleisure as a fashion trend and not just a functional one,” explains Saurabh Singh, Head of Design Menswear, Being Human Clothing. “The rise in popularity of athleisure is due to the fact that it’s now not just a trend which is an offshoot of performance sportswear but also a fashion lifestyle which can be worn by anyone even if they are not into sports.”

Meanwhile, Abdon Lepcha asserts that athleisure served as antidote to traditional attire, the monarchy of denim and rules of workwear formals. “Comfort and easy to wear (anywhere)



have been the main factors that has propelled this trend,” he says.

### **Dynamics: The Market & Consumers**

The athleisure trend is primarily aimed at a youth clientele, but it is being increasingly observed that middle aged consumers – who are into health and wellness and enjoy both sports and fashion – are also purchasing smart sportswear garments. “Athleisure is all about causal, comfort and easy to wear and the best part about this trend is that there is no specific age group,” says Abdon Lepcha.

### **BRAND CAPITALISE ON TREND ATHLEISURE**

- According to fashion analysts, the athleisure trend started with people wearing sportswear clothing outside of gyms, sports arena and onto streets and at work.
- All mainstream sportswear brands have launched lines which are lifestyle driven and even casualwear brands and retailers have forayed into athleisure by launching their own collections.
- Some formal wear brands are experimenting with this trend as well, by trying to merge tailored clothes with athleisure.
- Sportswear as well as casualwear fashion brands are promoting their products by highlighting their performance properties whether inherent or engineered.
- According to Rahul Vira, CEO, Skechers South Asia, “Sportswear brands are expanding with new products lines to fulfill the need of consumers and leveraging the trend. International and home-grown apparel companies are increasingly entering the segment.”
- As per Manjula Gandhi, Chief Product Officer, N1 Active, a mix of cultural, social and fashion factors led to the birth of athleisure and these forces are still driving it. “The health and wellness trend shows no sign of fading and this fits right in with the athleisure trend which is not just about looking good while working out but feeling good too.”
- Saurabh Singh, Head of Design Menswear, Being Human Clothing says that the clothes and footwear which now make up athleisure need to have performance built into them.





**“Athleisure needs to again look at its roots of performance sportswear where all the innovations happened. One key point will be adapting to sustainability in a big way”**

**– Saurabh Singh,**  
Head of Design-Menswear,  
Being Human Clothing

“Most sports athletes who have represented India on an international stage have been from Tier II or III cities. This has ignited a passion and enthusiasm among the people who aspire to be like them. They follow fashion through their sporting heroes, favourite movie stars or international celebrities through social media platforms such as Facebook, Instagram, etc., and want to look and dress like them. Audiences in Tier II or III cities want fashion trends at affordable prices. They want to wear brands while taking selfies. Runway fashion may not be directly accessible to them and hence they rely on sportswear brands like us in India to cater to their needs and demands,” explains Abdon Lepcha.

**Innovation in Collections**

The evolved consumers of today demand variety and at the same time look for innovative designs and new functionality. Hence, a focused approach is essential to capitalising on the athleisure market.

Skechers India promotes colours that are favoured for activewear products. Later this year, the brand is all set to introduce graphics and stripes as these are dominating trends.

Fila has always intertwined fashion and culture and uses its history and heritage to add to the nostalgic fashion quotient. With its recent collections, the



Being Human Clothing

“People don’t want to wear baggy sweatpants anymore and they are happy to invest good money in high-end striped joggers, crop tops, bombers, etc. Athleisure wear is versatile and super comfortable and that is why people are adapting to this trend at a high pace,” states Manjula Gandhi.

“India’s young generation wants convenience and in one outfit, Athleisure wear gives it all – convenience and style whatever the occasion or place,” says Rahul Vira.

And when it comes to consumption of fashion trends, Tier II and III market are no less. As Manjula Gandhi puts it: **“Fashion awareness and adoption is fast increasing in these interior markets with youth driving the demand for such trends. They are well connected with global fashion due to easy Internet access, hyper connectivity and presence on various social media platforms and aspire to follow their favourite celebrity icons from Bollywood or sports industry, all of whom are sporting this trend today. Since these Tier II and III markets constitute a large part of our consumer base, penetration of such trends to these sectors will surely give a huge impetus to the business.”**



N1 Active



**“People don’t want to wear baggy sweatpants anymore and they are happy to invest good money in high-end striped joggers, crop tops, bombers, etc.”**

**– Manjula Gandhi,**  
Chief Product Officer, N1 Active





**Rishabh Oswal**, Founder, Rock It

### **What factors have led to the popularity and growth of athleisure in India?**

The growing acceptance of fitness as a way of life has led to the normalisation of athleisure as a part of fashion. Percolating from the Parisian ramps into the attire preferences of India, athleisure has taken up the world by storm. As for India, the onset of a fitness revolution, coupled up with stars wearing athleisure in their day-to-day activities, have contributed to its popularity.

### **How have sportswear brands capitalised on this trend? Are general fashion brands also taking inspiration from the growth of athleisure?**

Today's gym-going generation has been the catalyst for this change of perception – mobilising the general taste in a particular direction. Sportswear brands have taken notice of these growing trends and from in-depth analysis, have culled to the best designs to choose from. General fashion brands, meanwhile, have assimilated the best of these trends into their line. The jogger pant design is the biggest example of how far athleisure has come, being inculcated into denim, tops and even bags.

### **Define the clientele for athleisure. How is the Indian consumer adapting to this trend?**

Initially considered to be made up of only youth and health fanatics, the clientele of athleisure has expanded to a wide variety of people, to the extent that it caters to the whole family now. Since athleisure is relevant to everyone, it has found significance amongst people of all classes. Indian consumers are taking it to the trend with gusto owing to its universal appeal and relevance.

### **What is the future of athleisure and what will be the key opportunities moving ahead?**

As India moves towards the path of complete health, more people are taking up the cause of fitness into their regular life routine. More people are taking up activities that would challenge both their bodies as well as their minds. This pathbreaking development has ensured that athleisure is set to see a victorious tenure through the years to come.

### **SKECHERS: ATHLEISURE MUST HAVES**

- **Comfy Leggings:** Black is a staple, but feel free to add some colored leggings to your collection as well
- **High-Impact Sports Bra:** Although your movement levels range depending on your daily activity, a supportive sports bra is a must
- **Versatile Gym/Running Shoes:** Get a pair of shoes that you'd wear in and out of the physical activity zone
- **Basic Layering Tanks:** Do buy a couple of cotton tank tops to throw on either alone or with a jacket
- **Athletic Jacket:** Nothing screams athleisure more than a zip-up jacket. Ensure that you have one (or two) in your closet to throw on during all seasons.



Skechers store

brand has given athleisure look a retro feel from the 70s and 80s including inspired track jackets and chunky dad sneakers.

With a collection designed for active men and women to lead athleisure movement and aid this new way of being, N1 Active uses fabrics that are comfortable and can stretch for flexible movement. The brand aims to create meaningful relevant products for Millennials with cottons with tech finishes and functional denim with excellent shape retention properties.

Being Human Clothing – which claims to be the pioneer in launching athleisure in India during its Autumn-



**Devender Gupta**, Director, Reforce

### Define the clientele for athleisure. How is the Indian consumer adapting to this trend?

Gone are the days when health and fitness were confined to youth. Now, every age group has become health conscious be it the middle-aged or elderly. Therefore, there is no specific clientele for athleisure. Also, the Indian consumer is quite receptive to this ongoing fashion fad. With many workplaces starting to adopt a semi-formal trend, athleisure is now being accepted in offices as well. Moreover, Hollywood and Bollywood celebs have also made the trend global by sporting shoes and track pants during outings.

### How crucial are Tier II and III cities for the growth of the athleisure business in India?

Today, almost every brand is expanding their business in Tier II and III cities to strengthen their presence across the country. It has also been observed



that Tier II and III cities are growing almost three to four percent faster than Tier I cities without the added problems that metros face, so it's easy to set up a business there.

### Which are the fastest selling products within this category for both men and women?

Menswear comprises the biggest share of the Indian sportswear market followed by women's and kids' segments. In the recent past, the women's market is progressively showing positive signs of accelerated growth. Womenswear

is the fastest growing segment in the sportswear industry in India now – both for the industry and for Reforce. Earlier, it was highly underpenetrated, but now it's a booming segment. The men's segment, meanwhile, continues to grow at a steady pace of 40 percent.

Products which are selling fast in men's segment include sports tee, trackpants and training shorts, while in the women's category the fastest selling products are shoes, tights, track pants and sports tops.

