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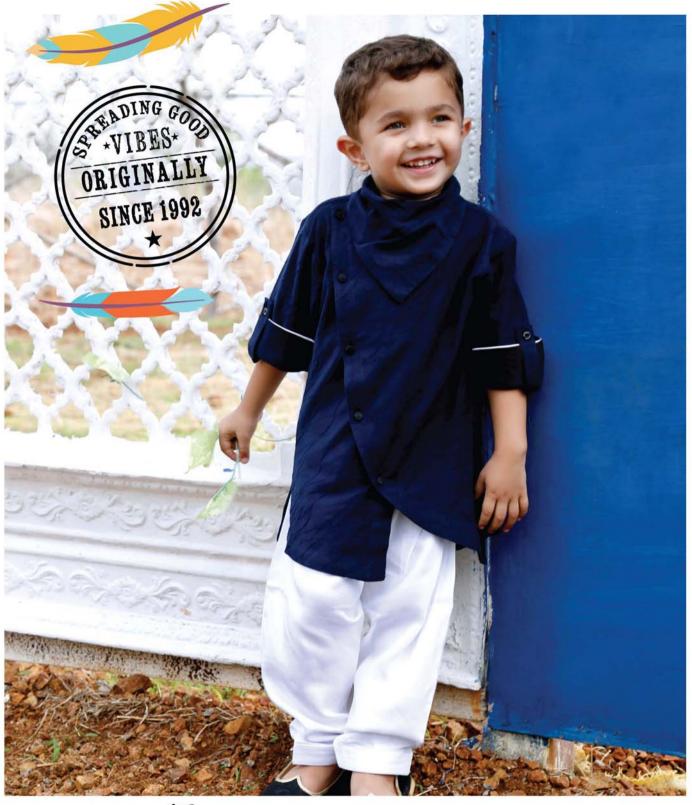














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IMAGES BUSINESS OF FASHION

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Dear all,

From shirts, trousers, denim to skirts and dresses, western wear is ruling fashion senses across the globe. Even in India, this comfortable fashion segment enjoys unparalleled popularity and is today, a staple in wardrobes across the country, irrespective of gender and age.

The roots of western wear in India can be traced to the British era. Yet till the 1990s, it was somewhat limited to the elites, professionals and office goers. The decades following the 90s are touted to be the era when Indians adopted more westernized concepts in fashion, making bold and stylish choices.

In recent years, rapid globalisation, enlarged brand awareness, growth of disposable income and expansion of apparel e-retailing have led to surge in demand for western wear. Increase in youth population and fashion consciousness among consumers is further fuelling this market's growth.

India's leading management consulting firm Technopak Advisors reveals in the lead

research how western wear constitutes the biggest segment in the Indian fashion retail industry. Estimated at ₹1,33,246 crores in 2018, the segment accounts for approximately 93 percent of the total fashion market in India. Yet, there is hardly any research documentation on the segment in its entirety.

In this first of its kind issue on Western Wear, IMAGES Fashion Bureau maps the evolution of the category as a whole in India along with tracking the shift in customer preferences. In addition to this, there are dedicated features detailing the market size, prevailing trends and opportunities in the major segments of Western Wear. We have also outlined the perspective of veteran brands and retailers on this growing segment.

We had a challenging yet educative time making this issue and I sincerely hope that you like reading it!

Cheers,

Amitabh Taneja

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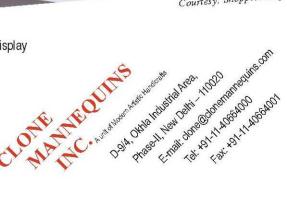




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MUSTARD FASHION TO RAMP UP ITS PRESENCE IN NORTH INDIA

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BRAND LAUNCH THAILAND'S RENOWNED JASPAL GROUP ENTERS INDIA WITH ACCESSORIES BRAND LYN

With their first store in India at Select CityWalk Mall New Delhi, Lyn Fall-Winter 2019 invites customers to the season where all individuality and uniqueness are fully expressed and celebrated

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DUKE FASHIONS' CHAIRMAN FELICITATED FOR OUTSTANDING CONTRIBUTION TO TEXTILE & HOSIERY INDUSTRY OF INDIA

Komal Kumar Jain, Chairman, Duke Fashions (India) Ltd., was honoured with a memento and a coffee table book by the Hon'ble Chief Minister of Himachal Pradesh, Jairam Thakur

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Bangla Readymade Garments Manufacturers & Traders Welfare Association (BRGMTWA) organised it's third Kolkata Garment Expo 2019 at the New Town Eco Park

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RESEARCH INDIAN WESTERN WEAR MARKET

Ashish Dhir, Associate Vice President and Shivanshi Bhatia, Associate Consultant, Technopak, map the western wear market in India

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COVER STORY

WESTERN WEAR MARKET MAKES UP INDIA'S NEW SOCIAL FABRIC

Today's well informed, well-traveled consumers - greatly influenced by social media platforms which provide ample knowledge of emerging new fashion trends thus increasing awareness - are willing to experiment with new styles, fabrics and products, thereby leading to a growth in western wear. Aside from this, e-retail has greatly propelled the growth of this category, bringing products to consumers in far-flung areas of the country, where brick-and-mortar stores can't reach. IMAGES Fashion Bureau brings an in-depth analysis

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Western Wear Study

CENTERSTAGE

MEN'S WESTERN WEAR MARKET EVOLVING

RAPIDLY IN INDIA

The men's western wear segment is one of the largest segments in the Indian fashion retail industry. We take a look at the rapidly changing dynamics of the segment

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A look at the dynamics of the largest contributor of western wear in India – denim. Aside from bringing western wear into the mainstream, denim in India played the role of radically changing urban lifestyle

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EMERGING CATEGORY WHAT WOMEN WANT:

WESTERN WEAR THAT'S TRENDY, YET COMFORTABLE

India is currently witnessing a tremendous increase in the demand for smart western clothing for women. The market has observed the entry of multiple players in the last decade, propelled by demand-side drivers of several shifts in consumer behaviour and an increase in the number of working women

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IN FOCUS GAINING TRACTION: WOMEN'S WESTERN WEAR IN INDIA

Sharad Walia, Brand Director, Park Avenue reveals how the western wear segment is getting traction and wider acceptance owing to an increase in disposable incomes, and more women joining the workforce

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WHAT'S HOT

STREETWEAR, DON'T CARE: NEW GENRE GOES FROM FASHION FAD TO TIMELESS TREND

With consumers demanding different styles, easy to sport yet fashionable apparel, the answer was simple – Streetwear. Streetwear is all about attitude and comfort. This genre of fashion is a mindset, rather than just a trend, a cultural shift leaning towards art and music. IMAGES Fashion Bureau explores this new clothing trend

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FASHION GENRE STREETWEAR POISED TO EXPLODE ON THE BACK OF EXCELLENT PRODUCTS, COMMITTED HYPEBEASTS

Capsul's model of retailing is online, via direct messaging and through pop-up stores. The brand does not display products at its pop-up stores, but instead creates an IP called 'Word on the Street', a platform for India's street culture community

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ACCESSORIES MARKET RETAIL'S TWINS: FASHION ACCESSORIES & WESTERN WEAR ARE INSEPARABLE

Just as western wear has shown a strong influence in the growth of fashion accessories in India, vice versa holds true as well, where accessories are now prompting women to experiment with their western wear

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ADIDAS INSPIRES SELF-EXPRESSION THROUGH STORIES OF THEIR WOMEN ATHLETES

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CLARKS UNVEILS NEW GLOBAL CAMPAIGN FOCUSED ON COMFORT

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EASIES BY KILLER LAUNCHES, WATER & STAIN REPELLANT COLLECTION

Easies by Killer launches water repellent and strain resistant clothing range, a first from a mainstream denim brand to come out with such an innovative range of clothes

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NUMERO UNO'S JOGG DENIMS UNIQUE FABRIC WITH A MIX OF KNIT & DENIM

These are specially designed and curated keeping in mind the active lifestyle of the millennial so that they can cruise through different phases of life – work, travel, play, fitness and fun

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NIKHIL THAMPI X INDYA COLLECTION: DEMOCRATISING DESIGNER FASHION FOR THE INDIAN WOMAN

The collection is a stunning amalgamation of Indya's grandeur and elegance, and Nikhil Thampi's new-age design aesthetic

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BUSINESS& Intovation

CITYKART: TAKING BIG FASHION TRENDS TO SMALL TOWNS

Launched in 2016, Citykart has been focusing on making fashion affordable and accessible to small town Indians. The retailer displayed an exponential growth and has opened 48 stores in 41 cities in the last four years. It reached the 25th store mark in just a little over two years (March 2018). Sudhanshu Agarwal, Founder and CEO, Citykart shares the journey and his opinions on the Indian fashion retail segment with IMAGES Fashion Bureau.



ityKart Retail Pvt Ltd - one of India's largest value retailers was founded in January 2016 and focuses on family fashion retail in Tier II and smaller towns of Uttar Pradesh, Bihar, Jharkhand, Odisha, West Bengal and the Northeast. In three short years, the brand has cultivated a following like few others, with personalised customer services, sensory experiences and usable benefits like redemption of points and e-vouchers.

The brand has gradually built a strong customer base across Tier II and beyond, helping shoppers in these areas warm up to the idea of modern fashion.

"These consumers thrive for in-store experiences and that's what we are tirelessly working towards," says Sudhanshu Agarwal, Founder and CEO, Citykart. "As consumers' exposure to digital experiences increase – from ordering to delivery and from billing to payment – a frictionless experience is becoming a basic hygiene expectation," Agarwal says. "What many retailers fail to understand is that retail in India is

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"The fashion retail story in Tier II and III cities is still highly underpenetrated in terms of organised retail. These are the places where people have increased purchasing power and aspire for a shopping experience. We wanted to tap the untapped retail opportunities by setting modern retail stores"

> **– Sudhanshu Agarwal,** Founder & CEO, Citykart

not just about selling products to customers. It is also about providing this seamless experience."

The value retailer has armed itself with resources to continuously deliver – then be these resources its people, products or experiences. From training its staff to better manage customer expectations to delivering affordable products across age groups, the retailer is setting itself apart from the competition.

Value for Money

The family fashion store, offering affordable and value for money products, targets the lower middle class in small cities and towns. With an average store size of 8,000 to 13,500 sq. ft., Citykart has steadily increased its store count to 48 this year.

"We started from Uttar Pradesh, moving to Bihar and are currently targeting to expand in Odisha, West Bengal and the Northeast. This expansion has given us the opportunity to be successfully present in Tier II and III cities with Tier IV cities being our next target. Our aim is to open 50 new stores in the next two years," states Agarwal.

"At this time, when major fashion retailers are making inroads, the fashion retail story in Tier II and III cities is still highly under-penetrated in terms of organised retail. These are the places where people have increased purchasing power and aspire for a shopping experience. We wanted to tap the untapped retail opportunities by setting modern retail stores across various small towns and cities like Ballia and Mirzapur in Uttar Pradesh and more," he adds.

Thriving in a Challenging Retail Scenario

India is a price-sensitive market where every consumer expects quality products at competitive prices. "Price

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manipulation is a strong weapon in the hands of a small, independent, unorganised players," he says.

Aside from this, Agarwal says that the absence of a developed supply chain and integrated IT management system along with low margins and high real estate costs are major challenges associated with retail in India.

However, he shares that it will be unfair to compare India's retail landscape with the West owing to the difference in scale, space, categories, range, brands and volumes. "Large format retail businesses dominate the retail landscape globally, while unorganised retail is still the order of the day in India. But having said that, one cannot overlook the fact that India is all set to reach the US \$1 trillion retail market mark and has become the mecca for global retailers. Moreover, the Indian government has relaxed its rules restricting FDIs leading to these big retailers to pursue one of the world's burgeoning retail frontiers, India," he says.

Technology: A Handy Weapon

"Over the last few years, we as an organisation have retooled our business model. We have deliberately chosen steady growth instead of reckless expansion to increase our focus on improving store economics. We have been investing in deft inventory management and bestDespite the fact, retailers have to grapple with the lack of a trained workforce in small towns in India, Citykart is progressively investing in training it's staff about new technologies primarily targeted at enhancing customer experience. The brand is avidly working upon providing coaching its staff to better greet and treat consumers. Staff at Citykart is also armed with knowledge of products to help serve consumers better.

"Every quarter we train our staff about the qualitative and quantitative aspects of retail from the qualified trainers. These trainings cover areas such as increasing footfall, customer enrollment, sales numbers, average selling price (ASP), average basket value (ABV) and basket size," Agarwal concludes.

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Suresh Nambiar, Chief Executive Officer, Pepe Jeans Innerfashion

FORAYS INTO EMERGING INNERWEAR CATEGORY WITH INNERFASHION

Suresh Nambiar, Chief Executive Officer, Pepe Jeans Innerfashion talks to IMAGES Business of Fashion and share the brand's plans to expand its innerwear category to North India. He also talks about the brand's marketing and promotion strategies in the region...

Rosy Ngaihte Sharma

Pepe Jeans London was launched in the year 1989 in India and over the years, the brand has become synonymous with denim fashion and casual wear in the country, all the while growing at a breakneck speed. The brand now has decided to foray into a new category – Innerwear. Their innerwear category, dubbed 'Innerfashion' was successful in the southern region of the country where it was initially launched, and the brand is now planning on venturing north.

Currently, the collection is available at 1,200+ multi brand outlets, 110 Pepe Jeans exclusive brand stores, select departmental stores, along with e-commerce portals like Amazon, Myntra and Flipkart. Suresh Nambiar, Chief Executive Officer, Pepe Jeans Innerfashion is positive that the brand will receive the same amount of appreciation which it got from the initial launch in the South, stating that Pepe has always worked on strategic progression by tapping new markets across each region having immense growth potential.

Excerpts from the interview:

Why did a renowned denim wear brand like Pepe Jeans decide to enter the innerwear category?

Pepe Jeans London has been at the forefront of international denim-led fashion for the past 45 years. The entry into the innerwear segment is a Pepe Jeans entered into an agreement with Dollar Industries in 2017. When we started doing research and development, as a global brand we realised that the business model, focus

realised that the business model, focus and the DNA required in innerwear is extremely different for innerwear and apparel. It is very important that you tie-up with somebody who understands the nuances and who already has the DNA of a good innerwear brand. We went about looking in the market and met a lot of partners and finally shortlisted on Dollar Industries. Dollar Industries has manufacturing units in Kolkata, Tirupur, Delhi and Ludhiana, and it enjoys a 15 percent market share in the branded hosiery segment in India. Together, we will be investing ₹70 - 75 crore into building this category to the next level.

natural extension for us to get to the

success.

same consumer base and drive on that

With many well-established fashion players entering the segment, what is your approach to the competition?

There will be competition with many brands actively participating in the category. Earlier there were limited brands and customers were loyal to their respective brands. They accepted black and white undergarments for a long time, unlike customers today who ask for trends, colours, fabrics, etc., and are keen to experiment with new styles and fabrics. We are actually going with that flow and trying to invent and innovate within that requirement.

Having said this, our advantage over the new entrants is that we have a brand salience already working for us across the country. And with regards to competing with existing brands we believe that we will understand the trends, be aware of consumer preferences, recognize competition and be completely focused and work each day as it comes.

How is the innerwear market evolving in India?

