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BUSINESS OF FASHION

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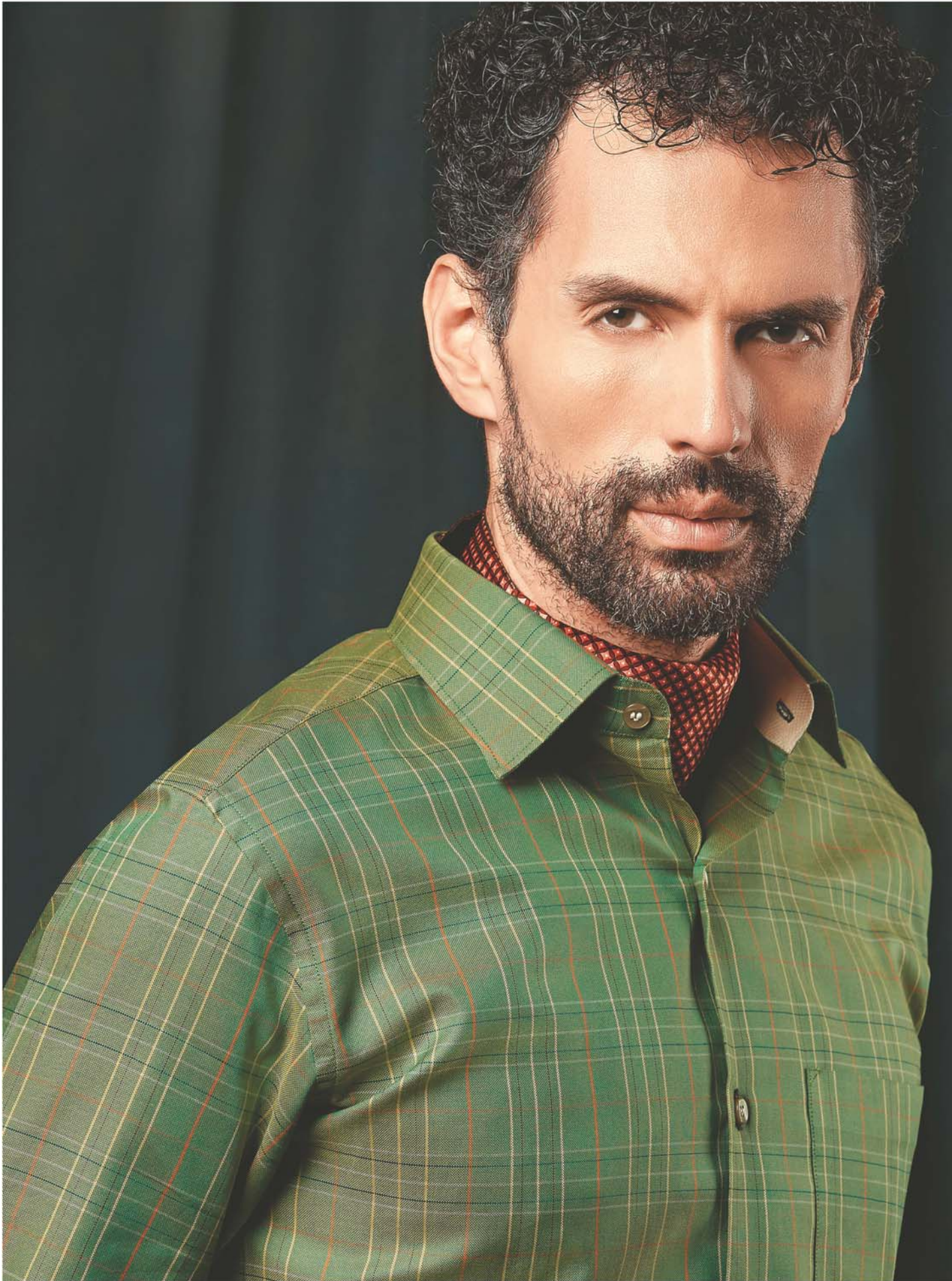
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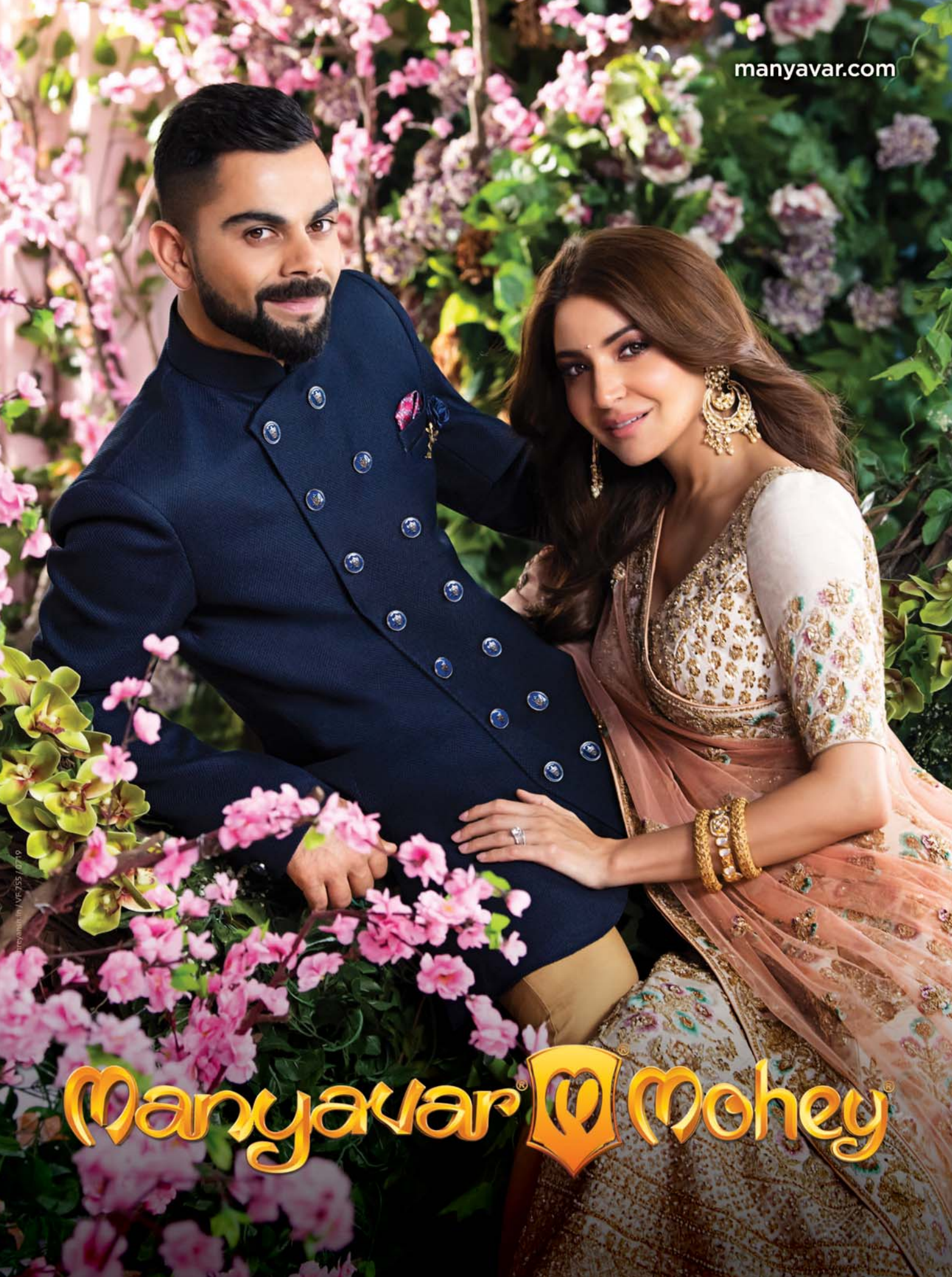
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Dear all,

In all these years, consumer preferences have exhibited massive evolution in the fashion segment in India. We all from the fashion industry are aware how the Indian consumer is now embracing the idea of fashion as a means of self-expression, and not merely as a functional purchase. The new generation is now at greater liberty from the traditionalist's sartorial template. Overall, the entire definition of fashion has changed. Yet, there is one category that has endured the test of time and is still one of the most popular apparel categories around the globe - Formal Wear.

The formal wear market has witnessed a remarkable change from its functional roots in the years gone by. The Indian youth today exhibits a pronounced inclination for trendy, modish and comfortable formal wear that aligns with the latest trends. His rising expectation has compelled brands and retailers to come up with various innovations to be able to raise the bar.

In this issue of BoF, we look at the ever-expanding market of formal wear in India, the innovations that have come up to keep abreast of changing times and preferences and the latest trends in the Indian market today. Apart from elaborately discussing the dynamics of some of the most popular product categories in this segment, the edition also talks about the challenges formal wear faces in India.

A feature on the growing trend of Made-to-Measure services in formal wear stands as a testimonial to the progressive Indian consumer, who had, till the 80s, hesitated to accept readymade garments.

As a whole, this edition makes a powerful attempt at analysing prevailing trends and the consumption behaviour of the Indian formal wear market to aid upcoming as well as existing brands establish a strong brand equity in today's volatile times.

Cheers!!



Amitabh Taneja

>

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UNIQLO to Enter India in October 2018 with 3 Stores in Delhi

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ABFRL Collaborates with CAIF as Part of Sustainability Strategy

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FORMAL WEAR STUDY

COVER STORY







The State of the Formal Wear Retail Segment in India

The formal wear category in India has witnessed a remarkable change in the last few years from limited options to a wide range of different cuts, colours and designs

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FORMAL WEAR STUDY

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THE BESPOKE SECTOR

Made-to-Measure: A Fitting Style Upgrade for India's Formal Wear Segment

Although the Indian formal wear industry is dominated by the ready to wear segment, a trend of opting for customised, made-to-measure fits has been registered in the last few years mostly among the young, style conscious, financially stable men of today

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CATEGORY WATCH

Men's Suits Segments Witnesses Sharp Growth Curve

All it takes is just one look at today's urbane and dapper men to realise that formal suits are his best personal style. Lately, a profusion of socio-economic factors has culminated in the proliferation of this savvy consumer base which exhibits a conscious inclination towards unique styles. A look at market growth drivers

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PROFILE

Shree: The Indian Avatar

The brand is targeted at fashion-conscious women who straddle both work and home with panache, confidence and grace

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E-COMMERCE

Women's Online Formal Wear Market Yet to Take Off

The online story in India hasn't left any category untouched, then be it apparel or education. However, one category which has a lot of catching up to do online is formal wear. Here is a look at the e-retail dynamics of the segment

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FASHION RENTAL

Pre-Worn & Pre-Loved: Future of the Fashion Retail Industry

For people who don't want to purchase an expensive dress for a one-time event, fashion rental is the way to go. In India, renting has emerged on to the fashion retail scene but is yet to gain a strong foothold. A look at this emerging trend

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CATEGORY WATCH

Brands Keep Formal Ethnic Wear Relevant in India

People have adopted western wear by default- either because of its easy availability or owing to the aspiration value it holds for most in non-western countries. In times like these, it is interesting to know where Indian wear stands and what the action plan is in place by brands in this category to keep Indian wear relevant

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FASHION CREATION

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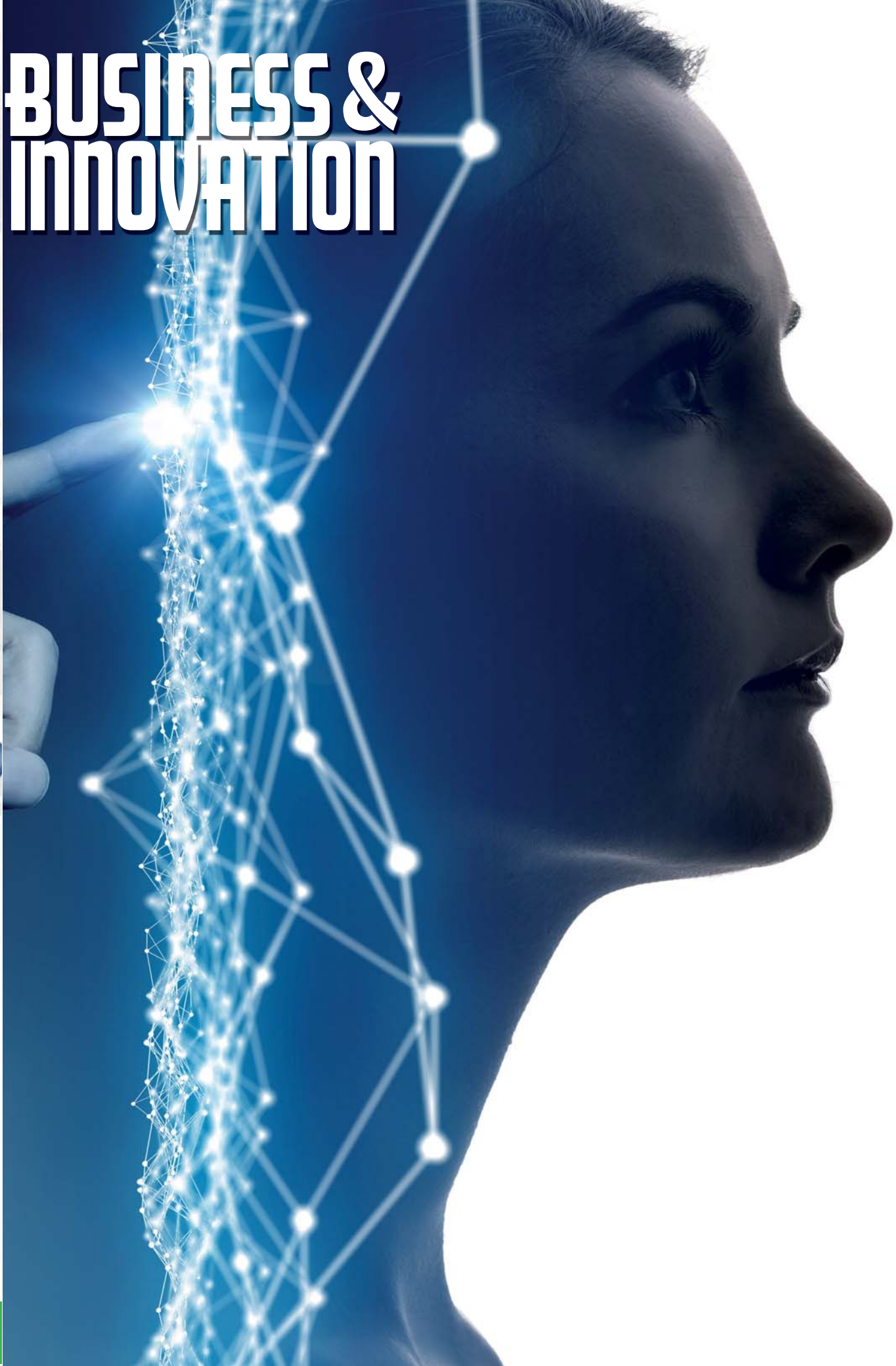
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Danish fashion group Bestseller has expanded its portfolio with the launch of an affordable brand called Produkt. The brand is especially aimed at India's millennial population.

Talking about the brand, **Vineet Gautam, Country Head, Bestseller India** exclusively to IMAGES Business of Fashion, "Produkt is part of our global bandwidth of brands which we operate, and this is an extremely affordable Millennial brand, meant for the young population of this country."

"With this affordably priced brand, our intent is to bring international trends into the market of distribution – a space where currently not many brands operate. We have been looking at launching something interesting in this segment for a few years now," he added.

BESTSELLER LAUNCHES AFFORDABLE MILLENNIAL BRAND, PRODUKT, IN INDIA

The brand, which includes three main ranges—Pro-Night, Urban-Pro and Pro-Leisure—will be entering the Indian market with an Autumn Winter collection in the West and South regions...

Gurbir Singh Gulati

PRO-NIGHT: The perfect collection which can take consumers from day to night effortlessly. Pro-Night is all about classic pieces which never go out of style. The garments are high on trend and quality. The range includes solid hued shirts and well fitted pants with subtle details and rich textures perfect for any occasion.

URBAN-PRO: It is inspired by the 'rock-n-roll' vibe of the streets. Right from jeans and graphic print tees, to trendy printed shirts as well as jackets in denim and sweatshirts, these fashion forward pieces are apt to spruce up consumers' street-style wardrobe. The Urban-Pro collection caters to the young millennials who are inspired by the freedom of the streets and express themselves through their individualistic sense of style.

PRO-LEISURE: Keeping with the latest athleisure trend, that has caught the eyes of the millennials, the Pro-Leisure collection is all about comfort and fashion. The collection has a range of tracks, t-shirts, bomber jackets and hoodies having minimalistic detailing like pockets, zips, badges etc. Taking cues from sportswear, this range has a number of utilitarian pieces which are high on trend.

The brand, which includes three main ranges—Pro-Night, Urban-Pro and Pro-Leisure—will be entering the Indian market with an Autumn Winter collection in the West and South regions.

“Both Pro-Leisure and Pro-Night are very strong parts of the collection and they will be our strengths in the market,” Gautam stated.

“Initially, we want to hear from consumers about this new product, the pricing, value proposition, the fashion, the trend and the quality. Once we have the required data, we will then look at exploring potential markets in the North and East regions around springtime next year. By Autumn-Winter 2020, we will be available pan-India through distribution networks,” he further added.



Internationally, Produkt is a men's wear brand but in India, it is going to be positioned as a unisex brand.

“For the first two seasons, we will start only with men's collection and establish the product. The globally designed, made in India brand will be launching many more products and lines once it gets the eco-system right. It will also be a part of the same global strategy of ours to operate with high compliance and sustainability,” Gautam said.

“We will get into SIS in a season or two, but we are not going online

currently with it. It is going to be complete offline model and we still believe offline is still a large segment in this country,” he added.

Over time, the brand will be launching its website as well as branching out into EBOs.

“Once we are done with the men's and the women's wear, and we believe the collection is strong enough to run a full retail store then yes, we will open the EBOs of the brand,” Gautam concluded.





A CUT ABOVE THE REST: LIVA LEADS WITH INNOVATION, SUSTAINABILITY

Despite the growth in the world of fashion retail, the industry, unfortunately, is still marked by its unsustainability. While many retailers are trying to go eco-friendly, there is one brand which is working towards putting the environment first – Liva...

Gurbir Singh Gulati

The modern clothing industry is a marvel. Walk into any fashion store and you can have your pick of thousands of different items in a huge variety of styles. Despite the growth in the world of fashion retail, the industry, unfortunately, is still marked by its unsustainability. While many retailers are trying to go eco-friendly, there is one brand which is working towards putting the environment first – Liva.

With its strong product innovation and processes, Liva – a man-made fabric from natural fibres, produced from wood pulp, a natural renewable resource – has proved that it is sustainable like no other fabric. The high-quality fabric is made using natural cellulosic fibres – tree pulp, specifically grown for this purpose. The brand also believes in planting more new trees than those which are cut to make this fibre, giving the earth a much-needed green cover, saving approximately 7X more land in comparison to cotton, and 4X more water than used for making regular fibre.

A part of the Aditya Birla Group, Liva is delivered through an accredited value chain. Unlike other fabrics which are boxy or synthetic, Liva is a soft, fluid fabric which falls and drapes well.

In an exclusive chat with IMAGES Business of Fashion, **Manohar Samuel, Senior President Marketing, Birla Cellulose**, talks about Liva's latest innovations, its new category movements and future plans.



Manohar Samuel,
Senior President Marketing, Birla Cellulose,

EXCERPTS FROM THE INTERVIEW

What are the latest developments and new innovations at Liva?

I will be happy to share this under two headings – process innovation and product innovation. Process innovation ensures that Liva follows a specific pattern of upgrading and enjoying the benefits of the value chain, which can churn out innovations.

As a company we have started LAPF (LIVA Accredited Partner Forum) Innovation Awards in our LAPF confluence. This time we were happy to see some 700 innovations as entries from India and those fabrics were unique. LAPF-driven innovation is something we created as a process and the process continues in taking those innovations to our studios.

How many LAPF studios do you run currently?

We currently have studios in New York, Delhi-NCR (Noida) and Tirupur. Every two weeks we put up across 100 new fabrics from the innovators here.



“Diverging into other segments will take some time, although we have started work on five very important categories in the menswear segment pertaining to some demands coming from our partners – bottom wear like denims and trousers, upper wear like shirts, knitwear and even stuff like innerwear and ceremonial wear”

– Manohar Samuel, Senior President Marketing, Birla Cellulose

We also work towards innovations in the field of fast fashion since we have identified a gap in India. 10 percent of our value chain only concentrates on innovating here, so that we can market a sustainable product with a 45-day turnaround time.

What’s the next category that you are addressing with product innovation?

We have recently entered the saree segment where we aim at giving comfort, manageability and fashion.

Apart from this, we have had discussions with our key target audience, the college-going crowd, and found that we have a scope in the denim segment as well. We have partnered with Bhaskar and Arvind to take this forward and Liva Denim has received excellent feedback. Another

innovation which we have introduced is ‘Livaeco’ which is a natural, fluid fabric that is now eco-enhanced. Sourced from FSC Forest Stewardship Council certified sustainable forests, a Livaeco garment is not just fashionable, it’s also ‘consciously’ fashionable. Last year we also launched a product called ‘Liva Snow’, which is a white viscose.

Tell us about your partnerships?

We have 4 sets of partners today. The strongest partnership with retail has to be with the top brands and then we have moved to big labels present in other multi brand outlets. We also have product innovations partnerships with top brands like ‘W’, who are working with us for Livaeco for the





last two seasons. We have also done various BTL activities and partnerships with large format retail chains like Pantaloons and TV channels like MTV etc. Secondly, we have partnered with LAPF, which is the supply chain for the brands. Here we have grown but at the same time we have consolidated and cut down on those relationships which were not moving ahead with new innovations.

Third, we have gone into category partnerships for example 'sarees' where we are working with RmKV and other partners as well.

The fourth is steps taken ahead within the fashion space where we have partnerships with stand alone designers and institutions. The clear objective of these partnerships is to create a culture.

Tell us about the initiatives taken up by Liva to be sustainable?

We have recently launched our brand Livaeco which is all about the eco system which covers a whole lot of work and benefits. When we talk about the eco-system, it's about taking leadership

The Higg Index is a suite of tools that enables brands, retailers, and facilities of all sizes - at every stage in their sustainability journey - to accurately measure and score a company or product's sustainability performance.

in giving eco-friendly products to consumers. We need to first educate the customers and tell them how this will translate to a product which they look for.

We are working on three strong pillars of sustainability for our brand:

- The first pillar is forestry management and giving a green cover. Our level of transparency is such that even consumers can come and see how we are creating more forest cover in lieu of the trees we use for our product.
- The second is about manufacturing and process where we have a Higg Index by The Sustainable Apparel Coalition. The Higg Index is a suite of tools that enables brands, retailers, and facilities of all sizes - at every stage in their sustainability journey - to accurately measure and score a company or product's sustainability performance. It delivers a holistic overview that empowers businesses to make meaningful improvements that protect the well-being of factory workers, local communities, and the environment. Our company has a score of more than 84 with Livaeco where the world average index is around 49. We use 1/3rd or even 1/4th of water in comparison to other viscose manufacturers.
- Apart from this we have a blockchain traceability system with our Livaeco fabrics and also with the garment. We are on a journey to customise this for our smaller customers.

Liva has a strong presence across the women's wear segment. Are you planning on branching out to other segments?