### What is the future of athleisure and what will be the key opportunities moving ahead?

Athleisure is an aesthetic blend of sports and fashion industry. It came in vogue in the last decade. With more brands, focusing on creating leisure wear these days, the trend of athleisure wear is going to stay for a longer period of time. Today, fashion is all about comfort. And, athleisure also has the added advantage of providing a chic look. Athleisure has become a way of life for many of its target buyers.

Winter 2014/15 collection – focuses primarily on its denim and athleisure lines. For the brand, athleisure has always been seen from a fashion perspective rather than from comfort, utility or functionality point of view.

While, key products in athleisure include track pants, shorts, leggings, hoodies, t-shirts and sneakers, power leggings are favourites among women. They are functional, easy to wear and practically meeting the demands of an increasingly busy lifestyle, without compromising on style and aesthetics. Until today leggings continue to rule the scenario purely due to its functionality and ease of pairing and coordinating with other apparel and looks, be it casual, street, formal or ethnic. For men too it is the relaxed yet trendy look of jogger jeans, having utilitarian looks, a cross between street and casual wear bordering sportswear due to the hybrid knit denim

combining aesthetics of denim and comfort of knitted stretchable fabric, styled with elasticated/drawstring waistband, knee-darts and tapered cropped hems to give the look and feel of everyday luxury.

### The Future is Athleisure

Athleisure is here to stay. The trend is a refreshing change from formal shirts and even casual denims that had been dominating the market for a long time now. "Moving ahead, athleisure needs to again look at its roots of performance sportswear where all the innovations happened. One key point will be adapting to sustainability in a big way. Again, many big brands have already made a move in this direction, and with good results," states Saurabh Singh.

Manjula Gandhi adds to this saying, "Performance properties, hybridised utilitarian looks that cross

environments and offer multiple wearing options are becoming increasingly relevant for work to workout, airport to office and travel to street transitions, and for men and women equally. Young consumers are driving this new aesthetic within sports, street and casual markets. Brands are realising this and incorporating comfort and performance properties, creating looks for everyday luxury."

"Trends are constantly changing, and people are instantly adapting to them as is the case with athleisure. The future of athleisure lies in the subtle fusion of comfort and style. The sole purpose of sportswear is to provide durability and performance. However, as times change people not only wear athleisure while they are working out, but also to work," concludes Rahul Vira.



# TAB91

## REDEFINING THE CASUAL T-SHIRTS' MARKET

Vishal Jain, Founder and CEO, TAB91 talks to IMAGES Business of Fashion and shares insights on the t-shirts market in India and the factors that have led to the acceptance and the rising demand...

### IMAGES Business of Fashion

#### Retail Reach (as on 31st December 2018)

- **MBOs:** 1,350
- **SISs:** 60
- **Indian Cities Currently Present In:** In all leading metros & non-metros
- **International Presence:** Bangladesh and Nepal

#### Challenges to be addressed:

- Imitation of branded t-shirts
- Shortage of skilled labour
- Long credit period by retailers
- Unreasonable SOR policy



An emerging casual wear brand, Tab91 was launched in 2013 by its founder, Vishal Jain. The brand redefined the casual wear market by introducing extremely trendy, young and vibrant collection which became an instant hit the consumers. Built on a simple philosophy of 3Fs—Fabric, Fit & Finish—the brand strives to deliver only the best to its customers. The brand offers a wide assortment of products for men and women in a variety of fabrics, silhouettes and fits.

As per the brand's custodians, t-shirts are the most preferred product and among the highest selling segments within the brand. Priced between ₹399 to ₹799 for round neck t-shirts and ₹599 to ₹999 for polo t-shirts. While the premium range is price between ₹2,599 to ₹5,999.

Aimed at the youth, the brand offers basic t-shirts, round neck chest print t-shirts, PK Polo, mercerized PK Polo, all-over print t-shirts and linen kurta. Their newly launched plotter print tees are receiving excellent response from the market.

“One of the main reasons behind the popularity of t-shirts today is the young buyers who keep many aspects in mind before purchasing a garment such as

colour, design, logo, price, etc., allow their mind to take over the t-shirts as their personality, style and attitude,” states Jain.

“Another reason for the rising acceptance of t-shirts is due it's comfort, ease care properties, affordability, easy design options and desire to look casual as well as the consumers' distinct shift from formal clothing to casual and trendy attire,” he adds.

Fabrics like combat cotton, organic cotton, Pima cotton and slub cotton are gaining popularity in manufacturing t-shirts. The Indian fashion market is also witnessing huge demand for polyester and cotton blend t-shirts mainly for yoga, gym and athleisure wear. Similarly, 3D printing technology is in much demand. Jain also believes that e-commerce has helped manufacturers like them display their products to a large chunk of audience, which they are not able to reach due to location constraints. However, he feels that selling premium t-shirts through e-commerce platform has been difficult task, where the online consumers are in constant look-out for some kind of offers/discounts. “Moreover the aspect of customer loyalty is missing,” he concludes.

×

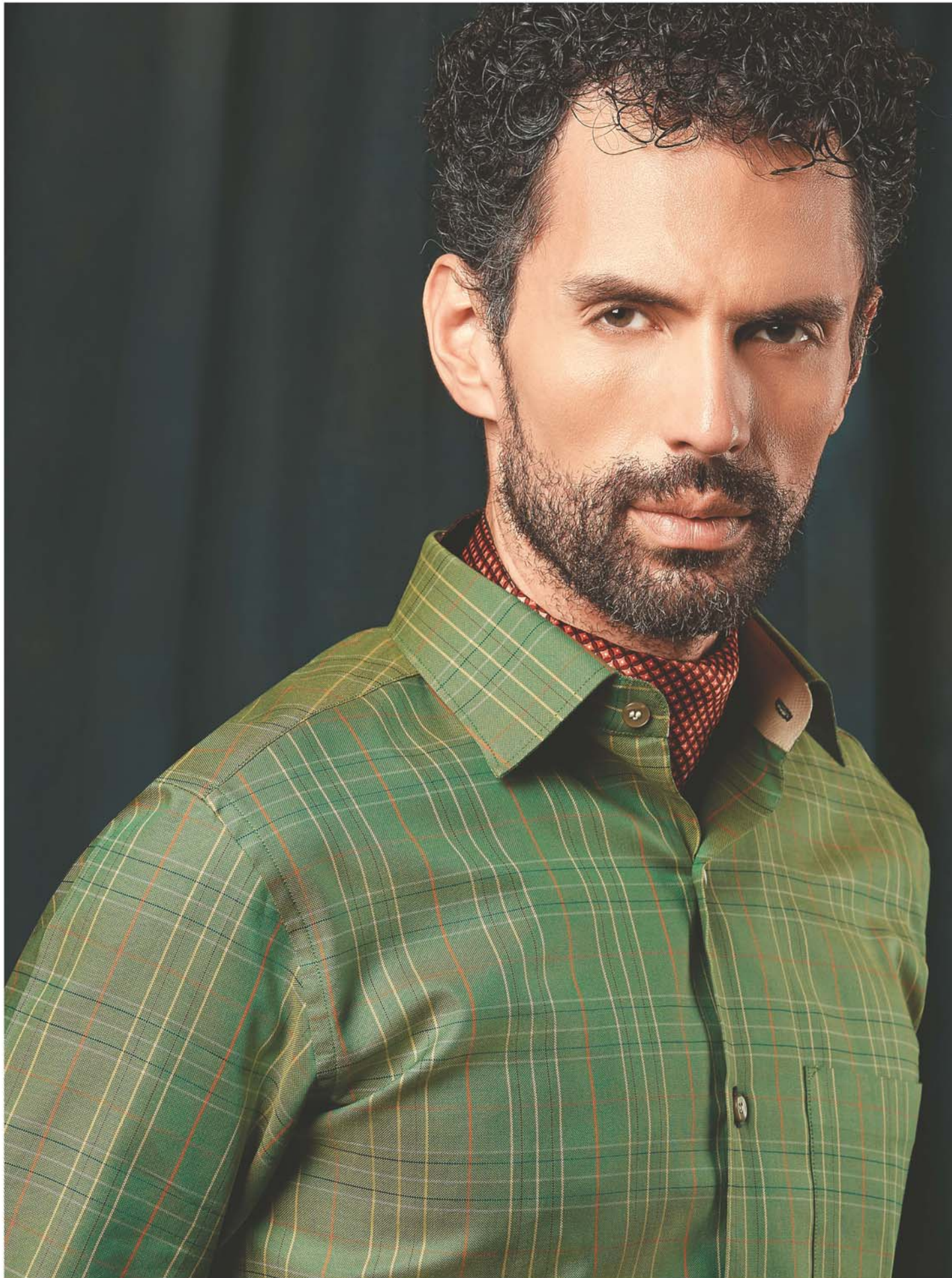




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14, 15 & 16 - August 2019

CHENNAI TRADE CENTRE  
Nandambakkam, Chennai.