If you look at the market per se, till about recently, there were not too many players in the innerwear category. It is just recently that a lot of players have come in. Consumers today are more conscious, more aware and they are demanding unlike 10 years ago when they bought plain undergarments and were loyal to one brand.



"When we started doing research and development, as a global brand we realised that the business model, focus and the DNA required in innerwear is extremely different for innerwear and apparel. We went about looking in the market and met a lot of partners and finally shortlisted on Dollar Industries."

-Suresh Nambiar, Chief Executive Officer, Pepe Jeans Innerfashion

Who are your target customers?

Through Pepe Jeans Innerfashion, we are targeting 18 to 40 years old consumers who are exposed to digital media and global trends. The consumers might be already using certain brands but at the same time are aware of and use Pepe Jeans.

What is your pricing strategy?

Considering our quality, trends and feel, we have kept the positioning absolutely mid-premium and premium. We have attempted to keep the price band very aggressive. We are at par with mid premium brands that are available in the country.

What will be your retail strategy?

We have started the placement of products across North India and will complete the launch by the end of the calendar year. The plan is not just to sell through the exclusive brand outlets only. We are will be present through hosiery multi brand stores, which is a huge marketplace when it comes to the Indian context. There is also the departmental store business wherein Pepe Jeans is a strong brand. Also, e-commerce is moving at a very fast pace and we are already available online, where we see good traction. So, the strategy is to make the product available across multiple channels.

Currently, we are available in 1,200 points-of-sale in South India in about 75 cities. Now we intend to enter North India – starting with Delhi and various other cities around it.

Tell us about your marketing and promotion plans.

Our brand salience is extremely strong and that makes very easy for us in terms of connecting with the consumer. We just need to remind the ardent Pepe Jeans' enthusiasts to take advantage of this brand loyalty and come to us for innerwear too. In this regard, we have been investing in digital, outdoor, BTL and in-store activities, etc. We are trying to communicate to our consumers that a category like innerwear can also be fashionable.

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MUSTARD FASHION TO RAMP UP ITS PRESENCE IN NORTH INDIA

IMAGES Fashion Bureau

ustard Fashion, a leading regular and plus size brand for women is scaling up its presence in northern India by opening three more stores in Rajouri Garden, New Delhi; Pacific Mall, Dehradun and Pacific Mall, Dwarka respectively. With these 3 store launches, the brand now has a total of 30 stores in 14 cities of India. The new store in Rajouri Garden, Delhi spreads across 800 sq.ft., and Pacific Mall, Dehradun store is spread across 764 sq.ft. The store is a physical render of the Mustard website - clean. fuss-free, effortless to browse, equipped with the most coveted modern ethnic fashion and lifestyle products.

Mustard has launched the store with a clear focus on design. The design of

the store flows around the 'desires' of target and loyal customers for Mustard these desires are translated into a store design which celebrates 'womanhood' in its most democratic form- 'urbane', 'sophistication', 'feminine', 'subtle', and 'energetic'. These expressions are translated in design using origami as a form and natural hues and textures. One can browse products online, get the touch and feel of the merchandise in the store and then order at their convenience online or offline!

Speaking at the launch, **Saurabh Gupta, Managing Director, Mustard** said, "North India is home to the huge retail growth opportunity for Mustard as the region witnesses hefty spending spree from its women population who are

driving the retail growth of the region. By the end of 2020, we plan to open 20 new stores taking the tally to 50 stores nationwide."

Founded in the year 2004 in India, Mustard is a fashion label of international repute. The brand was established to provide classy western and chic contemporary Indian wears for women of different age groups and of all sizes. Each of Mustard's designer collections brings the best of style, trend, and comfort. Mustard offers ready-to-wear garments for women in 10 different sizes from regular to plus as it understands the Indian body type better than any other brand.

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pretty woman°



Pretty Woman collection now flows with LIVA fabric

PRETTY WOMAN Kurtis which come in solid colours are now made with LIVA – a nature based fabric from the house of Aditya Birla Group. With LIVA, PRETTY WOMAN Kurtis acquire a soft fall and elegant fluidity which make you look both chic & comfortable. It is fashion so fluid, that when you move, it moves with you.

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THAILAND'S RENOWNED JASPAL GROUP ENTERS INDIA WITH ACCESSORIES BRAND

With the first store in India at Select Citywalk, New Delhi, Lyn invites customers to its Fall-Winter 2019 collection that expresses and celebrates all individuality and uniqueness. IMAGES Fashion Bureau aunched in 2001, Lyn caters to ladies with an eye for fashion and trendy products. With the brand essence 'fashion as an affordable luxury', Lyn offers a wide range of fashion accessories from runway-inspired handbags and wallets, glamorous occasion shoes, to staple accessories from watches to eyewear, with on-trend designs that stand on four brand attributes—sophisticated, trendy, sexy and elegant.

For 18 years, the success of Lyn has spanned across South East Asia region, making the brand reach number 1 in retail fashion accessory industry. With 50 stores in Thailand, 2 stores in Cambodia, and 10 stores in Vietnam and now in India, Lyn is continuing to fulfill the needs of its fashion-forward consumers with this first store in India.

With their first store in India at Select Citywalk New Delhi, Lyn invites customers to its Fall-Winter 2019 collection that expresses and celebrates all individuality and uniqueness. Shifting from the warm, adventurous air of summer desert to the elegant atmosphere of European urban, this newest collection majestically embarks on the 'dare to be' concept with highlighted pieces full of new statement ornaments and bold details that perfectly promote every modern woman's confidence, self-expression, identity and uniqueness, in a glamorous and sophisticated fashion.



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DUKE FASHIONS

CHAIRMAN FELICITATED FOR OUTSTANDING CONTRIBUTION TO TEXTILE & HOSIERY INDUSTRY OF INDIA

IMAGES Fashion Bureau

aving a successful track record in manufacturing quality readymade garments with contemporary styling, the lifestyle brand Duke Fashions was recently recognised and honoured for it's outstanding contribution to the textile and hosiery industry of India at the launch ceremony of 'The Himachal Ratna' coffee table book at Hotel Peter Hoff, Shimla (Himachal Pradesh).

Komal Kumar Jain, Chairman, Duke Fashions (India) Ltd., was honoured with a memento and a coffee table book by the Hon'ble Chief Minister of Himachal Pradesh, Jairam Thakur along with other dignitaries including the Education Minister, Suresh Bhardwaj; Urban Development Minister, Sarveen Chaudhary; Health Minister, Vipin Singh Parmar; Forest Minister, Govind Singh Thakur; Former Speaker, Himachal Pradesh Vidhan Sabha, Brij Bihari Lal Butail; and Chief Secretary, Dr. Shrikant Baldi.

Speaking on the occasion, Jain said that he is honoured to achieve this memento and have expressed his gratitude to the people who really meant for this award. "This is yet another pivotal milestone in Duke Fashions' history. This is a testimony to the hard work of our dedicated and committed workforce, who have been the biggest contributors for us being recognised as the most trusted company in India. At Duke, it is our constant endeavour to create benchmarks and constantly reinvent," he shared.

Addressing the event, Chief Minister, Jai Ram Thakur said that the textiles sector is playing a pivotal role in the economy and it needs to be recognised and respected by all. He unveiled the special coffee table book 'Himachal Ratna' and recognising the services of the people who have made a mark in different fields by overcoming hurdles and hardships and extended his wishes to them. "This book would continue to inspire people to work with greater dedication and commitment and they could also become lighthouse for others. There is no dearth of talent in the country and the only thing that is needed to tap is the available talent with proper skill and encouragement," he said.

Duke Fashions has also been conferred with a President Award; three National Awards; Make in India-National Productivity & Innovation Award in Textiles & Garments Sector; Indian Power Brand award at Power Brand Glam at Las Vegas, USA, and many more such awards.

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BANGLA READYMADE GARMENTS **A FERRE** MANUFACTURERS & TRADERS WELFARE ASSOCIATION: **KOLKATA GARMENT EXPO 2019**

IMAGES Fashion Bureau

Bangla Readymade Garments Manufacturers & Traders Welfare Association (BRGMTWA) organised it's third Kolkata Garment Expo 2019 at the New Town Eco Park. The three-day business event was inaugurated by Ashok Todi, industrialist and chairman of Lux Industries. And attended by the chief guest, Hari Prasad Rathi, President, West Bengal Garments Manufactures and Dealers Association; and guest of honour, Arun Bhawalkar.

Spread across an area of 50,000 sq.ft., over 204 exhibitors participated in the event and more than 3,500 visitors attended the three-day garment fair. Addressing the occasion, Nazrul Islam Molla, President, Bangla Readymade Garments Manufacturers & Traders Welfare Association shared, "Textile is the second largest industry that employs manpower after agriculture in India. In Metiabruz cluster alone there are 20 to 25 lakh people employed in this industry and earning their livelihood. Amongst them there are many skilled craftsmen and in West Bengal there is an opportunity to develop this industrial infrastructure."

The Kolkata Garment Expo was introduced in 2017 with an aim to uplift the value of Metiabruz garment industries and ensure more recognition and respect for the industry in India and abroad. The business module includes run in non-organised way and the art is now in unorganised form, despite that we are trying to express ourselves in organised form and in the coming days to advance ourselves to organised market.

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UUESTERN UUEAR STUDY

INDIAN WESTERN WEAR MARKET

Ashish Dhir, Associate Vice President and Shivanshi Bhatia, Associate Consultant, Technopak, outline the size, core categories, the key factors propelling growth, as well as the opportunities in the western wear market in India.

Indian Textile and Apparel industry shares 5 percent in the global T&A trade and is the second-largest manufacturer and exporter in the world after China. T&A sector contributes 7 percent of industry output in value terms and 2 percent to the country's GDP. The sector is one of the largest sources of employment in the country and provides direct employment to over 45 million people.

The sector stands for 12.4 percent of total exports in 2017-18, EU-28 and USA being the major T&A export destinations for the country have a total weightage of 47 percent of total T&A export.

Indian T&A market was estimated to be US \$111 billion in 2018; the domestic market is a major contributor to the sector with a contribution of 66 percent. In 2018, total T&A exports of India were estimated to be US \$37 billion and Apparel contributed 47 percent the figure.

Indian Domestic Apparel Market is estimated to be US \$54 billion in 2018 and will grow at a CAGR of 8.1 percent in the next decade and is projected to grow to US \$118 billion in 2028.

INDIAN WESTERN WEAR MARKET

The western wear market is defined as a total of tops/shirts, trousers/ skirts, t-shirts, denim, activewear and suits (only for men's category). Indian western wear market in men and women category is estimated to be ₹1,33,246 crore in 2018. Men's segment accounts for approximately 93 percent of the market size.

Indian men's western wear apparel market is estimated to be ₹1,23,363 crore in 2018. Shirt and trousers category contributes 34 percent and 27 percent, respectively to men's total western wear market and are expected to grow at a CAGR of 6.5 percent and 6 percent in the next decade.

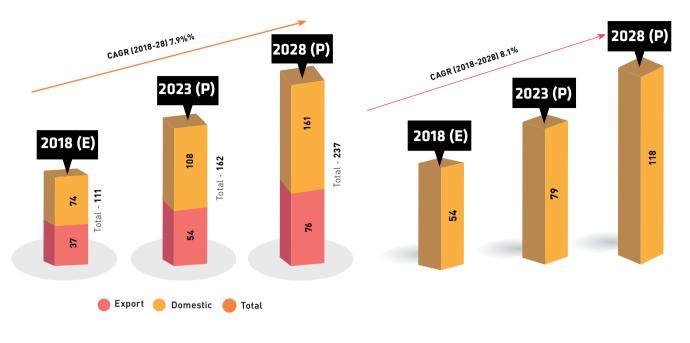
Activewear is expected to grow at the highest rate among all other men's western wear apparel category, at a CAGR of 15 percent by 2028. The second category to show high growth by 2028 is denim, which is expected to grow at a CAGR of 13 percent.

Indian western wear market in womenswear is estimated to be ₹9,882 in 2018. Currently, in Indian women's wear apparel segment ethnic category enjoys a larger share. Denim and shirts/tops are the highest contributing categories with a total weightage of 56 percent. Activewear and denim sector is expected to grow at a CAGR of 14 percent each by 2028.

Indian western wear segment is expected to grow in the coming years and some factors like the increasing number of working women, rising urban population and increase in the younger generation will add value to the sector. Western wear will grow at a higher rate as compared to ethnic wear in the next decade. By 2028, denim and activewear are projected to depict a positive growth and are expected to be one of the major contributing categories in the sector.

DOMESTIC APPAREL MARKET (IN USD BN)

INDIAN TEXTILES & APPAREL INDUSTRY (USD BN)



According to a published report, urbanization in India is happening at a fast pace, with every sixth person getting urbanized globally is an Indian. It is estimated that by FY 2020, 35 percent of India's population will be living in urban centres and will contribute to 70 – 75 percent of India's GDP.

Below mentioned are the major factors that will contribute to the growth of western wear segment:

• INCREASING URBANISATION

There has been an increase in the urban population of India. According to a published report, urbanization in India is happening at a fast pace, with every sixth person getting urbanized globally is an Indian. It is estimated that by FY 2020, 35 percent of India's population will be living in urban centres and will contribute to 70 – 75 percent of India's GDP.

Increasing urbanization has brought a shift in the consumer demand towards the western wear clothing, thus leading an increase in sector growth.

A RISE IN THE NUMBER OF WORKING WOMEN

Traditionally, on a broader level,

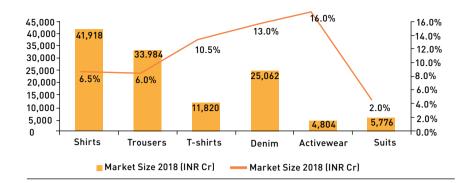
women's fashion was limited to ethnic wear. The increase in the number of working women has opened new opportunities for fashion brands in women's workwear and western wear.

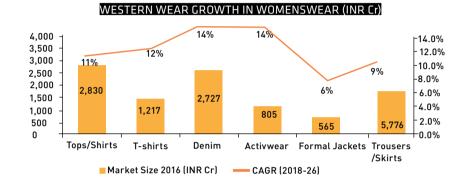
There has been a substantial increase in the number of working women in India in the past 10 years. Women are entering the professional fields which have impacted their lifestyle. As they have lesser time to shop they prefer more comfortable and western clothing.

CASUALIZATION OF APPAREL AT THE WORKPLACE

The upcoming job seekers are young and expect the freedom to choose what they wear to their workplace. They believe that casual clothing can help to increase their work efficiency. So, more companies are shifting towards the acceptance of casual Apparel at the workplace.

WESTERN WEAR MARKET SIZE/GROWTH PROJECTIONS IN MENSWEAR (INR Cr)





The increase in the acceptability has opened new doors for the brands that are coming with the idea of smart casuals which are comfortable and yet are not typical formals.

INCREASE IN PER CAPITAL EXPENDITURE ON APPAREL

There has been a decline in age dependency (the ratio of the dependent population

size to the working-age population size). This has led to an increase in the family overall income which in return has led to a rise in disposable income thus increasing the overall apparel buying capacity.

Earlier, people use to keep a limited number of apparel, but with an increase in the buying capacity, there has been an increase in the number of apparel and decrease in the apparel usage time.