Diverging into other segments will take some time, although we have started work on five very important categories in the menswear segment pertaining to some demands coming from our partners - bottom wear like denims and trousers, upper wear like shirts, knitwear and even stuff like innerwear and ceremonial wear.

Tell us about your expansion within the home fashion category?

We have launched our products with some co-branding with the brand Portico. We are soon going to extend this to other brands like Bombay Dyeing etc., which have a very good market presence.

Tell us about exports with Liva?

Liva as a brand with tags is present as of now only in India. But Liva as a fabric is present with most of the global brands. So, with the tag also we are planning to extend Livaeco which has tied up with a few global brands.

What's your take on circular fashion?

We are very soon going to launch the recycled version of cotton garments and fabric into our fibers and are partnering with a couple of global brands for the same.

In the end, all I'd like to say is that Liva was envisioned as a brand and today it has lived up though its LAPF partnerships as an eco-system for the entire value chain in the country. This is something very heartening for us because when we touch the customers with Liva, we wanted the right promise to go and the right innovation to reach them.



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UNIQLO

TO ENTER INDIA IN OCTOBER 2019 WITH 3 STORES IN DELHI

The first UNIQLO store at Ambience Mall, Vasant Kunj, measures close to 35,000 sq. ft. in total sales area on three levels and will feature prominent store-front branding through UNIQLO's unique red colour...

Charu Lamba

Japanese global apparel retailer, UNIQLO, has announced a strategic rollout plan for its foray into India this fall. Given the size and fast growth of the Indian market, the brand, for the first time, will be launching three separate stores. The first of three UNIQLO stores will open in October in New Delhi.

"We are committed to the Indian market and are very excited to be launching our first three stores in Delhi, a region that embraces diversity

and culture, from art and design to craftsmanship and fashion," said **Tadashi Yanai, UNIQLO Founder and Chairman, President and CEO, Fast Retailing.**

"The opening of our first store, UNIQLO Ambience Mall Vasant Kunj, followed by a second and third store a little later, represents a significant step in our company's global strategy. We look forward to offering our high-quality, affordable LifeWear apparel to the people of India," he added.



What is LifeWear?

LifeWear is UNIQLO's commitment to creating perfect clothing that meets the needs of everyone's daily lifestyles. It is simple, high-quality, everyday clothing with a practical sense of beauty – ingenious in detail, thought through with life's needs in mind and always evolving.

The first UNIQLO store at Ambience Mall, Vasant Kunj, measures close to 35,000 sq. ft. in total sales area on three levels and will feature prominent store-front branding through UNIQLO's unique red colour. The full range of LifeWear will be available for men, women, kids and babies, including the popular line of UTs (UNIQLO T-shirts).

The second and third UNIQLO stores will be located at DLF Place Saket, a newly renovated shopping destination set to reopen in Fall, and DLF CyberHub, respectively. Each of the two sites will be sized to offer the full range of LifeWear for men, women, kids and babies.

TECHNOLOGY-LED INNOVATIVE COLLECTIONS

UNIQLO has worked to perfect the functionality and design of all the products, using technology to make stylish clothing for all. This includes the HEATTECH, AIRism and Ultra Light Down product lines that are always among their most popular.

• **ULTRA LIGHT DOWN**- It is a light-weight, portable item that overturns the conventional concept of a down jacket. It brings warmth and comfort, while fitting in a bag or briefcase. It can be worn year-round, either as an inner layer or as outerwear. Available in vest and jacket designs, Ultra Light Down transitions easily from indoors to outdoors, and both can be layered comfortably. Less cumbersome than traditional down products, it is a contemporary take on traditional quilting techniques, utilizing an ultra-fine nylon shell. Featuring designs for men and women, this product travels extremely well.

• **HEATTECH**- It is innerwear that offers a smooth, fine feel to the skin and provides incredible comfort. Developed through a partnership with Toray Industries, one of the world's top fibres and textiles manufacturers, the material comprises four distinct yarns that optimize comfort by absorbing the body's moisture and converting it to heat that is trapped within the air pockets of the fibres. It delivers warmth in a single layer, reducing bulk.

• **AIRism**- It is functional innerwear that embodies UNIQLO's LifeWear concept. Jointly developed with Toray and Asahi Kasei, two of the world's-leading fibre and textile manufacturers, AIRism keeps people incredibly cool and comfortable in any kind of weather. Employing a specially engineered fibre to breathe and wick away trapped sweat, the innerwear accommodates the specific needs of men, women, children and babies to ensure comfort for all. AIRism is light, thin and smooth; designed to feel like silk on the skin. Wearing it as an additional layer under usual clothing helps the body adapt and cope with heat and perspiration.

• **UV CUT**- These thoughtfully designed pieces block and reflect up to 90 percent of all UV radiation, reliably protecting consumer's skin and keeping them comfortable in hot summers while looking stylish.

Depending on the weave and knit used, UV Cut products have been enhanced to either safely absorb dangerous UV rays or reflect them back to deliver a very high level of skin protection. Despite the thin nature of the fabric, UVA rays are stopped from damaging the skin's sensitive dermis layer while UVB rays are blocked from the epidermis level where sunburn strikes.

FDI in Single Brand Retail

The company's announcement to start operations in India comes after the country allowed 100 percent FDI in single brand retail, although foreign retailers still need to source 30 percent of their products from local suppliers, preferably medium and small enterprises.

In 2006, the government had allowed 51 percent FDI in single brand retail. In January 2018, 100 percent FDI was permitted for foreign players in single brand retail trade to set up own shops in India without government approval. Established in Japan in 1984,

UNIQLO now has over 2,000 stores worldwide, as well as UNIQLO.com. Today, more than half of the stores are located outside of Japan, and the brand currently operates in 22 markets - Japan, Australia, Belgium, Canada, China, Denmark, France, Germany, Sweden, Netherlands, Hong Kong, Indonesia, Malaysia, Philippines, Russia, Singapore, South Korea, Spain, Taiwan, Thailand, UK and the U.S. In the autumn, the brand is launching for the first time in Italy and Vietnam along with India.





HIDESIGN

OPENS FIRST ATELIER STORE IN HYDERABAD

India's leading luxury accessory brand, Hidesign has launched its first Atelier store at Rajiv Gandhi International Airport. First of its kind, this Hidesign airport store offers the option of customisation and personalisation.

Customers can choose to personalise their bag with their name or initials on it for free or design their bag from scratch and get it delivered for free anywhere across the world. Pick their shape, leathers colour, buckles, and lining to create their ideal bag exclusively made-to-order for them.

The store located at Domestic Departure terminal, Hyderabad Airport, will cater to Hyderabad's sophisticated customers who travel

frequently. This store will also continue retail its signature premium leather accessories, travel goods and all Hidesign products that are handcrafted using vegetable tanned, eco-friendly leathers.

What's special is that this store will stock not only Hidesign products but also lifestyle brand - Le Pondichery, along with partner artisanal Auroville brands like Mason & Co Chocolates, Probiotics House skin care products and Niligiris Honey Brand - Last Forest.

Dilip Kapur, Founder and President of Hidesign says, "We are excited to launch our latest store in Hyderabad; it reflects our brand values and evolving customer profiles. The clean lines, use of natural materials like leather, brass, and wood add warmth and create an exclusive experience for

the Hidesign customer. Hyderabad is an established market and of great interest to us. The made-to-order and personalisation services are a first for us and our customers from Hyderabad and travellers alike can now enjoy a personal connect with the brand."

The store is designed like 'a Hidesign bag' using the same elements and expresses the same values. Custom made with great care and detail, the fixtures of the store are hand-made in natural materials such as wood, solid brass and natural grain leather, creating a fresh and unusual look that the brand is recognised for. The architecture of store is conceptually based on designs by Ayaz Basrai from Busride Design who designed our earlier stores and is known for designing some of the coolest, most exciting spaces in India.

The store showcases an extensive collection of products ranging from handbags for women, travel bags, laptop bags, messengers, cross bodies and briefcases for men. An extensive range of small leather goods like wallets and belts are also available at the new stores. New collections such as HidesignxKalki, Brooklyn & Manhattan for men, Roaring 20s and Ashes are available at the Hidesign airport stores for Hyderabad customers. In addition, customers can enjoy free shipping and pay cash on delivery while shopping online at www.hidesign.com.





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P N RAO

STRENGTHS SOUTHERN FOOTPRINT WITH FIRST HYDERABAD STORE



L to R - Ketan Pische, Partner, P N RAO, Chandramohan Pische, Partner, P N RAO, actor Allu Sirish, Naveen Pische, Partner, P N RAO

P N Rao has been redefining men's fashion and bespoke clothing since 1923 and has pioneered many firsts in the suits category that have gone on to become statement pieces for years to come...

IMAGES Business of Fashion

The store is a one-stop solution for all suiting needs including ceremonial wear, wedding wear, smart casuals, business wear, Indo-western, etc. It houses an exhaustive collection of accessories to complete the ensemble, fabrics from all over the world to cater to a wider set of audience, impeccable in-house tailoring to give one an unmatched finish and style thus creating an identity that will be admired by one and all.

"We are a brand that has stood the test of time. We will soon be entering our centenary year and it gives us great pleasure to launch our first store here in Hyderabad. We will cater to the fashion-conscious people of the city, who look for products that reflect their lifestyle and enable them to make their own style statement," said **Ketan Pische, Partner at P N Rao.**

P N Rao has been redefining men's fashion and bespoke clothing since 1923 and has pioneered many firsts in the suits category that have gone on to become statement pieces for years to come. The brand is working tirelessly to disrupt and ante up the fashion game in today's competitive men's fashion market.



Legendary suit maker from Bangalore, P N Rao, known for fulfilling sartorial needs of the dapper Indian gentleman for over 90 years, launched its first store in Hyderabad in June 2019. The launch not only strengthened their footprint in South India, it also escalated the iconic retailer's store count to a total of 8 stores, completely operated and managed by the brand itself.

Located in the posh locale of Banjara Hills, the store is spread across 4,000 sq.ft. The state-of-the-art store is an extension of brand's ethos, 'Create You Own Legacy' - a legacy the brand has created and nurtured through the years, which reflects in their incredible line-up of cloths and accessories that has been part of many successful journeys.



IMAGES Business of Fashion

W & AURELIA STORES AIM AT ENHANCED EXPERIENTIAL RETAIL

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The renowned clothing company, TCNS Clothing recently opened a slew of stores across the country. The new stores feature clothing from both the brands—W & Aurelia—under one roof for the very first time. With this launch, both the brands expand their footprints in two of India’s major shopping destinations.

The stores are strategically located in premium shopping destinations to provide an experiential treat to customers. One part of the stores display the collection of W, with a complete range of styles featuring



an extensive mix of kurtas, fashion bottoms like palazzos, skirts, trousers, dupattas and accessories to match every occasion, thus providing a complete wardrobe solution for women.

The other part of the stores exhibit the collection of Aurelia highlighting Bollywood diva Disha Patani’s latest ‘That Disha Look’; inspired by her wardrobe. The collection offers dreamy flowy dresses with traditional motifs, easy-to-carry but elegant work wear and gorgeous festive ensembles which are perfectly displayed in the centre ramp on the mannequins inside the store.

The collection on display is a reflection of attempts to combine the feminine sensibilities of sophistication, with a hint of Indian craftsmanship.

Apart from its latest collection, the stores offer classic and contemporary designs in kurtas, kurtis, tops, fashion bottoms, drapes and ensembles with



REGION	LOCATION	AREA
Gwalior (Madhya Pradesh)	City Center	750 sq.ft.
Bhubaneswar (Odisha)	Bhubaneswar Airport	215 sq.ft.
Jammu (J&K)	Palm Island Mall	520 sq.ft.
Hosur (Tamil Nadu)	Denkanikota Road	1,400 sq.ft.
Zirakpur (Punjab)	Cosmos Mall	2,100 sq.ft.
Ajmer (Rajasthan)	Jaipur Road	870 sq.ft.

an extensive range of styles, colours, fabrics, silhouettes, prints, patterns and embroidery to choose from. The combined stores adopt a unified communication style for the brand, reinforcing brand authenticity, enabling a seamless customer journey at the stores. The brands have always stood apart, delivering refined, trendy ethnic wear designs, with a contemporary and modern touch of fashion.



Retail Reach

- As of March 31, 2019, both W & Aurelia sell their products through 541 EBOs, 1,623 LFS and 1,428 MBOs, located in 29 states and 2 union territories in India.
- They also have an international reach, selling products through EBOs in Nepal, Mauritius and Sri Lanka.
- Both brands have their own e-commerce websites – wforwoman.com and shopforaurelia.com – and are also available on all reputed e-commerce portals



SPYKAR FORAYS

INTO HIMACHAL PRADESH WITH FIRST STORE IN KANGRA

Spykar is available pan India across 240 exclusive outlets, 900+ multi-brand outlets, all key large format stores and e-commerce portals...

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India's leading jeanswear brand for the youth, Spykar has opened its exclusive brand store in Kangra, taking the total number of outlets in the country to 240. The city gets its perfect fashion hub to meet the trendiest casual wear needs of the youth. The Spykar store - located opposite UCO bank - welcomes the city with a stylish wardrobe in premium quality at an attractive pricing.

Sanjay Vakharia, COO, Spykar Lifestyles says, "With growing internet penetration, fashion loving consumers are getting extremely trend conscious across India. This makes it an ideal move to capture markets like Kangra which have huge potential. We look forward to higher engagement with the 'young and restless' audience of this beautiful city up north!"

The brand promises to provide fashion lovers with a one-stop shop with trend setting denims, trousers, tees, shirts, jackets and accessories like belts, wallets, socks, flip flops and much more.

The Spykar collection embodies a global inspiration that can match the insatiable search for the best in world class style. The brand is available pan India across 240 exclusive outlets, 900+ multi-brand outlets, all key large format stores and e-commerce portals.

In 2014, Spykar became a part of the Lord Bagri promoted Metdist Group, a diversified portfolio of companies. Headquartered in UK, the Metdist group is a global conglomerate with interests in metal and diverse industries like fashion, hospitality & technology.





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ICC CONFERENCE THEMED AROUND SUSTAINABILITY, REVIVAL OF FORGOTTEN FABRICS

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Industry body, Indian Chamber of Commerce organised the 'ICC Conference on Textiles & Apparel' on July 12, 2019 at ITC Sonar in Kolkata. The roundtable conference was followed by a fashion show by designers and ICC Apparel awards. Hon'ble Governor of West Bengal, Keshari Nath Tripathi was the chief guest at the conference.

The conference was attended by eminent designers who were particularly working with Indian heritage fabrics and weaving and stitching techniques and have brought them to the international dais.

Personalities such as Abhishek Dutta, Fashion Designer; Bappaditya Biswas, Founder, Byloom; Rachit Agarwal, Co-Founder, Simaaya & Sasya Group;

Chaitali Das, Social Entrepreneur and Mg. Trustee, Rakshak Foundation; Agnimitra Paul, Fashion Designer; Shamlu Dudeja, Fashion Designer; and Sharbari Dutta, Fashion Designer deliberated on how Indian fabrics and handlooms are being used so far and what are the way forward for their optimal utilisation and sustainability.

The fashion show showcased designs of prominent fashion designers such as Agnimitra Paul; Shamlu Dudeja; Sharbari Dutta; Chaitali Das; and Lata Harlalka & Anwasha Harlalka. The designs were themed to around sustainable fashion.

This was followed by the ICC Apparel awards. The winners in the Best Men's Clothing Brand was Turtle Limited; Best Women's Clothing Brand was

Prapti Fashions; Best Children's Brand was Zero Clothing Co.; and Best Innerwear brand was Macho.

"The state's rich heritage fabrics such as cotton, jamdani and expression of intricate artistry in Baluchari, Tangail, etc., positions the state to take its textiles sector to new heights," stated Hon'ble Governor of West Bengal, Keshari Nath Tripathi.

"Jute needs more attention as people are gradually becoming conscious of sustainable development goals and looking for alternatives to non-biodegradable materials. This is where West Bengal can utilise its comparative advantage in Jute to the full extent," he further said.

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IMAGES Business of Fashion



WBGMDA

ORGANISES 48TH GARMENT BUYERS & SELLERS MEET IN KOLKATA

The popularity and reputation of the meet organised by the association has been increasing year after year due to its unique programme and vast arrangements...

IMAGES Business of Fashion



In keeping with its avowed objective of developing market for readymade garment manufacturers, the West Bengal Garment Manufacturing & Dealers Association (WBGMDA) organised its 48th Garment Buyers & Sellers Meet at The Peerless Inn, Kolkata on July 1-3, 2019.

The three-day mega garment buyers and sellers meet witnessed an attendance of more than 2,000 garment distributors, agencies, retailers, etc., including representatives of major chain stores/malls from across the country. The pool of notable buyers at the garment fair created an excellent business opportunity for the participants.

The association has also published an 'informative souvenir' advertising the details of readymade garment companies. The designs, samples exhibited and displayed by the participants in the meet reflected creativity compatible with market acceptability of readymade garments thus conforming to the latest trends and increased demands. The popularity and reputation of the meet organised by the association has been increasing year after year due to its unique programme and vast arrangements.

WBGMDA will host its 50th Golden Jubilee mega B2B Meet at Kolkata in December 2019, it is expected the show will be an eye opener for the Indian garment industry.



ABFRL

COLLABORATES WITH CAIF AS PART OF ITS SUSTAINABILITY STRATEGY

In 2013, ABFRL began its sustainability journey titled 'ReEarth', a unique sustainability program. ReEarth addresses the most significant economic, environmental and social impact that humanity faces as well as measuring the progress ABFRL has made so far in its sustainability journey...

IMAGES Business of Fashion

Aditya Birla Fashion and Retail Ltd. (ABFRL) is joining a unique and pioneering industry-led platform, 'Circular Apparel Innovation Factory' (CAIF) in collaboration with Intellectap. Through the association, ABFRL will be demonstrating its commitment to shift the industry from its current 'take-make-dispose' approach, to one that encourages the use of sustainable material, maximise utilisation of clothing and textile and thereby promote recycling. These initiatives will help ABFRL retain its focus on creating significant social impact.

In 2013, ABFRL began its sustainability journey titled 'ReEarth', a unique sustainability program. ReEarth addresses the most significant economic, environmental and social impact that humanity faces and the progress ABFRL has made so far in its sustainability journey.

Ashish Dikshit, Managing Director, Aditya Birla Fashion and Retail Ltd., said, "We are pleased to partner with Intellectap to accelerate sustainable fashion concept through CAIF to build industry level platform for circular textile eco-system. We intend to bring forth ideas and innovation to add more strength to our pioneering work around sustainability. The association with Intellectap will help us create, collaborate and mainstream the conversation around circular economy and sustainable fashion."

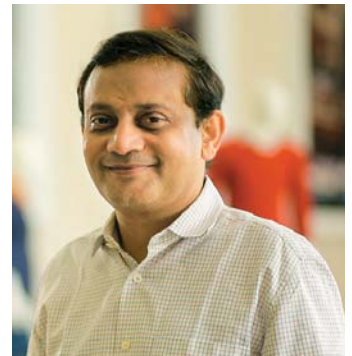
Vikas Bali, CEO, Intellectap, added, "ABFRL is a marquee name in Fashion and Lifestyle,

and its partnership with CAIF would help foster an ecosystem wherein not only ABFRL, but the larger industry could potentially be recognized as the global innovators in circular fashion".

He further added, "Intellectap through CAIF is here to co-create innovative solutions and business models that will help brands create solutions for a more circular apparel economy through prototyping and testing."

Dr. Naresh Tyagi, Chief Sustainability Officer, Aditya Birla Fashion and Retail Ltd., stated, "Sustainability will be at the center of innovation in the fashion industry in the coming decade and while tools and technologies will change, it will be the intellectual capital that will hold ABFRL in good stead. In continuation with our philosophy, we are partnering with Intellectap to build a positive impact for our businesses."

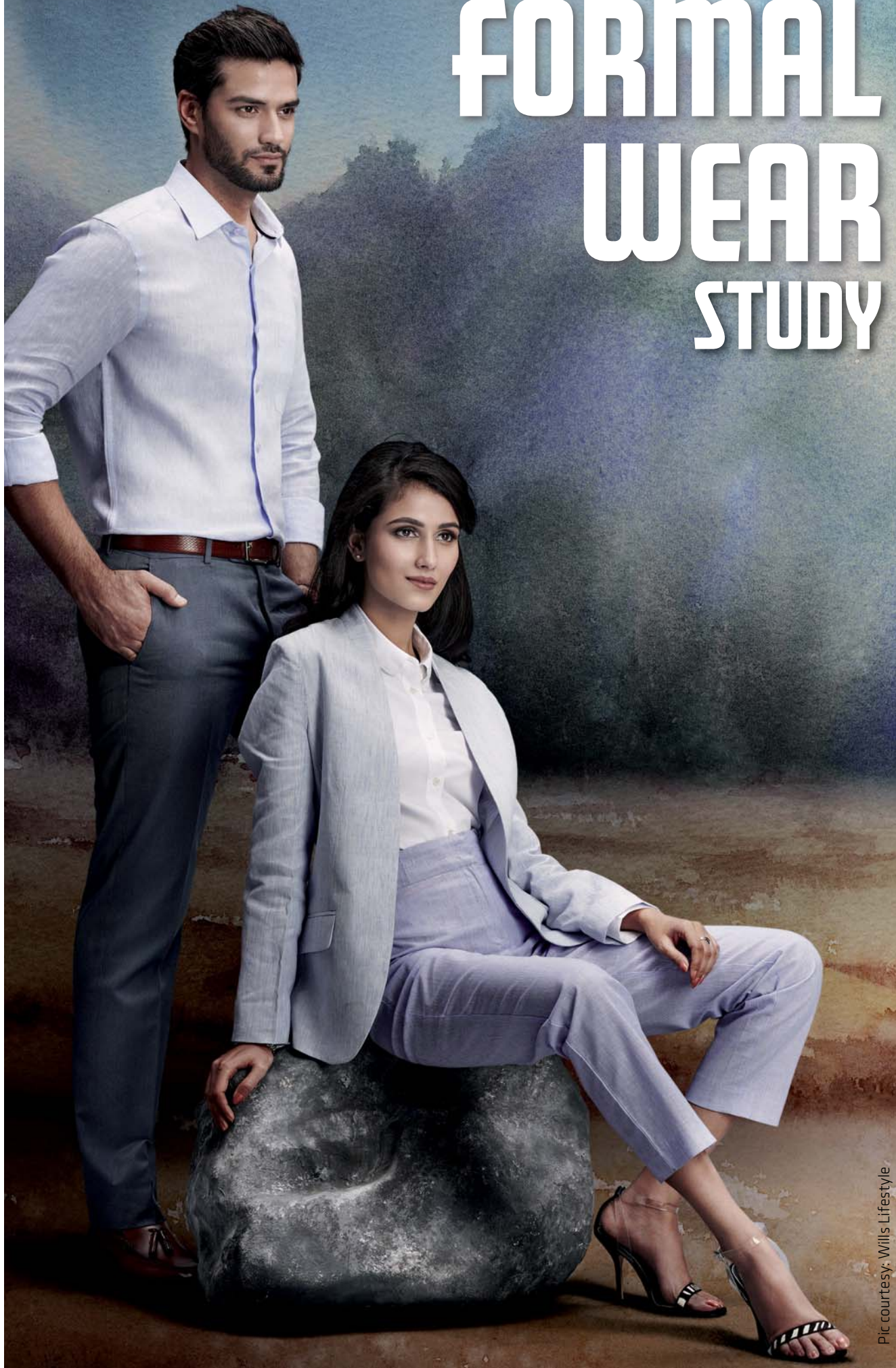
Stefanie Bauer-Vemuri, Director, CAIF, added, "With ABFRL as our first corporate anchor partner, we are laying the foundation of making CAIF India's first industry-led collaboration and innovation platform to create pathways for a more circular and sustainable textile and apparel industry. We are happy to see India's apparel and textile ecosystem joining forces under the umbrella of CAIF to identify opportunities for innovation and collaboration, drive implementation on the ground, together work on removing scaling barriers, and drive collective action."