# DUKE'S IN VOGUE DENIM COLLECTION 2019

Duke's cool and edgy style is embodied throughout its latest collection, featuring fun that blends high functionality with bold fashion statements...

**IMAGES Business of Fashion**

Inspired by the fashion culture of South East Asian Islands, renowned knitwear brand, Duke has launched an impressive collection of denim range in various styles, colours and sizes. The Islands' climate defines of what an ideal summer fashion should be like, which transcends in the brand's latest collection.

The combination of durability and versatility are key elements of the new denim collection. from regular to skinny, straight and slim-fit, either light or heavy washed. The styles comes from today's latest trends such as narrow bottom, designer denims, washed, regular, comfort, golf ball wash, scrapping, damaging, brushing, enzyme wash, etc. Hence, trendy casual dressing with fashion sense is the main mantra of Duke Denim Collection.

Duke is known for its standardised fits, superior quality, wide range and





## NEW MERCERISED COTTON T-SHIRTS COLLECTION 2019

Duke presents an all new gas Mercerised T-Shirts range made from 100 percent combed fine Egyptian cotton-2/60s double twisted yarn and crafted with finest gauge. This exclusive range of t-shirts is a blend of total comfort, feather feel, long lasting colours and lustrous fabric.

Made with fully computerized imported knitting machines, where the fabric and undergo gassing and mercerised process to enhance sweat absorbing extra light super soft feel and sheen. The mercerised 2-Ply cotton t-shirts and classic stitching make these a best option for a brunch. Style it with acid washed denim jeans and suede loafers of Duke for a casual look with an edge.

The whole range of mercerised t-shirts starts from ₹1,249 and is available on all Duke exclusive showrooms, leading multi brand outlets and on online shopping portals.

## DUKE'S LOAFERS & MOCCASINS

Duke introduces a high profile and extensive collection of loafers and moccasins, inspired by the defining trends of international fashion, featuring numerous designs, colors and variety. Made from the exquisite high quality material, these footwears are the companions of people with cool style and offer more formal, gentlemanly look as well as relaxed fashion and not only exhibit in-vogue trends but serve as a classic pair of semi-formal shoes.

With its cool and laidback design, the footwears are easy to pair with any casual outfits. From sleek-looking to party-material, the collection is conceived for men with high fashion sensibilities, as well as those who want stylish footwear that is versatile enough to blend in with their everyday routine.



‘fashion-right’ styles in its segment, making it the trusted brand amongst consumers. Keeping in mind the latest trends, our whole collection caters to men with panache and attitude. Made from the finest of fabrics sourced from world-class mills, the brand defines sophisticated essence of style, fashion and finesse.

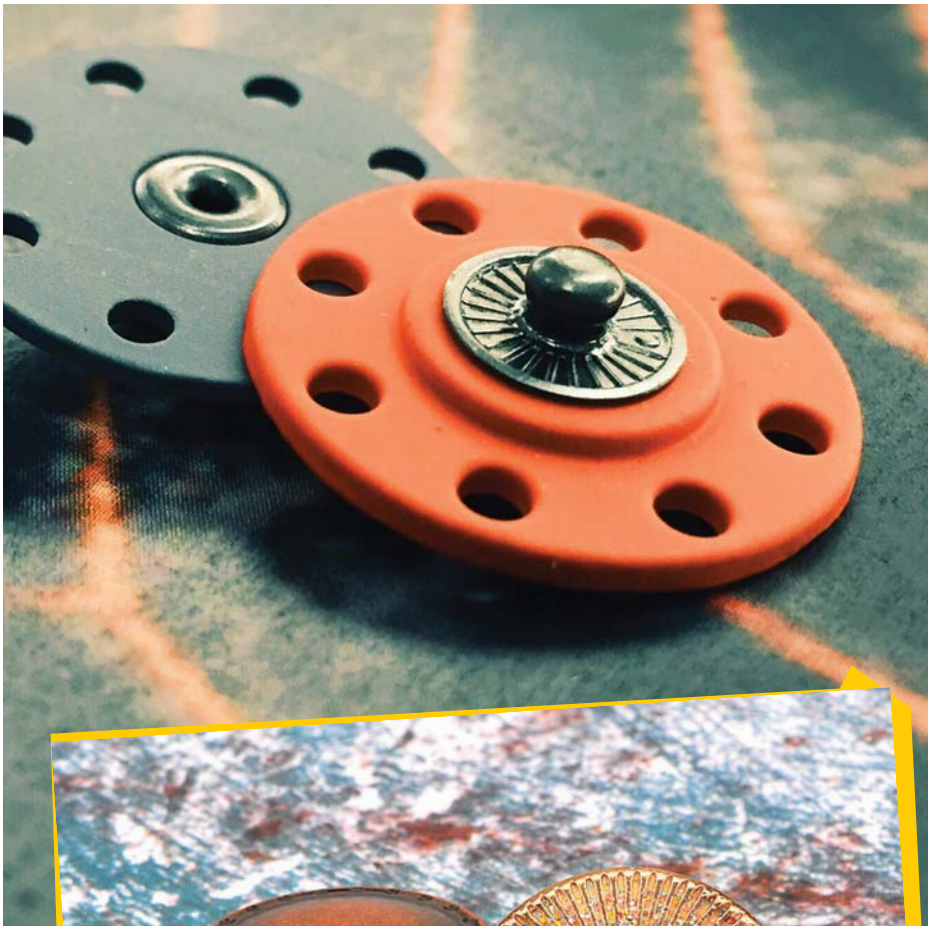
Kuntal Raj Jain, Director- Duke Fashions (I) Ltd says, “Our target audience is today’s youth who is looking for trendy and stylish range that is in sync with international designs, fashions and quality. With the needs of the fashion industry changing

constantly, we are always looking towards the product that can deliver a high degree of style and quality. We see it as our duty to provide our customers the inspiration they need to look and feel confident.”

### Retail Reach

Duke has a strong marketing network of more than 4,000 multi brand outlets and more than 360 exclusive stores across major cities in India. Also, the products are also exclusively placed at big chain stores and on online shopping portals.





# D&G:

## A LEADING GARMENT ACCESSORIES SOLUTION PROVIDER

Sweta Saraff, CEO, D&G talks to IMAGES Business of Fashion and shares insights on what makes D&G a reputed and trusted name in the garment accessories market...

**IMAGES Business of Fashion**

Committed to designing, manufacturing and wholesaling of high quality garment accessories, D&G Global Holdings Ltd. (D&G) along with its subsidiaries is one of the most accomplished companies in the industry. Since 1988, D&G has successfully laid a solid foundation and have consistently scaled new heights. With a reputable brand name, distinguished business acumen, strong R&D capability, extensive sales network spanning across 50 countries worldwide and all-inclusive after-sales service, D&G has firmly established itself as a leading garment accessories solution provider.

D&G offers a wide range of garment accessories such as jeans buttons, snap buttons, jeans rivets, eyelets, metal plates, die-casting buttons, fashion buttons, handbag suspender clips, dress hooks, metal buckles and fasteners.

Currently exporting 80 percent of its products to over 50 countries worldwide, in India D&G has a strong hold in all major garment centric cities. However, due to the shift in manufacturing industries, it is moving towards Ahmedabad, Ludhiana, Pune, etc. "After holding a strong presence in the export sector, it's time to take over the domestic market," says Sweta Saraff, CEO, D&G.



***“With the growing online culture, the customers have better accessibility to a plethora of garments and accessories. This has in turn increased their awareness of the latest fashion and brands. Further, the ease of ordering and flexible return policies have changed the shopping pattern altogether. There is a huge uplift in the demand for latest trends,”***

**-Sweta Saraff,  
CEO, D&G**

***D&G provide innovative automated production line, state-of-art technology together with an efficient labour force. The entire processes from design, procurement, mould development, carving, injection moulding, die-casting to assembling are all accomplish within the factory.***

### **Manufacturing & Production**

D&G provide innovative automated production line, state-of-art technology together with an efficient labour force. The entire processes from design, procurement, mould development, carving, injection moulding, die-casting to assembling are all accomplish within the factory. This not only maximizes production flexibilities and minimises costs, but also the product quality is ensured to meet customers' needs.