INCREASING REACH OF WESTERN WEAR BRANDS TO TIER II CITIES

India is one of the fastest-growing nations and is expected to grow at the same pace, making it an attraction for big Fashion and Apparel brands. A major part of the country's population resides in Tier II cities and also have a good buying capacity. Big fashion and Apparel brands see a big potential in the tier 2 cities. Recently H&M, a Swedish multinational clothing retailer, recently announced its plan to expand in Tier II cities of India.

RISING TREND OF DENIM

In today's world, denim is considered to be a multi-purpose Apparel, which can be worn as both casual wear and everyday wear. Denim being comfortable and durable has become a trend and is widely accepted at every occasion. An international brand like Levi's and domestic brand like Spykar have been performing well in India and seen an increase in their sales over the past few years.

INCREASE IN YOUNG GENERATION POPULATION

India has the lowest median age across the developed and emerging countries of the world. These younger consumers are more inclined towards western culture. Youngsters prefer to wear western clothing as it is more comfortable and affordable.

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WESTERN WEAR

ES UP INDIA'S

SOCIAL FABRIC

It is anticipated that brand awareness and social media trends will drive the growth of the western wear market in India. Today's well informed, well-traveled consumers greatly influenced by social media platforms which provide ample knowledge of emerging new fashion trends thus increasing awareness - are willing to experiment with new styles, fabrics and products, thereby leading to a growth in western wear. Aside from this, e-retail has greatly propelled the growth of this category, bringing products to consumers in far-flung areas of the country, where brick-and-mortar stores can't reach. IMAGES Fashion Bureau brings an in-depth analysis...

IMAGES Fashion Bureau

estern wear is one of the fastest growing categories in the retail industry that attracts consumer across demographics. Western wear is a clothing style derived from 19th century American old west region. It broadly comprises jeans, t-shirts and jackets for men and women. Over the years, this category has diversified significantly providing consumers with a wide variety of fashion trends and products. With the definition of western wear becoming wider, it has embraced casual shirts. trousers, suits, skirts, dresses, etc. This category of clothes is widely accepted by many cultures, as they offer comfort, durability, and variety.

According to a research, the global western wear market size was US \$71,132 million in 2016, and is expected to reach US \$99,423 million by 2023, registering a CAGR of 4.8 percent during the forecast period. "The western wear segment continues to lead the fashion category in the country with a strong growth for multiple years," says Vasanth Kumar, Managing Director, Lifestyle International.

A surge in fashion consciousness among Indian consumers has had a positive impact on the country's western wear consumption. Exposure to international fashion through social media websites such as Instagram, Tumblr, Pinterest and Facebook is one of the major factors that has fueled the



"With an abundance of knowledge made available to consumers through social media, their affinity towards global trends has become a key growth driver for western wear segment. Added to the mix are aspiration and accessibility – the ease with which today's consumers can shop across channels, including online stores has contributed considerably to the consumption of the category"

Vasanth Kumar, Managing Director, Lifestyle International

growth of the global western wear market, as this form of media is the most used by young fashion-conscious individuals.

"With an abundance of knowledge made available to consumers through social media, their affinity towards global trends has become a key growth driver for the segment. Added to the mix are aspiration and accessibility – the ease with which today's consumers can shop across channels, including online stores has contributed considerably to the consumption of the category," he further adds.

Aside from this, rapid globalisation, increased brand awareness, and a larger consumer group, have helped raised the demand for western wear across all regions. With rising disposable incomes and the right demographics, India, today, is one of the most important retail markets for global retailers. Retail as a business and fashion as a choice has seen a sea change in its concept and format.



This is reflected in the fact that global brands are announcing the opening of new stores in India. For example, H&M has announced it will open 4 new outlets - at Kochi (TMS Prestige), Nagpur (Trillium Mall), Dehradun (Pinnacle Plaza) and Jalandhar (Model Town). The new H&M stores - spread over approximately 65.000 sq. ft. - will offer western wear fashion inspirations for the whole family, with collections for men, women, teenagers and kids. The world's largest fashion retailers, which is known for offering high fashion and quality basics at affordable prices, H&M currently operates 42 stores across Delhi NCR, Mumbai, Hyderabad, Chennai, Bengaluru, Pune, Amritsar, Indore, Coimbatore, Kolkata, Mohali, Mysore, Ahmedabad and online on Myntra and hm.com.

Similarly, India also became the fashion destination to another global



Retailers have a clear point of view and are focused on offering what they good at – Western Wear. They are clear about who they are and what they offer and do what's right for their consumer.

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brand, Uniqlo. The first Uniqlo store was opened at Vasant Kunj (Ambience Mall), with new stores promised in Saket (DLF Place) and Gurugram (DLF CyberHub).

According to Umashan Naidoo, Category Head - Men's Wear & Cosmetics, Westside, "Zara and H&M drive affordable stylish fashion abroad and they are on the cheaper spectrum. In India, consumers consider them a premium treat as they offer a total package from value, style and confidence. Then there are brands such as Massimo Dutti and Mango, which provide fantastic premium western wear options." According to Naidoo, the aforementioned retailers have a clear point of view and are focused on offering what they good at - Western Wear. They are clear about who they are and what they offer and do what's right for their consumer.

Western Wear: Indian Scenario

Today's fashion-conscious population is expected to lead to surge in demand for western wear. At present, the demand for casual western wear such as chinos, bright coloured trousers and fashionable shirts is outpacing sales of formal shirts and trousers, partly due to preference of semi-formal apparel at work. Where, formal western wear is mandatory for employees in numerous organisations, many organisations have shown acceptance to casual western wear.

Rise in brand awareness, surge in demand for comfortable wear and better design at affordable prices and increase in female working population with high disposable income have acted as the key drivers to demand in western wear. "More and more women are working in the corporate sector and with this inclination we see more women adapting western wear in India. In today's scenario clothing plays a very critical role, and women are experimenting more and more with their sartorial choices and coming out of their comfort zone," says the Spokesperson for Vero Moda in India. At Vero Moda, the brand believes in delivering fashion that bring out the best in its customers. It offers an entire range of smart working outfits available

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from classic shirts and trousers, to tailored pantsuits, coordinated separates, pencil skirts, formal tops, coloured trousers, culottes, etc.

Moreover, the consumption patterns are becoming more experimental in nature as consumers are well travelled and exposed to international trends. They are adapting to pieces that are unique in terms of design, offer an edge in style and deliver on the dual factors of price and comfort. In India. the past few years have seen the emergence of western wear becoming a fashion staple. In fact, over the last decade, western wear has penetrated deep into markets of metros and mini metros, with growing popularity especially among younger generation. Various factors have contributed to its transformation such as innovations in styling, great designs, new trends and awareness via social media.

"The casual wear market, also referred as 'street style' clothing, has brought about a change in the last decade with celebrities and influencers riding the wave of this trend," states Manjula Tiwari, CEO, Cover Story. "Today, the casual western wear trend has gained popularity amongst all demographics. It has a stronghold as a wardrobe staple through all age groups as the middle class Indian lifestyle has undergone a lot of changes with more outings, travel, get-togethers, etc., all of which require a casual, yet appealing, fashion formula. The fashion industry has probably not witnessed a force more unrestrained than causal western wear in the past."

Cover Story specifically creates designs keeping Indian consumers in mind, giving them an edge over their international counterparts. It curates designs keeping in the mind the Indian body type and preferences while maintaining global trends.

Umashan Naidoo adds, "There is a change in lifestyle and Indians



"The casual western wear trend has gained popularity amongst all demographics. It has gained stronghold as a wardrobe staple throughout all age groups as the middle class Indian lifestyle has undergone a sea of changes in recent years – more outings, travel, get-togethers, etc.,"

Manjula Tiwari, CEO, Cover Story

are looking for comfort along with contemporary fashion. Pop culture (that includes movies, art and celebrity influence) and exposure to the world either through social media or by taking vacations to new countries has motivated people to become more active and realise that comfort is good for the soul. Today, there is a generation of millennials who are creating new rules and are working in spaces that encourage a casual dress code. Also, the western wear market has more than doubled in the last five years and is getting stronger as organisations are adapting a relaxed and less traditional dress code."

"Western wear is ageless, and fashion is a state of mind. The youth market is the driving force behind denim. streetwear but there are fashion building blocks from washed back linens, voiles, cotton stretch, viscose, cotton linen blends that is growing amongst a w<u>ider spectrum</u> of customer. There is athleisure in casual sphere which endorses a sporty look and may have some technical innovation like "Dry Cool" a fabric that keeps you dry in summer through absorbing body sweat. Cotton stretches that are styled in an athletic way allow freedom of movement and now massive as a concept in the denim segment. With so many fabrics and trends, western wear can be easily targeted to any age group," he further states.





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"Millennials are creating new rules and working in spaces that encourage a casual dress code. The market of western wear has more than doubled in the last five years and is getting stronger as organisations are adapting a relaxed and less traditional dress code"

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

Western Wear: Market & Consumer Behaviour

Retail sector is experiencing exponential growth, with development taking place not just in metro cities but also in Tier I, II and III cities and towns. Both domestic and international retailers have vigorously expanded into India's vast hinterland over the last few years and are re-hashing their retail strategies as well as the understanding of consumers.

It has been witnessed that as a segment western wear is becoming immensely popular in smaller towns. Earlier, western wear was restricted in metropolitan regions only, however with increase in disposable income in Tier II, III and other smaller markets, there has been tremendous growth in these markets. The smaller markets are doing better compared to their counterparts in bigger cites due to increasing demand and paucity of availability of merchandise.

Tier II, III cities, in fact, are now starting to become very crucial markets as metros and Tier I cities are getting saturated. In addition to this, consumer in these markets are now getting more aspirational and lifestyle conscious. Hence, the online platforms are preferred to purchase western wear by these area. They display vast availability of apparels and provide attractive offers. In addition, quick delivery service and flexible return policies by online sites propel sales through this platform. As Vasanth Kumar rightly puts it, online presence has assured greater accessibility to a plethora of brands and products. "Our web store delivers to over 26,000 pincodes across the country and provides consumers access to great fashion," he says.

Umashan Naidoo also stresses on the fact that digitisation has helped the fashion industry so much that it has become extremely easy for retailers to reach their target audience, attracting them with great photography and huge discounts.

Conclusion

The growth of e-commerce has definitely given an impetus to the western wear category. With this the exponential growth in the number of potential buyers in India is expected to drive the western wear market. The ease of availability of international trends across multiple platforms and a burgeoning aspiring class, the future for this category looks positive.

This leads to a multitude of design options and silhouettes, cuts and styles that can be incorporated into everyday western dressing. People are moving away from traditional pieces and are curating a stylish and comfortable range of western wear.

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MEN'S WESTERN WEAR MARKET **Evolving Rapidly** in India

The men's western wear segment is one of the largest segments in the Indian fashion retail industry. We take a look at the rapidly changing dynamics of the segment...

Shivam Gautom with inputs from Gurbir Singh Gulati



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The Indian apparel industry has traditionally been largely driven by women; it was always the women who were more inclined towards fashion trends. Men's purchases were need based. However, the tables have turned now as an increasing number of men are paying greater attention to their grooming and appearance and are making more apparel-related purchases based on fashion trends rather than need. And since, the Indian men's wear market is skewed towards western wear, the market has seen tremendous evolution in recent years.

In terms of organised fashion retail, the men's western wear market has been the biggest, with the formal wear segment being the largest contributor over the years. "Men's western wear accounts for at least 60- 70 percent of the overall fashion market in India. A few years back, the growth was about 10-12 percent which, unfortunately, has come down since the last 2 years due to weak market performance in the overall fashion sector," reveals Saurabh Singh, Head of Design Menswear, Being Human Clothing.

"Western wear for men was adopted as standard office or work clothes as early as a century ago in India. Collared shirts, suits and jacket were the earliest adopted categories, even sported by political leaders of yesteryears like Lala Lajpat Rai, Jawahar Lal Nehru, BR Ambedkar, etc. Post-independence most of India's elite continued wearing western wear with the trend especially becoming a stape with professionals and office goers," says Sandeep Khapra, Design Head – Menswear, Max Fashion.

One of the biggest triggers for western wear was the adoption of western clothes in Bollywood and South Indian Cinema in the 70s. This brought core categories like shirts and trousers to the masses as daily wear. Although customised tailoring was the norm back in the day and the only option, the RTW segment frog leaped to popularity by late nineties, especially in urban centres, and ever since, the segment has grown rapidly and outpaced the RTS segment in the western wear market in India.

Although the men's western wear segment has been traditionally dominated by formal wear, the segment has, in recent years, seen growth

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India is among the world's fastest growing fashion markets and very naturally, like all other categories, the men's western wear category is evolving at a accelerated rate too. Ephemeral fashion cycles brought in by fast fashion bigwigs and increased inclination towards comfort, mobility and sustainability is fast changing the template of the game.

> coming from other segments as well, including massive contribution from casual wear and sportswear. With the turn of the century, slowly casual wear categories like t-shirts and jeans started replacing shirts and trousers. Easy access to Hollywood and international fashion because of internet led this change.

Today, western wear is flourishing in India, not only in the men's segment but in women's and kids' segments as well. "A young population, increased disposable income, urbanisation and relaxed dress codes are mainly driving growth in the men's western wear market. Influx of foreign brands and expansion of domestic and foreign brands/retailers in Tier I and II cities will keep driving growth of western wear further. There are category extensions and new subcategories that have evolved and will keep evolving. At present, comfort and mobility is driving the design and product direction," avers Vinit Doshi, Head – Product, Planning & Sourcing, Celio.

However, the big change in the men's formal wear market came post 2010 with the entry of a few big fast fashion retailers. This and the emergence of e-commerce brought menswear market in India almost at pace with international trends.

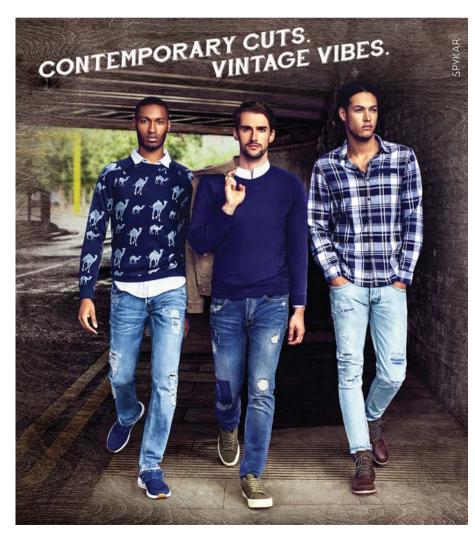
The Evolving Market

India is among the world's fastest growing fashion markets and very naturally, like all other categories, the men's western wear category is evolving at a accelerated rate too. Ephemeral fashion cycles brought in by fast fashion bigwigs and increased inclination towards comfort, mobility and sustainability is fast changing the template of the game.

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The global trend of casualization, that has gained unprecedented momentum in India, has also metamorphosed the men's western wear market. In the recent past, a profusion of factors has culminated to give impetus to the changing fashion sensibilities of the Indian populace. "With the advent of international fast-fashion retailers, new collections are launched four to eight times a year and consumers have been conditioned to buying the latest trends. Mostly, these products are designed to become obsolete in six months. Although, fast fashion is not a sustainable concept, most fast-fashion retailers have realized the impact on the environment and as well as how sustainability is a key desirable of the millennial customer base. So, most have started adopting sustainable products," reveals Khapra.