Top: Ashish Dikshit, Managing Director, Aditya Birla Fashion and Retail Ltd.

Below: Vikas Bali, CEO, Intellectap

FORMAL WEAR STUDY



FORMAL WEAR STUDY

Pic courtesy: Wills Lifestyle



MARKET STUDY

INDIAN FORMAL WEAR MARKET

Experts Ashish Dhir, AVP, Fashion - Textile & Apparel & Saima Nigar, Associate Consultant, Fashion - Textile & Apparel from Technopak detail how increasing fashion awareness, product innovation and promotion by brands and retailers, among others, are driving the formal wear market in India...

The Indian apparel market has evolved along with the global apparel market. With increasing disposable incomes, growing middle class, increasing penetration of e-tail and increasing acceptance for branded apparel, the Indian formal wear market segment has expanded its consumer base in the past decade.

Consumers are embracing the idea of fashion for their own sake, as a means of self-expression, and not merely as a functional purchase. A similar trend can be seen in formal wear; it is no more a functional category buy but has become a part of self-statement.

The Indian formal wear can be categorised into men's formal wear and women's formal wear. Women's formal wear consists of shirts, blouses, trousers, skirts, formal jackets, etc. Whereas, shirts, trousers and suits/coats/safaris together comprise the men's formal wear market.

MEN'S FORMAL WEAR

Men's shirt category is the largest men's apparel category, followed by men's trousers accounting for 27 percent and 22 percent respectively. However, the suits/coats/safari suits market is ~4 percent of the total menswear market.

MEN'S SHIRT MARKET

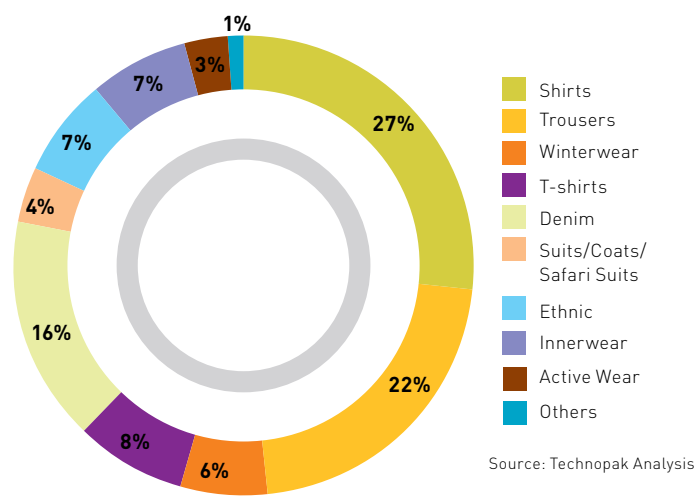
In 2018, men's shirt market in India was estimated to be worth ₹41,918 crore. This market is expected to grow at compound annual growth rate of 6 percent to reach ₹75,069 crore by 2028.

The market of shirts is under transition for last few years from limited colours and designs to distinct categories of formal and stylish shirts. With evolving consumer preference towards semi-formal and causal look, demand for stylish shirts is growing. In urban markets, men's wardrobe for shirts has increased considerably in the last decade. On an average a working professional in an urban market has more than 20 shirts in his wardrobe.

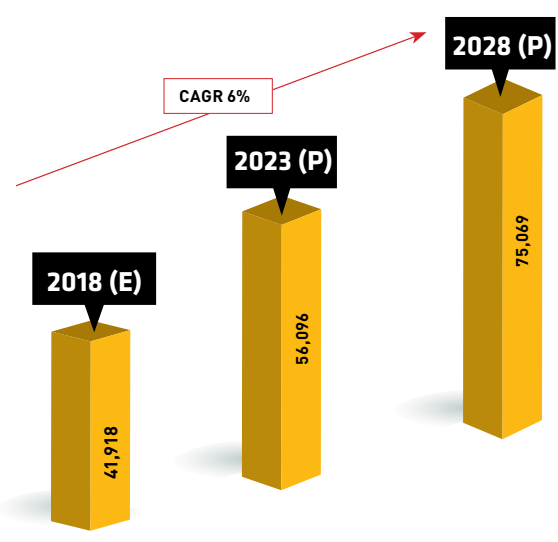
MEN'S TROUSERS MARKET

The men's trousers market is expected to grow at a CAGR of 5.6 percent to reach ₹58,602 crore

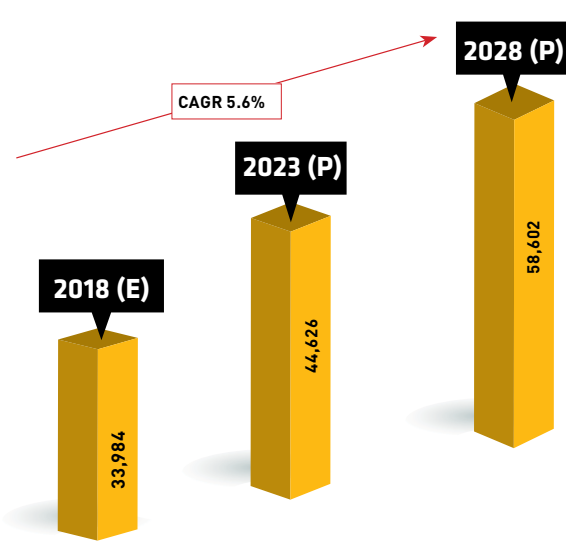
SHARE OF INDIVIDUAL CATEGORIES WITHIN MENSWEAR (2018)



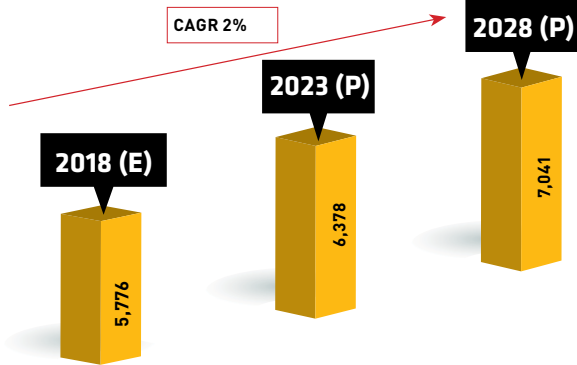
MEN'S SHIRTS MARKET 2018 (INR CR)



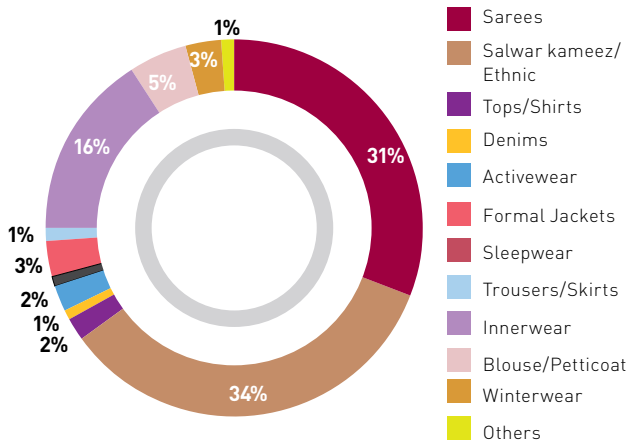
MEN'S TROUSERS MARKET 2018 SIZE (INR CR)



MEN'S SUITS/COATS/SAFARI SUITS MARKET 2018 (INR CR)

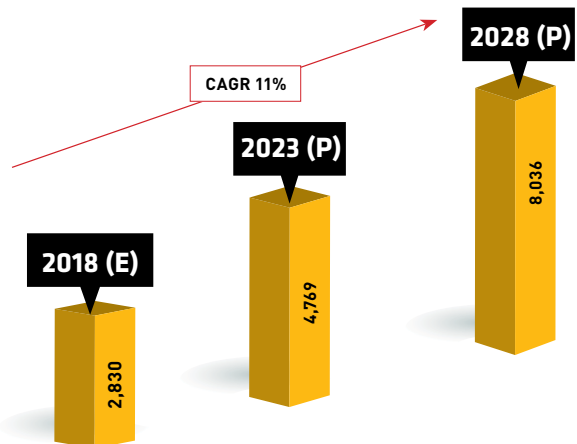


SHARE OF INDIVIDUAL CATEGORIES WITHIN WOMEN'S WEAR (2018)



Source: Technopak Analysis

WOMEN'S TOPS/SHIRTS MARKET 2018 (INR CR)



by 2028 from its current size of ₹33,984 crore. It is the second largest category among menswear. The men's trousers market has witnessed a remarkable change in last few years from limited options to wide range of different colours, designs and fits in both formal and casual wear.

MEN'S SUITS/COATS/SAFARI SUITS

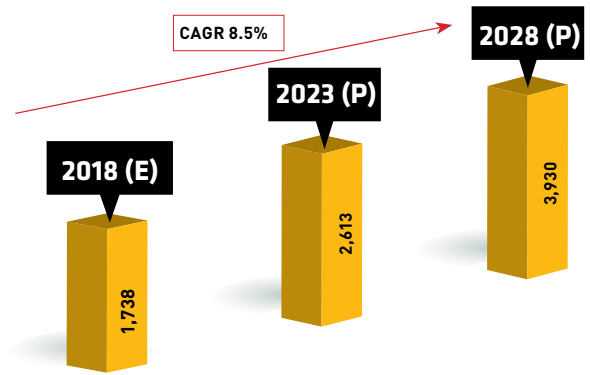
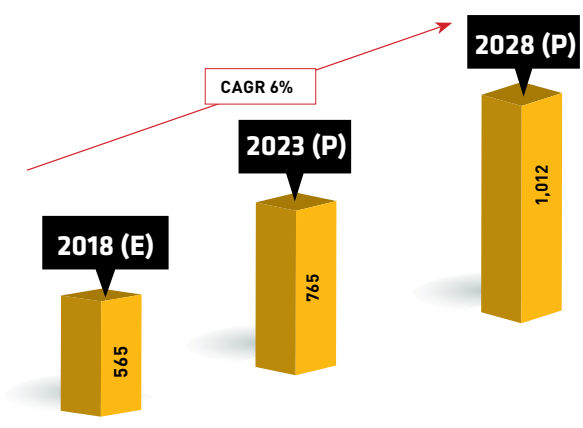
The men's suit market is worth ₹5,776 crore and is expected to grow at a CAGR of 2 percent for the next decade to reach the market of ₹7,041 crore.

WOMEN'S FORMAL WEAR

The women's formal wear constitutes tops/shirts, formal jackets, trousers/skirts, etc. In contrast to men's formal wear, women's formal wear is growing at a higher pace. This growth can be attributed to the increasing number of women in the workplace. One of the major reasons for this growth in the low base (market size) of woman's formal wear historically. But that has changed in last 10-12 years.

WOMEN TOPS/ SHIRTS

The women's tops/shirts category is one of the highest growing categories in the womenswear segment. It is due to increasing acceptance of western wear and increasing number of women in the workforce. The women's tops/shirts market is expected to grow at a CAGR of 11 percent in near future to reach ₹8,036 crore from its current market size of ₹2,830 crore. Proliferation of international brands in India during the last few years has given plethora of options to women.

WOMEN'S TROUSERS/SKIRTS MARKET 2018 (INR CR)**WOMEN'S FORMAL JACKETS MARKET 2018 (INR CR)****WOMEN'S FORMAL JACKETS**

Women's formal jackets are expected to grow at a CAGR of 6 percent over the next 10 years to reach ₹1,012 crore from current market size of ₹565 crore.

WOMEN'S TROUSERS/SKIRTS

The women's trousers/skirts market is witnessing a high growth of 8.5 percent. It is expected to grow from current market size of ₹1,738 crore to ₹3,930 crore by 2028.

The fashion element which is so inherently present in women's clothes has been taken care of through the introduction of 'flexible / stretch' fabric for different applications and it has led to emergence of various new categories in trousers such as Treggings and Jeggings.

Features such as adjustable trouser length, hidden and roomy pockets, anti-stain, anti-wrinkle and easy-care garments have become the norm. Year 2018 also witnessed the reappearance of reversible clothing and this should continue to be a part of work-wear closets in 2019, too.

GROWTH & TRENDS

The Indian apparel market has witnessed huge influx of international brands in the last few years. Increasing penetration of international players in the market has played a vital role in converting consumers from preferring tailor-made apparel to ready-to-wear by providing them a plethora of options in terms of fits, designs, colours and patterns. Though the share of ready-to-wear has increased, the ready-to-stitch





women's trousers and high-end men's formal trousers. In the coming years, the Indian market might witness demand for commercial production of trousers produced from recycled fibres, eco-friendly manufacturing processes. Success of manufacturers and brands in Indian trousers market shall depend on their ability to offer innovative products at right price points and their ability to expand their reach beyond

Indian market might witness demand for commercial production of trousers produced from recycled fibres, eco-friendly manufacturing processes. Success of manufacturers and brands in Indian trousers market shall depend on their ability to offer innovative products at right price points.



category cannot be neglected as there is sizeable demand in this category. The steady growth in the premium tailoring segment comprises the fashion designers and the bespoke/luxury segment. Customers in the super premium segment are willing to pay a premium to ensure that their tailor-made clothing reflects their personality.

Indian fashion consumers, both male and female, will continue to seek better product quality, superior designs and perfect fit in their trousers. Most of the product innovation is expected to be witnessed in the men's and women's formal shirts, women's formal jackets,

the metros and big cities. It is due to the growing formal wear market that many start-ups have started catering to this segment by providing customized tailoring the formal wear

Increasing fashion awareness of Indian consumer, growing disposable income, product innovation and promotion by brands and retailers, etc., are acting as growth drivers for formal wear market in India. Thus, to keep pace with changing consumer's preferences the retailers serving formal wear market needs to keep innovating and provide better dressing solutions.





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THE STATE OF THE FORMAL WEAR RETAIL SEGMENT IN INDIA

IMAGES Business of Fashion



During the 1960s and 1970s, at the same time as Western fashion was absorbing elements of Indian dress, Indian fashion also began to actively absorb Western dressing sensibilities, which at that time was dominated by formal wear like shirts and trousers.

Following the economic liberalisation of 1991, as the market opened up and more employment opportunities cropped up, the demand for formal wear started to gain momentum rapidly. Especially in the urban clusters, formal wear became a staple and was uniformly sported by people of all social levels. Increasing fashion awareness of Indian consumer, growing disposable income, product innovation and promotion by brands and retailers, etc., are growth drivers for the segment.

The Indian formal wear market can be categorised into men's formal wear and women's formal wear. Women's formal wear consists of shirts, blouses, trousers, skirts, formal jackets, etc. Whereas, shirts, trousers and suits/coats/safaris together comprise the men's formal wear market.

Increasing penetration of international players in the market has played a vital role in converting consumers from preferring tailor-made apparel to ready-to-wear by providing them a plethora of options in terms of fits, designs, colours and patterns.

The revenue share in the formal wear category in India has traditionally been dominated by the men's segment. But, in recent years, with the ratio of working-class women rapidly increasing, the demand for women's formal wear is escalating at a rapid pace.

Overall, the formal wear category in India has witnessed a remarkable change in the last few years from limited options to a wide range of different cuts, colours and designs. In the following pages, we bring to you a detailed view of the formal wear category in India including, market dynamics of the most popular product segments, consumption behaviour as well as the latest trends.



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FORMAL SHIRTS MARKET ANALYSIS:

CURRENT TRENDS & FUTURE MAPPING

Factors such as the e-commerce boom, population growth, increase in disposable income of middle-class consumers and surge in fashion consciousness among end users is generating a positive impact on the growth of the formal shirts segment in India...

Gurbir Singh Gulati

Despite the fact that the segment has seen a setback with the advent of the casual wear industry, lately formal wear is back in fashion with brands having modernized their offerings that include new colours, fits and innovative fabrics. The Made-to-Measure segment too has led to the growth of formal shirts. Branded formal wear shirts segments have expanded beyond metropolitan cities with rapid globalisation, increased brand awareness, and larger consumer groups. Social media trends are also new drivers for the growth of formal shirts, communicating a positive impact to young, fashion-conscious individuals.

Let's Look at the Score Chart

Formal shirts are gaining traction among consumers, presenting major opportunities for market expansion. Online platforms are being preferred to purchase formal shirts, as they cover maximum market geographies with its vast availability of options.

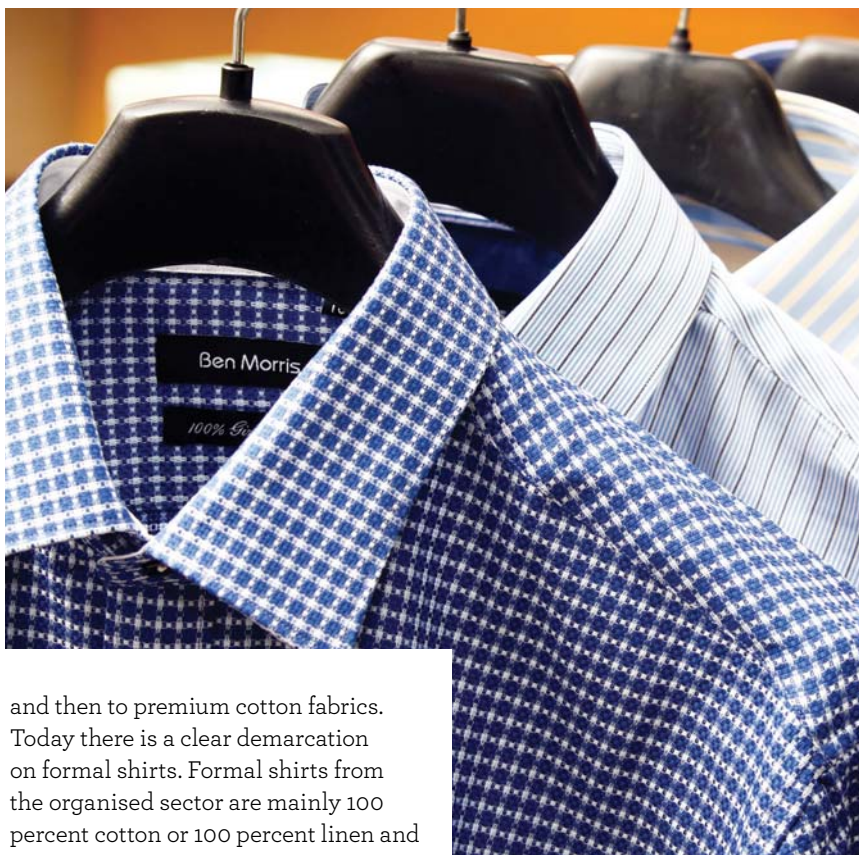
But on the contrary, there is a strong debate on the long-term relevance of formal shirts since the casual trend has heavily taxed the formal wear segment. The debate now is whether formal shirts will lose their existence, or will they maintain an immortal form which cannot be replaced with the new

casual wear trend. This article analyses the debate and arguments for and against formal shirts while speaking to key brands in the shirts business who definitely say, 'formals have changed the way they look now, and semi-formal is the new formal!'

Salman Noorani, Managing Director, Zodiac, a brand which has pioneered the formal, ready-to-wear shirt segment in India, shares his thoughts, saying, "Understanding the changing perception of consumers is a must. With a proliferation of brands and consumers going up the value chain as well as new businesses being set up, there has been a spurt in both formal and casual wear. These new-age businesses have far more relaxed norms for dressing at work and we address that segment with our casual wear brand z3 Relaxed Luxury."

"In Zodiac during the past couple of years we have innovated to provide the classic business wear consumer with both, fashion and product differentiation in Bassano and Barboni along with our hall mark of 2 ply Egyptian cotton structures. In our trendy fashionable brand ZOD! Club Wear we have seen a lot of pull for our Tuxedo shirts and bow ties," he adds.

Formal shirts are strongly differentiated with their fabrics as Dharmen Mehta, Director, Ben Morris explains. "The formal shirt market, which evolved around polyester cotton fabrics moved upwards to cotton



BEN MORRIS

and then to premium cotton fabrics. Today there is a clear demarcation on formal shirts. Formal shirts from the organised sector are mainly 100 percent cotton or 100 percent linen and formal shirts from regional players are mainly blended fabrics of polyester and cotton.

As per Narinder Kaur, Design Head, Turtle, formal shirts segment has changed roles. "The perception of formal shirts has drifted from stiff collars to soft ones. It is more towards cross overlook, to be paired with chinos and knit bottoms. The sizes of checks and colours have become relaxed. Though the 'Reformals' (as we call them in Turtle) have gained ground, board room formals still have a contribution in the market share," she states.

Competition Index: International Vs. Domestic Brands

Competition has intensified in the country as more domestic brands gain market share with their shirt centric portfolio. International brands in formal shirts still maintain their unique positioning and there are very few domestic brands competing against them.

Dharmen Mehta explains the difference in competition saying, "If we look at the Indian formal brands and international brands there is no competition at all. We are far behind on the fabrics being used by international brands. Apart from the fabrics; it is the fit, styling, collars and pricing that gives them an edge over Indian brands. There are very few brands in India who have the strength and ability to compete with international labels. Some brands which are up to the mark include Ben Morris, Cameccie, Brunito, Zodiac, etc. to name a few."

His theory stands true as foreign brands are always searching for new strategies for continuous growth and are more innovation led. While foreign brands continue to lead with innovation led products, domestic brands are gaining ground in some markets including the first-tier cities differentiating them at the design level. This truly is now highlighting the intense competition for mind share of



“Understanding the changing perception of consumers is a must. With a proliferation of brands and consumers going up the value chain as well as new businesses being set up, there has been a spurt in both formal and casual wear”

SALMAN NOORANI,
Managing Director, Zodiac

consumers by both international and domestic brands.

Narinder Kaur gives a clear explanation of this saying, “In the formal shirts segment, international brands are on the elite side and are focused more on giving high-end products with premium pricing. The pure formal shirts segment is really miniscule in our country. This affluent section with an elite taste rarely prefers the domestic brands for their daily wear. As such there is negligible competition in international vs. domestic brands in formal shirts.”

Price Play

Companies employ a number of pricing strategies to differentiate their brand and gain competitive advantages in the marketplace. Technically there are two pricing strategies which operate largely in the branded Indian formal shirts business. One is the premium pricing segment which encompasses brands like Louis Philippe, Van Heusen, Zodiac, Arrow, etc., which are on an average priced ₹2,000 and above. Then

is the affordable pricing strategy which covers the aspect of value given in the garment in justification for its price.

An expert brand like Zodiac unfolds its pricing strategy in the formal shirts business. Salman Noorani says, “From the days of fabric being bought and then a tailor converting it into a shirt with a very gradual shift to readymade shirts, our brand has seen it all. Our range starts at ₹2,499 and goes up to ₹19,999 for a 2/300’s Italian fabric shirt in our Regale made-to-measure, limited edition bespoke collection.”