With the emerging demand for quality buttons, highly advanced equipment were invested to expand the production capacity without compromising in quality. It's R&D team continues to develop unmatched manufacturing techniques, innovative designs and ideas each year, so as to provide a comprehensive OEM services to meet customers' requirements.

**“In the current scenario of Indian market, we have developed an economic range of products catering to all segments of the industry while retaining the original D&G DNA and complying to our quality standards. We are looking forward to serve as a one-stop-solution for the garment industry,”** explains Sweta. **“With price sensitivity at its peak in the market, D&G introduced semi-hollow buttons and stainless steel shanks as a solution. Also to cope up with the modern fashion trends new colours and finishes are also introduced.”**

### **Challenges & Opportunities**

Sweta further says, “Even though we are the leaders in quality and on-time delivery, the lack of awareness towards quality trims in the garment amongst the local manufacturer is dismal. And, the fast fashion culture in the fashion industry has made the market highly price competitive.” With its newly developed range, D&G anticipate a great opportunity in capturing the economy brands, which are generating huge volumes in present times.

According to Sweta, the future of the fashion industry looks bright. “With the growing online culture, the customers have better accessibility to a plethora of garments and accessories. This has in turn increased their awareness of the latest fashion and brands. Further, the ease of ordering and flexible return policies have changed the shopping pattern altogether. There is a huge uplift in the demand for latest trends,” she concludes.





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# ***BLUE TO GREEN***

## ***A RACE TOWARDS SUSTAINABLE DENIM PRODUCTION***

*IMAGES Business of Fashion showcases some of India's most prominent denim brands that are making waves with their conscious efforts to improve and change the standard lifecycle of denim...*

### **IMAGES Business of Fashion**

**V**ery few fibers have enjoyed the stellar popularity of denims. From the ranches to evolving into a symbol of youth rebellion to being the forerunner of the global casual wear revolution, denim has traversed an interesting trajectory. Since the early 1900s the garment has been continually experimented and subjected to bountiful of styles, cuts fits, silhouette, etc. The only sustaining factor is its burgeoning dominance over wardrobes across the circumference of the globe, irrespective of gender and age.

But it's only lately that the sustainability concerns of producing this beloved blue fabric has come to the forefront. Denim production typically involves use of dangerous chemicals to grow conventional cotton and creates millions of gallons of waste water in the dyeing process. A study by Levi Strauss & Co found that producing one pair of Levi jeans requires a staggering 3,781 litres of water. With 10 percent of the world's population currently deprived of access to clean water, these statistics put an alarming perspective on our own denim purchases.



Numero Uno



are taking the road to sustainable production of late, committing themselves to both the people and the planet. Levi's' Water<Less™ Jeans, G-Star's The Most Sustainable Jeans in the World, Guess' Eco Collection, Nudie Jeans' 100 percent Organic Cotton denims, etc., are just a few examples of the many sustainable initiatives being followed by some of the leading brands across the globe.

Water consumption isn't the only ethical concern with denim. While cotton takes up 2.4 percent agricultural land, it accounts for more than 11 percent of the global pesticide use. In addition to the pesticides used in cotton production, harmful chemicals may also be used extensively in denim's dyeing process. All too often, the jeans are sewn in factories where employees work and live in substandard conditions.

All in all, denim is a 'dirty business' with severe social and environmental consequences. Considering this, an increasing number of denim brands

IMAGES Business of Fashion showcases some of India's most prominent denim brands that are making waves with their conscious efforts to improve and change the standard lifecycle of denim.

### PEPE JEANS

Pepe Jeans believes that the future of denims is sustainable. The brand has been working on addressing its environmental impact for the last few years on a global level. Keeping in mind the need for sustainable clothing, Pepe Jeans introduced a range of environmentally conscious denims including True-Fresh And Tru-Blu in 2018.

The True-Fresh range of denim uses a revolutionary technology that neutralizes odour causing bacteria on contact, in turn keeping denims fresh for longer. Denims treated with this technology can be worn more often without washing. Even after days of continuous use, the denim retains its

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***Producing one pair of Levi jeans requires a staggering 3,781 litres of water. With 10 percent of the world's population currently deprived of access to clean water, these statistics put an alarming perspective on our own denim purchases.***

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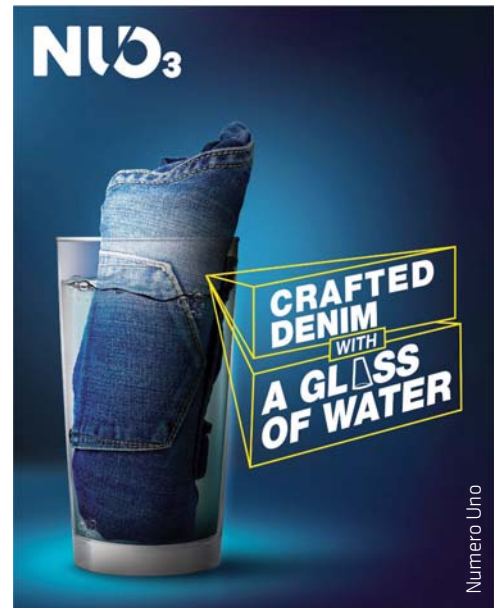
freshness. Tru-Blu is a pioneering denim collection with zero chemical washes, resulting in radical reduction of water consumption. This sustainable production process includes natural ozone gas treatments and sophisticated new three-dimensional lasers to create astonishing depths of indigo contrasts on jeans.

### **SPYKAR**

Spykar focuses on ethical sourcing and sustainable developments as sustainability is a prime concern of the company. The brand also strives to lower the consumption of natural resources like fuel for energy and water. The chemicals used are bio-degradable and non-hazardous.

Spykar's denims are produced in a government approved facility. All denims that Spykar rolls out are made using environmentally responsible processes right from recycled cotton, washes that require less water to technologically advance dry processes such as laser techniques. The brand uses solar power and relies heavily on latest technology like laser machines, ozone wash technology and cloud wash, that has aided the brand to lower the material to liquid ratio considerably.

Additionally, Spykar is among the few brands that refrains from using pumice stone while washing, to not disturbing the depleting pumice belt. The brand also has a fully functional water treatment plant which ensures no polluted water is released into any natural water source. The water is re-treated/purified and re-used for washing.



*In 2017, Numero Uno collaborated with Jeanologia of Spain and created a sustainable collection of denims called One Glass Water Denims, wherein only one glass of water is consumed during the washing/finishing process of the denim.*

### **BEING HUMAN**

Being Human's commitment to sustainability starts with their sourcing stage. The brand sources fabrics from mills that are known for their concern for the planet and its people. Moreover, it utilises cutting edge technology like laser and ozone to help it in reducing the use of harmful chemicals and wastage of water.

### **NUMERO UNO**

For Numero Uno sustainability is not just about making a contained range and labeling it as conscious or sustainable. Rather, it is about inciting a real change at every stage of the product lifecycle – from manufacturing to washing and finishing, delivery to recycling and disposal.

Numero Uno has taken real and significant steps towards setting up an ethical and sustainable ecosystem from the beginning. The brand adheres to eco-friendly processes and technology with emphasis on low water consumption, restricted use of hazardous chemicals and good working conditions for its workforce. Adoption of effective technology like

extensive use of laser machines instead of handscraping for benefit of workers' health, use of E-Soft, Ozone/G2, Cold-Eco Dyeing, etc., have helped the brand in reducing water and hazardous chemical consumption.

Besides this rain-water harvesting to replenish ground water, use of solar water-heaters, and energy-efficient lights in the factory also help in reducing burden on natural resources. Numero Uno has also installed an ETP which cleans water and operates on Zero Liquid Discharge technology such that all the water used in washing process is completely recycled making it a truly eco-conscious and responsible brand.

*In 2017, Numero Uno also collaborated with Jeanologia of Spain and created a sustainable collection of denims called One Glass Water Denims, wherein only one glass of water is consumed during the washing/finishing process of the denim. Jeanologia is the world leader in sustainable and efficient finishing technologies for textile, coding, packaging, and other industrial applications.*





# DENIM TRENDS 2019

Experts tell us about denim trends that are expected to enjoy the most popularity in the months to come in India . . .

**F**ashion trends come and go, but denim jeans are one item of clothing that will always be a staple in everyone’s closet. It’s only the particular style of denim that changes year after year, some decades seeing a rise in baggy jeans, others full of tight, low-rise moments.