As brands in the segment are aligning their businesses to comply with the



expected standards of sustainability, the segment has witnessed rigorous innovation in recent years. "Sustainability is being adopted across fibre and fabric categories. Today, almost every fabric mill has a collection of sustainable product range. New innovations in fibers, fabrics and finishing technology is helping brands adopt more of environmentally sustainable products like recycled/ organic cotton, yarns made form PET bottles, less water and limiting chemical usage in processing, etc," says Doshi.

The global trend of casualization, that has gained unprecedented momentum in India, has also metamorphosed the men's western wear market. In the recent past, a profusion of factors has culminated to give impetus to the changing fashion sensibilities of the Indian populace. This changing fashion sense coupled with affordable prices has pushed the market for casual wear.

"The increasing preference globally towards casual dressing in most corporate spaces is proving to be a huge drive for smart casual wear options. Also, consumer's changing lifestyle pattern has provided a huge boost to this category," says Pragati Srivastava, Brand Head – Parx.

"Today, looking good as well as being comfortable is the trend. Active wear has become an essential part of modern life, especially in metros. The shift from formal attire to comfortoriented casual attire is driving the market for men's t-shirts, alongside the demand for denim. Bottomwear sees an acceptance with a variety of colors. No more sticking to just blacks, blues and greys anymore in the men's western wear category," adds Sanjay Vakharia, CEO, Spykar.

Just as the market and the trends have changed, men's western wear, as a category has adapted to tremendous

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TRENDS IN MEN'S WESTERN WEAR

"Streetwear of the nineties has been big influence on men's fashion in recent years. Silhouettes, colors, graphics and fabric are all inspired heavily by this trend. There is a big demand for t-shirts with graphics using slogans and self-expression text. Slim fits are making way for long and loose silhouettes. Trends are more and more inspired by street fashion and social media influencers"



Sandeep Khapra, Design Head – Menswear, Max Fashion



"In the overall men's western wear market, the current drivers are casual wear and sportswear categories and this is due to shift in consumer lifestyle and patterns of consumption from largely formal wear to these new categories,"

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

"In casual western wear, stretch fabrics and other fabric innovations are big in bottom wear. Casual pants and chinos have become more fashionable both in terms of styling and colors. Formal fabrics are also being used in casual pants. Cotton shirts are partially being replaced with new fabrics like viscose, tencel, lyocell, etc,"



Vinit Doshi, Head - Product, Planning & Sourcing, Celio.



"Experimenting with fabrics, colors, prints and fits is evident. Occasion wise dressing is on the rise. The approach to styling is drastically changing. Today, men are far more aware of their choices,"

Sanjay Vakharia, CEO, Spykar

"Currently 'Sport Story' with bright colors is a big trend. Also, sustainable fashion awareness is catching up steadily with consumer and will have a huge impact on consumer's buying decision in near future,"

Pragati Srivastava, Brand Head - Parx





product diversification in the recent years. "Absolutely!" says Saurabh Singh. "With the rise of causal and sportswear, product diversification has been very much evident in the men's formal wear segment. E.g., the new wave of Athleisure, which can be described as a hybrid between causal clothing and performance sportswear, this is an exciting time for menswear," he adds.

"Society has changed tremendously in a relatively short time and concepts such as Androgynous, Street Fashion, etc., continue to grow. This has led to the emergence of a 'new man' who is more fashion-forward and open to experimentation. The fashion industry was quick to capitalize on this shift and new categories such as Athleisure wear, have emerged," states Vakharia.

Personalisation - a Key Trend

Although the Indian formal wear industry is dominated by the ready to wear segment, a trend of opting for customized 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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"Custom tailoring has been an historical part of men's western wear. Especially in India, it had been the norm, much before readyto-wear clothing came in. Today, it still contributes substantially to the men's western wear market in India. Personalisation is common in the formal wear, occasion wear and casual wear segments and in denims," says Singh.

"Product personalisation is happening mainly in men's formal wear. In the casual wear space, this category still needs to grow as there are challenges to creating a personalised look. For example, a denim washed look, overdyed shirts, graphic t-shirts, etc., are some of the product types where it is difficult to get a personalised effect on the garment," reveals Srivastava.

Advent of International Brands

The advent of a slew of international brands have ensured that the competition is high in the men's western wear segment in India. Armed with better facilities and a strong supply chain, these brands can afford to bring latest trends very quickly to the market and offer stiff competition to domestic and home grown brands. "Competition is hot, there is intense pressure on Indian brands and retailers, especially in the western wear, and international players are naturally advantaged to offer authentic trends in this area. However Indian players are in the lead when it comes to logistics costs and market understanding," says Khapra.

The result is that, brands in the space have been compelled to constantly innovate with both production and product. "The men's western wear market is witnessing a great progression. Be it prints, silhouettes, fabric, kind of treatment given – a lot of experimentation is happening in the category. A variety of options is a welcome relief to otherwise a restricted wardrobe," says Vakharia.

"Absolutely! Innovations are happening fast, and the most notable ones are related to sustainability with new materials being made from alternate sources like farm waste or grown in labs algae substitute for leather. As a brand we are looking to adapt to changes as and when they happen and keep a close eye on all the innovations for chance to adopt early," says Singh.

The Future

The way men approach fashion and personal style is evolving from what it used to be. Today, men are far more aware of their choices. This is a clear testimonial that the western men's wear market is set to grow at a rapid pace in the coming years. With increase in online shopping behaviour, the market is going to grow deeper into small towns and even rural areas.

Social media platforms are only going to add the demand for the trendy clothes in the coming years. While digitally strong retailers are going to gain leadership in the youth market, competition will certainly intensify. The only brands which can sustain are the ones who are willing to keep pace with changing times and changing consumer preferences.

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Today, men are far more aware of their choices. This is a clear testimonial that the western men's wear market is set to grow at a rapid pace in the coming years. With increase in online shopping behaviour, the market is going to grow deeper into small towns and even rural areas.

AT THE FOREFRONT OF THE WESTERN WEAR REVOLUTION IN INDIA

A look at the dynamics of the largest contributor of western wear in India – denim. Aside from bringing western wear into the mainstream, denim in India played the role of radically changing urban lifestyle...

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enim is a legend in itself. It's the world's favourite blue fabric and has an iconic history. Over the years, denim has single handedly revolutionised the western wear market around the globe. In India too, while western wear was somewhat limited to the well-heeled only, it was denim that brought it to the mainstream. In addition, it also tagged along a radical change in urban lifestyle and changed the way the country consumed western fashion forever.

Growth Drivers

The denim industry in India has witnessed rapid growth triggered by increasing usage of western wear by the fashion conscious youth. The inclination to denim was being witnessed due to the growing youth population and pop-culture, which has been the main reason for fashion revolution in the country. "Its use as an all-weather and evergreen piece of apparel for all (men, women and even children) helped it get the attention and created a large market for it which was not so for any other piece of clothing earlier. Also, the he most important factor has been its durability and maintenance in the long run which actually turns out cost-effective for all," says Kewalchand P Jain, Chairman & Managing Director, Killer Jeans.

E-commerce and social media have dramatically boosted the growth of denim in the country, especially in organized category. While the access



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

to brands and discounts has opened up a new arena for consumers it has also been instrumental in providing brands with a robust platform that promises both exposure and penetration to remote locations.

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

Moreover, as mobile devices continue to permeate deeper into smaller cities and towns, the nation has increasingly gravitated towards western wear. This has definitely turned to denim's advantage. "I think the openness to adapt to change among people comes more from the western culture, movies, celebrities, social media influencers, etc. People want to look good and feel good," says Neha Shah, Assistant General Manager - Marketing, Pepe Jeans.

Also, parallel to the growing preference towards comfort, jeans are now acceptable office garb even in smaller towns in India. This is another major





"Indian denim manufacturing in recent times has been constantly upgrading and evolving like never before. Innovation is a key factor with the introduction of laser machines, e-flow and ozone machines and the industry has started focusing on eco-sustainable alternatives over hazardous chemicals"

Pragati Srivastava, GM & Brand Head, Parx

factor that have propelled denim into wardrobes across the nation.

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

The Denim Market in India

Denim commands the biggest share of the western wear market in India. Even in rural areas, denim is a staple across wardrobes with most men and teenager girls opting denim wear over traditional outfits.

According to India's leading management consulting firm, Technopak Advisors, the denim wear market in India is estimated to be around ₹29,203 crore in 2018. As one of the most popular western wear categories in the country, the it is expected to grow at CAGR of 12 percent and reach ₹91,894 by 2028. Denim wear market in India is dominated by men's segment, accounting ~ 86 percent of the total market size.

"The men's denim wear segment is the fastest growing segment. Men's denim wear accounts for largest share and is poised to grow at a high CAGR of 12 percent over the next decade. Branded sector has been the biggest beneficiary of this with its presence all across and also varied offering in men's wear," says Jain. However, the women's denim wear segment is expected to show higher CAGR than the men's segment. The women's denim category in India is expected to grow at a CAGR of 14.5 percent over the next 10 years to reach ₹39,651 crore by 2021, and ₹77,999 crore by 2026.

The denim market in India is finally coming of age. The industry is no longer a poor imitation of hip western culture or a limited edition of elitist apparel: they're becoming both a fashionable art and a major growth industry. While international denim





"In my opinion, the two major challenges that are a hindrance to the growth of denim wear in the country have been unorganised players in the segment and the discounts they and other brands offer to the customer. Unbranded denim products constitute to about 70 percent of the market share"

> Kewalchand P Jain, Chairman & Managing Director, Killer Jeans

brands like Pepe Jeans, Levi's, Wrangler, etc., have witnessed rapid growth over last few years, a slew of Indian brands have emerged across all segments of the Indian denim market (premium, medium and value for money).

Naturally as the market matures, the competition has increased manifolds. Moreover, the denim wear market in India is extremely fragmented. which has further led to increased competition. "Domestic players have to up their game when evaluating consumer preferences and insights and have a faster turnaround of their collections in order to gain the attention of style conscious Indians. Price points will inevitably be a major concern as more and more new brands enter, the customer will look for style and function in one at a specific price point. Another prominent development is the rise of private labels that are eating into the share of the already cluttered market," states Shah.

Also, the country's promising consumer ecosystem over the past few years has opened its gate to some of the biggest brands in the denim world and their success has continually enticed others to explore the opportunities in the calmer Indian waters. In the premium and super premium segment, the global brands have an advantage while at the lower and mid segment



the advantage lies with the domestic brands with their larger retail presence across the country. At the same time, the entry of these global brands has compelled the domestic brands to ante up their offerings, resulting in a highly evolved market replete with high quality products.

Competition Leads to Innovation

Currently, the Indian consumers are at par with their global peers. They are a lot more evolved with their shopping choices and are constantly seeking novelty in experiences. So, in order to cater to these discerning consumer base, and constant pressure from established global brands, home grown brands are compelled to ante up their game. Domestic brands today are fast catching up with their international counterparts in terms of design, innovation and adoption of technology.

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TRENDING NOW: MEN'S DENIM

- Colors: Khaki, Olive, Grey, Brown, Teal, White, Aquamarine, Sulphur Based Colors
- Fits: Slim, Skinny, Straight, Mid Waist and Low Waist
- Washes: Whiskers, Spray Effects, Laser Finishes, Stone Wash, Smoke Wash

TRENDING NOW: WOMEN'S JEANS

ONLY

- Leather Finished Jeans: These are a kind of jeans which are in the form of denims with a touch and feel of leather to it.
- **Flared Jeans:** The demand for flared denims has grown over last season. These are well fitted at the top and flares up from the knee to the bottom.
- **Skinny-Fit Jeans:** These jeans are a staple style that accentuates a women's curve like no other jeans. These are well fitted from top to a narrow fit at the bottom.
- **Statement Jeans:** These jeans have a fit of the boyfriend denim or straight-fit denim with either a statement texture or colour to it.

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- Skinny Jeans: A tight fit around the hips and slightly relaxed below the mid-calf
- **Super Skinny Jeans:** Fits the body from the waist down including all the angles that flatter a figure
- **Push-Up Skinny Jeans:** Specially designed at the butt area to give it a push and define contours to accentuate the shape
- Classic Jeans: A snug fit till the mid-thigh and relaxed from the mid-thigh down
- Wide Leg Jeans: Fits on the hips and flares from below
- · Girlfriend Jeans: Relaxed around the hips and wider at the ankle

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

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

Also, as the demand for sports inspired, casual fashion with focus

on comfortability grew, Indian denim manufacturers have been compelled to concentrate on more comfortable and sporty denims fit for everyday use.

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

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





"There has been a conscious effort in developing and adopting innovative technology for sustainable and environmentally friendly options. New technology helps reduce water and chemical consumption. There are denim fabrics made using post-consumer waste like recycled pet bottles, etc."

Vinit Doshi,

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Head – Product, Sourcing & Retail Planning, Celio

Sustainability: An Expected Standard

The need for sustainable production has become an imperative over the past years in fashion. This holds especially relevant to the denim segment, considering the incredible amounts of water and toxic dyes used in manufacturing jeans. In line with this, denim companies are now compelled to embrace greener methods and are also making effort to develop new techniques of producing jeans, as a part of their business strategies to protect the environment as well as connect to the consumer.

"There has been a conscious effort from brands, manufacturers and category leaders in developing and adopting innovative technology for sustainable and environmentally friendly options. New technology helps reduce water and chemical consumption. There are denim fabrics made using postconsumer waste like recycled pet bottles, etc. Laser finishing technology and better wet processing technology helps substantial reduction in water consumption," says Vinit Doshi, Head – Product, Sourcing & Retail Planning, Celio.

Emphasising on how brands and manufacturers in India have caught on the trend of sustainable production in the recent years, Pragati Srivastava, GM & Brand Head, Parx adds, "Indian denim manufacturing in recent times has been constantly upgrading and evolving like never before. Innovation is a key factor with the introduction of laser machines, e-flow and ozone machines and the industry has started focusing on eco-sustainable alternatives over hazardous chemicals. Eco-friendly trims have slowly started replacing conventional ones."

Small Towns Are Big Business Hubs

It's no news that India's retail revolution is gaining momentum in the country's smaller cities. A huge base of aspirational consumers, lower estate cost and plethora of other factors have culminated in compelling fashion



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Manu Sharma, Business Head, Replay





other crucial aspects. Unbranded denim products constitute to about 70 percent of the market share and this trend needs to change with regards to domestic market," says Jain.

The Road Ahead

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

With right knowledge of consumer preference and global best practices, denim wear brands can exploit the available growth opportunities in domestic denim wear market.

2019 / OCTOBER ISSUE // MARKET WATCH



"Price points will inevitably be a major concern as more and more new brands enter into the fray. The customer will look for style and function in one at a specific price point. Another prominent development is the rise of private labels that are eating into the share of the already cluttered market"

Neha Shah, Assistant General Manager - Marketing, Pepe Jeans retailers to make a beeline for Tier II and Tier III towns. Especially for the denim segment these small towns hold immense potential. Traditionally, these places were dominated by the unorganised sector. As exposure grew over the years, consumers have exhibited a high inclination towards brands.

It is noteworthy to mention here that the big unorganised market poses as the biggest challenge in the denim wear sector in India.