With deep understanding of the market serving regional to national retail players, Narinder Kaur explains: “The formal shirts segment is price sensitive. The tendency is more towards a lower MRP. For daily wear shirts in this segment, the consumer is not ready to pay extra. His budget is tight in this section. Only if it has some tangible value addition, the consumer will pay the price premium. So, the MRPs have become sharper in this segment.”

Market Gap: The Mid Segment

The mid segment in shirts is also nicknamed as the ‘popular shirts’ segment which truly has either disappeared from the corporate



brand planning or has been left to the regional or unbranded players to enjoy. An obvious question here arises as to why corporates are not willing to enter the popular formal segment.

Dharmen Mehta sheds some light on this subject stating, “The shirt category of ₹1,000 is mainly controlled by regional players and they play more with blended fabrics. On the other hand, ₹1,000 and above prices are mainly governed by organised players and who mainly use cotton fabrics. The gap between organised and regional players is reducing and only a few organised formal shirt brands are now present in India. The major chunk is taken by the regional players who are going big and planning to be national. They offer quick response to the change in designs, fits and quick turnaround vis-à-vis national brands. Since the decision making is at a single place with regional players,



“The demand for formal shirts is oscillating from low to medium but is not hitting the high. This is not the segment where consumers indulge. For maximum population of our country, formal is a basic necessity. Of course, there is a demand for good formals where the consumer is willing to pay the price for its USP”

NARINDER KAUR,
Design Head, Turtle

it becomes easy to control, modify or change the entire formal shirt gimmick quickly. They are fast to adapt changes and sometimes are far more ahead in forecasting of the trends than an organised brand.”

Defining why corporate brands are not comfortable to enter the mid segment, Mehta further adds, “Due to the corporate culture, politics and multiple decision levels in the organised sector, it becomes very difficult to the process of implementation at a faster pace. This in turn keeps them way behind the regional players who do not face these issues. Moreover, corporate brands also have multiple businesses and hence their focus may not be only on garments. Current example is of ITC wherein they sold out John Player.”

Narinder Kaur is also in agreement with Mehta saying, “In the mid formal shirts category, there are more brands which use blended fabrics. And it is completely driven by price. Design and colour are a second priority. The mid segment category focuses more on Tier II and III cities. The unorganised brands don’t carry many overheads to take care of their brand loyalty. They thrive purely on lower MRPs. In addition, the economies are set for the unorganised sector to penetrate deep in the Tier II and III locations within the city and rural markets. They work on easy logistics. They keep themselves light on the stocks and raw materials which help them to react faster to the market changes.”

Consumer Awareness: High-End Propositions

Quality comes at a price. The Indian consumers have a deep understanding on

>



TURTLE

FORMAL SHIRTS: TREND REPORT

NARINDER KAUR, DESIGN HEAD, TURTLE

Different Types of Formal Shirts

Currently, formal shirts have two broad classifications: board room and fashion formals. Board room are conservative formals, whereas fashion formal is more of relaxed colours and patterns, where the pattern size can vary.

Fabrics

Cotton has the highest sales. Cotton blends are catching up in formals as lots of innovations are happening on technical grounds. So, lots of non-iron bases along with odour free fabrics are gaining popularity among consumers.

Colours/patterns in formal shirts

All time favourite colours are shades of blue –from sky to powder to navy to the typical medium blue of a formal shirt.

White is the highest selling colour in this segment with cream catching up fast.

Other colours which are in trend include fresh soft pink, mauve and lemon colours. Medium tones of red are also

good picks with consumers. Consumers are also opening up to new colours like olive, mint and coral.

Patterns – Small and clean checks are in trend as are mini geometric prints. Bengal stripes do well.

A lot of dobby play in stripes is popular.

International trendometer

The western counterpart of the formal shirt has two very distinct lines: Conservative formals and fashion formals. The latter has playful checks, stripes and prints. The colour combo is relaxed. Meanwhile, boardroom formals have a limited colour basket and the patterns are same or similar.

But in India we do not have such demarcated boundaries.

Globally, button downs are quite handy but in India, they are a big no.

In terms of the formal shirt, the regular fit has the larger share whereas the

western counterparts prefer the cut close to the body. Globally, tech innovations have caught up a high time. But in India, it is still in a very nascent stage.

Global trends and its influence

The formal segment doesn't display many variants in terms of style and cut.

But prints, colours and design patterns of check, stripe and structures do modulate as per the seasonal forecast.

The prints might be spaced out. Or the trend may be of small floral in formals.

The ratio of checks to stripes to solids also changes in accordance with seasons.

The shape and size of collar, placket and pocket are few fashion spots on a formal shirt which adapt to the global influences.

DHARMEN MEHTA, DIRECTOR, BEN MORRIS

Different Types of Formal Shirts

The main fabric used in formal shirts in India in terms of its volume is poly-cotton and cotton. Slowly linen is being added to the basket.

Fabrics

India is a country of colours and we use all kind of colours and weaves in formal shirts. We can see red cotton shirts also being worn in summer like linen being worn in winter. We use all kind of stripes, checks, engineered designs apart from the solids and the

dobbies. Jacquard fabrics are also used in formal shirts and this trend will continue for some time.

Colours/patterns in formal shirts

Yes, we do monitor international trends and styles, and these are then moderated to the Indian taste. International trends cannot be sold in their original state in India. We Indians love to wear colours and need different ones for different occasions and festivals.

Global trends and its influence

At Ben Morris we use only International fabrics. We only use colours and designs which are specific in trend for the premium category. These are with fine count with different finishes and weaves. Woven and the basic colour combination make the base fabrics in the premium category 'Never Go Out of Fashion'.

SALMAN NOORANI, MANAGING DIRECTOR, ZODIAC

Different Types of Formal Shirts

High quality poplins, structures and digital printed Shirts.

Fabrics

Our shirts made from Egyptian cotton with a silk touch finish have worked well for us.

Colours/patterns in formal shirts

We see consumers experimenting

with colours in the wardrobe a lot more than before but white and blue continue to remain staples.

International trendometer

The Indian consumer is extremely clued into global trends and most of them are willing to adapt or experiment with current fashions.

Global trends and its influence

We have design-cum-sales offices in 3 out of the 5 fashion capitals of the world. They update us with latest ideas, trends and news. These are then incorporated into our brand collections.

this subject and are able to judge the difference between normal cotton shirts and shirts made out of Supima, Pima or Egyptian cotton, etc. They understand the unique properties, its comfort and richness level and are willing to pay extra for this.

Being into high-end exclusive shirts business with his brand Ben Morris, Dharmen Mehta has clearly studied this. He says, "Indian customers are now knowledgeable and are ready to pay a better price for a shirt if they find a value addition to it. This proposition could be in form of base products, styling, fits, performance etc."



ZODI

Meanwhile, for some it's subjective. Narinder Kaur says, "Formal shirts sell on the basis of good hand feel, colours and fits as well as some tangible technical value addition. Supima, Pima entices a small segment as their price impact is high."

Linen & Its Popularity

Common linen fabric (made from the stalk of the flax plant *Linum usitatissimum*) wrinkles but is classy and works well for semi-formal occasions. If it has to be given a formal touch, a high-quality linen-blend works well with formal shirts.

Narinder Kaur says, "Linen is considered as a casual fabric in India.

"If we look at the Indian formal brands and international brands there is no competition at all. We are far behind on the fabrics being used by international brands. Apart from the fabrics; it is the fit, styling, collars and pricing that gives them an edge over Indian brands"



DHARMEN MEHTA, Director, Ben Morris



BEN MORRIS

It hasn't gained much dominance in formal except a few formal shirts in linen solids and some old checks. But lately, the scene has changed. Printed linen shirts and fancy checks are gaining ground in this section. Linen has now become an all-season fabric. Even in festive seasons, linen prints and bright solid shirts have a good demand. Blended linen has made it easier on the pocket of the consumer. The fabric is grabbing more share percentage vis-à-vis cotton. Dharmen adds to this saying, "Linen is slowly getting its place in the formal segment due to availability of good finished fabrics in India. At Ben Morris, we use only 120's lea and 150's lea and make very fine formal shirt which is light weight and comfortable. More of design development in linen and its blend will make this product more affordable in formal segments. More and more brands >

are now adding 100 percent linen formal shirts into their portfolio due to good availability of the base fabrics. This trend will continue, and linen will grow in India at a faster pace.”

E-Commerce Fueled Growth

The digital retail channel is no more seen as yet another medium to buy shirts. Rather it’s modernised and value-added version – something which physical stores lack. The good fashion e-commerce channels are moving to solutions based on artificial intelligence where personalisation and content curation on personal taste have become a lot more important.

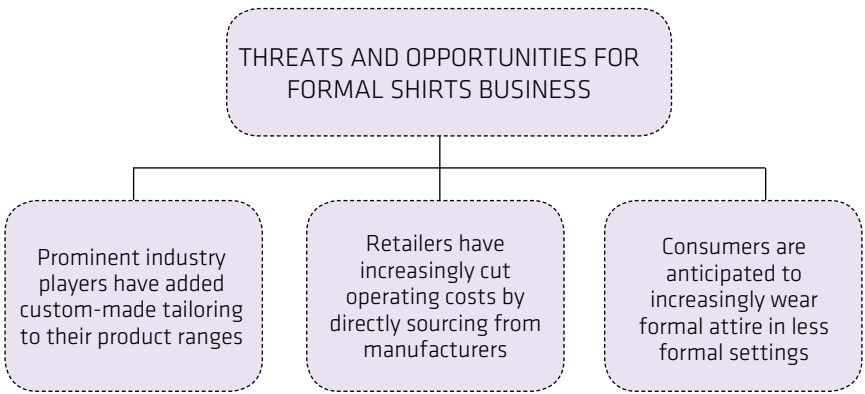
Dharmen Mehta gives his perspective saying, “E-commerce has helped organised players to market their products from door-to-door with an increase in volumes and turnovers. But the other side the biggest question which has to be addressed is whether this retail channel is being used for selling their normal range or using this platform to clear their old stocks. If this platform is used properly, it is sure to give a boom to the organised shirt segment. The only requirement is to put the complete information handy to the end customer so that it becomes easy for him to make a purchase call.”

Salman Noorani further illustrates this point saying, “Our brands are available online only through our own web store www.zodiaconline.com We started this channel when e-commerce was at a nascent stage in India and today, we are happy with the results we are getting.”

The Future of Formal Shirts

Being formal is a way of life in India and it will be difficult to see the category being affected largely. But yes, the key to success to the formal shirts business will be innovation which gives a good fit, comfort, new age fabrics and a uniqueness in itself.

THREATS AND OPPORTUNITIES FOR FORMAL SHIRTS BUSINESS



Competition has intensified in the country as more domestic brands gain market share with their shirt centric portfolio. International brands in formal shirts still maintain their unique positioning and there are very few domestic brands competing against them.

Talking on the demand for formal shirts Narinder Kaur says, “The demand for formal shirts is oscillating from low to medium but is not hitting the high. This is not the segment where consumers indulge. For maximum population of our country, formal is a basic necessity. Of course, there is a demand for good formals where the consumer is willing to pay the price for its USP. But that section is tiny. A lot depends on the changing lifestyle and the dynamic day structure of a consumer. Innovations and inventions are required along with more focus from brands to revive the formal shirt category.”

Dharmen Mehta looks at a bigger picture as he shares his viewpoint. “The future of formal shirts in India is good but the price of the product matters.”

“Formal wear is definitely in trend just now – we can see it across Zodiac for



the classic male and Zod! Club Wear our brand that targets the sharp, trendy dresser. This segment has been our main stay of business since more than 65 years. However, in the recent years fashion has seen a swing from formal to casual – hence our reason to have z3 Relaxed Luxury as part of the House of Zodiac,” Salman Noorani concludes.



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HIGHLIGHTS OF THE NEXT MEGA ISSUE

SEPTEMBER 2019 SPORTSWEAR SPECIAL ISSUE: The Asia-Pacific region has been documented to be fastest growing market for sportswear in the entire world, with a CAGR of 6.9 percent. The report, published by Global Industry Analysts Inc., also revealed that India and Thailand are the kernels of this new cultural revolution. The **September issue of IMAGES Business of Fashion** will cover in details the booming category of Sportswear.

KEY HIGHLIGHTS OF THE ISSUE

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

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THE OLD SCHOOL, CUSTOM-STITCHED FOR FIT AND PRICE MENTALITY PERTAINING TO TROUSERS IS FINALLY WITNESSING A REVOLUTION IN INDIA AS YOUNGER CONSUMERS EXHIBIT AN INCREASING INCLINATION TOWARDS TRENDY READY TO WEAR BOTTOM WEAR...

IMAGES Business of Fashion

Since the advent of western wear in India, trousers have been an important wardrobe investment especially for men in India. While fit, cuts and fabric may have witnessed staggering evolution over the time, what has remained constant all these years is the popularity of this apparel segment.

Today, trousers have come a long way from its just functional roots to become a style defining piece of apparel. Especially in India, the traditional mentality pertaining to trousers is finally witnessing a revolution parallel to the modern corporate young men's penchant for trendy ready-to-wear, bottomwear. On the other hand, the women's segment too has picked up

momentum in the recent years as the number of working women increase by the day. Overall, the trousers market, especially the formal trousers category, has witnessed a remarkable change in the last few years from limited options to a wide range of different colours and designs.

Market Size

According to India's leading management consulting firm, Technopak, the bottom wear market in India, excluding denims, was estimated to be worth ₹41,988 crore in 2017 for men, women and kids. It is estimated that this market segment will grow at a CAGR of 6.5 percent

over the decade to reach ₹78,480 crore by 2027. Segment wise, the trousers market in India is dominated by the men's segment which comprises ~71 percent, followed by the kids' segment which accounts for ~25 percent and finally there is the women's segment that accounts for ~4 percent of the total share.

Trousers is the second largest category in the menswear and accounts for 23 percent of the total market. Technopak's latest data reveals that men's trousers market is expected to grow at a CAGR of 5.6 percent to reach ₹58,602 crore by 2028 from its current size of ₹33,984 crore.

The women's trousers category is a relatively small category in the overall women's fashion segment, contributing about 1 percent to the overall women's apparel market, but is expected to grow at a CAGR of ~9 percent for the next decade to reach a market size of ₹3,689 crore by 2027. The key drivers behind such high growth rate are increase in number of working women, changing lifestyle and fashion awareness, higher spending patterns, etc.

The kids' bottom wear, as documented by Technopak, was worth ₹8,575 crore in 2017 and accounted for ~25 percent of the total bottom wear market of the country. Across both boys' and girl's segment, trousers contribute very trivially.

On the basis of price, the trousers market can be divided across four major broad categories across the men's, women's and kids' segments – super premium, premium, mid and economy. The super-premium and premium segments are dominated by both Indian and International brands. Consumers in these segments tend to have high association with the brand image and seek exclusivity. Innovation

in weaves and special finishing are distinguishing factors in this segment.

The mid and economy segments contribute the largest chunk to men's trousers market with a share of approximately 82 percent of the total market. Value brands and private labels are growing rapidly in these segments as the consumers' awareness of brands has increased substantially; at the same time, the consumer is increasingly seeking value for money.

Growth Drivers

The apparel industry in India has traditionally been largely driven by women, who have tended to be more interested in fashion trends. However, this has slowly been changing as more men are paying greater attention to their grooming and appearance and are making more apparel-related purchases based on fashion trends rather than need. The demand for chic trousers too has been chiefly fuelled by the Indian youth, who now seek trendy look due to increasing fashion awareness, availability of international brands, higher disposable income, etc.

With many women entering the corporate world, the formal women's trouser segment has got a major boost. A growing number of urban working women are accepting concepts like 'board room dressing' and 'business dressing' that involves extensive use



Cambridge

The mid and economy segments contribute the largest chunk to men's trousers market with a share of approximately 82 percent of the total market.

TROUSER TRENDS 2019

Prashant Bhatia,
Managing Partner, Cambridge

opens up about the latest trends dominating shelves in India



What are the different types of trousers that are in trend in both men's wear and women's wear?

Checks have been popular for a while now. Of late, stripes are slowly making their presence felt too. In terms of fits slim fits have been ruling the roster for quite a while now and the share is only slated to increase in the near future.

What are the evergreen colours/patterns in trousers? Also tell us about any emerging colours/patterns that might potentially trend in the near future.

Colours like black, blue, grey and brown remain all time classics; so are matt weaves. In my opinion, structured fabrics in different hues of blue, brown and grey that can be worn with solid/white shirts will trend in the coming season. Also, brighter hues will also be worn by the self-employed segment of the population.

How is the Indian market different from the International market?

Well, it is not much different in the sense that we do follow global trends, but we tend to infuse our indigenous flavours. We try to use the colour palettes popular in the global context and blend that with the fabrics needed by the Indian buyer. So, the fabric in both these markets have a stark contrast.

Globally, the trouser market is dominated by wool and wool blends. In India that doesn't sell too much in the mass market segment due to the Indian climate and mainly maintenance issues. In India, the market is more inclined towards man-made fibres over the natural ones.

Tell us about any upcoming fabric/fabrics that has the potential to be popular in the future.

Practicality is the new mantra of fashion. The fabric has to be relevant to modern times; let's say a fabric that is natural and features easy maintenance properties can be the next big winner. We all are living on the fast land today. People travel all the time on work, and they like to travel light. What we all need now is a trouser that can be worn on consecutive days and yet be fresh enough.

As a whole, what would you say about the consumption trend of the trousers market in India in 2019?

It's a tricky question to say the least. The market is undergoing tremendous changes. In certain markets, the consumption is exhibiting signs of slowing down whereas in other parts, there has been an astonishing increase in the demand of trousers. Especially in the Tier I and II towns, the consumption has gone up in the last few years.

of formal trousers. In the rural fashion market increasing shifting from ethnic wear to western trouser shall contribute to the volume growth of the trousers market while the need of higher quality shall drive the value market.

The reason behind the slow growth of women's trousers might lie in the innate preference for traditional ethnic wear and growing share of contemporary ethnic and fusion wear in women's wardrobes.

Growth in Smaller Town & Cities

It's an established fact by now that the growth in the next few years for the retail category, as a whole, will come from Tier II and III cities. With mobile data being freely available and online shopping portals offering delivery to the remotest of pincodes in India, brands and manufacturers have, before

them, the option to reach out to the previously underserved patrons living in smaller towns and cities across India.

There has been a strong rising demand for trousers in these cities along with the rapid proliferation of jobs in the private sector. The rising disposable incomes and growing infrastructure availability is further fuelling growth. During the festive season too, many brands usually clock a very strong growth in the trousers category.

In the women's sector, the major share of women's trousers market is still concentrated in the metros and bigger cities. However, the category is expected to penetrate into Tier I and II cities in the coming years. Moreover, now that the brand culture is picking up in these towns and cities, it gives brands and retailers immense opportunities.

Market Trends

For trousers, cotton Lycra is one of the top selling fabrics followed by various cellulosic based blends and linen. In the coming future, regenerated fabrics have the potential to be popular. On the contrary, polyester-viscose has become a standard substitute for the classic wool or wool blend trousers in the economy and value market.

Indian consumers are today willing to pay a higher amount as long as the brand perception, consumer value equation and their needs being satiated all along. Consumers are also accepting innovations, which might have been shunned upon previously. Though finishes like wrinkle-free treatment, durable press, water resistance, water repellence, etc., have been in the market for a long time, there have been continuous improvement in all these

In the smaller markets of India, increasing shifting from ethnic wear to western trouser shall contribute to the volume growth of the market while the need of higher quality shall drive the value market.



finishes over time. At the same time the market has witnessed the introduction of new finishes like breathability with superior moisture management characteristics and exceptionally good comfort properties.

The Future

The Indian fashion industry has been going through a phase of transformation, both from the supply as well as the demand side of the market. On the demand front, consumers are moving away from the conventional need-based purchase to occasion specific clothing, from unbranded to branded apparel, from ready-to-stitch fabric to ready-made apparel, from limited colours and styles to experimentative colours and styles. The Indian trousers market is no exception to this trend.

In the smaller markets of India, increasing shifting from ethnic wear to western trouser shall contribute to the volume growth of the market while the need of higher quality shall drive the

value market. The economy segment will also witness entrance of many strong local and regional brands who would offer value for money trousers that the consumer could trust for quality.

On the other side, the established national and international brands will continue to strengthen their position in super premium, premium and mid-price segments of the market; many of them are expected to extend their product offering to economy segment of smaller cities.

With consumers increasingly seeking newer product innovations and responsible production, success of manufacturers and brands in Indian trousers market shall depend on their ability to offer innovative products at right price points and their ability to expand their reach beyond the metros and big cities.





MADE-TO-MEASURE:

A FITTING STYLE UPGRADE FOR INDIA'S FORMAL WEAR SEGMENT

Although the Indian formal wear industry is dominated by the ready to wear segment, a trend of opting for customised, made-to-measure fits has been registered in the last few years mostly among the young, style conscious, financially stable men of today. IMAGES Business of Fashion takes a look...

Shivam Gautam & Team BoF



If fashion is all about glamour, what can be more charismatic than having clothes tailored to your exact specifications? So, it's only natural that modern fashion preferences, given the newfound penchant for exclusivity, are accelerating towards the utmost personal style upgrade – Made-to-Measure fashion!

Made-to-Measure fashion, once a prerogative of well-heeled style connoisseurs, is fast becoming a growing trend among professional men around the world. Propelled by the gaining penchant for exclusive details, individualised fashion preferences and a desire to stand out in the crowd, made-to-measure fashion has today been impelled to the street

level making it accessible to everyone developing their personal brand.

“Made-to-Measure has become an international craze in the recent years especially among the Italian brands. Hong Kong, Dubai, New York and London are the hubs of this growing trend. Even renowned brands like Armani and Parada offers made-to-measure services today, such is the demand of this trend,” says Manoj Mehra, Chairman and Managing Director, Study By Janak.

Sandeep Gonsalves, Director and Co-Founder, SS Homme – Sarah & Sandeep, who keeps a close tab on the international markets to match the standard of service provided by his brand, concurs with this view. “Made-to-measure is experiencing consistent growth internationally and there has not been a reason to conclude that it may decline anytime soon. We see

individuals who are opting out of wearing suits to work but then again, millennials are more likely to spend on experiences due to which the volume of purchasing during the festive season is higher,” he says.

While the trend is catching up in India too, the novelty quotient might not be as high as it is in the western world considering India's illustrated heritage of bespoke fashion.

Especially in formal wear, bespoke was the norm and the only option back in the day in India. The garment industry in India was restricted to small scale manufacturing units and owing to lack of size standardisation, there were few ready-to-wear options for consumers of yesteryears, who preferred to buy ready-to-stitch (RTS) fabric and then have a tailor style it according to their respective size and preferences.

It was only in the 1990s with the entry and expansion of international and domestic apparel brands came the trend of readymade garments which

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MADE-TO-MEASURE VERSUS BESPOKE TAILORING

- The difference between made-to-measure and bespoke tailoring seems to be a very common misconception. Made-to-Measure clothing involves garments that are machine-cut using standard size base patterns. The garments are then adjusted to the customer's measurements with the help of alterations.
- A bespoke garment, on the other hand, is handcrafted with the pattern cut from scratch as per the customer's measurements. Multiple fittings are offered to the customer during the bespoke process in order to achieve the best possible fit.
- Additionally, the bespoke process involves a fabric selection stage where the customer picks out the fabric and may choose to personalize the garment further to their liking.