In India things were a little different – denim pretty much stuck to its traditional straight/regular fit in staple colors like blacks and blues for quite a better part of its journey. But in the recent years, as the penetration of denim proliferated rapidly, it pretty much became the trouser of choice

of the country and preferences of the country’s denim aficionados have exhibited signs of drastic change. Today, the market is replete with myriad choices in terms of fabric, fits, washes, designs and colors.

In an attempt to map the trending preferences of the denim market in India, IMAGES Business of Fashion interviewed a few of the most influential figures of the Indian denim wear industry who expressed their respective views on the styles that emerging brands and retailers can bet on for the forth coming season.





- Vinit Doshi,  
Head - Product, Sourcing & Retail Planning, Celio\*

**Current trends in jeans, in terms of Design, Wash, Fits.**

**Design-** Tape details, joggers denim, etc.,  
**Washes-** Colored denims and fashion washes.  
**Fits-** Slim, skinny and straight slim.

**Current international denim trends and innovations.**

New blends, multi-dimensional stretch, soft touch denims are the latest fads in the international market.



-Pragati Srivastava,  
General Manager & Brand Head - Parx

**Design -** Knitted, structured denim, sporty and street smart looks with high usage of trims, colored weft and overdyed fabrics. Stretch, sustainable fabrics with clean look and minimal styling in basic denim.  
**Washes -** Heavy washing, distressed and vintage look. Clean look and eco-friendly washes in basic denim.  
**Fit -** Skinny fit is the most preferred in fashion denim along with cropped length. In basic denim Slim Straight is trending.

Sustainable production with less water and energy. Stone free industrial washing, controlled shrinkage, shape retention and fabric dyeing compatible with faster wash down.



-Manu Sharma,  
Business Head, Replay

Boot cuts and straight fits are very prominent in the current season. Minimalistic and clean denims are in vogue with more detailing towards the hem. The upcoming season will see more straight fits with distressed effects on them.

Focus on jeans which enhance movement are trending globally. Innovations are centered around eco-friendly production techniques and materials.



-Amit Dhelia,  
Proprietor, Courtyard

**Design-** 5 pocket, ribbon, longer high-rise, straight-leg, hem details, embroidered denim.  
**Wash-** Pale gray, dark washes, vintage distressing, brilliant blue, vivid blue, destroyed washes, cloudy effect.  
**Fits-** Higher-rise, cropped, straight silhouette, classic straight leg, low-slung denim.

Lasered logos and lettering, destroyed washes and anti-fashion shapes with tattoo artwork, sub culture prints and detailing. Convertible styles, gathered hems and rope lacing. Dense glitter, gold foil and tickertape ribbon.



-Dhiraj Ladha,  
Director, Sherif

**Design-** Simple and clean designs.  
**Washes-** Mute and clean washes that speaks for itself.  
**Fits-** Classic and skinny.

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## 'Innovation & Sustainability Will Drive Market the Denim Segment in India'

*Launched in 1998, Lawman Pg3 is targeted at customers between the ages of 18 to 28 years. Positioned as a brand for young executives, it primarily caters to the corporate executives...*

### IMAGES Business of Fashion

IMAGES Business of Fashion

One of the four iconic brands from the Kewal Kiran Clothing company, LawmanPg3 is for those with a unique sense of style and a refreshing new outlook towards life. The brand is known for redefining corporate fashion in India in the coolest possible way. With fresh colours, trendy cuts, and patterns, here's where you will find the perfect blend of style and comfort, like nowhere else.

Launched in 1998, Lawman Pg3 is targeted at customers between the ages of 18 to 28 years. Positioned as a brand for young executives, it primarily caters to the corporate executives. The brand offers classic range of apparel for the modern, uber-cool man. In a tête-à-tête with **Vikas P Jain, Director, LawmanPg3**, IMAGES Business of Fashion gets the inside scoop on styles and trends dominating the denim wear market in India.



A Showcase of The Season's Collection...



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## EXCERPTS FROM THE INTERVIEW...

### Tell us about the current looks trending in the jeans segment?

Well, in terms of design, ripped jeans and embroidered denims are in trend. If I talk about washes then laser wash, smoke wash and cloud wash are very prominent right now. In fits, the regular fit, slim fit, skinny, stretch and comfort fit are prevalent in the market.

### Tell us the trends and innovations in vogue in the denim segment in the international market right now?

The international trends in the denim segment focusses on fabric blends, athleisure trend, two toned denim wear, etc. At present, innovations that the international market is working around are new dyeing technologies to save water, sustainable denim wear, anti-microbial jeans, yoga jeans and stain repellent jeans. Most of these innovations in denims are already underway at Kewal Kiran Clothing. If we keep up with such innovations, denim wear has a very bright future.

*The popular fabrics with regards to innovative denim blends are sustainable fabrics and dual toned fabrics. New dyeing technology that saves water, eco-friendly denim wear and super soft fabrics, contrasting colours, among others, are also very popular.*

### Jeans have always been blue or black but colors like red, green are now catching up. How is the Indian market responding to these new colours?

The Indian denim market is becoming more experimental with regards to new innovations in fabrics and dyes. Women's denim wear, which is mainly dominated by latest international fashion trends, responds well to dynamic colours. The market is positively responding to this trend as well as it brings out the experimentation side of the segment. It may be a fad in the long run as change is the nature of fashion but for now it is here to stay for the time being.

### What are the popular fabric innovative denim blends which can

### be seen in the market?

The popular fabrics with regards to innovative denim blends are sustainable fabrics and dual toned fabrics. New dyeing technology that saves water, eco-friendly denim wear and super soft fabrics, contrasting colours, among others, are also very popular.

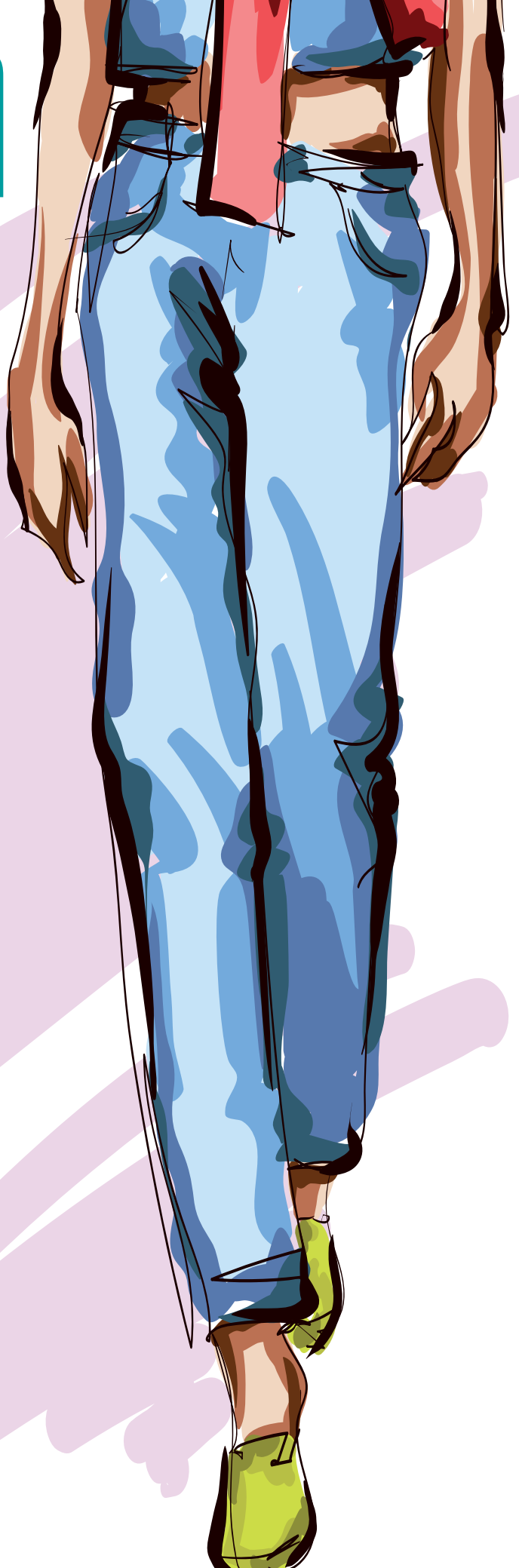
### Does the Indian market follow international trends?

Fast changing fashion scenarios across the world have levelled the competition for players across the world. The story is no longer about Indian brands following their global peers, rather it is about being instrumental in taking a leap with regards to innovations catering to domestic markets and understanding evolving consumers.