"In my opinion, the two major challenges that are a hindrance to the growth of denim wear in the country have been unorganised players in the segment and the discounts they and other brands offer to the customer. They are a major roadblock, not letting this segment get the growth it deserves. Hence brands are sometimes forced to compromise on quality and



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WHAT OMEN WANT:

Western Wear That's Trendy, Yet Comfortable

India is currently witnessing a tremendous increase in the demand for smart western clothing for women. The market has observed the entry of multiple players in the last decade, propelled by demand-side drivers of several shifts in consumer behaviour and an increase in the number of working women...

Rosy Sharma with inputs from Gurbir Singh Gulati

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ndia is home to nearly 1.2 billion people, of which 48.5 percent are women. Out of this, 48.1 percent live in urban areas. A large chunk of this comprises of working women, who have a sizeable disposal income which they tend to spend on clothes that match their corporate image.

The growing purchasing power and the need for western clothes for both work and play has led to a massive demand in the Indian women's western wear segment, with the segment itself transforming into a youthful, chic and classy choice of clothes for contemporary women. Aside from the ever-present dress, the segment has broadened its spectrum to include shirts, skirts, trousers and blazers in sub-segments like formal, semi-formal, smart casual, business casual and business formal.

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This high potential market is gaining ground in India due to factors like rapid globalisation, increased brand awareness and surge in fashion consciousness among women consumers, aside from heightened demand from confident and independent working women.

According to Apeksha Patel, CEO, Deal Jeans, the women's western wear market has evolved beyond the regular top and bottoms. "From predominantly sarees to salwar kameez to conservative western wear to fast fashion, Indian fashion has undergone significant transformations through the decades. The market for women's western wear in India has probably become extremely lucrative in terms of variety and scope," she states. Manjula Tiwari, CEO, Cover Story supports this saying, "The business has definitely moved beyond a pair of trousers and a shirt. Millennial women are very adaptable to change and love experimenting anything that is fresh. They are smart consumers and fashion conscious. While ethnic wear and Indowestern wear segments are still leading the charge of this growth, one can see a growing increase in the demand for western wear by women that follow global trends."

According to Akhil Jain, Executive Director, Madame, the women's western wear category has always added to the Indian apparel market. "The women's western wear is broadly made up of casual western wear and formal western wear. The casual western wear without fail has been ruling the stores but now with increase in the number of working women, the formal western wear is taking a hike. Now, women like to go for smart western wear," he states.

Market Size

As per McKinsey's FashionScope report, the Indian apparel sector will be worth US \$59.3 billion by 2022, making it the sixth biggest market on the planet, equivalent to the United Kingdom's (US \$65 billion) and Germany's (US \$63.1 billion). "Women's



wear contributes almost 42 percent to the overall apparel market and the women's apparel market is projected to reach over ₹2.9 trillion in Indian in 2028. As compared to previous statistics, the market for apparel in India grew at a CAGR of 13.8 percent," states Patel.

"The branded women's apparel is set to grow to 6X in the next decade from the current level," adds Tiwari. "The western wear market has been growing at 17 percent in the last few years. While men's wear dominates the Indian market in terms of sales at



"The women's wear segment has seen the entry of multiple players in the recent decade propelled by demandside drivers of several shifts in consumer behaviour and an increased number of working women. Branded women's apparel is set to grow to 6X in the next decade from the current level"

Manjula Tiwari, CEO, Cover Story

42 percent, women's wear is not far behind at 37 percent and is set to grow even more over the next decade."

The women's wear segment has seen the entry of multiple players in the recent decade propelled by demandside drivers of several shifts in consumer behaviour and an increased number of working women.

Indian Players v/s Global Leaders

A growing fashion consciousness among Indian women has turned the western wear segment into a lucrative and highly evolving market. "Going by the market insights and opportunity, global brands find it extremely promising to be present in the Indian market, while the Indian players have leveled up their game to keep up with their international counterparts. Better fashion forecasting and more intense research on fabrics, which people prefer to wear, will further help Indian players survive," says Jain.

"Today fashion trends change within the blink of an eye and to cope up has been a concern for brands, mostly because the time required in designing and production is longer in comparison



"Today fashion trends change within the blink of an eve and to cope up has been a concern for brands, mostly because the time required in designing and production is longer in comparison with the pace of the changes. However, brands are now making the effort to understand international trends and make them available in the Indian market within a short span of time"

Apeksha Patel, CEO, Deal Jeans



"Indian brands have a great mix of things to offer such as designs, colours and fits. Our London-based design team brings in a new collection every week. We curate designs keeping in mind the Indian body type and preferences while maintaining the global trends," adds Tiwari.

The penetration of internet in Tier I, II, III, IV and beyond along with the influence of celebrities and social media has given rise to an increasing appetite for international trends. Brands – both domestic and international – are focusing on providing excellent quality at competitive prices to attract discerning customers, whether through physical stores or online.

The penetration of internet in Tier I, II, III, IV and beyond along with the influence of celebrities and social media has given rise to an increasing appetite for international trends. Brands - both domestic and international - are focusing on providing excellent quality at competitive prices to attract discerning customers.

"The demand is such that many homegrown brands are only operating through the online space to retail their products," explains Tiwari. "The e-commerce platform has provided an easy and less time-consuming option in today's busy times. The increasing number of working women, with less time to shop has found an easy mode of purchasing. The online market is one of the major reasons in the growth of this category in semi-urban and rural markets."

Current Trends: Fast Fashion v/s Sustainability

Women today want comfort clothing and minimal designs. Current trends







"Going by the market insights and opportunity, global brands find it extremely promising to be present in the Indian market, while the Indian players have leveled up their game to keep up with their international counterparts. Better fashion forecasting and more intense research on fabrics, which people prefer to wear, will further help Indian players survive"

Akhil Jain, Executive Director, Madame

are simple, clear with flowing fabrics, bold stripes and prints. Women now go for comfort clothing and minimal designs. Western wear is no longer restricted in metropolitan regions only, the Indian women consumers are now well versed with global fashion and aspire to wear a very similar look in Tier I, II and III cities. "With the rise in the number of working women in India, there has been a tremendous increase in the demand for smart clothing like trousers, formal shirts, blouses and skirts," says Tiwari. "Globally, a lot of innovation in fashion is taking place especially in the fabrics that are being used. Hence forth, efforts should be made to use recycle/up-cycle or ecofriendly fabrics to reduce any negative impact of the environment. There is an effort from brands to innovate in materials and processes so as to create a balance between consumption and preservation."

Patel also believes that fashion is no longer seen as just about trends and innovative design, it is a means to encourage dialogue on sustainable choices. The low-priced, quickly produced and designed for obsolescence, fast fashion encourages consumer detachment from issues of sustainability. She says, "Sustainability often means environmentally conscious clothes. Every brand is contributing with unique processes, i.e., slow fashion cycles, opting for natural fibers and dyes, and committing to recyclable styles."

The sustainable fashion market in India has seen a significant growth in the recent past. A lot of brands are switching to manufacturing ecofriendly clothes which do not cause harm to the environment. Brands like Madame are working on a minimum waste policy and eco-friendly fashion products in women's wear. Madame is all set to launch its eco-friendly collection in stores with fabrics like hemp, linen, bamboo and ramie.

"Opportunities ahead are blooming as contribution of brands are extensively increasing. Shoppers increasingly prioritise convenience over conservation, creating more practical and economically sustainable solutions for these dilemmas. With the rise of the resale and rental fashion market, there are signs that 2019 marks a turning point in the way that sustainable fashion makes way in stores and wardrobe," concludes Patel.

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MEN | WOMEN | KIDS





Colours available: OFF WHITE

GREY

SKIN

ANTHRA

BLACK

NEVA ESANCIA



OUR THERMAL RANGE







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GAINING TRACTION: WOMEN'S WESTERN WEAR IN INDIA

Sharad Walia, Brand Director, Park Avenue reveals how the western wear segment is getting traction and wider acceptance owing to an increase in disposable incomes, and more women joining the workforce.

IMAGES Fashion Bureau



Sharad Walia, Brand Director, Park Avenue

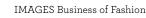
Tell us about the women's western wear market in India? How has it changed over the years?

Globalisation coupled with fast fashion has resulted in awareness on fashion trends and styling. Further, the increase in number of working women has fuelled the women's western wear market. The women's wear market is currently growing at 10 percent CAGR in India, where women's western wear is growing at 17 percent CAGR.

Can you help us understand more on the size of the women's western wear market in India?

The women's wear market in India contributes 38 percent of the total apparel industry. It is estimated to be worth ₹1,11,467 crore (US \$17.5 billion in 2016) and is expected to grow at a CAGR of 9.9 percent to reach ₹2,86,456 crore (US \$44 billion in 2026). The women's wear in India comprises ethnic wear, western wear, Indowestern, innerwear, etc.

Ethnic wear is the single largest category in women's wear with a share of 66 percent. In ethnic wear, saree is perhaps the most common traditional Indian dress for women and has a market of ₹37,837 crore. It is expected to



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grow at a CAGR of 5 percent and reach ₹61,632 crore by 2026. Though a market shift is expected from saree to salwar kameez and western wear in urban and semi-urban markets, the saree will still remain as the predominant category among elderly and middle aged women across urban and rural India.

Salwar kameez is another dominating category in ethnic wear, especially among the working women because of it's comfort. With a market share of ₹35,804 crore, it is expected to grow at a CAGR of 12 percent to reach ₹1,11,203 crore by 2026.

Denim is another high growth category among women's western wear and is expected to grow by a promising rate of 17.5 percent for the next 10 years to become a market of ₹10,209 crore from ₹2,035 crore currently. Initially, denim brands used to focus primarily on men, but with change in demand and preferences of women, they have started catering to women consumers as well. Stretch denims have seen a huge demand among women.

Women's t-shirts and tops categories are also growing fast owing to generic inclination for western wear categories. The women tops and shirts market is valued at ₹2,236 crore and is expected to grow at a CAGR of 14 percent to reach ₹8,291 crore by 2026. The women's t-shirts market of ₹933 crore is growing in tandem with the growth of other casual wear categories and is expected to grow at a CAGR of 17 percent to reach ₹4,484 crore by 2026.

According to you, what are be the key growth drivers in the segment?

Firstly, it is globalisation and democratisation of information.





"We Indian players are not threatened by international brands coming into the country, rather we feel confident knowing our strengths and understanding the customers well. Instead, such competitions help improve the market and ensure that brands deliver better than before."

- Sharad Walia, Brand Director, Park Avenue

thanks to the internet. Secondly. more international brands coming to India. Thirdly, women are travelling more unlike before. And finally, the growing participation of women in the workforce.

With global brands coming in how are Indian players coping and scoring?

We Indian players are not threatened by international brands coming into the country, rather we feel confident knowing our strengths and understanding the customers well. Instead on a positive note such competitions help improve the market and ensure that brands alway deliver better than before.

Price is a major factor in women's wear. How do brands strike a balance?

Well, I find price is a factor in every category, not just in women's apparel. What's the key is whether the customer perceives any value in what he is paying for. There's always a price-value equation which we run while making a purchase decision. For example, when you see a product, you know whether you will use it frequently or not, especially given our products are very iconic and classic. \rangle



Innovation and styling drive the women's wear market. With rapidly changing trends, the average number of wears of each garment has come down and people adding more number of new garments into their wardrobe.



Tell us about the key innovations in the women's western wear segment today. What is your brand doing in it? Innovation and styling drive the women's wear market. With rapidly changing trends, the average number of wears of each garment has come down and people adding more number of new garments into their wardrobe.

Garments are no longer a basic need, they depict your personality today.

We have a number of innovations to our name, including the auto fit pants for women, which allows for an adjustable waist: perfumed shirts for customers to feel fresh all day long. Apart from offering on-trend styles, our products are also rooted in our true-toinnovation heritage, and as such offer new innovations each season.

What has been the role of e-commerce in helping the category grow?

E-commerce has made fashion accessible to customers in more ways than one. Today Tier III and IV markets are more aggressively driving women's wear growth than others because the customers doesn't have to leave the comfort of their homes to get what they want. The latest trends are available to them. 24x7. At the same time, unlike a brick and mortar store, where there is limitation in the number of styles it can offer due to space, e-commerce takes away all of those limitations. Our business on e-commerce has been growing at 15 percent year-on-year.

Throw some light on your design capabilities. What is your USP? Our products are designed with the end users in mind. For example, you will

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find buttons inside placket to ensure there's no accidental reveal. Simple things like auto fit trouser that expands at the waist ensures that our user is at ease, irrespective of body changes. We imbue our clothes with such thoughtful details while creating innovation and staying on trend.

Therefore, Park Avenue Woman offers style choices that an independent, vivacious, millennial Indian women make through a week - Monday - to - Sunday; morning - to - night - that are never boring and always experimenting. The consumers can mix-and-match trends to create a styleidentity that is uniquely theirs. From boardroom to mid-week chic, from the red carpet to an easy Sunday brunch, with Park Avenue by her side, she is always topping the style charts.

How will the future unfold for women's western category in India? What are the opportunities in the vears ahead?

The opportunities for growth are very exciting in women's western wear market. We see pockets of growth, of course, coming as a result of more women wearing western wear overall. However, there's also the segment of Indo-western chic that's growing well. We see women's wear market becoming very sophisticated, and the consumer going after brands that resonate with their identity. Today, women still seek inspiration or ideas from brands on how to pair ensembles, etc. But we foresee the market maturing where they're more confident in their choices. With a wave of "self acceptance" we see sweeping the globe, we also expect women to be bolder in their choice of styles which truly reflect their tastes and not being shy.

VESTERN WEAR **STUDY**



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NEW GENRE GOES FROM FASHION FAD TO TIMELESS TREND

With consumers demanding different styles, easy to sport yet fashionable, the answer was simple – streetwear clothing. Streetwear is all about attitude and comfort. This genre of fashion is a mindset, rather than just a trend, a cultural shift leaning towards art and music. IMAGES Fashion Bureau explores this new clothing trend... Rosy Sharma with inputs

from Gurbir Singh Gulati



Sanjeev Mukhija, Founder and Managing Director, Breakbounce Streetwear

he current state of fashion in India is dynamic, disruptions are common, and people are no longer scared to experiment. One fashion genre which is changing the way people look dress is streetwear. This genus is all about a mindset, an attitude which is visible in everything the wearer does.

Originated from Californian surf and skate culture, streetwear is a style of comfortable, casual clothing inspire by skateboarding, surfing, hip-hop, punk, Japanese street fashion and other subcultures. It is avidly bought and worn by. The trend is picking up pace in India, with 'hypebeasts' – avid streetwear collectors - on the rise. buying the latest releases from the world of streetwear.

According to Shakeef Khan, Co-Founder and CEO, Disrupt, the rise of hip hop and rappers in India, along



"Streetwear is a phenomenon in India. It speaks to the young who are highly persuasive and globally connected. Independent brands are making their mark, upholding streetwear in India, appealing to the Millennials and Gen Z"

Sanjeev Mukhija, Founder and Managing Director, Breakbounce Streetwear

with movies and shows like Gully Boy and MTV Hustle are moving this trend along at a fast rate.

Sanjeev Mukhija, Founder and Managing Director, Breakbounce Streetwear says, "Streetwear is a subculture that expresses freedom to experiment. It breaks away from mainstream and thrives on real concept of counter-culture. And, a true enthusiast strives to keep up the identity."