-Sandeep Gonsalves



In made-to-measure and bespoke tailoring, considering the time and dexterous attention invested in the customising or creating the product to an individual's specific taste, the extra cost is well justified.

were manufactured with defined specifications on input material, with defined process parameters that promised to give consistent quality – the industrial quality. Over a period of time, as the quantity maturity increased, factories leveraged their economies of scale, better sourcing, product engineering and process engineering to deliver a wide range of apparel choices at a relatively lower cost. With the rising middle class and increasing disposable incomes more people started buying branded clothes of graded sizes that best fitted them. Well, most of them!

For the discerning few, style conscious, financially stable men, 'off the rack' RTW could hardly keep up to their expectations. This expectation gradually resulted in made-to-measure services evolving in the high streets of key metros like Delhi, Bangalore and Mumbai. The made-to-measure market in India is steadily scaling the ranks. The growing sense of perfect

fit, awareness of best fabrics, quality international brands and companies offering impeccable made-to-measure products and a higher detail of product understanding, has led to a drastic growth in people's inclination towards opting for made-to-measure clothing.

"While ready-made garments still dominate the Indian market, made-to-measure and bespoke tailoring are both rapidly picking up in India. The want for personalised styles, teamed with comfort is what is giving rise to this segment. And with the presence of stylists/experts who guide a customer through the journey, the end-product turns out as per the customer's wants, even though he/she might not be an expert in that subject," says Harssh Chheda, Founder and Chief Executive Officer, Corporate Collars.

It also is worth mentioning that the made-to-measure concept truly works in favor of formal wear like shirts, trousers, and suits because there are



“Made-to-measure has gained a lot of momentum internationally and more brands are realising the potential it holds. Our stores in New York and Dubai have been well received by people. Our online shop has customers shopping for custom shirts from all over the globe”

AKSHAY NARVEKAR, Founder & CEO, Bombay Shirt Company

standardized fittings for the same, which can be tweaked according to the customer’s fittings. Moreover, for people in the corporate world, shirts, trousers, and suits personify them and made-to-measure/bespoke tailoring does true justice to it.

At the same time, this, naturally, has opened doors to a slew of new breed of brands and designers that specialise in meeting the suave, modern consumer’s

demand for a more anonymous look. It has also given rise to a healthy competition among the established names of this domain to ante up their products and services and be stand out among their peers.

Why Made-to-Measure?

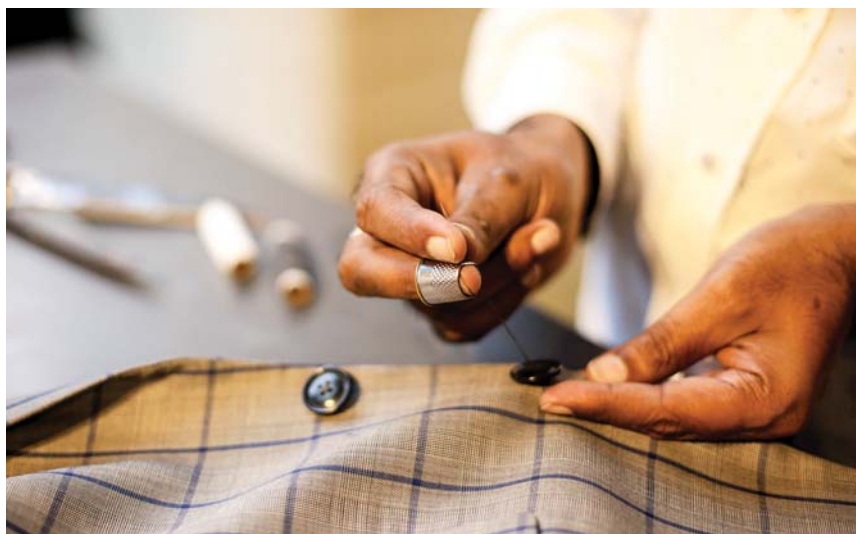
The simplest reason is the FIT! Made-to-measure formal wear is completely customised with utmost attention given to even the tiniest of details. It gives the consumer the best fit for his body type without compromising on the comfort factor, unlike ready-to-wear suits.

“A good fit is the key aspect of the corporate attire. In the case of ready-made garments, they are bound to be compromised when it comes to fitting. While some brands use the number system or sizes like small, medium, large, etc., one has to settle for approximation and lack of perfection. Customisation/made-to-measure services score high on this aspect,” says Harssh Chheda.

“One of the primary reasons why people opt for a made-to-measure service is that it gives you a better fit at accessible prices. At Bombay Shirt Company, we allow customers the sheer ease of picking every little detail that goes into their shirt - from fabric to the fit. And that we believe is what makes our service so special - the opportunity to design a shirt that is truly one-of-a-kind,” says Akshay Narvekar, Founder, CEO, Bombay Shirt Company.



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“With the middle class becoming more prosperous, custom made services are seeing higher demands compared to off the rack RTW clothing. In India, luxury is becoming more synonymous to personalisation and it could be just a matter of time for exponential development of made-to-measure services especially when it comes men’s formal clothing”

MANOJ MEHRA,
CMD, Study by Janak



“It is not necessary that brands with a textile background can only offer made-to-measure services. Yes, having a textile brand will certainly benefit but, there’s more to it. A team of experienced stylists, master tailors, a good collection of fabrics to choose from and a customer friendly approach can go a long way for building customer loyalty”

HARSSH CHHEDA,
Founder & CEO, Corporate Collars



“There is a severe and undying need for both made-to-measure and fast-fashion products in the market. Custom-made clothing is more of a luxury-based concept and once one gets accustomed to it, they opt to avoid off the rack fast-fashion as much as possible. However, fast fashion will always be necessary to cater to the ever-changing trends for increasing fickle audiences”

SANDEEP GONSALVES,
Co-Founder & Director, SS Homme



BOMBAY SHIRT COMPANY

It might come as a surprise, but the fit isn’t the sole overriding concern of the made-to-measure enthusiast. More than the fit, a purposeful sense of individuality and uniqueness is what makes a made-to-measure experience more appealing than a homogeneous high street offering or even the expensive most factory produced apparel. This is fairly pronounced among the growing nouveau riche and the High Net-worth Individuals (HNIs) of India. This section of society, armed with high disposable income and a keen desire for exclusivity, sees the made-to-measure exclusivity an extension of their own personality.

Moreover, made-to-measure is also beginning to grow as a viable option to the increasing number of people who are doing away with fast fashion and opting for more sustainable ways of dressing up.

The Made-to-Measure Enthusiast

Made-to-Measure fashion is much affordable now as compared to a decade back when the trend was still tethering. Before it becomes affordable in the true sense, the growth was driven by a small set of affluent customers who didn’t not mind paying a premium over ready to wear shirts/suits. The premium paid is viewed by these customers as an investment rather than cost.

But times are a changing and a new consumer section for made-to-measure has risen the ranks. Proliferating awareness, falling prices and most of all, modern India’s newfound penchant for “looking and living good” has culminated into a new and savvy consumer base who exhibits a conscious inclination towards unique, made-to-measure pieces; a part of what is being coined “the new luxury”. This legion of young and

dynamic consumers not only harbour a penchant for style and comfort but also has the financial stability to not shop 'off-the-peg'.

"Office-goers, professionals and businessmen are the predominant segment with a special focus on high ranking officials like CEOs, CFOs, etc., who represent themselves through power dressing. However, with the increasing awareness and affordability, a lot of youngsters are also exploring customized tailoring /made-to-measure services. Influenced by these changes and modern perspective, even ready-made brands are exploring ways to customize apparels in order to better serve their loyal customer base," says Harssh Chheda.

"The popularity for made-to-measure services is rapidly growing among men who are willing to pay a little extra than what they consider reasonable to have a choice of playing with the fabric, lapels, colours and personalising them as per individual preference. Due to increase in rising aspirations, young adults who wants to try something unusual are particularly attracted because of the extent of personalisation it offers," says Manoj Mehra.

Today, Millennials are one of the main consumers of the made-to-measure segment. "They are becoming increasingly aware of the segment. They are extremely fashion conscious and want to give the best impression with their attire at all times, which is why the made-to-measure concept works great for them," says Sandeep Gonsalves.

Made-to-measure formal fashion wear also enjoy high demand across occasions such as marriages, festivals and business travel. "The target customer for custom-made or bespoke garments are usually grooms and sartorially inclined business professionals. As more and more people understand the pros of bespoke and made-to-measure clothing, they are more likely to opt for these services instead of going to a store and picking up garments off the rack. It is, however, a norm in India amongst wedding attendees to opt for custom made clothing due to the value attached to the additional services offered with the garment," he adds.

Corporate offices and business meetings have always emphasized on sharp formal dressing codes and the made-to-measure concept fit in very well with modern young corporates. "Customisation of formal wear is now becoming popular in the corporate world and is ruling the formal wear market today since offices emphasise on sharp dressing codes and this is where made-to-measure fits perfectly," says Manoj Mehra.

In a nutshell, the made-to-measure brands in India serve a potpourri of age groups, genders and socio-economic classifications today. There is no specific TG for these services anymore -- it can be a young lad, an adult or a complete old man. End of the day, it all boils down to one thing -- 'the style and comfort' that people seek in their garments and the readiness to pay for the same.

Percolation in Smaller Cities

With a rapidly growing middle-class consumer base propelled by rising income, the Indian luxury market is

Corporate offices and business meetings have always emphasized on sharp formal dressing codes and the made-to-measure concept fits in very well with modern young corporates.



BOMBAY SHIRT COMPANY



experiencing strong evolution even in the smaller cities. Today, growing awareness of digital facilities amongst youth has lifted the demand of made-to-measure services in smaller cities as well.

“While there is no denying that metros and Tier I cities are the focus markets for made-to-measure and bespoke services, smaller cities have a good amount of business professionals with affordability who follow fashion trends. Additionally, these smaller towns offer lesser variety when it comes to readymade garments, which is a potential advantage for bespoke/customised services,” asserts Harssh Chheda.

“With the growing urge for made-to-measure and exposure to global brands, the demand of made-to-measure has fuelled all over the nation. The scope in smaller cities is growing at a rapid pace with the growing spending power of the people and is not restricted just to Tier I cities.

We are open to expansion and providing our services in smaller cities if they have such retail infrastructures,” says Manoj Mehra.

Made-to-Measure is Costly!

Customised fashion is freedom of choice! And as the saying goes, “Freedom has a price.”

More often than not, made-to-measure services are expensive than ready-made garments but cheaper than bespoke tailoring. In both cases, considering the time and dexterous attention invested in the customising or creating the product to an individual’s specific taste, the extra cost is well justified.

“Made-to-measure and bespoke are two different types of tailoring techniques with completely different price points. Made-to-Measure suits at SS Homme start at ₹40,000, whereas a bespoke suit can cost anywhere between ₹60,000 to ₹3 lakh,” says Sandeep Gonsalves.

But over the years, as the customer base and the market grew, the prices have started to fall. Today, made-to-measure, as it traditionally used to be, is not the exclusive entitlement of the wealthy alone. Brands are increasingly trying to attract the new consumer base with attractive pricing policies. “With Bombay Shirt Company, our aim has always been to defeat this very idea of made-to-measure being expensive. We offer custom shirts at prices that won’t burn a hole in your pocket. An average shirt starts at ₹2,090, which is almost at par with prices of ready-to-wear brands,” says Akshay Narvekar.

What the Future Holds

The Indian custom fashion industry is thriving and growing despite the growth of ready-to-wear and branded segment of the apparel market. And as is apparent, the concept of made-to-measure especially in the formal wear segment enjoys nationwide popularity that is growing by the day. With the newer generation coming in, it is only imperative for such a change to take place.

The result is a slew of new brands, including a surprising number of regional and online players, that have emerged in the last few years. This reinforces the demand and potential of made-to-measure services in India. This also implies that, with increased competition, fulfilling consumer needs will be an important success factor for brands that will also have to design their go-to-market plan cautiously, identifying key pain points and ensuring that a superior experience is offered.

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Sportswear India today is at par with the wider global fitness trend. The booming economy and changing lifestyle preferences have compelled Indian consumers to be more health conscious and add new health and wellness routines to their hectic lifestyles.

The Asia-Pacific region has been documented to be fastest growing market for sportswear in the entire world, with a CAGR of 6.9 percent. The report published by Global Industry Analysts Inc., also revealed that India and Thailand are the kernels of this new cultural revolution.

The September issue of IMAGES Business of Fashion Will cover in details the booming category of Sportswear.

Within each we will:

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



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A NOT TO BE MISSED ADVERTISING OPPORTUNITY



MEN'S SUITS SEGMENTS

WITNESSES SHARP GROWTH CURVE

All it takes is just one look at today's urbane and dapper man to realise that formal suits are his best personal style. Lately, a profusion of socio-economic factors have culminated in the proliferation of this savvy consumer base which exhibits a conscious inclination towards unique styles. IMAGES Business of Fashion takes a look at market growth drivers...

Rosy Sharma with inputs from Gurbir Singh Gulati

When menswear brand Peter England launched its suits and blazers collection for weddings and other occasions with Chennai Super Kings' superstars MS Dhoni, Shane Watson, Dwayne Bravo and Murali Vijay sporting striking looks earlier this year, all the brand had on its mind was a high voltage fashion quotient.

Crafted with superior fabric, the collection featured suits and blazers

with rich colour palettes that include lustrous wine tones, deep cobalt blues and vibrant earthy reds. The satin weaves along with the luxury fabric lend a touch of exclusivity to the collection. Reducing the heavy trims, the collection comprised three-piece suit sets, and blazers thoughtfully created to keep the customer's comfort in mind. The high on fashion suits and blazers collection break the monotony by adding contrasting colours to the ensemble with perfection.

This collection by Peter England goes to show that men today are experimenting more than ever, wanting to look their finest on all occasions. "Standing out seems to have struck a chord among style-conscious men," says Salesh Grover, Business Head, OSL Luxury Collections (Corneliani). "According to recent statistics, men are spending more on shopping than women, which indicates a change in trend. The men's occasion wear market is transforming into a very detail-oriented, fashion conscious segment. It is all about getting noticed and being different."



"The advent of bespoke tailoring has added another factor to the suits' market. People who want perfectly fitted suits are preferring bespoke. On the whole, bespoke is going to stay and has a bright future and we believe it will even complement the readymade suits market"

RAJNISH SETHIA, Director, Success

Celebrity endorsement plays a considerable role in setting fashion trends which are a crucial driver for suits market growth. It also helps to improve product and brand awareness. Additional growth factors include the acceptance of smart casuals in offices, rise of social media and new age digital media influencers, aside from the increasing workforce and growing disposable income of the middle class.

And after witnessing a boom in the men's suits wear segment, brands have upped their game.

Market Size

The Indian economy is one of the fastest growing economies in the world. Most of India's young population - approximately 65 percent - is below 35 years of age, something which further stimulates the menswear market, with the new millennial man being a key growth driver.

According to Grover, the Indian menswear industry is valued at a whopping US \$16 billion and is growing rapidly, and the size of men's suits market is 8.9 percent of the total menswear market in the country.

In terms of volume, this market is 1 percent of the total menswear market and is expected to grow by 8 percent in the coming year.

Rapid urbanisation has spawned a modern class of consumers with more money to spend and a growing passion for current fashion. The demand for occasion-specific clothing is growing within the menswear segment. Modern age males are starting to prioritise personal grooming and fashion, further driving growth of the suits' market. The demand for ethnic dressing at special occasions like marriages and social functions also gives a stimulus to the men's formal wear segment.

"The segment has seen pretty good growth in the last couple of years. The young generation has a good chunk of income which is disposable and being exposed to international market, this generation wants to dress well. This has pushed the growth of suits and blazers market to new heights," says Rajnish Sethia, Director, Success.

"The segment has been fueled by deep internet penetration and a growing awareness of global fashion trends thanks to the rise of fashion and lifestyle media. As a result, the middle class and the young population of the





“Men are spending more on shopping than women, which definitely indicates a change in trend. Over the next 8 years we expect the size of the men’s formal wear market to expand by 15 percent. The men’s occasion wear market is transforming into a very detail-oriented, fashion conscious segment. It is all about getting noticed and being different”

SALESH GROVER,
Business Head, OSL Luxury Collections
(Corneliani)

country are extremely trend conscious. And that’s the reason the future of formal wear is bright and blooming,” adds Grover.

Fashion & Trends

Features like nano-coating, quick-dry, feather light, stretch, light lining, fitted shapes, soft shoulders and slimmer lapels in hues that are currently ruling the season in as far as formal menswear goes.

For brand Corneliani, there is more to dressing up than the basics like black, brown and navy. “This season, it’s all about pastels, jeweled tones like burgundy and forest green, etc. Colours like lilac, mauve, sea blue, mustard, burgundy, ultra-violet and salmon pink are extremely in trend,” says Grover.

For Success, fitted suits that are shorter in length and checkered suits are dominating currently. “Brands are experimenting with brighter shades such as red and electric blue. Three-piece suits are also very in,” says Sethia.

“Trends are changing drastically and come festive and wedding seasons, the men’s formal wear market will be brimming with exhaustive fashion and accessories collections,” Grover adds.

Another trend that is catching on in the segment is bespoke suits.

“The advent of bespoke tailoring is another factor giving a fillip to the suits’ market. People who were unable to buy readymade suits because of their physical structure are getting bespoke suits done. Moreover, people who wants perfectly fitted suits are preferring bespoke,” says Sethia. “On the whole, bespoke is going to stay and has a

bright future and we believe it will even complement readymade suits market as people are becoming more conscious about wearing suits.”

Grover adds to this explaining that Made-to-Measure (MTM) services are meeting the burgeoning demand of bespoke to suit precise requirements.

“Corneliani’s MTM experts not only focus on fittings but also on the consumers’ choice of fabrics, length of the garments, button lining codes, inside leg lengths, shape and posture of a customer’s body et. al. We continue to push the boundaries of quality and creativity with impeccable tailoring, fine styling and luxurious selection and textures. It has added growth to this industry as higher disposable incomes, nuclear family set ups and being fashion conscious, increased awareness, etc., have brought about a great change in the spending pattern of modern men,” he adds.

Sethia believes fashion and functionality – comfort – should go hand in hand. “A suit which is high in fashion but poor in comfort is of no use,” he says. His brand, Success, makes suits in fabrics with Lycra content and knit fabrics to add stretchability and comfort to the person wearing it. “We are making lightweight unlined coats for maximum comfort.”

“The future of suits seems safe and bright. India being a young country full of young entrepreneurs, the suits segment is going to grow tremendously. It is in this segment that lies a huge opportunity,” he concludes.



SHREE

THE INDIAN AVATAR

The brand is targeted at fashion-conscious women who straddle both work and home with panache, confidence and grace

> Company: **SHR LIFESTYLES PVT. LTD.** > Year of Launch: **2011**
> Headquarter: **DELHI, INDIA**



Women's wear brand, Shree is renowned for offering a perfect blend of traditional and modern ethnic wear that are matchless in terms of style, quality and price. Deep rooted in rich Indian culture, the brand draws inspiration from the modern Indian woman who balances both work and home with elegance and confidence.

Focus Customers

The focus is on fashion-conscious women in their early 30s and over 40s, who are committed to their roots.

Product Portfolio

The present product portfolio includes a wide range of kurtas, tunics, tops, dresses, coordinated with/without dupatta or scarf, variations of bottoms like palazzos, leggings, jeggings, shararas, dhoti salwars, etc. The product range also includes accessories like earrings, scrunchies and home lifestyle products like coasters, mouse pads and table mats made out of fabric cut bits.

Shree is trying to delve into the zone of 'sustainability' and promote 'up cycling' by introducing hair accessories, coasters and packaging made out of factory waste.

Latest Collection & Theme

Inspired from regional art and architecture while adding a contemporary look and feel to the final garment, the brand shares themes like Azam-The Mughal, inspired from Mughal art and architecture; Jashn-e-Jaipur, inspired by Jaipur block prints; Pixel Garden, inspired from the pixel art and a blend of floral motifs; and an exclusive festive range Glitz-and-Glam with royal classy fabrics and heavy embroidery

Most Innovative Products

In terms of styles and cuts, the brand has experimented with 'togas' (jacket-style garments) in various lengths and cuts. Flared, umbrella kurtas (long and short lengths) added volume to the product and at par with the festive demand.

Keeping in mind the trends, it introduced flared dresses with stoles and scarves and re-introduced short kurtis by pairing them up with shararas (wide-legged bottoms as well as skirt and pants). Similarly, thinking of the younger generations, it has added traditional jacquard and brocade lehenga cholis with bright colour digital printed dupattas and stoles.

Primary Markets & Retail Presence

The brand focuses more on Tier I, II and III cities and has presence through 76 EBOs, 36 lifestyle stores and approximately 3,500 point-of-sales including MBOs.

Online Retail

The brand registered 40 percent growth from online retail every year and is also working extensively with Myntra-Flipkart Group.

Turnover & Growth Rate

The brand is aiming at ₹250 crore turnover and a CAGR of 33 percent in the next 3 years.



A woman with long brown hair is standing on a city street. She is wearing a long-sleeved blouse with vertical stripes in shades of pink, purple, and yellow, and a high-waisted, knee-length pink skirt with a matching belt. She is also wearing dark brown boots. In the background, there is a building with a sign that says 'FOOTWEAR' and a car parked on the street.

THE CHANGING DEFINITION OF

WOMEN'S FORMAL WEAR IN INDIA

Till recently, the women's formal wear segment was a developing category with a handful of players in the segment, with leading names including Allen Solly Woman, Park Avenue Woman, Van Heusen, etc. The phenomenal growth in this segment has attracted not only some of the biggest lifestyle and fashion brands but has also inspired a few startups. IMAGES Business of Fashion talks to young brands to understand the changing consumer demands and trends in the market...

Rosy Sharma with inputs from Gurbir Singh Gulati

For years, Indian clothes have been rooted in the vastness of the country's culture, the richness of its ethos. But with changing times, and changing demographic and psychographic profiles of Indian consumers, retailers are beginning to adapt to global trends and India's fashion scene has started evolving at an extremely fast pace.

Women's 'formal' clothing, which was primarily confined to monotonous monochromatic colours, sober solids and stripes, has undergone a sea of change today, transforming into a youthful, chic and classy choice of clothes for contemporary women. The segment has broadened its spectrum to include dresses, gowns and formal tops besides the always present shirts, skirts, trousers and blazers. It has also taken under its wing, segments like semi-formal, smart casual, business casual, all of which are marginally different from the main segment.

"There has been an overall lifestyle change which has led to a change in preferences in the type of clothes women are choosing. This coupled with high disposable income, easy access and awareness to e-commerce and social media has led to the rise of the formal wear segment in India," explains Pooja Khanna, Founder, Venn. "Younger women, today, seamlessly switch from ethnic to

With the emerging middle class with its disposable income, access to the Internet, smartphones and exposure to innovative technologies used to create experiential e-commerce, the projected fashion consumers will grow to more than 1.2 billion by 2020.

western wear – an ability that Indian women employ fabulously – while senior female managers in professions with customer interfaces like banking still rely on the elegant saree. There has been an increase in preference for western formals among younger professionals like doctors and lawyers leading towards a similar consumption pattern."

Dipti Tolani, Founder and CEO, Salt Attire shares, "The rise in the number of women getting into the workplace is another major factor in the rise of the segment since stepping out of the home space and into the professional space requires them to dress better." Also, women want to project a serious image and look fashionable and trendy at the same time – a trend which is especially seen in metro cities.

Looking at the emerging middle class with its disposable income, access to the Internet, smartphones and exposure to innovative technologies used to create experiential e-commerce, she is optimistic that the projected fashion consumers will grow to more than 1.2 billion by 2020. The good news for the fashion retail industry is that the majority of these new consumers are within the 16 to 24 and 25 to 34 age groups.