# FASHION

*CREATION*





# CORNELIANI

## LAUNCHES LOUNGEWEAR EDITION FOR MEN

**G**lobal menswear brand, Corneliani has launched a new loungewear edition for its discerning male consumers. The collection comprises polo t-shirts in tropical prints, running shoes and bags.

A nineties' feel gets a contemporary makeover in the feather weight garments-dyed jackets embellished with precious colour effects, while the urban-chic bombers are crafted from washed silk.

The collection's fresh and relaxed feel is exalted by the colour palette inspired by natural elements, in particular flora and fruits motifs. It includes powdery

tones of indigo, periwinkle blue, hydrangea, orchid and apricot, matched with neutral hues of gray, oil green and tobacco.

### The Collection

The polos are a complete reflector of luxury loungewear for men sewn according to the meticulous experience of Made in Italy knitwear. An elegant garment in all circumstances, imagined for a modern wardrobe where the boundaries between casual and formal fade away. Fabricated in the highest quality light cotton, it goes through innovative fiber processing procedures that give it high freshness and anti-crease properties. The

bombers and summer jackets are designed to be worn at any time of the day for impeccable everyday elegance. A game of contrasts between smooth surfaces and the suede effect, designed for a wardrobe with a modern attitude that rests on the best sartorial tradition.

Corneliani combines two worlds, apparently different, in the range of sneakers coalescing the nature of sportswear innovation and Made in Italy craftsmanship. These shoes are crafted in noble leathers and highly performing technical materials, with an extremely light sole ensuring comfort and cushioning on any type of ground.



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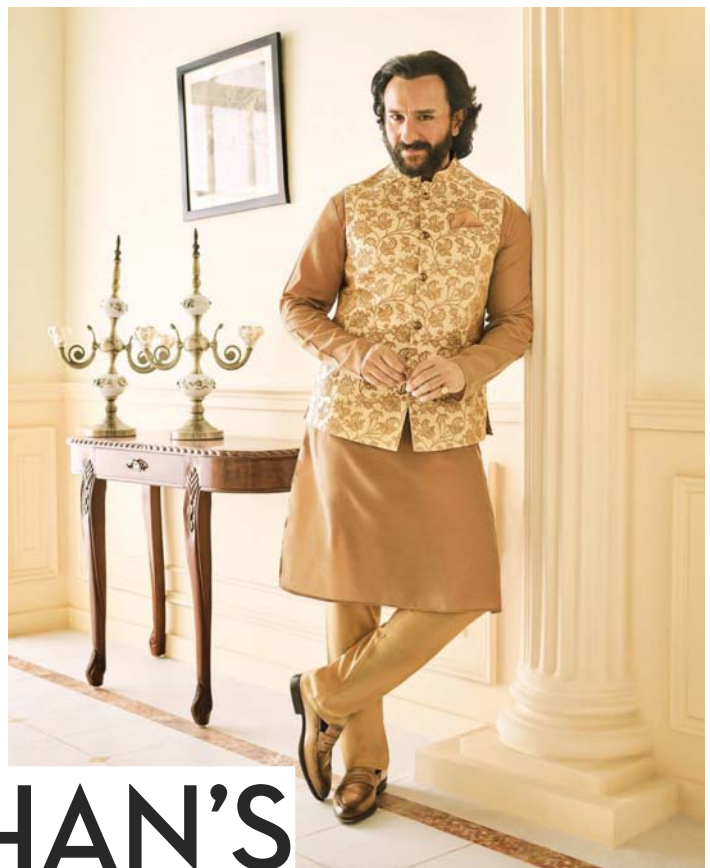
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# SAIF ALI KHAN'S

## 'HOUSE OF PATAUDI'

## LAUNCHES PALACE INSPIRED COLLECTION

### IMAGES Business of Fashion

**H**ouse of Pataudi, co-owned by Saif Ali Khan, Myntra and Exceed Entertainment launched its latest collection that is inspired by the Pataudi Palace. The Summer Palace Collection brings alive the ornate beauty and grandeur of the Pataudi Palace. The collection has been designed keeping in mind the festive flavour and trends of the season. It comprises everyday Indian wear conceptualised as Firdaus – festive with royal charm, Noor and Riwayat– for classic Indian weddings.

“The palace is an architectural marvel for many but for me, its home and holds a lot of emotional value. It is interesting for me to see a collection inspired by the hues of the palace gardens. The floral patterns and designs used in the

### The Collection

- **Firdaus:** Inspired from the shades of the Palace garden, the colour palette transitions from powder pink and pastels, to sky and walnut shells.
- **Noor:** The festive finery line is inspired by architectural designs and intricate motifs of the Palace.
- **Riwayat:** This collection showcases the beauty of the old world charm that never fails to impress. Luxurious brocades, jacquards, hues such as royal blue, maroons and opulent golds makes it perfect for Indian weddings.

collection intertwine with elements of the nature that surrounds Pataudi Palace,” says **Bollywood star, Saif Ali Khan.**

**Amar Nagaram, Head, Myntra-Jabong,** said, “House Of Pataudi’s new ‘Summer Palace Collection’ is a reflection of the opulence and grandeur surrounding the

Pataudi Palace and is a royal treat for patrons of ethnic wear. Every collection from the brand embodies the rich cultural heritage of the erstwhile Nawabs, offering shoppers a unique opportunity to experience elegance with its designs and styles. Myntra’s design team has worked closely with Saif to create a collection that is truly spectacular.”







## IMAGES BUSINESS OF FASHION

**Formal Wear** The ripple effects of the nation's fashion evolution is now fairly apparent in the formal wear sector. The otherwise trite formal wear sector has undergone massive metamorphosis to manifest into its present youthful, chic and classy form. Today, it is a growing and propitious segment that has broadened its spectrum to include a wide range of cuts, silhouettes, trims, and embellishments.

### ISSUE HIGHLIGHTS

The edition looks at the continually growing formal wear market, the technology and innovations introduced, consumer demands and the latest trends.

- >> OVERVIEW OF THE INDIAN FORMAL WEAR MARKET
- >> CLASSIFICATION: MEN & WOMEN FORMAL WEAR
  - Men's Formal Wear: Western Range- Trousers | Suit | Vest | Shirt | Tie And Blazer. Indian Range
  - Women's Formal Wear: Western Range - Cocktail Dresses | Skirts | Shirts | Trousers And Gowns. Indian Range
- >> CONSUMER PREFERENCES
- >> EMERGING TRENDS V/S GLOBAL TRENDS
- >> RTW (READY TO WEAR SEGMENT)



*The August issue of IMAGES Business of Fashion will, for the first time ever, look at the ever expanding market of formal wear, the innovations that have been introduced in the sector so as to keep abreast of changing times, along with consumer preferences and the latest trends.*



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## PRODUCT INNOVATION:

# LOTTO'S BREEZE PROMISES ODOUR-FREE FEET TO WEARER

The collection is packed with air breeze sock-liners that allow complete air recirculation for fresh and odour-free feet...

### IMAGES Business of Fashion

Featuring contemporary designs, the latest collection by Lotto, Breeze is comfortable, lightweight and infinitely fashionable.

The collection is packed with air breeze sock-liners that allow complete air recirculation for fresh and odour-free feet. The slip-on structure presents a knitted texture and pattern which offers maximum flexibility and an amazing fit-and-feel sensation.

**Garima Behl Sapra, AGM, Lotto** says, "The high-quality material of the insole provides an all-around comfort and also has a perforated surface that guarantees coolness and better

moisture dispersion. All the comfort is amped up by great style too. The Lotto Breeze shoes come in ultra-modern designs in summer-perfect colours as well as different shapes and lace-up options. There is a pair for everyone."

With new uppers, materials as well as lacing, the new Lotto Breeze collection is just as easy on the customer's pocket too. The price range of Breeze series starts from ₹3,299 and goes up to ₹4,799 this is surely a summer style steal for both men and women.

The Lotto Breeze collection is available across all the Lotto stores in India.



- Lotto Sport Italia S.P.A, a global name in the sports industry, was established in 1973.
- Today the Italian sports and leisure brand is recognized in over 130 countries across the world.
- Lotto is Italian design aesthetics blended with the brand's technical experience in sports merchandise.
- SSIPL Lifestyle Pvt. Ltd is the Indian licensee of Lotto Sport Italia S.P.A. in India.