Abdon Lepcha, Creative Director, Cravatex Brands Limited (Fila) explains that streetwear is a mindset, not just a trend. "Streetwear is a revolution to the fashion that has been prevalent for decades. It has brought a change in how we feel, dress and

express ourselves. It is a cultural shift as streetwear works in the opposite way than the common practice of brands telling the consumer what to wear. It is the consumers that direct styles. It has erased the boundary line between casual and formal. Today it is okay to wear jogging pants and sweats and go to office, which wasn't the case some years back."

Focus Consumers

Streetwear is modern, usually casual, clothing that is typically worn by urban youth subcultures. Originating from cultures and neighborhoods as opposed to the fashion styles dictated by designers and major retailers, the attractiveness of streetwear rests on the fact that one can wear whatever he/she wants, creating a mix-n-match style that fit their personality. In India, streetwear fashion is popular among Millennials who are otherwise predominantly into international labels.



Abdon Lepcha, Creative Director, Cravatex Brands Limited (FILA)

These Millennials want innovation in design, along with unique collections that reflect their individuality, and are willing to go that extra mile to get the styles they desire.

As Khan puts it, "Millennials and Gen Z represent a large and still growing share of fashion consumers, and they want community and authenticity. Add to this comfort and a lot of attitude and streetwear is the outcome. It's no surprise then that the most followed streetwear stars are massively visible celebrities like Rannvijay Singh, Melvin and Raftaar are household names in streetwear these days." He further states that the culture of hip hop is not just a cult anymore but a major community considering the size of the youth in India with many of them being influencers, it was but overdue for streetwear to go mainstream.

As per Lepcha, streetwear is a combination of keeping true to one's own identity while being comfortable and not shying away from others. "India is a market where street culture is growing at a tremendous rate not just in terms of fashion but also art, music and a lot of other avenues. India now is a country with a new attitude, an attitude of change and this has boosted the streetwear culture. We are a country with a new attitude, an attitude of change and this has boosted the streetwear culture. The mixing of cultures and adoption of new trends has resulted in an explosion of creativity"

"Be it individual or group, everyone has their own ideas. People want to explore and express, and streetwear is a great platform. Globally the Kardaishans, Kanye West, etc., are the kind of celebrity influencers for fashion, music, make up. They create their own style, and this is something which influences a major chunk of millennial today – being comfortable with who you are and not afraid to express yourself is the definition of streetwear," he states.

Retail Responds to Streetwear

Retailers today are trying to provide whatever their consumers demand and are stocking up on streetwear to give



Streetwear is a combination of keeping true to one's own identity while being comfortable and not shying away from others. The culture of hip hop is not just a cult anymore but a major community considering the size of the youth in India with many of them being influencers, it was but overdue for streetwear to go mainstream.

shoppers clothes which reflect a 'don't care' attitude.

"Shopping trends are changing with people adapting to comfortable and personalised buying. Streetwear speaks to the young who are highly persuasive and globally connected. Independent brands are making their mark to uphold the genre in India, appealing to Millennials and Gen Z buyers. Customers are now asking for the category and retailers are delivering, making space for these new age styles in their stores," says Mukhija.

"Streetwear is here to stay, and every brand wants a piece of the pie. It is self-expression and hence cannot be confined to one specific business unit. It could be one t-shirt with an expression, a studio, a boutique, a brand or even a community. There is space in this category for everyone," states Lepcha.

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"Streetwear has been a constant talking point and the trend is only getting bigger. The idea behind streetwear is to offer the wearer a relaxed style whilst looking good. Along with this, the hype around luxury streetwear brands like Supreme, OffWhite and Bape, makes the style more desirable but also less affordable"

Shakeef Khan, Co-Founder & CEO, Disrupt

From the runways of Milan Fashion Week to the collaborations that Fila has done in India with brands like NorBlackNorWhite and VegNonVeg talks about the seriousness of the brand towards this fashion trend.

"The collaborations we do is to nourish the growing street culture in India, then be it art, culture. fashion, music or any other form of expression, because we believe that when different ideas come together, the result is often an explosion of creativity," Lepcha explains. "Every range that we make has a story to tell. What we do is create memories rather than just put products out in the market. Fila is not just a sportswear brand but a fashion sportswear brand. The fashion element to sports is the differentiator and we believe that the stories we tell create a bond between us and our consumers."

Khan adds, "Indian fashion markets are still adapting to streetwear and the genre is still evolving. More and more street style designers are emerging, and designers are creating more urban collections. Meanwhile brands have just started mainstream collaborations, like the Louis Vuitton X Supreme. The market is also seeing fresh competition from Chinese fashion brands like Shein, ClubFactory, etc., which have gained popularity with their affordable prices and contemporary clothing."

The objective behind streetwear is to offer the wearer a relaxed style whilst looking good, though very few brands have been successful in linking themselves with the streetwear category. There are also luxury streetwear brands like Supreme, Off White and Bape, which make the style extremely desirable. Sportswear major adidas too has done well by leveraging their early market entry and collaboration mix.

The Street Ahead

According to Lepcha, streetwear as a culture is going to grow a lot more in the next 2-3 years as compared to formal wear.

"In the next few seasons, we will face a lot of unisex clothing, training lines for athleisure, etc. Comfort as well as styling which will be a combination of streetwear and lounge wear. But, as of now what's running in the market will continue for two more seasons for sure," he concludes.

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STREETWEAR POISED TO EXPLODE ON THE BACK OF EXCELLENT PRODUCTS, COMMITTED HYPEBEASTS



Bhavisha Dave, Co-Founder and Director, Capsul

Capsul's model of retailing is online, via direct messaging and through pop-up stores. The brand does not display products at its pop-up stores, but instead creates an IP called 'Word on the Street', a platform for India's street culture community...

IMAGES Fashion Bureau

S treetwear is all about drops and product stories as opposed to themes. It is a specific fashion genre, streetwear is a style of comfortable, casual clothing inspire by skateboarding, surfing, hip-hop, punk and other subcultures – think hoodies, t-shirts, trainers, and tracksuit bottoms by companies who aim for a distinct style and ethos.

Capsul, India's first multi-brand streetwear platform, has a mix of skate brands, pop culture based brands and street luxe brands in its portfolio. The platform has spent the year building partnerships with streetwear brands that it now makes available to Indian consumers through the curated platform, www.shopcapsul.com. It offers over 15 brands to its discerning consumers including Stussy, The Hundreds, Chinatown Market, Thrasher, Carhartt WIP, HUF and Staple Pigeon to name a few. It also has sneaker care products by Reshoevn8r and Rastaclat bracelets.

Capsul's model of retailing is online, via direct messaging and through popup stores. The brand does not display products at its pop-up stores, but instead creates an IP called 'Word on the Street', a platform for India's street culture community, wherein it brings together tribes representing streetwear, sneakers, art, music or just about anybody with an interest in being a youth culture creator.

Capsul is always on a lookout for great product and greater product stories, curating multiple brands and each brand has interesting products with stories. In the first year of its existence, Capsul worked on projects around street culture such as India's first Hypecourt Hoopers and Air Canada. It also worked for Budweiser India's foray into streetwear with BUDXStreet.

In an all-encompassing chat with Bhavisha Dave, Co-Founder and Director, Capsul, talks about the prevailing scenario of streetwear fashion in India.

Excerpts from the interview..

How do you feel about the current state of fashion and the growth of streetwear clothing in India?

It is an incredibly exciting time for streetwear in India. With rappers like Kanye becoming designers, global style icons and trend setters, the rise of hip-hop as the most popular genre of music and the growth in influence of communities that started streetwear – skate, surf and graffiti – is enabling this form of self-expression in India.





sports and culture. And it seems like everyone wants to be on it. And there are those who want to capitalise on the buzz-worthiness of 'streetwear'." – Bhavisha Dave, Co-Founder and Director, Capsul



An almost universal sense of style among Gen Z and Millennials, the proliferation of Instagram and the gradual acceptance of comfortable, functional clothing, including tees, hoodies and cargos, as work wear have catalysed the streetwear movement. Streetwear is poised to explode!

Is the culture of streetwear style still as authentic as it used to be or is everybody just copy and pasting outfits?

Both. There are genuine communities who are the torchbearers, who dress to represent their communities. This is true both in India and outside. An overall shift in the way people are dressing shows that streetwear isn't just a trend; it's the fashion component of an attitude that spans music, art, sports and culture. And it seems like everyone wants to be on it. And there are those who want to capitalise on the buzz-worthiness of 'streetwear'. As for consumers, there are kinds-and are essential for the eco-system to flourish — those who create looks, style trends, those who appreciate those trends, are inspired by them or just copy paste them.

Has streetwear clothing been able to revolutionise the western wear trend in the country?

The overall athleisure trend has done that. Streetwear is a subset of that trend that gives more importance to community building, product storytelling and authenticity. Globally, streetwear's impact on luxury as well as the 'hypebeast' culture has also been a catalyst for pushing the trend in India.

What does streetwear stand for Millennials and Gen Z in India? What are their style influencers?

We're seeing two kinds of streetwear consumers — one, those who are fans

of the OG (original) streetwear brands, for their heritage, storytelling, role in building sub-culture communities and breaking through societal barriers. Others, those who identify primarily with the 'hype' aspect of streetwear. And this is how it is both in India and outside.

Streetwear is a way of representing the tribe or sub-culture you feel connected to. So, if you're into skateboarding you probably connect with Thrasher, HUF or RIPNDIP. If you're into art or are opinionated, you probably identify with The Hundreds.

Rappers are the biggest influencers for streetwear, followed by designers of cult brands like Off-White, Heron Preston, The Hundreds, Staple Pigeon, BAPE. We have seen that these personalities are style influencers for early adopters.

Bollywood has embraced luxury inspired by streetwear and been

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"An overall shift in the way people are dressing shows that streetwear isn't

just a trend; it's the fashion component of an attitude that spans music, art,



MOST INNOVATIVE PRODUCT

- The most innovative product at Capsul is the INDVLST Screen Printing Kit. It comes with a pre-designed stencil mounted on a frame for ease of use (multiple use), inks, a blank long sleeve neon t-shirt and all the elements that are required to customise a t-shirt.
- The idea is that customisation and individualism can be taken up a notch even in the selfexpression heavy world of streetwear. Additionally, it is about bring the Do-It-Yourself ethos to the consumer, which is the foundation of streetwear.

repping 'streetwear fits' thus further spreading that aesthetic in India. For a majority of Indians, Bollywood celebrities like Ranveer Singh, Diljith Dosanjh, Ranbir Kapoor, etc., are style influencers. Micro influencers focusing on streetwear content also influence their communities.

Tell us about the competition in this category and how do you make your fashion brand stand out from the rest?

The space is nascent in India and at this point in time everyone involved is helping build the market. It is too early for competition, in our opinion.

The streetwear landscape in India currently has Capsul, which is the only platform offering streetwear at retail prices, VegNonVeg, India's first sneaker boutique that also has their own branded streetwear drops and Superkicks. There also are a few other amazing Indian labels such as Space Biskit, Jaywalking, NorBlackNorWhite, Huemn and NoughtOne. And then there are resellers who curate hype brands and resell them to various communities, spread across India.

As we've said before, it's a very exciting time because the 'tee' has never been a bigger canvas for making a statement or showing one's creativity. We're regularly seeing new brands popping up, inspired by Indian streets and Indian culture. Consumers who want to buy authentic streetwear, whatever their definition of streetwear is, will buy brands that speak to them. And they know where to buy streetwear.

How has Indian retail identified the prospects of this category? Are big box retailers giving space to new breed of streetwear brands or its just restricted to e-commerce?

We're seeing brands and platforms include 'streetwear' or 'streetstyle' in their offerings to consumers. However, most of the traction and push is from our platforms and the brands that I have mentioned earlier, along with Bollywood celebrities and rappers.

Do you think the mainline sportswear brands link well with the streetwear category too?

Yes. They go very well together. And personally, we believe that sports brands have been instrumental in the mainstreaming of streetwear. While streetwear helps keeps all collaborators relevant and topical. Streetwear has its origins in action sports and has been regularly collaborating in creating exciting drops.

How would you define the future of streetwear clothing?

Streetwear is an attitude, it's the fashion expression of youth culture. Streetwear is also sometimes about being among the only few wearing it. So, it's possible the early adopters who took to streetwear because of its ethos, will continue looking for more obscure emerging brands. All of these factors along with more access to fashion trends through social media are going to help catalyse the streetwear scene in India, over the next few years.

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RETAIL'S TUINS: FASHION ACCESSORIES & WESTERN WEAR ARE INSEPARABLE

Just as western wear has shown a strong influence in the growth of fashion accessories in India, vice versa holds true as well where accessories are now prompting women to experiment with their western wear...

Zainab S Kazi

The influence of western culture in India has set a wave for a growing sense of fashion among Indian women. Thanks to the increased penetration of technology, awareness about latest fashion trends across the globe is available within a matter a seconds; this has helped the market for fashion accessories grow considerably. Women today have at their disposal. a host of fashion accessories. not restricted to just fashion jewellery. Be it scarves, belts, shoes, bags, brooches, etc., the choice to add in glamour quotient to the simplest of ensemble being chosen to wear is limitless. Thus, just as western wear has shown a strong influence in the growth of fashion accessories in India, vice versa holds true as well where accessories are now prompting women to experiment with their western wear.

Market Overview

Jacqueline Kapur, Co-Founder and President, Ayesha Accessories shares an overview of the women's accessories market in India citing the major growth drivers. "The fashion accessories market in India is witnessing a rapid growth owing to a multitude of reasons. The millennial customer occupies 47 percent of the working population and is the main target customer for fashion Where western influence is a strong factor for an increase in demand for western wear accessories, one cannot dismiss the fact that women today are no longer shy of experimenting with the way they wish to be seen.

accessories. Increased globalisation and the access to fashion items through the internet for not only the urban customer but also young buyers in the Tier II and III cities drive growth. The westernisation in fashion trends in India further requires western styled accessories and this has opened a whole new market for the same," she says. Little wonder then that Ayesha Accessories, growing at a rate of 20 percent YoY, is a leading name dedicated to satiating the need for fashionable accessories for women in India. The brand has a strong presence across the country with prime space being occupied in prominent malls and shopping centres.

Where western influence no doubt is a strong factor for an increase in demand for western design influenced accessories, one cannot dismiss the fact that women today are no longer shy of experimenting with the way they wish to be seen.

Tanushri Biyani, Founder, Ceriz, hits the nail right on the head while attributing the rise in demand for accessories on the growing need among young urban customers to express their uniqueness. Elaborating on this, she explains, "Accessories are no longer need based purchases but give customers the opportunity



to make a fashion statement. Young women of India have moved away from buying purely functional accessories to embrace the whole gamut of accessory possibilities' wear mostly western apparel, which calls for a range of fashion accessories."

"Millennials composed of those between the ages 18 and 35 years are India's largest demographic segment. They are the chief wage earners and send a far greater percentage of their income on consumer products. The effects of globalisation have influenced the tastes and consumption patterns of millennials through access to international television shows / films and social media. With their higher disposable income and need to define themselves, millennials have championed the rise of fashion accessories into the organised retail market being the drivers to increase in demand of fashion accessories," she adds.