According to Khanna the Indian women formal wear market stood at



around US \$460 billion in 2017 with a growth of 4.9 percent in the same year. It was anticipated to grow at a CAGR of around 6 percent during the period 2017-2024 with the revenue reaching to more than US \$690 billion by 2024. The global women's formal wear market is expected to achieve an incremental opportunity of US \$46.3 billion in 2024 over 2023. "The sector holds 38 percent share in the Indian apparel market. It has been estimated that the ₹1,02,358 crore women's wear market will grow at a CAGR of 11 percent to reach ₹2,89,518 crore in 2025," Khanna adds.

Ashish Gurnani, Co-Founder, PostFold also shares that the women's wear segment contributes to 38 percent of the total market in the country. Within this, the women's formal wear category



is growing at an average of 15 percent as compared to 8 to 10 percent growth in the menswear category. “Brands nowadays have started tapping the women’s formal wear segment because of the increase in the number of working women over the years. Also, this change has led to an increase in purchasing power which makes the women’s wear segment contribute so much to the total apparel market of the country,” he says. “A broad market with infinite home-grown and international brands competing to offer the best results in pocket-friendly prices brings to the Indian women, a never-ending list of formal wears to choose from. Of course, with more women stepping into the corporate world, the ratio of women wear is inclining day by day.”

Despite the fact that the Indian women’s formal wear market is evolving rapidly it is highly underpenetrated with just about 3 to 4

brands predominantly selling in this segment. The fact that so few brands are operating in the space has left a lot of white spaces for a brand like us to come and grow in this segment,” states Shweta Sharma, Co-Founder and CEO, Ombré Lane.

Demand & Innovation

With changing lifestyles, the demand for utility, comfort and versatility is taking precedence in formal wear today. According to Sharma, women are looking for superior quality products that are driven by all these elements. They want to look and feel great at their workplace so they can put their best foot forward. She believes that along with design, functionality and fit will be the key drivers in this segment.

“There is a growing need for comfort and practicality in everything we purchase with the main objective being convenience. Our fast-paced lives demand functionality and ease. Today’s woman is looking for products that offer these facets,” she says. “Women spend countless hours fiddling with pins on shirts to avoid peeking, always having to carry a bag for essentials because they won’t fit in tiny (or non-existent) pockets and constantly worrying about visible bra straps and panty lines. Most of the formal wear available today is devoid of these small but crucial details that make a garment practical to use and this is the gap we aim to fill.”

A lot of research has gone into the sizing and measurements that Ombré Lane follows for its garments. The brand has taken measurements and interviewed over 2,000 women to understand body types, size variations and fit requirements. They consider all of these aspects at every stage of design and prototype development, which helps them create the right fit for Indian women.

“You have to understand who your target audience is and the price they associate to the value your clothes bring to her. Price is not an outcome of just the raw material, but has more to do with the positioning of the brand that sells it, and the relevance/demand of the design”



POOJA KHANNA, Founder, Venn

“Earlier, workwear was classified as boring but nowadays many experiments have been introduced to this segment. It is about the impact of power dressing while keeping market trends in mind,” says Tolani. Salt Attire offers bespoke clothing, which is made and manufactured in the same capacity as other items. “Our design process involves many facets; from the usual trends and weather to most importantly ensuring functionality in the design process. We have certain basic design principles, that ensure the garments are work-appropriate, which all our garments must satisfy.” “Women these days have multiple roles

and prefer cross functional clothing that they can wear from boardroom to dinner. We design stylish yet practical wear. We focus a lot on practical details like pockets, sitting comfort, high quality buttons and fasters, etc. We offer custom sizing which has seen a lot of popularity from our customers,” affirms Khanna. “At Venn we make sure that we have clothes that are not only as per the present trend but are also environment friendly. We only use sustainable fabrics like organic cotton, bamboo fabric, Tencel, etc.”

According to her, conventionally grown cotton is a very thirsty crop.

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OMBRÉ LANE

ALLEN SOLLY WOMAN: REVOLUTIONISING THE LIFESTYLE OF YOUNG PROFESSIONALS WITH NEW-AGE WORK WEAR

A pioneer for western wear for women, Allen Solly Woman has redefined workwear in India with its 'Friday Dressing' fashion concept. Allen Solly Woman's range features fashion forward dresses which look tailored yet feminine that are suitable for work and beyond. Their staples – vibrant and stylised shirts and tops are working women's favourite.

Recently, Allen SollyWoman unveiled its first ever media campaign “Fun at Work”. With this campaign, Allen Solly sets new benchmarks for work wear where cool new fashion meets comfort to enable high energy lifestyle of this generation. It gives young women a chance to express their very own fashion statement at work.

Anil S Kumar, COO, Allen Solly says, “Allen Solly has been one of the most sought-after brands for the modern working woman, who desires something trendy yet comfortable for workwear. The new campaign is in line with the brand's offerings of vibrant and comfortable workwear for the new age working woman. 'The Stag', which has become an integral part of our brand imagery, has been integrated into the line in a fun and relatable way. Allen Solly is a pioneer in the category of western workwear for the Indian woman and this campaign is an attempt to re-connect with the new-age woman in a most fun manner.”

Jayanth Gurumurthy, Creative Director, Allen Solly further adds, “Allen Solly Woman stands for fulfilling fashionable work wear needs of new age consumers. Our women's range is vibrant, colorful and offers the best fabrics, style and fit for long lasting comfort. The new campaign helps us to showcase the best of the Allen Solly Woman's wide range from fitted trousers to fluid tops.”



In Conversation with Spokesperson, Vero Moda, a Bestseller Company

Tell us about your observation of women's formal wear market in India? How has it changed over the years?

More and more women are working in the corporate sector and with this inclination we see more women adapting western formals in India. The misconception that 'formals cannot be stylish and comfortable' is fading away gradually, which is a good sight. Formal wear is not only restricted to workplace, they are flexible and edgy and can be accessorised to suit any occasion.

The corporate attire rules have become more dynamic. It is no longer limited to conservative styles like shirts and trousers. This promises exciting growth opportunities for different categories and also for the formal wear market.

What will be the key growth drivers in the segment, according to you?

As workplace dressing slowly becomes an extension of ones' personality, versatility of the designs, comfort and availability in different sizes will be the factors affecting the growth of this segment! There is an abundance of options available in the market. Being an international brand, at Vero Moda, we try and incorporate European fashion trends which would best suit Indian women.

What are the current trends in the segment as well as consumption patterns?

Fashion consumption is becoming more experimental in nature. As consumers are well travelled and exposed to international trends, they are inclined towards pieces that are unique in terms of design, offer an edge in terms of style and also deliver on the dual factors of price and comfort. Formal wear was assumed to be very basic but these days the category has been adopting a variety of runway trends into its products like bold tints, edgy hemlines, prints, etc., which is turning the entire segment into a vibrant and exciting one! Current topical trends include experimenting with silhouettes, palazzo pants, cigarette pants, coloured culottes, high-waist pants which are being liked by the consumers. These changing consumption patterns are drastically changing the concept of workwear and adding an element of freshness to the whole corporate dressing culture.

How will the future unfold for the women's formal category in India?

As the corporate work culture especially workplace attire rules become less stringent and restrictive, we can expect the formal wear category especially women's formal wear to become more experimental and diverse in terms of product categories. With the growing start-up culture, workplace norms have become relaxed and a lot of new age offices allow their employees to wear 'smart casuals' as well. This leads to a multitude of design options and silhouettes, cuts and styles that can be incorporated into formal dressing. People are moving away from traditional pieces like white shirts and black trousers and are inclined towards curating a stylish 'work wardrobe' which has a different range of pieces right from tops, bottoms and blazers to dresses, pantsuits and separates. Workplace attire has now become an extension of your personality.





“The future of fashion will undoubtedly be shaped with advancements in machine learning technology. Artificial intelligence will help leverage inventory efficiency, reduce costs, and at the same time, create a best in the class shopping experience for the consumer”

DIPTI TOLANI,
Founder & CEO, Salt Attire



“Utility, comfort and versatility are the key trends in the formal wear, today. Women are looking for superior quality products that are driven by these elements. They want to look and feel great at their workplace so they can put their best foot forward. Our aim is to create products that make her feel confident and comfortable at work and beyond”

SHWETA SHARMA,
Co-Founder & CEO, Ombré Lane

Over 2,700 litres of water is required to make one cotton t-shirt. That is enough water for a person to drink for two-and-half years! Cotton production uses 16 percent of all the world's insecticides and 7 percent of pesticides. Organic cotton farming uses natural processes rather than artificial inputs. More importantly, it does not allow the use of toxic chemicals or GMOs (genetically modified organisms). In comparison, organic cotton uses 71 percent less water and 62 percent less energy. It is 80 percent rain-fed. The fabric is biodegradable and decomposes without any toxic remains. It actually feels better on the skin than commercial cotton as it is free from toxic chemicals.

“Unfortunately, sustainability in fashion is still not understood properly. Formal and informal wear both can be made easily in sustainable fabrics. There has been enough innovation in sustainable fabrics and there are ample fabrics available today to make sustainable formal wear,” she says.

Gurnani, tie-ups are trending for women and silhouettes which are comfortable and functional like culottes are also doing well.

For Gurnani, anti-wrinkle, hydrophobic and organic fabrics that last long are one of the prime innovations in the formal women's wear segment. PostFold offers garments in smart fabrics like Supima, Tencel and Travel360 which are wrinkle-resistant, stain proof and comfortable

to wear from 9 am to 9 pm. “Classics and basics are the evergreen favourites of women to wear to the office. With functionality and fashion on their minds, the middle class and young working professionals are aspirational for better quality and stature, both factors which heavily affect their consumption patterns,” he shares. “With the presence of international brands like H&M, Zara and Van Heusen in the market, the new Indian consumer prefers more of branded clothes over unbranded because of a more aspirational lifestyle. To cope up with the current scenario, Indian brands offer a new on-trend fashion in high quality with lower prices.”

Role of E-Commerce

A decade ago, e-commerce entered India and changed the lives of urban consumers forever. Today, with the penetration of Internet, e-commerce is changing the lives of Indians in small towns and beyond as well, owing to the convenience and wide variety of choice it affords a consumer. E-commerce provides a wide array of comfortable and stunning options for Indian women when it comes to western formal

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POSTFOLD

wear. “The emergence of e-commerce has uplifted the entire fashion retail market. Various market platforms provide elegant yet comfortable outfits in less time, which is a perfect option for working women who otherwise don’t have a lot of time to spare for shopping,” states Gurnani.

“E-commerce improves visibility aside from creating a buzz in the industry. The digital world knows no geographical boundaries, and the possibilities of worldwide recognition, brand recall and sales are enormous,” explains Tolani. “The reach of e-commerce is helping the category grow in a big way.” “E-commerce allows us to reach our customers directly and take their direct feedback to give them a well-curated experience. Social platforms like Instagram and Facebook allow growing brands like ours to share the brand story and create a one-on-one connection with the customers. On the operations side, it allows us to analyse our sales, returns, and product level customer engagement data daily and react immediately if needed. We can optimise our inventory levels based on initial demand trends and not get stuck with unsellable inventory to liquidate,” adds Sharma.

Manjula Tiwari, CEO, Cover Story (Future Style Lab)



Tell us about the women’s formal wear market in India? How has it changed over the years?

The formal wear market in India contributes about 40 percent of the total apparel industry. The market has greatly evolved over the past decade due to awareness of global trends and designs at the click of a button. Social media has also led to more image conscious buyers. More and more women are getting aware about formal/ work wear. However formal wear in India is still at a nascent stage and has a long way to evolve compared to the western markets.

What will be the key growth drivers in the segment over the next 3 years?

Increased disposable income, accessibility to more brands, increased awareness of global trends, digital exposure, etc., have made women more image conscious. The growth of e-commerce and social media platforms have helped this segment to grow tremendously and will continue to be the key factors in driving this segment.

Throw some light on your design capabilities. What is your USP?

Indian brands have a great mix of things to offer such as designs, colours and fits. At Cover Story, we have specifically created designs keeping the Indian consumers in mind giving them an edge over the international counterparts. We have our design team in London and our biggest USP’s is having a new collection every week. The team curates designs keeping in the mind the Indian body type and preferences while maintaining global trends.

With global brands coming in how are Indian players coping and scoring? Has the competition intensified?

India is still at a nascent stage with regards to the formal wear segment. With increasing exposure to digital and social media, availability of brands at the click of a button and the increased disposable income, all these will lead to greater opportunities for domestic and global brands.

The market size for formal wear is expected to more than double over the next five years and will continue to grow since more and more women are getting style conscious than ever before. We as a brand will seize this opportunity with an international design hub, a niche retail concept and solid supply chain management.

Meanwhile, Khanna states that because of e-commerce people have access to fashion from across the globe and while they may not be buying from every



COVER STORY

“The emergence of e-commerce has uplifted the entire fashion retail market. Various market platforms provide elegant yet comfortable outfits in less time which is a perfect option for working women. The increasing penetration of the Internet and the increasing purchasing power of women have made e-commerce an important and super relevant medium of shopping”



ASHISH GURNANI, Co-Founder, PostFold

brand, they are now aware of high-quality designs and trends. “This helps women make more informed decisions about their clothing.”

However, Tolani finds that price is a major factor in the e-commerce segment. “Unfortunately, a precedent has been set in e-commerce to offer deep discounts and lower prices. The volumes may be high, but the margins are extremely low. Also, a lot of brands compromise on the quality of fabric to allow the prices to be low,” she says.

Nonetheless, this can be checked says Khanna. “If you understand who your target audience is and the price, they associate to the value your clothes bring to her. Price is not an outcome of just the raw material but has more to do with the positioning of the brand that sells it, and the relevance/demand of the design.” For example, two dresses could have very different cloth, as a fast fashion brand the price range of both will be same because a consumer is coming to that brand for a short life garment. Whereas, if it is a comfort wear brand, then the price will be more as that is what the customer is seeing value in. “You price yourself for the value you are bring to the consumer. The rise in price of raw material would have an impact, albeit small, on the pricing,” she says.

The Future of Formal Wear

The formal wear segment has witnessed a major boost with many women entering the corporate world. Gurnani says, “The coming up of malls in Tier II and III cities has made the category undergo a transition with time. Also, with the increase in lifestyle and income level, women’s wear segment is all set to grow exponentially over the next few years.”

“The future of fashion will undoubtedly be shaped with advancements in machine learning technology. Artificial Intelligence will help leverage inventory efficiency, reduce costs, and at the same time, create best in class shopping experience for the consumer. There is also a need for a formal wear brand in value segment for women. It is largely, a fragmented market – in India – and even stores that are exclusively for ethnic wear haven’t been doing well,” says Tolani.

“We see a bright future ahead for the women’s formal wear category in India. There are innumerable opportunities in terms of innovation and incorporating state-of-art developments in fabric and design to make premium formal wear at affordable prices. There is never a lack of need for good quality products that are comfortable, durable and aesthetic,” adds Sharma.

“Formal wear for women in India is only set to grow. However, women no longer want men’s styles customised as women’s western wear. Women are looking for stylish, practical and well-fitting garments for their formal wear,” concludes Khanna.

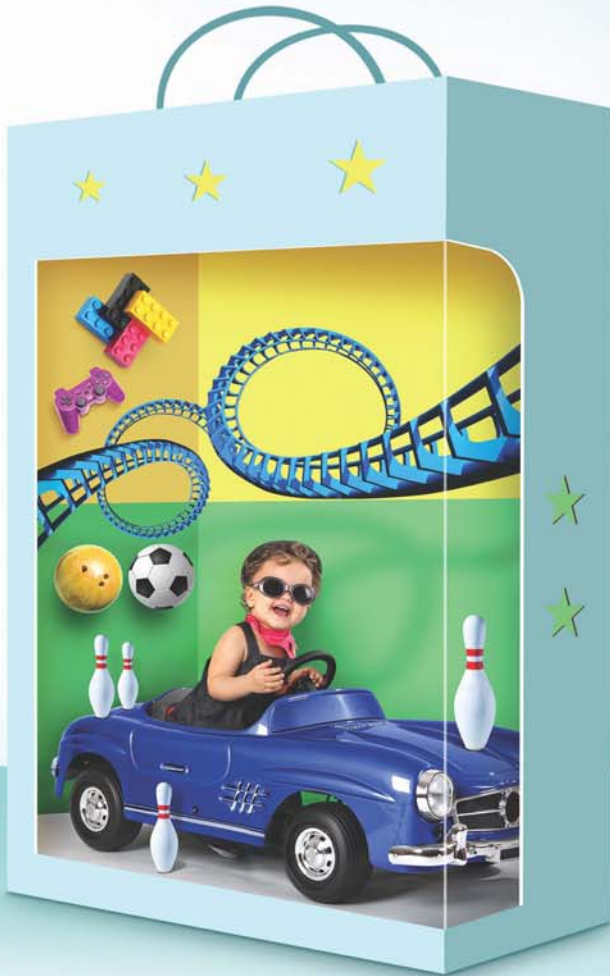


OMBRÉ LANE



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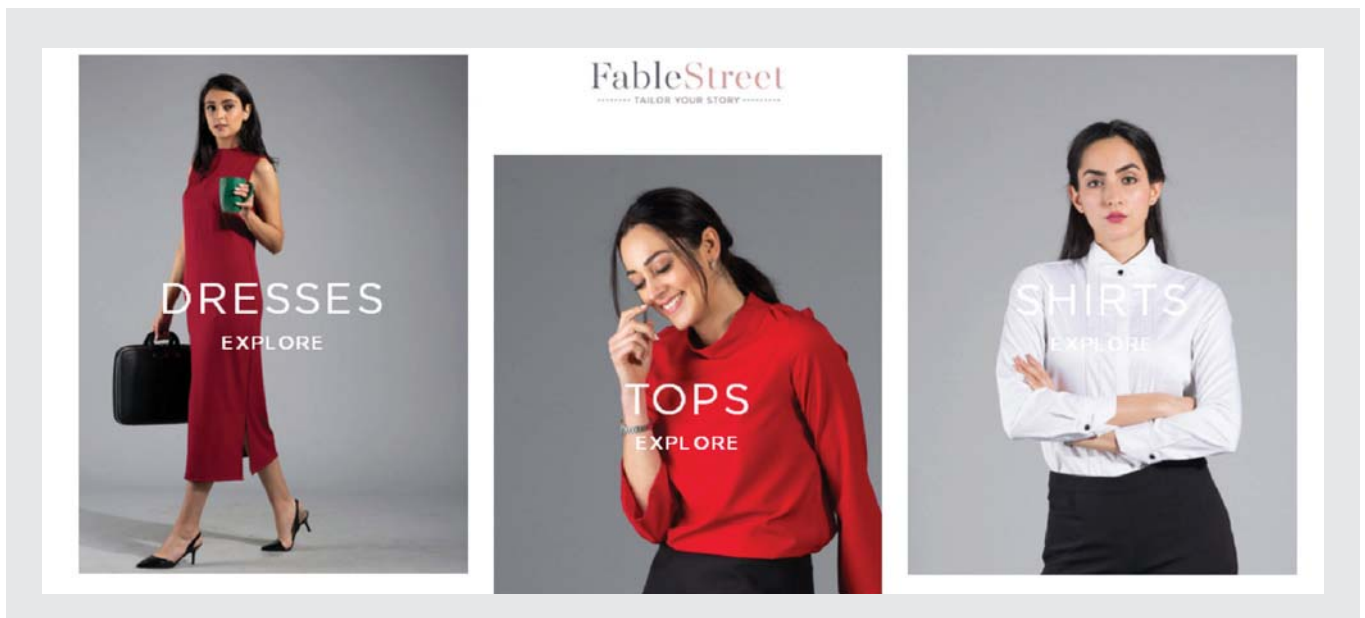
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WOMEN'S ONLINE FORMAL WEAR MARKET YET TO TAKE OFF

The online story in India hasn't left any category untouched, then be it apparel or education. However, when IMAGES Business of Fashion took a look to dissect shopping patterns, it found that one category which has a lot of catching up to do online is formal wear. Here is a look at the e-retail dynamics of the segment...

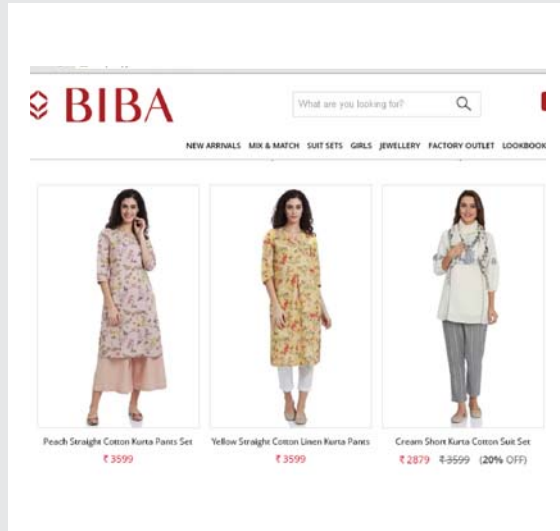
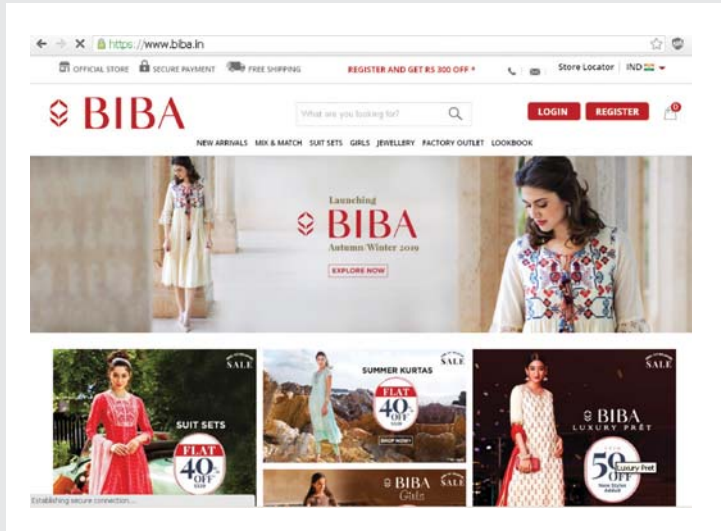
Zainab S Kazi

The online story in India hasn't left any category untouched, then be it apparel or education. However, there is one category which has a lot of catching up to do online is the formal wear segment. We take a look at the e-retail dynamics of the segment.

Setting the context for the story, Ayushi Gudwani, Founder and Chief Operating Officer, Fable Street says, "Online has played a significant role in purchase of apparel over the past 5 to 6 years in India. Ideally, this should be more so in case of work wear (or formal wear in India) given working women need convenience of delivery at home in addition to good style and quality.

However, online penetration has been limited due to lack of work wear brands online, and association of online brands with cheap, discounted, low quality stuff. Traditionally, office wear has been offered by Indian brands in a brick-and-mortar format."

Gudwani's argument is not unfounded. Take a quick look online for formal wear for women, especially western formal wear, majority of the brands haven't been able to do justice to the needs of a typical Indian customer. The cataloguing is designed using international models or models with body types that aren't really a true representation of an average Indian woman who roughly weighs anything



between 58 to 65 kgs. This proves to be a major deterrent for women to shop for formal wear online.