# THERE'S A DASH OF COLOUR MANIA IN MOCHI'S NEW CAMPAIGN



Renowned footwear brand, Mochi has launched its latest campaign 'Catch the Color Mania' for its Spring Summer 2019 collection. The ad campaign focuses on intimacy and connection between colours and fashion trends. The look and feel of this colourful campaign is vivacious with a fun quotient and explores different elements that make them stand out. The products are characterised in pop colour that will elevate your awesomeness this summer. The shoes complete the silhouette by expressing elegance and confidence. With a host of fresh styles and patterns ranging from heels, wedges and flats for women to loafers, sneakers, slip on and sandals for men, the collection offers a palette of bright, bold and pastel colours like red, blue, yellow, orange, pink and white.

**Alisha Malik, Vice President, Marketing, Metro Brands Ltd.,** says, "Being true to its brand imagery of stylish vibrant and youthful, Mochi continues to bring to you unique designs in bright colours, combining innovation with style and quality. The Spring Summer Collection'19 for both men and women comes in various styles having superb fits, vibrant colours and interesting patterns. Mochi's style is embodied throughout its latest collection, featuring fun that blends high functionality with bold fashion statements."



The Mochi SS19 collection campaign ad will soon release across major cities via print, OOH and digital media. The collection is available across all Mochi outlets. They are also present across other e-commerce platforms.





# PUMA

## LAUNCHES COLLECTOR'S EDITION SHOES FOR VIRAT KOHLI & FANS

As a tribute to team India's prolific captain and Puma ambassador, Virat Kohli, Puma one8 has launched a collector's edition shoes for Virat and fans this season. Virat would be seen sporting these gold spiked shoes at the biggest cricketing event of the year. With just 150 pieces for the taking, this limited-edition shoe is a must-have for cricket lovers and Virat fans. The first pair from the 150 would be auctioned at the inaugural edition of the Indian Cricket Heroes event in London.

**Abhishek Ganguly, Managing Director, Puma India** said, "Virat is not just the greatest athlete of our time, he's also the biggest youth icon in India. Having performed like a real champion on and off the field, Puma celebrates his sportsmanship as he shoulders the nation's expectations for the upcoming international cricketing tournament

with his captaincy. Exclusively made for Virat, the colour gold synonymous with victory will make an entry onto cricket pitch for the very first time. With just 150 pairs available globally, these limited-edition shoes are a must-have for collectors."

Sharing his reaction to this tribute, Indian cricket team captain, Virat Kohli, said, "I am humbled to receive this special treatment from my PUMA family. With a very important tournament ahead of us, I'm excited to take the field in PUMA's custom-made Golden Shoe. I have always loved white and gold and the design truly compliments my needs in terms of the fit and style."

**Bunty Sajdeh, CEO, Cornerstone Sport** added, "It is a great initiative by Puma. The limited-edition shoes celebrate Virat's cricketing journey.

This will be the first time a gold spike shoes will be worn by a cricketer and that too during the biggest cricketing event. A must have for all cricket lovers and Virat's fans, the shoes will make an excellent item for memorabilia. I hope his fans will love it as much as we do!"

The shoe design features Virat's favourite colour - white, fused with accents of gold. This is not only Virat's signature shoe, but it's also the next generation Puma Spike 19.1. The removable spikes on the rubber outsole of the shoe are a dazzling gold as well. Created with a lightweight upper, that also provides unmatched support for multi directional movement on the pitch. Puma's EVA technology in the midsole provides optimal cushioning, clubbed with superior stability and traction.

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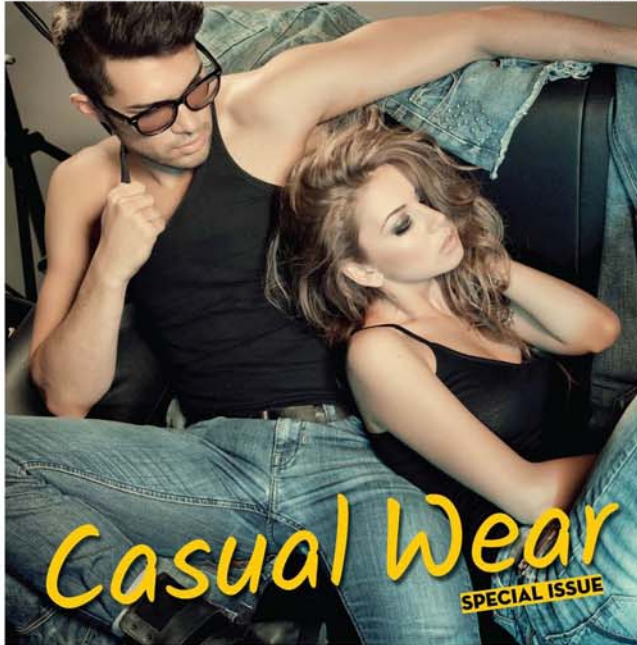
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## BUSINESS OF FASHION

June 2019 | Volume XX // No. 6 // ₹ 100

6  
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## HIGHLIGHTS OF THE NEXT MEGA ISSUE

**AUGUST 2019 FORMAL WEAR SPECIAL ISSUE:** The Formal Wear sector has undergone massive metamorphosis to manifest into its present youthful, chic and classy form. The August Issue of IMAGES BoF takes a look at the rapidly growing Formal Wear sector, which is often touted as one of most propitious segments in the Indian Fashion Industry.

### KEY HIGHLIGHTS OF THE ISSUE

1. Overview of the Indian Formal Wear Market
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For more information on nominations, please contact:

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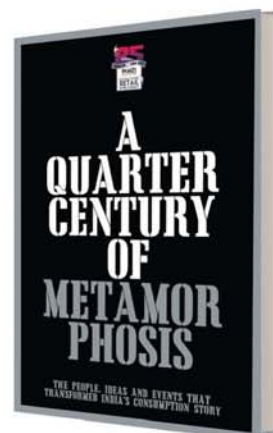


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## SUPERDRY SS19 COLLECTION SUMMER OR NOTHING!

The Summer or Nothing collection is enriched with creative influences collected from a variety of international stop off points, the collection where intricate design details and fabric upgrades take centerstage...

### IMAGES Business of Fashion

**T**he Spring Summer 2019 collection of Superdry takes us on a vibrant and colourful journey across the globe. The Summer or Nothing collection is enriched with creative influences collected from a variety of international stop off points, the collection where intricate design details and fabric upgrades take centerstage bringing a wardrobe update to a balmy and sun-drenched summer.

**Boutique Bazaar:** The women's collection is all about reclaiming through patchwork, craftwork and customisation. Jacquards and trinket trims come together with a graphic direction to give a ruffled up folk-inspired vibe. Crinkle knit wovens bring texture whilst ditsy florals and washed lace keep it light and feminine. Paisley and bandana prints in dip-dye chambray with metallic highlights prove that here 'more is more'.

**Carnival:** The women's collection is a fun and frivolous story. Bright clashing colours and 3D multi-applications, tassels, sequins and applique flowers in zingy yellow and papaya make up the essence of this collection. Over-scaled tropical fruits and statement psychedelic kaleidoscopic prints play up to their Rio inspiration where silhouettes are key. Hero items include a peekaboo stripe bikini and a bold crochet midi dress.

**Cote D'Azur:** The women's collection focuses on clean and simple dressing with a lean toward preppy chic. Pretty broderie skirts are worn with stripes and micro gingham across light and summery fabrics with lots of cutaway details. Frills and bows in sunflower yellow and blush pink are mixed with primary colours to create a fresh contrast and a sporty, nautical vibe.

**Mariner:** The men's range also stays close to the coast but looks toward Ernest Hemmingway and his adventures of an old man at sea. Textured herringbones and blotchy florals span across Oxford-based



fabrics and signature product such as the sun-scorched short and the dry originals tee. Sun-kissed pastels and Hawaiian prints inspired by 1930's travel posters give an islander lifestyle feel to this look.

**Big Sur:** Worn rusted and homespun denims fixed with patching are mixed with military surplus and workwear overalls in tonal weaves and textures make up the men's collection. There is a sense of the bohemian traveller with twill structures, plaids and duck canvas.

**Skate Lux:** Designed with a more youthful, urban customer at its heart, men's 'Skate Lux' collection plays homage to 90's skateboarding and BMX on the Californian sidewalk. Box fits are key, seen across tees, sweats

and shirts. Accessories such as caps and cross body bags are bold with ice cream pastels offset with a fresh take on camo – this story is about pushing the boundaries and living your best summer.