PETA approved vegan brand FOReT's Founder and Creative Director, Supriya







"Young women of India have moved away from buying purely functional accessories to embrace the whole gamut of accessory possibilities' wear mostly western apparel, which calls for a range of fashion accessories"

Tanushri Biyani, Founder, Ceriz



Shirsat Satam highlights that there is a growing propensity towards western wear by younger professionals and this has also been a catalyst for a new trend that reflects through a fusion of Indian and Western style. She says, "We have also seen a new confidence with buyers wanting to try something new and different, and for a discerning buyer who is conscious of creating a certain look, western design does blend. However, the preference largely is towards bold designs."

Satam further adds on the online factor leading to the growth of fashion accessories in the country saying, "Indian market is price sensitive and with fast fashion and discounts on commerce stores, price does play a role. At the end of the day, it is based on the market strategy, if one needs to reach out to the masses, then price has to be a major attraction with Instagram popular designs and for a niche player, concentration on exclusive design balanced with the right price point, can get the ball rolling."

Indranath Sengupta, Managing Director and Co-Founder. Kompanero is quick to point out that growing demand for apparel and other fashion products along with growing influence of promotional strategies by e-commerce players especially during festival season is supporting the market growth from last few years. Creating a niche for itself with offering a wide variety of colours in leather bags, Kompanero's collection is designed in a way that adds in sophistication even if just teamed up with a plain coloured clothing. He further makes an interesting point reiterating Biyani's and Satam's view stating, "With the kind of exposure gained due to extensive travel, people nowadays want products which are more suitable to their personality and products which come with ease."

Of Luggage Bags, Footwear & Fine Jewellery

Like everyday fashion accessories, travel and luggage bags too have undergone a transformation with western wear becoming more of a preferred choice when it comes to apparels. The choice of luggage

"The millennial customer occupies 47 percent of the working population and is the main target customer for fashion accessories. The westernisation in fashion trends in India further requires western styled accessories and this has opened a whole new market for the same"

> **Jacqueline Kapur,** Co-Founder & President, Ayesha Accessories

bags now is more tilted towards designs that have a strong western influence. Sachi Maker, Vice President - Marketing (PAN India), Traworld reveals, "Creative colours and prints has now become all fashion brands' new initiative for innovation. Pastels and raw colours have become the new trend along with a growing influence of pop coloured luggage. We do not see much of blacks, greys and dark colours as luggage are the new thing to show off." She further adds, "Following the rise of Internet and smart phone usage, more women are now able to stay au courant of latest fashion trends and have become smart consumers who know what they want when it comes to fashion. 'Unique, chic, personal and bold" is the new style statement."

Maker points out that there has been a big influence of Bollywood movies in transforming the way Indian women dress and this eventually has impacted the change in preference for luggage bags as well.

Glamourising one's attire with fashion accessories was not that prevalent in the yesteryears unless of course one belonged to a certain class and was frequent at parties and outings so one can well imagine that the trend for fine jewellery too didn't easily find its way unless it was a special occasion where women were expected to dress well. Neha Arora of Soni Sapphire rightly points out, "A few years ago, accessories were something which were reserved only for the wealthy, but today, walk into any department store and the accessory section is filled to the brim with outfit add-ons that appeal to those with jazzy tastes, to those who are looking at something subtle, and of course at a price that is pocket friendly. Furthermore, increasing demand for the product due to growing working population is propelling the market demand in recent times. Increasing number of manufacturers has brought

a lot of affordable options thus, increasing popularity among the youth, corporate people, and working women. This has led to an increase in demand for the product in the last few years."

Arora further adds that demand for western influenced jewellerv is on the rise also because of how Indian brides prefer accessorizing themselves on their wedding day. Based on the sales trend witnessed by their brand, she shares, "We have witnessed a healthy growth in the last few years because brides have also started choosing more of artificial or semi-precious jewellery that we have available in our stores today for their wedding day. The choice and demand for jewellery that we see in the market today has motivated us to bring new trends not only during festive season but also during the wedding season."

Similar to accessories, footwear too has witnessed a change in demand where 'sandals' are no longer considered a must have. Bollywood icons have made it cool to have a pair of sneakers being teamed up with a saree and this perhaps have motivated women to experiment with their footwear collection too. Biyani points out, "In the footwear segment, we have our athleisure section, Pumps, Ballerinas and Loafers that have remained key drivers in sales."





signed in Italy

"With the kind of exposure gained due to extensive travel, people nowadays want products which are more suitable to their personality and products which come with ease"

> **Indranath Sengupta,** Co-Founder & MD, Kompanero

The Eye-Catchers

Bright, bold, blingy and Bohemian are catching the fancy of Indian women in their choice of fashion accessories and all of these three features resonate with western designs. It is not uncommon to spot a woman teaming up her kurta and palazzo with a pair of large hoop earrings and a scarf that has prints in bold colours. Similarly, a long dress in monotone can be made to look fashionable with a shiny colourful belt and long boots thus making it a perfect party wear.

Kapur shares, "The demand for western fashion accessories has grown over the last 3-5 years. Jewellery is mostly gold and silver tone based, but accessories such as scarves, caps and bags certainly offer a bigger colour range than similar products would in Germany for example." The demand for accessories is such that the brand not only offers a range of fashion jewellery for their primary target audience that comprises of young girls between 15 to 25, but they have also developed a sub-brand for young man called UNKNOWN, Lil'Star for the kids 'market segment and another one for the young urban working women called JQ. Kapur adds, "Our biggest range is fashion jewellery and hair accessories with an emphasis on western styles."

When it comes to handbags, according to Sengupta, his brand Kompanero is witnessing a strong demand in simpler and minimalistic products. He shares, "Thus few of our latest collections like Zen, Coachella, Amalfı, etc., tend towards a more simplistic design and offer a wide variety of colour options to the consumers. We keep introducing warm colours like Olive Green and Garnet Red for the Autumn-Winter collections in addition to the good old Cognac colour and bright colours like mustard yellow and turquoise blue for Spring-Summer collections."

In jewellery, Satam shares, "Stackable jewellery is most popular while fusing with western wear. Black, nude and white are evergreen and there is so much yet to unveil with these colours."

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"Luggage are the new thing to show off. Creative colours and prints have now become fashion brands' new initiative for innovation. Pastels and raw colours have become the new trend along with a growing influence of pop coloured luggage"

> **Sachi Maker,** VP – Marketing (PAN India), Traworld



"We have also seen a new confidence with buyers wanting to try something new and different, and for a discerning buyer who is conscious of creating a certain look, western design does blend. However, the preference largely is towards bold designs"

> **Supriya Shirsat Satam,** Founder & Creative Director, FOReT

Seasonal Flavours

On the market for accessories being influenced by seasons, Kapur points out that there is certainly a correlation between new trends coming up in the apparel market and the accessories trends. She elaborates, "New colour schemes do influence the demand for matching accessories, but at the same time factors as winter and summer do not have such a strong impact on the jewellery market. Earrings and necklaces do not change in the material according to the weather. Colours though change with new seasons with brighter colours being predominant in summer and gold metal statement pieces becoming more popular during the festive times."

Kapur says, "One of the biggest jewellery trends this year is oversized and



embellished Hoop earrings, modern styled pearl jewellery and very big gold toned earrings are trending for the upcoming festive season. Scarves with gold metal weaves are big for the winter, small silk scarves reminiscent of the early 60's styling are supposed to be worn close to your neck with a bow. Small camera bags with a wide strap with sporty prints are on vogue this season."

To Conclude...

Where Indian wear can be carried on its own owing to its colourful prints, western wear remains incomplete without throwing in basic accessories even if it is just a large dial hand watch and a tote bag with a scarf tied around its handle. The relation between western wear and accessories cannot be undermined and perhaps that could be the reason we have major western wear brands also offering a range of accessories for their patrons to choose from. Be it H&M. Zara. Van Heusen. Allen Solly, Only, etc., each of these brands have gone ahead to launch their exclusive range of accessories to compliment with their collection of western wear. Be it a brooch or a buckle for the hair, the accessory range to compliment western wear is limitless. Where Ayesha Accessories has managed to get the pulse of the market in place with its collection, the country is yet to see any other major player dedicating their collection to suit the sensibilities of Indian women in terms of price and designs that goes well with her choice of western wear.



PERFORMANCE FABRICS ADDING VALUE TO INNOVATION & FUNCTIONALITY

With the advent of new trends and technology in the textile industry, one can find a massive variety of fabrics available in the market. With extensive uses and traits, performance fabrics are gaining wide popularity in the textile world. Manufacturers are revolutionising at breakneck speed to present an exquisite range of fabrics with enhanced performance features for their patrons...

Rajendra V Agarwal

The textile industry has evolved to a great extent and has witnessed numerous transitions over the years. Expert manufacturers have started experimenting a lot to keep up with the current trends. In the present era, fabrics hold high value in development of various segments of apparel business, ranging from workwear to party wear and sportswear to trekking wear. Therefore, it has become extremely essential to choose the fabrics wisely. Technology and innovations have always been the core of every business, fabric industry being no exception. With the advent of new trends and technology in the textile industry, one can find a massive variety of fabrics available in the market. However, to opt for the best fabric as per the requirements, an understanding of the fabric is a must.

Fabric Characteristics

Fabrics are often intertwined with one or a group of yarns or interconnected loop of yarns which are composed of fibers and filaments. A fabric behaviour that plays a pivotal role in an apparel is affected by fibre blends

EXPERT SPEAK // OCTOBER ISSUE | 2019

and their fineness. Likewise, a yarn count is important to create a uniform texture for fine clothing, yarn quality parameters such as yarn twist, number of folds and yarn count affect the characteristics of a fabric.

Amongst the diverse range of accessible fabrics, the one with extra comfort and added performance potential holds the highest value. Possessing all such qualities and synonymous to the term 'performance' are performance fabrics. Most of the times, the look and style of a fabric is given preference over its characteristics unlike in the case of performance fabrics. Such types of fabrics are engineered for multiple practices, where the performance of the fabric and not style is the major parameter. These fabrics have the capacity to perform extra other than their natural behaviour.

Performance fabrics have a combination of fabrics made of woven and knitted to suit various applications. They are most commonly used for all active wear, sportswear, summer and winter wear, mountaineering and activities like trekking, work-wear purposes, military, urban wear and protective wear. They possess the ability to deliver extraordinarily more than their natural behaviour or the original qualities in their natural state. These added benefits of performance fabrics have enabled them to replace traditional materials and become popular among the end-users.

Qualities of Performance Fabrics

Performance apparels widely use an extensive range of synthetic filaments

Most of the times, the look and style of a fabric is given preference over its characteristics unlike in the case of performance fabrics. Such types of fabrics are engineered for multiple practices, where the performance of the fabric and not style is the major parameter.

like nylon, polyester, elastane, acrylic and so forth. Qualities such as durability, strength, colourfastness. aesthetics and more are often observed in fashion apparels as these properties are quite essential for everyday purpose and maintenance. However, in case of performance fabrics, the requirements are functional and application specific such as moisture transmission, thermal resistance. wicking, waterproof, and flame resistant. The main reason following the requirement of these characteristics is because 'performance fabrics' or 'value-added textiles' are subjected to a wide range of end uses where the garment is affected by both internal factors including fibers, yarn fineness, warp/weft movement, fabric density, thickness, fabric count and external factors like exposure to sunlight, wind, rain and cold weather conditions.

The fineness of a fibre and yarn quality majorly affect the comfort characteristics namely wicking and moisture vapour transmission of a garment. This parameter is very important in maintaining and retaining the comfort level of a garment. Apart from this, fabric density also affects the performance of a fabric. For instance, a high fabric count has good abrasion resistance, fabric cover, and dimensional stability. In addition, the fabric has excellent resistance to wind and reasonable strength, a property widely preferred in work-wear category. These facts clearly indicate that a number of internal factors including fibres, yarn and fabric structure affect the fabric characteristics. Therefore, the manufacturers should pay utmost attention in selection of appropriate fabric for different types of apparels.

Since performance fabrics and apparels are exposed to a wide range of external conditions including sunlight, rain, wind, cold or warm weather conditions and physical activity interaction with the human body, it becomes extremely vital to pay more attention to the traits than the style of the fabric.

Technology & Innovation

The interaction between the human body and garment is also guite essential, thus leading to increased preference for performance fabrics. With such extensive use and traits. performance fabrics are gaining wide popularity in the textile world. Manufacturers are revolutionising at breakneck speed to present an exquisite range of fabrics with enhanced performance features for their patrons. This has further given rise to immense competition and widespread introduction of performance fabrics amongst the manufacturers to provide new levels of comfort and safety to the customers.



New or enhanced performance characteristics are typically achieved through a selection of specialised fibers, or the inclusion of such fibers along with natural or synthetic materials during spinning, weaving or knitting process, or by addition of coatings or other finishes to the finished fabric. These new or enhanced performance characteristics are typically achieved through a selection of specialised fibers, or the inclusion of such fibers along with natural or synthetic materials during spinning, weaving or knitting process, or by addition of coatings or other finishes to the finished fabric. For instance, a premium quality yarn made of fine denier filament possesses a supple and pliable fabric that has low drape co-efficient. While on the other hand, a coarse varn produces a stiff fabric that has high drape. In other words, it can be said that fibre type, yarn quality and fabric attributes affect a fabric's performance.

Technology also plays a significant role in the processing of 'performance fabrics' by enhancing their features. Numerous techniques are devised by fabric manufacturers to enhance the quality of the fabric. Incorporation of technologies like nanotechnology has been a game-changer in the production

of these types of fabrics. Usage of certain types of nanoparticles in fabrics during production provides improved performance and characteristics such as increased stain or odour-resistance. without having any significant impact on a fabric's weight and texture. Use of nanotechnology in the production of performance fabrics further leads to new paths for textile manufacturers to bring more innovative fabrics to the market in the future. Technology also comes to the forefront in improving the comfort factor of a garment. Smart fabrics which have intelligent approach to high body or ambient temperature are classified as performance fabrics and rely on the technology using micro-encapsulated phase change materials to absorb and release heat, thereby enhancing the comfort level.