Unlike in casual wear, the fit of the outfit holds extreme relevance in this category as formal wear is either worn to work or during special occasions/festivals where the fit and fall of the outfit and fabric cannot be compromised upon. Indian formal wear though is at an advantage. It has a stronger presence online because getting the right fit in a saree, a salwar kameez or a kurta isn't difficult. To tackle the challenge of 'fit', FableStreet.com has gone ahead to offer its patrons the facility to get their clothing customised as per their size.

"We offer custom fits with only three measurements online, and are the only brand globally, which works on a 'My Style - Your Fit' model," says Gudwani. She says that over the past 2.5 years, the brand - which is primarily online - has been growing 4X year-on-year.

"Our repeat rates are more than 50 percent and our order values are above ₹5,000 per order (unheard of, in online space). We have clearly learnt that getting quality clothing which

"Due to growing digitisation, consumer shopping preferences have changed in the recent past. Women are independent these days and they do not get enough time to move out and shop from physical stores. They are increasingly looking for outfits which are stylish, trendy and at the same time comfortable and have the best quality"

SIDDHARTH BINDRA, Managing Director, Biba

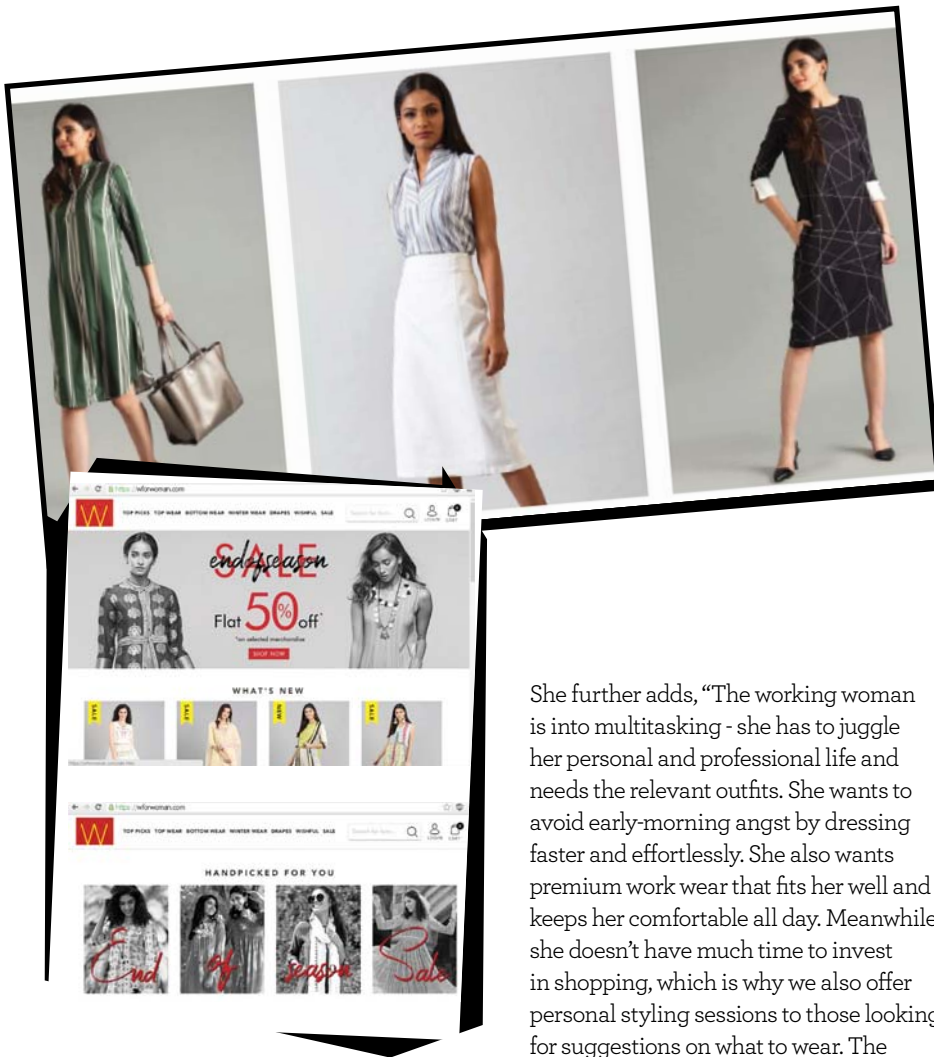
fits well and comfortable all day long, has been a challenge, which has also been reason for our early growth and significant consumer acceptance. Our designs are, therefore, crafted with two things in mind—fit and functionality. This is translated into details such as anti-gape shirts, hip-covering tops, functional pockets, non-sheer dresses, nickel and lead-free accessories, etc. (with options of adding sleeves and length)," she adds.

The Growth Drivers

Citing the reasons women are looking at the online channel to satiate their need for formal wear, Siddharth Bindra, Managing Director, Biba says, "Due to growing digitization, consumer shopping preferences have changed in the recent past. Women are independent these days and they do not get enough time to move out and shop from physical stores. They are increasingly looking for outfits which are stylish, trendy and at the same time comfortable and have the best quality." >

One factor that contributes heavily, according to Bindra is 'product reviews'. What other shoppers have to say about a particular product online makes a considerable difference on the shopping decision of a buyer.

Gudwani advocates a clear brand positioning and exclusive availability as one of the strong growth drivers for a brand in this category. Explaining this, she says, "We believe, women eventually want to know the brand they wear and why they want to wear it. Therefore, there is more comfort and genuine brand building possible with your exclusive online portal. The brand, its values, its USP can be communicated and differentiated. You can share much more on your own online portal, talk more about products, fabrics, technologies etc., used."



“Online has played a significant role in purchase of apparel over the past 5 to 6 years in India. Ideally, this should be more so in case of work wear (or formal wear in India) given working women need convenience of delivery at home in addition to good style and quality. However, online penetration has been limited due to lack of work wear brands online, and association of online brands with cheap, discounted, low quality stuff. Traditionally, office wear has been offered by Indian brands in a brick-and-mortar format”

AYUSHI GUDWANI,
 Founder & COO, Fable Street

She further adds, “The working woman is into multitasking - she has to juggle her personal and professional life and needs the relevant outfits. She wants to avoid early-morning angst by dressing faster and effortlessly. She also wants premium work wear that fits her well and keeps her comfortable all day. Meanwhile, she doesn’t have much time to invest in shopping, which is why we also offer personal styling sessions to those looking for suggestions on what to wear. The shopping experience should be fun, convenient and not time consuming. This has to be enabled by a good website, with great UI/UX and seamless shopping and delivery experience.”

Exclusive vs. Marketplace Shopping

Shopping online on marketplace models like Amazon, Flipkart, Myntra, etc., is akin to shopping at MBOs. But is this the most preferred shopping pattern for online customers? As Gudwani pointed out earlier, when it comes to formal wear, women would want to know the brand up close and personal. Hence, the chances of an exclusive brand portal seem to be just right.

However, many customers, she says, would find it intimidating to shop on exclusive portals, especially if they are new. Elaborating on this, she explains, “People are sometimes skeptical about

purchasing from new brands. They need to know if an online portal is secure, and they are always wondering whether their money go waste. Marketplace models, therefore, get new consumers, early trials and in long term are good to drive sales, liquidate old stock. Both models, therefore, will exist independently and solve different objectives.”

Bindra holds a different view on the shopping preference for women’s formal wear between both the formats, saying, “There is a significant difference in male and female purchase preferences. It is found that women are more comfortable buying products from multi-vendor e-commerce platforms as they are able to compare a lot of brand’s offerings there. They can compare in terms of designs, price reasonability, product quality or presence of multiple diverse marketplaces at one place.”

However, Aarti Ahuja, Head - Marketing, TCNS Clothing, differs saying, “Whether it is a brand exclusive portal or an online marketplace, what matters the most to a buyer is the convenience and brand experience. It is all about the comfort of shopping which is just a click away for customers buying online. Brand experience is another very important aspect that consumers look for across both the channels. In order to provide consistent brand experience, online marketplaces are increasingly creating brand shop-in-shops on their respective portals.”

She highlights the need to move beyond the offline and online debate as today’s shopper is adamant on being served irrespective of the medium they choose. This implies the need to adopt an Omnichannel approach, “People love to shop online owing to the convenience this platform provides. However, there are consumers who

“Whether it is a brand exclusive portal or an online marketplace, what matters the most to a buyer is the convenience and brand experience. It is all about the comfort of shopping which is just a click away for customers buying online. Brand experience is another very important aspect that consumers look for across both the channels. In order to provide consistent brand experience, online marketplaces are increasingly creating brand shop-in-shops on their respective portals”

AARTI AHUJA, Head - Marketing, TCNS Clothing



KEY DO'S & DON'TS FOR FORMAL WEAR RETAILING THROUGH E-COMMERCE

Do's

- Have a USP, communicate it well. People will copy you, stay ahead of the game! Rather than getting troubled, think of that as “imitation is the best form of flattery”.
- Make a clean website/app. Ensure it enables secure payments. This is hygiene.
- Focus on consumer experience and solve that every step of the way – from website experience to call center to delivery to post sales.
- Explore multichannel marketing upfront – paid, unpaid, influencers, social media etc.
- Get the product-market fit right.

Don'ts

- Don't discount on Day 1 to drive sales. You need to know what will sell and why it will sell. Discounting is not a sustainable solution. Product market fit is.
- Don't do 50 experiments at a time. Do 5 and execute them well and then scale them.

Ayushi Gudwani, Founder & CEO, Fable Street

still want to go and check the product physically after shortlisting the styles online. Observing these shifting trends in the market, we have explored an Omnichannel digital solution in stores which leverages the entire inventory of organisation present across stores. This ‘endless aisle’ concept enables consumer to never go out of stock or styles thereby, assisting them in a better way,” she further explains.

The Journey Ahead

Shopping online is only going to get stronger. The reasons are multifold – convenience, digitisation of payment thanks to mobile wallets and UPIs, scarcity of time to visit physical stores, easy returns and refund policies that

brands extend only to their online consumers, multitudes of options to choose from and most importantly, massive discounts and endless offers. Despite all these perks, whether or not shopping for formal wear will be at par with casual wear depends solely on the players in this category. Better and more realistic cataloging is the first step for brands to take care of. As long as the cataloging is not undertaken keeping in mind the body type of an Indian women, the formal wear shopping online may either stagnate or the return rates for clothes purchased online will be high enough to convince players in this category to pull their shutters down, at least on the online channel.



A woman with dark hair styled in a bun is shown in profile, looking towards the right. She is wearing a sleeveless, floor-length gown. The bodice is gold with intricate sequin and beadwork patterns. The skirt is a vibrant red with a sheer, tulle-like texture and scattered sequins. The background is a soft, out-of-focus white fabric.

PRE-WORN & PRE-LOVED:

FUTURE OF THE FASHION RETAIL INDUSTRY

For people who don't want to purchase an expensive dress for a one-time event but aren't the same size as their best friend so they can borrow something, fashion rental is the way to go. Renting clothes is a common practice in the West - both for fancy occasions like weddings and for the everyday, like a Sunday brunch. In India, fashion renting has emerged on to the fashion retail scene but is yet to gain a strong foothold. IMAGES Business of Fashion takes a look at this emerging trend

Rosy N Sharma

believe, we will be catering to an even wider range of demographic.”

Stage3, a company which focuses on millennials, caters to fashion lovers who are inspired by celebrities and media feeds. “Whether it’s setting trends or simply following them, our customers use clothing to express their identity. They lead an active digital life across various social media platforms and have an active social life as well,” explains Sanchit Baweja, Co-Founder and COO, Stage3.

Ease of online retail is an accepted fact. The rapid growth in Internet penetration, growing popularity of online shopping portals and advancement in mobile internet technology has helped the growth of online fashion rental market.

Growing at CAGR of 10.6 percent year-on-year, the Indian fashion rental market is touching ₹12,000 crore, says Aanchal Saini, Co-Founder and CEO, Rent It BAE.

“We are increasingly moving towards shared models, which call for switching to renting and borrowing instead of sticking to the archaic models of ownership and re-selling at tarnished rates. Millennials today want a fancy lifestyle and do not believe in ownership. Fashion is one such industry that is showing signs of shifting away from ownership. This shift is completely disrupting the industry and our relationship to clothing,” she states.

When Flyrobe, the fashion rental service received venture capital funding and raised US\$7 million in two rounds from Sequoia Capital, IDG Ventures and Tokyo based GREE Ventures, the Indian retail sector took notice and saw an opportunity. Globally, earlier this year, Rent the Runway entered the unicorn club with a valuation of US\$1 billion with Alibaba Chairman, Jack Ma investing in the company.

These developments are leading to the emergence of a new market category – fashion rental.

The service is targeted at men and women who have disposable income but not enough to buy new clothes for every single occasion, clothes which they will probably wear just a couple of times. The fashion rental service caters to customers who love to dress up but believe that spending an enormous amount for a one-time-wear is a waste.

Aimed at fashion forward, social media savvy, well-traveled youth is The Clothing Rental. Shilpa Bhatia, Founder, The Clothing Rental says, “Today, people care about being presentable and looking well groomed. At present we are offering services to age group 15 to 60 years. If the market is lucrative, we might venture into the younger age bracket too. In future, we

“Right now, we have many players in the market, all vying for a share of the same pie. Over time some will burn out and some will sustain. Renting will give rise to the secondary retail industry such as pre-owned/ second-hand trade/ shared closets and more. Eventually the main stay retail and secondary markets will co-exist”



SHILPA BHATIA, Founder, The Clothing Rental



With increase in internet penetration, e-commerce has witnessed a massive boost in the way business is done. Also, owing to the increase of social media influencers, consumers today have openly switched to renting from the old-fashioned buying. Today, no one prefers repeating outfits. With changing mindsets of people who have found more viable options of living a luxurious lifestyle without actually owning them, fashion rental market is maturing at a good pace”



AANCHAL SAINI, Co-Founder & CEO, Rent It BAE

tremendous potential in this hardly explored space,” she says.

She further explains that with increase in internet penetration, e-commerce has witnessed a massive boost in the way business is done. Also, owing to the increase of social media influencers, consumers today have openly switched to renting from the old-fashioned buying.

“Nobody wants to repeat outfits today. The idea is pretty much impossible. Aside from this, consumers religiously follow bloggers, influencers and celebrities, all of whom play a major role in establishing fashion trends and everyone wants to crack celebrity style or look,” she says.

Stage3 has noticed an increasing pragmatism amongst customers, where they are embracing fashion rentals not just to flaunt a designer label but also because it’s a smarter way to go. “Once they grasp that, they open their minds to the idea of fashion rentals for more low-key events as well. So, in addition to lehengas, sarees and gowns, we will bring in statement pantsuits, structured jackets, tailored dresses that will be great for workwear,” says Baweja.

“We’ve partnered with leading designers from across the country and are adding to our inventory from international designers as well. In addition to already-established designers, we also tap into young designers that aren’t as well known, acting as a discovery platform for them,” he adds.

Rental Model

Rent It BAE offers a plethora of brands and designer labels at 10 to 15 percent of the retail price. The product offering includes westerns, ethnics and accessories. It caters to on-demand rentals [4-days or more] and monthly fashion subscriptions. It



Growth Drivers

According to Saini, fashion rentals have been in the country for a while now but largely in an unorganised manner. “However, over the past few years the tables have turned drastically with renting portals moving into niche labels and brands, having a mixed variety of fashion categories including dresses (from bodycon to sequin to casuals), work formals, ethnics (lehengas, sarees and more), jewellery, handbags, clutches, sherwanis, Indo-westerns, sunglasses and more. You may rent out the latest fashion trends. The market is maturing and there is



partners with designers and customers who own A-list designer labels and share rental revenues with them. Its key clients comprise of men, women, media houses, photographers, make-up artists, bloggers, tourists, NRIs, etc.

The Clothing Rental buys products based on current trends and dominating demands. The rent is based on 25 percent of the retail price. "As a standard, we must rent a garment 6 times before we turn profitable. We need 4X rentals to cover just the cost of the product and then we have other expenses like laundry, stocking, rent of space, salaries, marketing, product shoots, etc., those are costs that we try to cover in the next 2X; it's only when we cross the sixth rental that we start to make a profit," explains Bhatia. Another fashion renting portal, The Stylease, offers high-end designer

outfits and jewellery for men and women. Usually available for a 4-day period, the portal relaxes these norms for a wedding, allowing up to 8-days' rental. The garments are custom fit along with a network of established stylists who help curate a complete look instead of just renting an outfit. It is the only rental platform that ships pan India with no cap on pincodes. All logistics such as dry cleaning, marketing, photoshoots are handled by them.

The Stylease either buys apparels straightaway or ties-up with owners of high-end garments on a profit-sharing model, where the owner receives 30 to 50 percent of the rent of each garment. It also has its own in-house label, Stylease Exclusive that rents one-of-a-kind exclusive garments. The average price point is between ₹4,500 to ₹6,500 for a 4-day rental.

Challenges

Jheal Shah, Founder and CEO, The Stylease, says that the Indian market is just getting started with fashion rental. She says the cause of slow pick-up of the business is people's pre-conceived notions about rental clothes. She feels in India people look down upon those who are unable to afford high-end designer clothes.



SANCHIT BAWEJA, Co-Founder & COO, Stage3



"India is an ownership driven country and the biggest challenge faced in a business concept such as rental is to create a behavioural change among the consumers. There is a certain degree of social stigma attached to renting when it comes to Indian consumers as fashion has come to represent one's personality, aspiration and one of the biggest status symbols. Their skepticism around hygiene, self-esteem issues, peer-pressure are few of the biggest challenges to break"



“It is sometimes hard to educate customers and make them realise that this concept exists in the first place,” she says.

Baweja further adds to this saying, “India is an ownership driven country and the biggest challenge faced in a business concept such as rental is to create a behavioural change among consumers. There is a certain degree of social stigma attached to renting when it comes to Indian consumers as fashion has come to represent one’s personality, aspiration and one of the biggest status symbols. Their skepticism around hygiene, self-esteem issues, peer-pressure are few of the biggest challenges to break.”

“Educating the market with the newfound ways of renting as against buying was a challenge we faced in the initial months,” Saini also affirms. “When you introduce a new concept, the early adopters embrace the new processes. Later the resistant population joins in, and, under the right conditions, there is a viral cascade of change. At the moment, for fashion rental, you can say that the resistant population has started to join in. Changing the world is always disruptive.”

Shilpa Bhatia too says, “The biggest challenge is convincing the client to shift his/her mindset. If the consumer is open to the idea of renting or wearing a pre-used product only then can you make progress. It’s a process of delayed gratification.”

“Globally renting or buying gently used is not considered a bad thing, however

in India we have a certain mental block against wearing somebody else’s worn clothes. People prefer fresh pieces but once they realise the value of the product and the nominal price they pay for temporary purpose, the mindset changes. India is in nascent stages for fashion rentals, but we seem to be open to the idea,” she explains.

Another challenge is ensuring the right fit for every customer besides concern for care-and-handling. “Since they may not be able to try the apparels in advance, consumers worry about renting and wasting money, but we take care of that with offering alterations and customisations with every outfit,” says Shah.

Opportunities

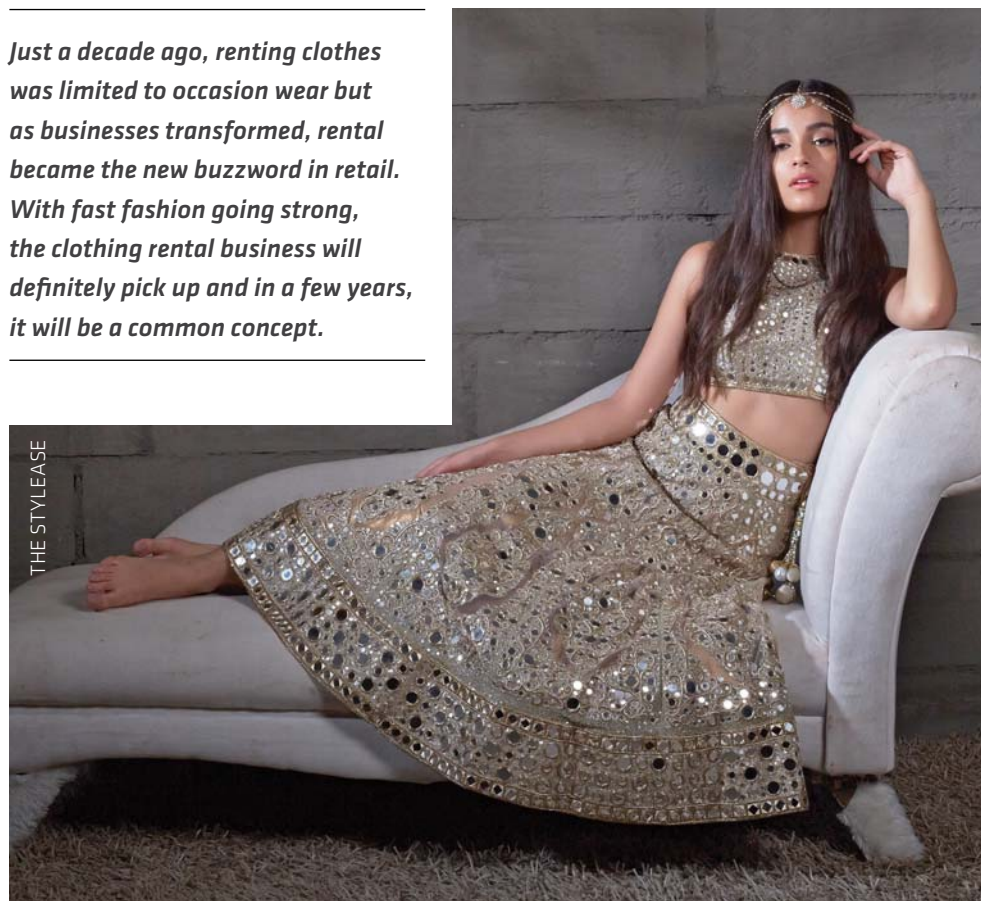
Just a decade ago, renting clothes was limited to occasion wear but

Just a decade ago, renting clothes was limited to occasion wear but as businesses transformed, rental became the new buzzword in retail. With fast fashion going strong, the clothing rental business will definitely pick up and in a few years, it will be a common concept.

as businesses transformed, rental became the new buzzword in retail. According to Saini, without a doubt, occasion wear is a huge market for anyone doing business in ethnic wear, especially during wedding seasons. “But ‘everyday fashion’ rentals has also picked up pace in India just like the West,” she says.

Rent It BAE is the first one in India to introduce unlimited fashion subscription for women to have access to a rotating wardrobe for everyday fashion needs. “Be it westerns for work, party, vacation, date, bags or other accessories, we have seen a good number of subscriptions from users in Delhi-NCR. As consumers are becoming price conscious, both men and women are reaping benefits of the clothing rental options and there is a huge opportunity to grow up and forward,” she shares.

“The segment that does really well is wedding clothes for family of the bride





THE CLOTHING RENTAL

including cousins,” says Shah. She also feels, the high-end designer wear has the highest margins, but casuals will deliver highest turn due to low value of rentals as well as the recurring nature of how often one wears casuals. “In future, I hope, we can expand our market to casuals as well for men and women as well as expand into specific categories like maternity and kids clothing.”

“Occasion wear and designer wear is the low-hanging fruit at this point, but looking at it from a sustainable point of view, fashion rentals should be embraced across the wardrobe – be it workwear, partywear, casualwear, etc. We’re bringing in statement pantsuits, structured jackets, tailored dresses that would be great for workwear,” says Baweja.