**Nu Lad:** Oversized logos mixed with contemporary and relevant athleisure give an element of street chic in a colour blocked primary palette of red, navy and optic to this men's range. This story is set to stimulate the senses with digi-prints and camo, worn with simple, sleek tennis trainers.

With clearly defined collection themes and more unique prints, colour and detail than ever before, Superdry's SS19 is true to brand whilst elevated with an array of trend-lead, contemporary newness.



#### ABOUT SUPERDRY

Superdry is an exciting contemporary brand which focuses on high-quality products that fuse vintage Americana and Japanese-inspired graphics with a British style. They are characterised by quality fabrics, authentic vintage washes, unique detailing, world leading hand-drawn graphics and tailored fits with diverse styling.

The global brand has a significant and growing presence around the world, operating through 515 Superdry branded locations in 46 countries. There are 139 owned stores across the UK and mainland Europe, 208 franchised and licensed stores, all but one outside the UK, and 168 concessions.



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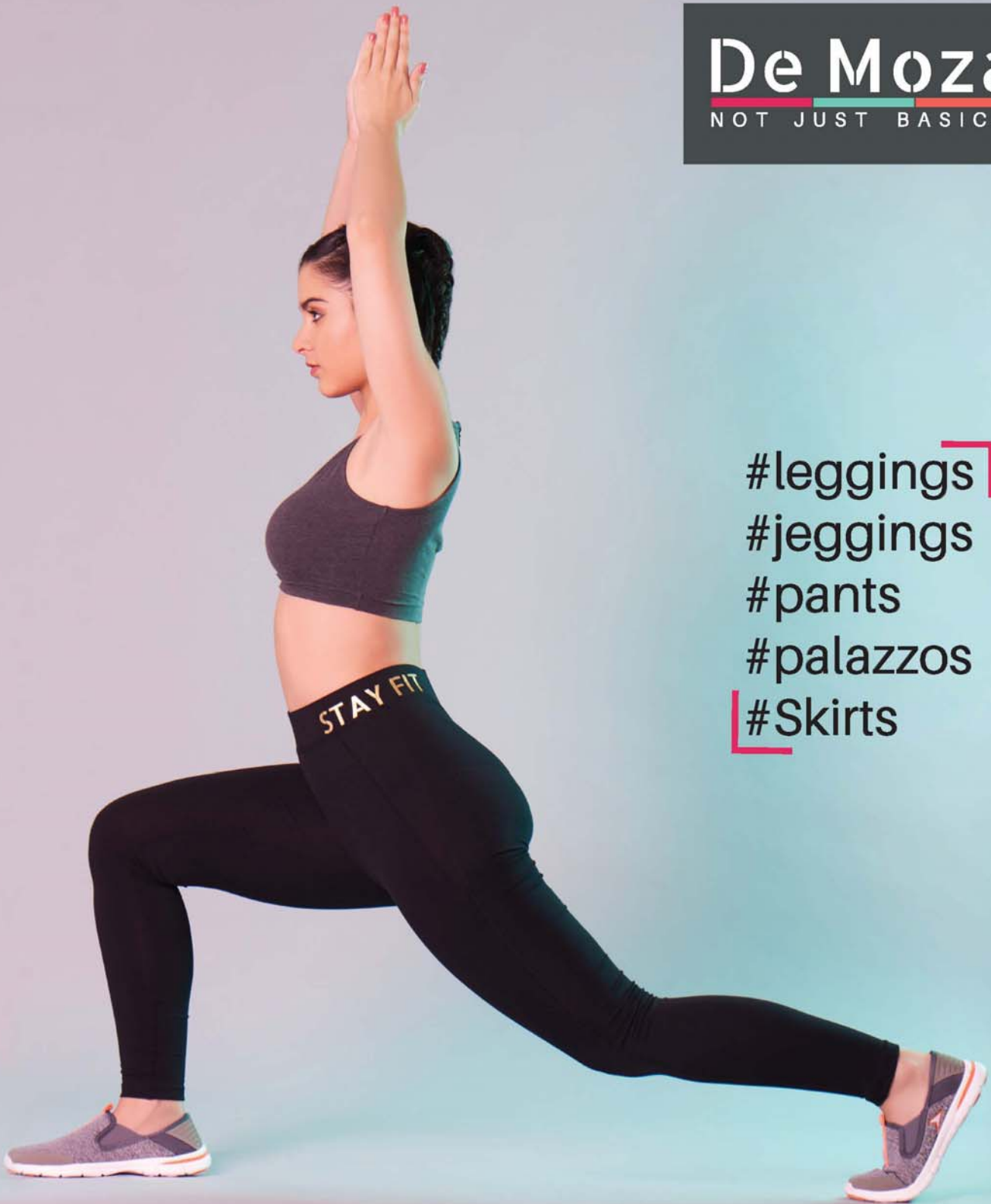
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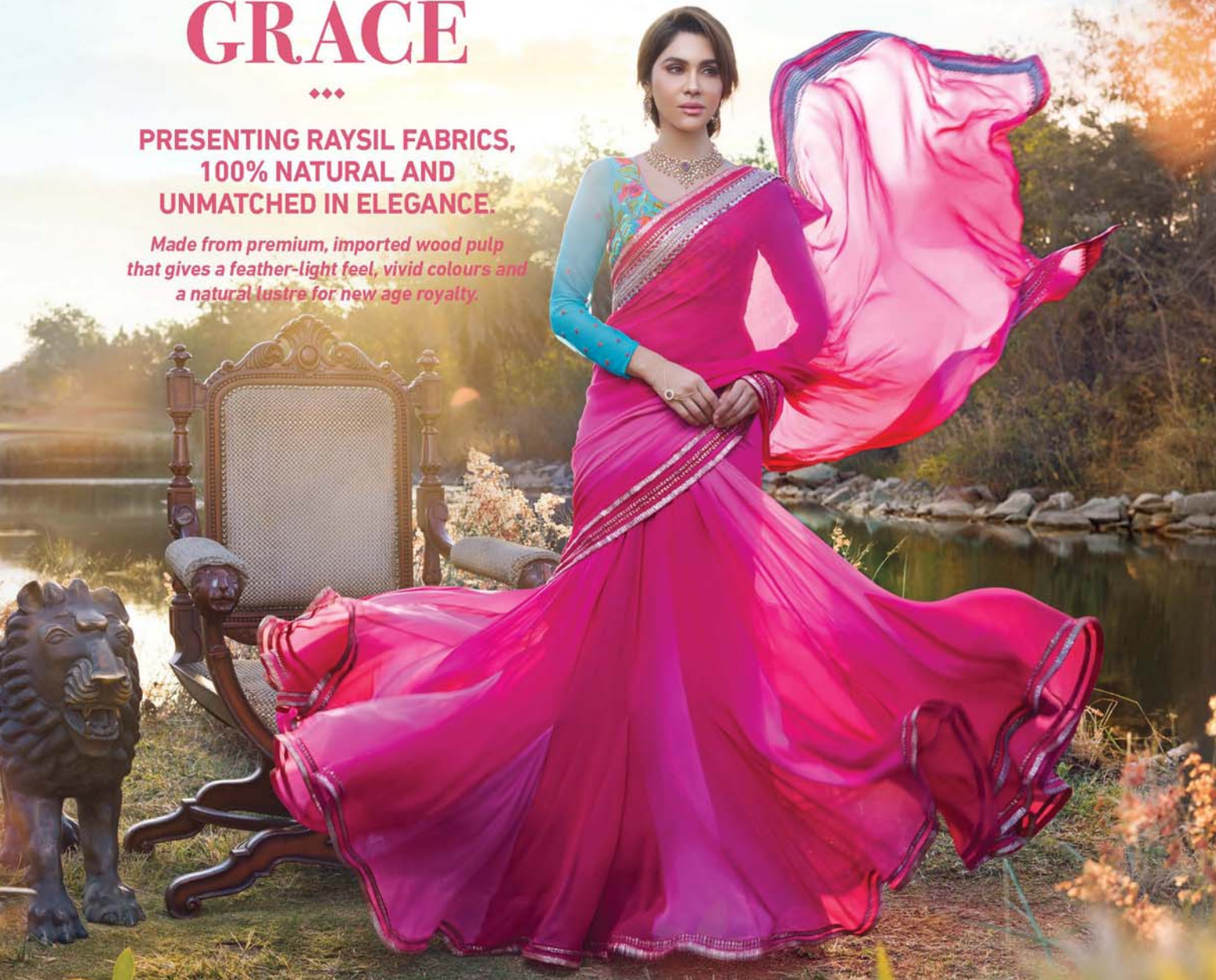
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