Conclusion

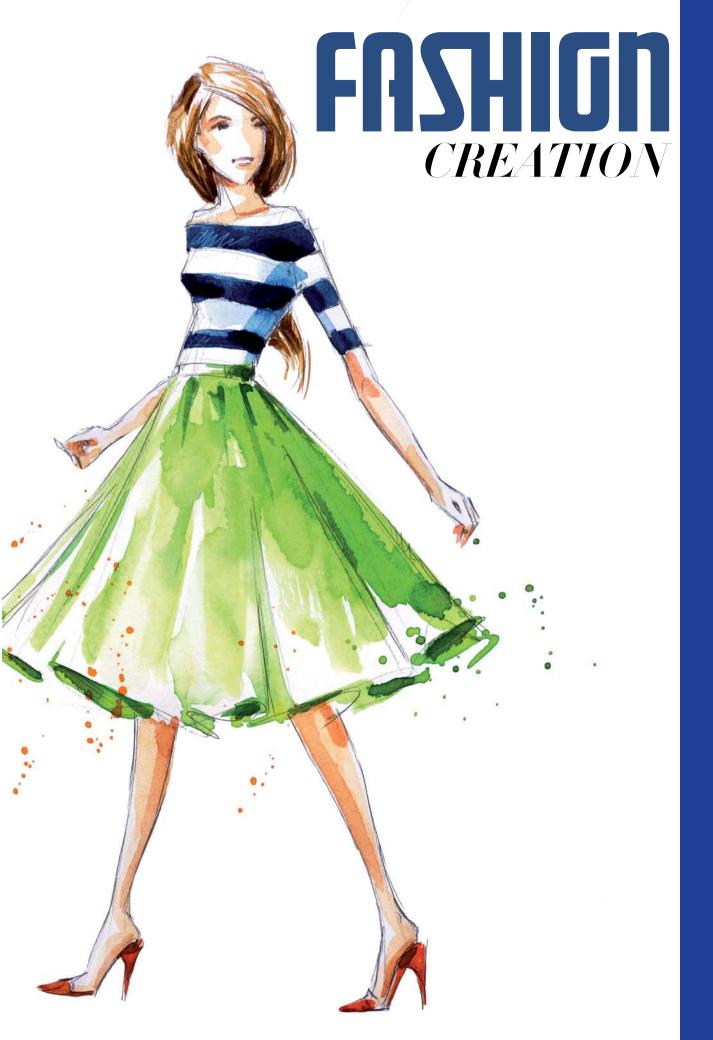
The increased availability of advanced performance textiles and fabrics are leading to important innovations in the apparel industry. At the same time, unverified claims regarding the performance characteristics of these materials can also lead to confusion and incorrect decisions by the manufacturers. Hence, detailed knowledge of the fabric is essential in the selection, designing and developing of a garment. In other words, understanding the fabric and giving preference to its performance rather than the style quotient, that is, choosing 'performance fabrics' is important to produce the finest garment and to have an advantage in this increasingly competitive market.

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ABOUT THE AUTHOR:

Rajendra V Agarwal, Managing Director & Chief Executive Officer, Donear Industries Limited Rajendra V Agarwal has over two decades of techno-commercial experience in the textile industry. A Textiles Engineer, he set up Donear Group's first manufacturing facility at Murbad (Maharashtra). Under his leadership, Donear has successfully established its position as a quality manufacturer of P/V, P/W, cotton and linen fabrics.



ADIDAS INSPIRES SELF-EXPRESSION THROUGH STORIES OF THEIR WOMEN ATHLETES

IMAGES Fashion Bureau



G lobal Sportswear giant, adidas has launched a fresh new athletics franchisee, the VRCT jacket. Inspired by the iconic varsity jacket which is worn by high school and college students world over to represent team pride, VRCT reworks the iconic design of a classic bomber aesthetic with a sleek, modern fit. Featuring flexible, lightweight material, the jacket offers maximum freedom of movement, while a soft double-knit fabric enables year-round wearability.

To celebrate the campaign and give wings to the idea of self-expression, adidas has been working with leading women athletes in India who have overcome multiple challenges both on and off the field and displayed immense individuality to succeed. These include national icons – heptathlete Swapna Barman, squash player Dipika Pallikal, boxer Simranjit Kaur and sprinter Hima Das who will be the leading voice of the campaign in India.

Present at the launch along with adidas ambassadors, **Manish Sapra**, **Senior Marketing Director, adidas India**, said, "adidas has always inspired athletes through products and campaigns. Today's youth, whom we refer to as creators, are looking for various avenues to express their creativity and individuality. Through the VRCT jacket, we are providing the youth of today a platform to show what they stand for."



To inspire creativity and self-expression, the VRCT jacket features a classic adidas 'A' team badge that can be interchanged with eight other badges:

AUTHOR: You are the author of your own life. Choose your story, take ownership, and be your own protagonist.

I'M PERFECT: Acceptance starts from within. Embrace your natural self and use your flaws as an armour, and you'll truly realise your potential.

FAMILY: Everyone needs someone they can fall back upon when life throws challenges their way. Always put up for the hero who is your rock!

BRAVE: Brave is believing. It's about breaking free and looking towards the future. It means building something from nothing.

SACRIFICE: When you set a goal, you have to give your all. There can be no regrets. If you don't sacrifice, you sacrifice your goal.

DCEAN LOVE: No Oceans. No air. No life. It IS cool to care.

RKFC: Sports has the power to change lives. And it's not more true than for the Real Kashmir FC that has fuelled positivity in the land of Kashmir through football.

ALL ROUNDER: You are the ALL in one in your game, life and world.

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NEXT ISSUE HIGHLIGHTS NOVEMBER 2019



IMAGES BUSINESS OF FRSHIGN



ETHNIC WEAR SPECIAL Indian ethnic wear has witnessed an unprecedented transformation over the last few years. Presently, the category covers a wide spectrum of sartorial elegance - from inherently classic to more contemporary avatars; from everyday wear, festive wear to office wear that befits even corporate boardrooms.

KEY HIGHLIGHTS OF THE ISSUE

>> Overview of the market >> The market by consumer Men/Women/Children

- >> Indo-western reshaping Ethnic Wear >> E-commerce and Ethnic Wear
- >> New entrants in the Ethnic Wear space OCCASION WEAR
- >> Partywear/bridal wear >> Apparel rental market
- >> Popular segments in Occasion Wear >> Rise in theme-based occasions
- >> Changing consumer preferences

The November issue of IMAGES Business of Fashion

Inspite of the massive transformation, the essence of it remains intact and no wardrobe in India is complete without ethnic wear. The November 2019 issue of IMAGES Business of Fashion will feature a run-down of the key Indian Ethnic Wear trends that will dominate shelves in the seasons to come. Along with it, the issue will also reveal the hottest trends in Occasion Wear.



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CLARKS UNVEILS NEW GLOBAL CAMPAIGN FOCUSED ON COMFORT

Clarks has introduced a new Autumn-Winter 2019 brand campaign with actors Alexander Skarsgård and Freida Pinto starring as the faces of the campaign...

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Campaign

Alexander Skarsgård, styled by George Cortina, was shot in his hometown of Stockholm, by photographer Mikael Jansson. His shoot featured collections such as the Desert Boot, Ronnie Walk, Clarkdale Gobi, Trace Quest and Batcombe Lord. Freida Pinto was shot on location in London, a city she fell in love with and the urban environment where she feels most comfortable, by photographer Cory Tran and styled by Elizabeth Saltzman. She can be seen wearing the Desert Boot, Clarkdale Arlo, Pure Viola, Sense Lula, Tri Spark and Trace Pine. Campaign imagery captures the idea that we do not need to sacrifice comfort for style, but can experience both-24 hours a day, 7 days a week, 365 days a year.









Conic British footwear brand, Clarks reinforces its belief in the importance of comfort in every situation with this season's campaign. The brand has enlisted stars Alexander Skarsgård and Freida Pinto as the faces of the new global campaign. It has asked Skarsgård and Pinto to share their comfort stories in cities most meaningful to them.

Tara McRae, Chief Marketing Officer,

Clarks, explains, "Authenticity, style and comfort have always been core attributes of the Clarks brand and we wanted to bring this to the forefront of our marketing for AW19 with key ambassadors of the brand. Alex and Freida were organic choices to serve as the faces of our campaign, given their existing affinity and history with the brand dating back to their childhoods."

Skarsgård recalled his first pair, saying, "The Gallagher brothers of Oasis wore them, so naturally I had to get a pair. I remember thinking they looked too clean when I got them, so I asked my dad to run over them with his car. He went back and forth a bunch of times, so they'd look aged and worn."

On the theme of the campaign, actress and activist, Freida Pinto said, "Clarks and I share a common understanding of the need for comfort, because that is something in the world of fashion that is really not preached. At the beginning of my career I was told I had to sacrifice comfort for the sake of style and being a fashion icon, which I think is not true at all – so I think Clarks and I have a common idea of what comfort really means and I find the collaboration very organic."

The campaign rolled out globally on September 3 across various media platforms, featuring styles available on Clarks global e-commerce sites and in multi-brand retail outlets. Skarsgård and Pinto will continue their partnership and will return for the Spring-Summer 2020 Clarks campaign.

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FASHION CREATION



EASIES BY KILLER LAUNCHES WATER & STAIN REPELLANT COLLECTION

Easies by Killer launches a water repellent and strain resistant clothing range, a first from a mainstream denim brand to come out with such an innovative range of clothes...

IMAGES Fashion Bureau

asies by Killer, a brand name that is synonymous with innovative styles and design, has recently launched a new range of formal and casual clothing for men which is both water repellent and strain resistant.

Launched in its Spring-Summer '20 collection along with their other brands – Killer, LawmanPg3, Integriti and Desi Belle – Easies' new range received good response. A major reason for the response was the fact that this was the first time there was a collection which was not prone to stains – either during work or travel. With no stains, collection also works towards conserving water.

The collection consists of smart formals for young professionals. It uses a range of smart styles and colours which are super comfortable to fit in helps people breathe.

Upbeat about the launch of their new SS'20 collection, **Kewalchand P Jain**, **Chairman and Managing Director**, **Kewal Kiran Clothing** said, "It is an extremely proud moment for us as a brand to have come so far and offer innovative solutions keeping in mind the Indian consumers' daily needs and expectation from their clothing brand. We have gained immense trust over the past three decades from consumers who have trusted us, and this is yet another leap forward by an Indian brand. We at KKCL believe in constantly doing better by coming up with new ideas and trends that will offer a new taste to our experimental customer. We are the only mainstream denim jeans brand which has launched water repellent and strain resistant range."

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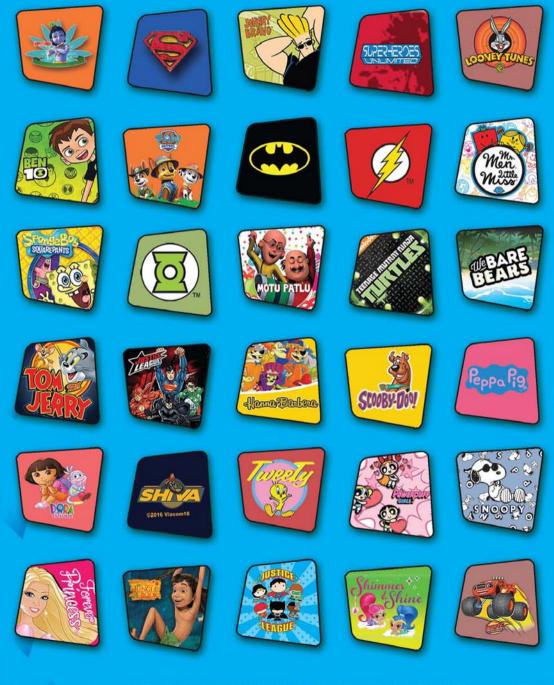
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UNO'S JOGG DENIMS UNIQUE FABRIC WITH A MIX OF KNIT & DENIM

These are specially designed and curated keeping in mind the active lifestyle of the millennial so that they can cruise through different phases of life – work, travel, play, fitness and fun...

IMAGES Fashion Bureau





o meet the requirement of today's generation Numero Uno has launched Jogg Denims. These are specially designed and curated keeping in mind the active lifestyle of the millennial so that they can cruise through different phases of life - work, travel, play, fitness and - fun in their favourite pair of denims.

Jogg Denims are made from a special and unique fabric which extends comfort of a knit with optics and aesthetics of pure denim. The knit structure gives these denims the flexibility and comfort whereas the special weaving techniques give it the look and durability of a true denim fabric thereby extending best of both worlds – fashionable and functional.

The denims can be easily worn during workouts, joggings as well as running, giving ease of movement, comfort and flexibility combined with toughness-and-durability to withstand the washes-and-treatments.

Numero Uno, known for their denims, has always tried to trump up the customer experience by creating these edgy, stylish and comfortable denims for their customers season after season with newer details and washes.

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NIKHIL THAMPI X INDYA COLLECTION: DEMOCRATISING DESIGNER FASHION FOR THE INDIAN WOMAN

The collection is a stunning amalgamation of Indya's grandeur and elegance, and Nikhil Thampi's new-age design aesthetic...

IMAGES Fashion Bureau



his festive season, Indya weaves a new sartorial tale in collaboration with designer Nikhil Thampi. The Nikhil Thampi X Indya, is a stunning amalgamation of Indya's grandeur and elegance, and Nikhil Thampi's new-age design aesthetic. With painterly motifs, pearl embellishments and fluid silhouettes, this designer edit is all about being effortlessly stylish and stepping out with confidence. Capturing the essence of the season and the richness of Indian design, the sheer beauty of the collection lies in its subdued luxury that is classic and practicalperfect for the contemporary Indian woman who wants to keep her occasion wear fuss-free and chic.

The capsule comprises 45 styles spanning across categories such as skirts, tops, strappy tunics, anarkalis and dupattas. With full-bodied skirts matched with flowing short tops, palazzo pants paired with draped dupattas attached to crop tops, voluminous tunics, and maximal sleeves, the design language of the collection is fluid and versatile! The colour palette ranges from ivory and vintage rose to mustards and a deeper midnight blue.



But all through the silhouettes and colours, what steers the collection is inclusivity. Age, body-type, skin tone — there's something in this collection for every fashion-forward woman out there.

Speaking about the collaboration, **Nikhil Thampi** shared, "There has always been a part of me that wanted to cater to a larger audience without modifying my design DNA. Indya as a brand is current, functional and affordable, making it the perfect brand to collaborate with for a ready-to-wear festive line, that can make my designs more accessible to all the modern women everywhere. This collaboration challenged me to step out of my comfort zone and do something commercial but with a modern twist. It was a perfect marriage between the

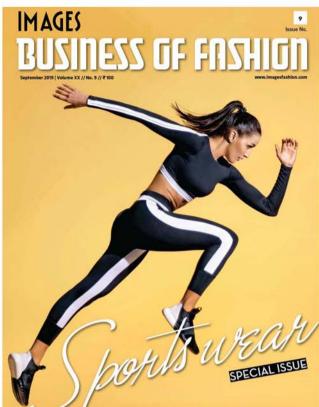
two brands, and we are very excited to share it with the world."

Tanvi Malik, Co-Founder, Indya, added,

"Indya as a brand continuously endeavours to provide the multi-tasking millennial woman a platform where she can shop the choicest of occasion wear without onerously spending her time on bespoke clothing. Our clothes are fuss-free yet stylish, and Nikhil as a designer brings out that value so aesthetically. This collaborative line is sexy, now, and is everything you want your festive wardrobe to be. The price point of the collection is pegged between ₹1,800-₹4,500, making it very accessible and a step forward in democratising designer fashion for the Indian woman."

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HIGHLIGHTS OF THE NEXT MEGA ISSUE

NOVEMBER 2019: ETHNIC WEAR/OCCASION WEAR: No wardrobe in India is complete without Ethnic Wear. The November 2019 issue of IMAGES 2019 will feature a run-down of the key Indian Ethnic Wear trends that will dominate shelves in 2019. Along with it, the issue will also reveal the hottest trends in Occasion Wear.

KEY HIGHLIGHTS OF THE ISSUE

- >> Overview of the Ethnic wear market in India
- >> Ethnic wear market by consumer Men/Women/Children
- >> Indo-western reshaping Ethnic wear
- >> E-commerce and Ethnic wear
- >> New entrants in the Ethnic wear space
- >> Party wear/bridal wear and popular segments in Occasion wear
- >> Occasion wear rental market
- >> Changing consumer preferences in Occasion wear

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