“With increase in internet penetration, e-commerce has witnessed a massive boost in the way business is done. Also, owing to the increase of social media influencers, consumers today have openly switched to renting from the old-fashioned buying. Today, no one prefers repeating outfits. With changing mindsets of people who have found more viable options of living a luxurious lifestyle without actually owning them, fashion rental market is maturing at a good pace”



JHEAL SHAH, Founder & CEO, The Stylease

Justifying the rental model, he explains, “We’ve grown so accustomed to fast-fashion that we tend to overlook its hazardous effect on the environment. The rental business allows one to keep up with fast-fashion without causing much environmental damage.”

The Road Ahead

With fast fashion going strong, in the next few years the clothing rental business will definitely pick up and in a few years, it will be a common concept.

“Right now, we have many players in the market, all vying for the same pie. Over time some will burn out and some will sustain. Renting will give rise to secondary retail industry, which is the pre-owned/ second-hand trade/ shared closets and more. Eventually the main stay retail and secondary markets will co-exist,” believes Bhatia.

Shah says till recently, there was no one doing marketing for renting clothes in India. There were small local shops from where one could source costumes, but no one was renting designer pieces at all. Since then there has been a sharp rise in the rental business due

to increased awareness by several companies vying for consumers in the same space.

“In the last 3 to 4 years we have gone from people looking down at clothing rentals as wearing used garments or not being able to afford clothes to a more sensible clothing option. People today consider rentals as a viable option to buying garments due to limited storage space in metros as well as reducing discretionary spending among the millennials. People are also becoming more environmentally conscious and don’t want to buy something they don’t have use for over and over again. In the future I do see an increased uptake in rentals, not only for clothing, but in other aspects of our lives as well,” she says.

“We strongly believe that fashion rentals are the future of fashion. We are living in an era where trends change in a nanosecond and shoppers don’t want to repeat outfits they’ve been spotted in. Millennials are embracing the culture of sharing economy across verticals and fashion won’t be behind. Renting fashion is convenient, cheap and accessible and fulfil the desire of shoppers of having something new to wear every time,” concludes Baweja.



BRANDS KEEP FORMAL ETHNIC WEAR RELEVANT IN INDIA

People have adopted western wear by default – either because of its easy availability or owing to the aspiration value it holds for most in non-western countries. In times like these, it is interesting to know where Indian wear stands and what the action plan is in place by brands in this category keep Indian wear relevant...

Zainab S Kazi

Everyone is a global citizen today thanks to a world without borders – at least on the world wide web that is! Globalisation is often synonymous with westernisation, so when it comes to the way people want to be seen dressed, western wear by default is the most sort after – either because of its easy availability or owing to the aspiration value it holds for most in non-western countries. In times like these, it is interesting to know where Indian wear stands and what the action plan is in place by brands in this category keep Indian wear relevant.

A walk into any department store/MBO reconfirms the prevalence of an impressive section dedicated to western wear and in fact within the Indian/ethnic wear section too, one can notice how brands are gearing up to offer their customers cuts and silhouettes that are a fusion of Indian and western wear.

The advent of leggings led to the popularity of mix-and-match where Indian women decided



to ditch the salwar suit ensemble and started filling in their wardrobes with a host of colourful leggings that they could mix-and-match with different kurtis. Thus, was born the concept of fusion wear. This didn't mean that the three-piece salwar suit vanished from their preference list, but it had a strong competitor now which paved way for more and more women experimenting with western wear.

Keeping all of this in mind, would it be right to state that Indian wear is losing its relevance? The players in this category strongly disagree.

THE RELEVANCE OF INDIAN WEAR

Karan Berry, Creative Director, Karleo shares, "Indian wear will never take a setback and women will still want to have 70 percent of Indian wear in their closet and 30 percent to be a mix of other pieces. What is important in all of this is to keep reviving it. We as designers make sure to keep on applying different techniques and materials to the Indian silhouettes, working more on the artworks and the elements than the silhouettes."

Vinay Chatlani, Co-Founder and Chief Executive Officer, Soch adds, "Despite the popularity of western and fusion wear, ethnic wear (salwar suits and sarees) still remains biggest category in women's wear segment in India. Much of this is attributed to the rise of women workforce in the country. We see this segment as continuously rising in the future."

He adds, "Though there has been a rise in demand in the formal western wear segment, especially in Tier I cities, formal ethnic wear still remains the go to option for most women in the country. The Indian market is largely dominated by the women's ethnic wear segment."



THE GAME CHANGERS

Within the Indian wear category, what has kept the category alive besides its unbeatable place during festivities is the mix-n-match concept. Also, the fact that brands in this category are going all out with design innovation to match the expectation of a patron who is aspiring to fill in her wardrobe with more of western wear is allowing Indian wear to remain relevant.

Aarti Ahuja, Head - Marketing, TCNS Clothing says, "The consumers demand pattern in the past few years has undergone a drastic change and TCNS focuses on understanding the changing fashion requirements of the woman. We try to stay ahead of the curve keeping Indian wear relevant for women in India. Season on season, we come up with new concepts while adapting global trends making Indian wear more relatable to our ever-changing never-changing modern women. Gypsuit, Kaleidokurta and Yolo dresses are some of the key concepts that were well accepted by our consumers."

Elaborating further on the design dynamics that keep Indian wear relevant, Chatlani states, "While a



"Despite the popularity of western and fusion wear, ethnic wear still remains the biggest category in women's wear segment in India. Much of this is attributed to the rise of women workforce in the country. We see this segment as continuously rising in the future"



VINAY CHATLANI, Co-Founder & CEO, Soch



Designer Vandana Malhotra points out towards the contribution of designers in keeping the category relevant and aspiring to. According to her, a lot many designers have successfully experimented with Indian wear giving it a rather western look and feel that makes it easy for women to wear at work.

“Indian wear, because of its versatility, can be mixed and matched to look chic and ethnic and at the same time and not look out of place when worn for a formal occasion or as office wear or simply for a casual evening out. One can pair a kurtis with denims and a pair of sneakers, one can wear palazzos with short tops and even a simple dupatta can be draped to give it a lot of a saree. The options are endless now,” she says.

Berry adds, “Over the past few years Indian wear has seen a rapid increase in its overall presence with regards to design. The use of traditional concepts in the modern age has made it more versatile for it to be used. There’s been a tremendous transformation in the kinds of fabrics being used besides the traditional ones. This has made Indian wear design more edgy and dynamic in approach.”

Malhotra’s pick is a straight line kurta which she thinks would never go out of fashion and would always be an important component in keeping Indian wear relevant, “A straight line kurta with a self-print or a lightly embroidered kurta in pastel hue is going to remain evergreen as these can be worn to work and can be confidently carried for a function during the day as well when paired with a palazzo and some floral embroidered juttis.”

Ameet Panchal, Director and Chief Executive Officer, Ethnicity interestingly points out on the contribution of Bollywood in making Indian wear desirable, saying, “Indian wear has broken the stereotype of being occasion wear and has now



large segment of the market looks at traditional silhouettes for formal wear like sarees and suits, the younger audience is looking towards fusions styles and new-age silhouettes. The advent of mix-and-match has completely changed the ethnic wear market. Customers pair their kurtas with knit chudis which are comfortable and trendy. Many young consumers also mix-and-match with jeggings, dhoti pants, harem pants, etc. Due to this, ethnic wear is finding greater acceptance with more and more consumers.”

Highlighting another interesting point Chatlani adds, “Brands are also constantly evolving. From being a pure ethnic player in the initial days, Soch has today transformed into a stylish designer brand that retails fusion products such as tunics, palazzos, fusion suits and stoles, apart from traditional staples such as salwar kameez, kurtis and sarees, at affordable prices.”

“Indian wear has broken the stereotype of being occasion wear and has now become a staple in women’s wardrobes for work-wear owing to the varied styles and fits readily available in the market these days. Ease and comfort mixed with complementing silhouettes and designs make it an easy choice”



AMEET PANCHAL, Director & CEO, Ethnicity

become a staple in women's wardrobes for work-wear owing to the varied styles and fits readily available in the market these days. Ease and comfort mixed with complementing silhouettes and designs make it an easy choice. Not only that, mainstream films and movies also see celebrities rocking Indian wear in everyday life making it easier for women these days to take style inspiration from that source and implement it in their looks."

"Indian wear has undergone a huge transformation today due to its increased demand that is constantly peaking. Ethno-fusion dresses and gowns have been one of the most liberating style statements for the Indian woman. Colours have become more earthy and muted, silhouettes more relaxed and high quality of fabrics have become sacrosanct. 'Sustainable Fashion' is the new buzzword as women become more 'aware'," he further states.

THE SAREE STORY

A few years ago, one would have thought that sarees would probably become extinct, but off late it isn't uncommon to spot young women in sarees wearing them confidently at and after work as well. Malhotra reasons this out saying, "Sarees can never go off because designers have started making fusions with sarees, semi

"Indian wear, because of its versatility, can be mixed and matched to look chic and ethnic and at the same time and not look out of place when worn for a formal occasion or as office wear or simply for a casual evening out. One can pair a kurti with denims and a pair of sneakers, one can wear palazzos with short tops and even a simple dupatta can be draped to give it a lot of a saree"



VANDANA MALHOTRA, Designer

draped sarees, ruffled sarees and lots of design innovation in blouses too!"

Chatlani adds, "Sarees have gained momentum amongst with several young consumers opting for it and also experimenting in terms Indo-western looks."

"The whole six yards can never lose its charm. It is the epitome to the Indian design community. The saree has seen such a transitional growth and has gained international recognition as well. Designs textures, prints have been evolving over the years make it even more desirable," says Berry.

Accentuating the prominence a saree occupies in a woman's wardrobe, Panchal shares, "A flawlessly draped saree is what a well-cut suit is to a man. It can be worked with in multiple ways, can be worn in the traditional style or be tweaked to look more edgy. It's the one garment that is flattering for all body types. The charm of the saree has





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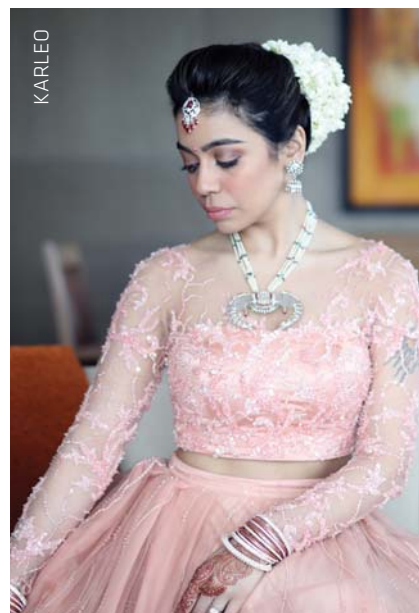
AARTI AHUJA, Head - Marketing, TCNS Clothing

also been kept alive with the legacy associated with it. Women even today, care for their sarees and consider it as family heirlooms to be passed down from one generation to the next. A lot of our important customs and rituals involve wearing sarees, which also makes you wonder if it might even be sacred! I could go on and on, but cutting the long story short, the saree is evergreen and classic, and its charm remains intact, regardless of times passing.”

CONCLUSION

An excerpt from a blog on the website of Ethnicity for an Instagram campaign aptly sums up the efforts being put up by the brand – and more like them – as custodians of Indian wear, thus helping keep the category relevant.

It reads, “The way people dress represents a huge part of their identity and culture. However, along the years, borders have disappeared, and barriers have reduced, tradition and ethnicity are no longer the same. Some aspects are coming across the country symbolising a sense of unity while some aspects are individual to



every person on the planet. Ethnicity is diverse and very unique in its own way. We wanted to drive individuals to discover their ethnicity by going back to their roots.’

On a concluding note, Chatlani states, “While the options for women are endless today, each segment has its appeal and customer base. The ethnic wear market holds the largest share and we believe this trend will continue in the future. The trends going forward include a revival of traditional techniques in printing and embroidery – consumers are looking to reconnect with their roots. There is also a large emphasis on style with comfort, and brands that are able to give their consumers this balance will win share of wallet.”

“Indian wear will never take a setback and women will still want to have 70 percent of Indian wear in their closet and 30 percent to be a mix of other pieces. What is important in all of this is to keep reviving it. We as designers make sure to keep on applying different techniques and materials to the Indian silhouettes”



KARAN BERRY, Creative Director, Karleo



FASHION

CREATION





CLOVIA LAUNCHES QUIRKY POWERPUFF GIRLS COLLECTION

Sophisticated, sharp and suave, contrasted with flirty, fun and bold prints, and in keeping with international designs and styles, Clovia wants to redefine the Indian lingerie market...

IMAGES Business of Fashion

India's fastest growing lingerie brand, Clovia aims to take young girls on a nostalgia trip with its latest Powerpuff Girls collection. The 'oh-so-cute' designs feature the three super girls - Buttercup, Blossoms and Bubbles - on nightwear and briefs.

Like every new collection by Clovia, all the pieces are designed to make one feel relaxed and happy after a long tiring day. The collection ranges from bright printed hipsters with a double layered gusset for hygiene to soft and breathable night suits with cute Powerpuff Girls imprints. It is crafted with stretchable cotton spandex fabric for utmost comfort. At Clovia, highly skilled designers, fashion experts create exquisite, playful and designer innerwear ranging from bras, briefs, shapewear to nightwear.

Sophisticated, sharp and suave, contrasted with flirty, fun and bold prints, and in keeping with international designs and styles, Clovia wants to redefine the Indian lingerie market and help customers choose beyond standard cuts, shapes, and sizes. The company's mantra is - lingerie is a critical part of your wardrobe and it doesn't need to be drab and boring. The company has been growing at an impressive 100 percent every quarter and is currently shipping over 550,000 units monthly.



DA MILANO

LAUNCHES VINTAGE COLLECTION TO CELEBRATE 30 YEARS



With more than 80 stores in India, Dubai and Nepal, Da Milano boasts of two state-of-art manufacturing units which employ efficient craftsmen who are trained to create each piece with intricate details...

IMAGES Business of Fashion

India's leading accessory brand, Da Milano has launched a unisex 'Vintage Collection' to celebrate its 30th anniversary. In order to pay tribute to its inaugural collection, which was launched in the year 1989, the brand has unveiled the latest line of 'Vintage Collection'. Inspired by its first ever collection, the new line comes in traditional styles and colours which are borrowed from the 1980s.

The unisex sling and laptop bags can be combined with any office wear for a perfect office look. On the contrary, the cross-body slings and backpacks can be paired with any casual wear for an effortless normcore look.

With this collection Da Milano is continuing their effort to create maximum consumer satisfaction by offering lifetime service warranty on the entire collection. "We are living in a time where fashion has no boundaries. Vintage fashion is widely

being accepted by the youth today. To pay tribute to our 80s collection, we have launched a collection which is similar to the collection the brand had launched during its inception in 1989. It is a proud moment for us to unveil this collection at this time," says **Sahil Malik, Managing Director, Da Milano.**

Da Milano is an affordable luxury leather accessory brand. It is a leading brand that provides a holistic range of wallets, handbags, laptop bags, portfolio bags, travel bags, office and home essentials and much more. The brand proudly endorses its products with a life-time service warranty. With more than 80 stores in India, Dubai and Nepal, Da Milano boasts of two state-of-art manufacturing units which employ efficient craftsmen who are trained to create each piece with intricate details.

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NUMERO UNO'S

NEW COLLECTION PROMISES EASIER MOVEMENT, WEIGHT BALANCE

Weaved in breathable mesh that controls odor, Fire by Numero Uno keeps freshness intact all day long. It's available in a variety of colours, patterns and options...

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Numero Uno, one of India's first indigenously manufactured denim labels, has launched Fire by Numero Uno, an affordable range of stylized sports shoes and trainers for all fashion enthusiasts. Expanding its footwear range with this launch, Numero Uno, has demonstrated the brand's specialty of amalgamating style with comfort.

Fire by Numero Uno features a chic collection of super light footwear that promise easier movement. Weaved in breathable mesh that controls odour, this collection also keeps freshness intact all day long. The collection also features Light Eva soles that balances weight. So be it running or everyday struggle with work, or when sweating in the gym, the label is as much an ideal companion as it is for travel freaks or anyone who loves being outdoors.

Available in variety of colours, patterns and options the assortment is bound to complement any look and personal choice at an unbelievable price point.

The affordable range is priced at ₹999 and is available at Numero Uno's webstore as well as physical stores across New Delhi, Uttar Pradesh, Jammu and Kashmir, Punjab and more. Numero Uno was incorporated in 1987 by Hi Fashion Clothing Co., the flagship brand of Numero Uno Clothing Ltd. Over the years, Numero Uno Jeanswear has transformed into a dynamic and perceptive label for the youth. Today, it has the privilege of being one of the few power brands that fuses international trends, innovative fabrics, washes, treatments and accessible pricing.

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SWING & SLING WITH **PANTALOONS'** **SPIDER-MAN COLLECTION**

As fans geared-up to watch Marvel Studios' Spider-Man: Far From Home, Pantaloons one of the pioneering retail fashion brands in India, launched its brand new 'Spider-Man' collection.

Keeping children and their style sensibilities in mind, the collection has been created using super-fun interactive print techniques like reversible sequins, foil print, 3D badges and embroideries.

Tailored from fine quality textured and novelty fabrics, the Spider-Man collection comprises of a huge range of snazzy t-shirts, shirts, jeans, shorts, and sleepwear. The collection ranges from ₹499 to ₹999. These can be styled with an assortment of comfortable Spider-Man slip on shoes available at Pantaloons.

Pantaloons, a division of Aditya Birla Fashion and Retail Ltd., is India's favourite fast fashion destination with

over 313 fashion destinations spread across 150+ towns and cities in the country.

With continued focus on catering to varied apparel and non apparel needs of Indian consumers in a modern retail environment, Pantaloons has emerged as a strong brand in the fashion industry over the past two decades and is making fashion accessible across the length and breadth of the country.



Keeping children and their style sensibilities in mind, the collection has been created using super-fun interactive print techniques like reversible sequins, foil print, 3D badges and embroideries...

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REFORCE INTRODUCES ATHLEISURE SHOES

WITH ANTI-SKID TECHNOLOGY

Specially curated keeping in mind the multi-purpose needs of the modern generation, the entire collection has been designed using modern techniques including anti-skid and phylon soles...

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Indian active-wear startup, Reforce, has introduced shoes that are not only best suited for day-to-day activity but also provide great comfort while playing sports. Specially curated keeping in mind the multi-purpose needs of the modern generation, the entire collection has been designed using modern techniques including anti-skid and phylon soles that provide unmatched cushioning and shock absorption during performance usage.

“Our sports and casual lightweight shoes are designed to suit the carefree look of the youth of today. Reforce shoes are a combination of soft synthetic and breathable mesh with padded tongue and comes in latest and trendy designs. The range offers superior comfort and are best suited for both day-to-day and sports needs,” says **Devender Gupta, Director, Reforce.**

Founded in February 2019, Reforce’s footwear section includes shoes, slip-on sneakers, flip flops and casual sneakers. The brand also offers a wide range of apparels along with accessories like backpacks, caps and socks.

The brand’s clothing line is 100 percent polyester/terry/fleece and is tailored utilising advance fabrics imported from China, Taiwan and Korea. Besides these, the brand’s portfolio also includes a wide array of shorts, track pants, t-shirt and contemporary lines in athleisure and yoga wear.

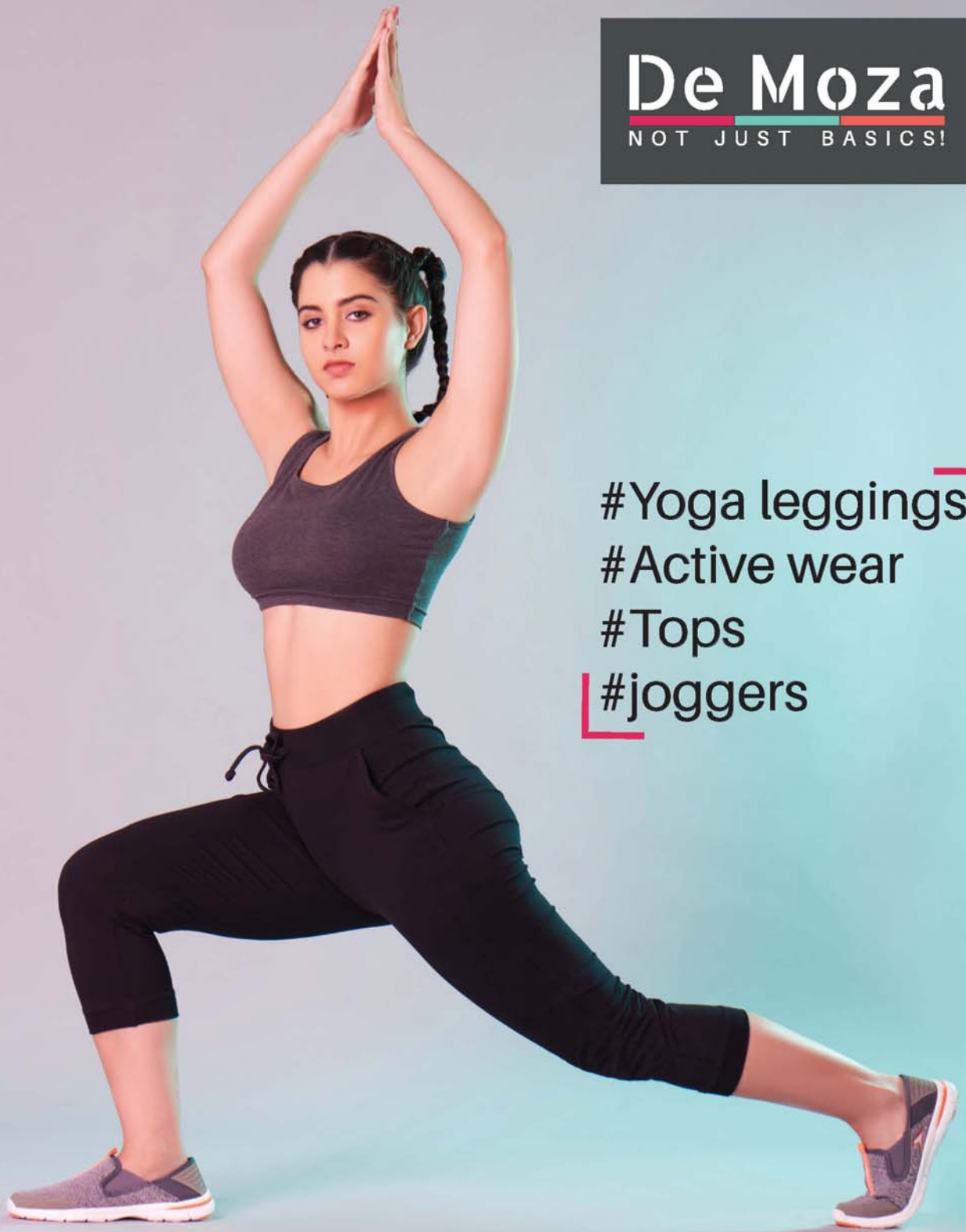
Reforce’s USP lies in its ‘value for money’ products that guarantee high quality and lasting performance. The sports and casual shoes’ collection ranges between ₹799 to ₹1,499, whereas flip-flops and floaters are available at an affordable price range of ₹199 to ₹499. Women’s athleisure sneakers start from ₹699.

The brand is currently available on all leading e-commerce sites as well as on its own website. It plans to make its presence felt in 24 large format stores over the next few quarters.



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