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11

Issue No.

# BUSINESS OF FASHION

Volume XX // No.11 // ₹ 100

NOVEMBER 2019



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*Ethnic wear*

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Dear Readers,

Welcome to the busiest time of the year!

This indeed is an exuberant time for all of us at the retail fraternity. This is the season that morphs India to its brightest and most jubilant avatar of the year with every calendar week dotted with festivals, celebrations and weddings. It is the time the entire nation comes together to feast, pray, share love and above all flaunt resplendent ethnic fashion.

Ethnic wear is an intrinsic part of the festive season. Infact, traditionally, ethnic wear was solely reserved for festivals. But, in the recent years, the category has evolved in massive proportions, especially the women's section. Keeping pace with India's massive strides towards modernization, the ethnic wear category has been resuscitated with keen focus towards the modern consumers penchant for comfort and practicality. Today, the category includes a wide spectrum of cuts, fits, silhouettes - from inherently classic to more contemporary avatars that are as comfortable for daily wear as they are appropriate for corporate boardrooms.

This evolution ensued an increasing preference of the young and consuming class towards Indian ethnic wear as well as boost the dynamics of the market like never before. Today, pegged at an estimated Rs. 112,893 crores and constituting approximately 32 percent share of the total Indian apparel market, the ethnic wear category in India holds a very promising future.

In this one-off issue on ethnic wear, we track the evolution of the category in the recent years as well as the shift in customer preferences. It was an uphill task for us to gather all this data for this fast growing market has not yet matured enough to prompt proper research documentation. Nevertheless, the IMAGES Fashion Bureau did an incredible job of delving deep and putting pieces together to give you all readers a slew of dedicated articles on the pervading trends and the immense opportunities teeming in this new market segment.

I hope you enjoy reading the issue as much as we enjoyed putting it together.

Cheers!



**Amitabh Taneja**

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# ADVERTISOR'S INDEX



Cover on Cover  
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Inside Front Cover

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▶ **ETEENZ**

▶ **GAME BEGINS**

Inside Back Cover

▶ **DEMOZA**

Back Cover

▶ **INDIAN RAYON/  
RAYSIL**

BAD BOYS	6
BRGMTWA	113
CAROLON	63
CLONE MANNEQUINS	23
CMAI	16,17
DEAL JEANS	7
DOLLAR ULTRA THERMALS	39
DOLLAR WINTERCARE	57
DUKE	45

EIGMEF	95
ETHNICITY	14,15
FORCE NEXT THERMALS	79
GROVERSONS	25
IFF	66,67
JUST SCARVES	12,13
KK FASHION	91
LIBERTY	85
LIVA	51
MANYAVAR	11
NEVA	75
NEXT ISSUE	107
ONN	35
OTTO CLOTHING	27
PRETTY WOMAN	33
RELAN	5
SAFEXPRESS	28
SUBSCRIPTION	116
SUPERSOX	19
TERMSWEAR	55
TOYO	8
WBGMDA	10
YKK	20
ZOLA	9





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**Decoding Uniqlo's Strategy for the Indian Market**

*The brand aims to enhance lifestyles in India by offering more innovative apparel that draws on the nation's distinct culture and traditions, and by contributing to India's economic development in the process*

**Pg No. 30-34**



SPECIALTY FIBRE

**MODAL & OTHER CELLULOSIC (SPECIALTY) FIBRES - OPPORTUNITIES IN END CONSUMER APPLICATIONS WITH TOP GLOBAL BRANDS & RETAILERS**

*Based on the superior properties, viscose along with other cellulosic (specialty) fibres are expected to emerge as the preferred fibre choices for different end consumer applications including apparels and home textiles*

**Pg No. 36-37**

NEW STORES

**Asics Redefines Retail Experience with New Concept Store in Goa**

**Pg No. 38**

NEW STORES

**Rupa & Company Launches 3 Flagship Stores in West Bengal**

*With its wide range of outerwear and innerwear collections, Rupa Comfort stores aim at giving complete dressing solutions to men, women and kids of every age group*

**Pg No. 40**

STORE LAUNCH

**SUCCESS LAUNCHES NEW STORE IN BHUBANESWAR'S UTKAL KANIKA GALLERIA MALL**

*Success was started in 1996 as a trouser manufacturing company. It has everything possible needed to complete a man's wardrobe - suits, blazers, jackets, waist coats, shirts, trousers, denims and accessories*

**Pg No. 41**



RETAIL LEADER

**'FASHION IS AMONG THE TOP THREE CATEGORIES FOR AMAZON'**

*The e-commerce giant has about 86,000 sellers who list close to 8.7 million different fashion styles across categories. In the past one year, Amazon has added 22,000 new sellers listing 2 million new products*

**Pg No. 42-46**

Ethnic Wear Study



47-104

**IN CONVERSATION BRAND ETHNICITY: A UNIQUE BLEND OF VINTAGE & NEW AGE**

*In a tête-à-tête with Ameet Panchal, Director, Ethnicity, IMAGES Fashion Bureau discovers all about the evolution of the ethnic wear market in India and the unexplored opportunities in the segment*

**Pg No. 48-50**



RESEARCH

**ETHNIC WEAR IN INDIA**

*Ashish Dhir, Associate Vice President and Shivanshi Bhatia, Associate Consultant, Technopak, map the ethnic wear market and outline the growth drivers*

**Pg No. 52-56**

FASHION RETAIL

RETAIL REVOLUTION

**Innovation & Creativity Will Drive Men's Ethnic Wear Market**

*The men's ethnic wear market is an emerging segment. With the early entry of big branded players like Raymond, the segment is gaining major proportions. IMAGES Fashion Bureau talks to renowned brands to understand the dynamics of men's ethnic wear in India*

**Pg No. 58-62**





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### MARKET DYNAMICS THE CHANGING PARADIGM OF WOMEN'S ETHNIC WEAR IN INDIA

*A look at how the market dynamics as well as the new consumer's consumption pattern are transforming the potential of the burgeoning ethnic wear market in India*

**Pg No. 64-71**

### SUCCESS STORY BRINGING TRENDY ETHNIC FASHION TO EVOLVING CONSUMERS

*From being a pure ethnic player in the initial days, Soch has transformed into a stylish brand that retails trendy Indian fashion across categories at delightful prices. Backed by the rise in disposable income among consumers, the influence of social media in making buying decisions as well as easy accessibility through e-commerce, the brand is witnessing an influx of consumers who choose to showcase their individual style with ethnic wear*

**Pg No. 72-74**

### IN CONVERSATION MANYAVAR'S RAVI MODI ON THE INDIAN WEDDING TROUSSEAU INDUSTRY

*The high growth wedding apparel industry is running on an aspirational engine that shows no signs of revving down or being affected by any market force. With an estimated 10 million weddings taking place each year in India, the industry is pretty much recession-proof*

**Pg No. 76-78**

### CATEGORY GROWTH THE 'DAPPER MAN' LEADS TO RISE OF THE OCCASION WEAR MARKET IN INDIA

**Pg No. 80-84**

### EVOLUTION WOMEN IN SAREES: CHANGING CONNOTATIONS FROM THE 20TH TO THE 21ST CENTURY

**Pg No. 86-90**

### SPOTLIGHT ETHNIC WEAR WEDDING TROUSSEAU BRAND SASYA FOCUSES ON PERSONALISATION OVER EXTRAVAGANZA

*Offering services in ethnic wear, wedding clothes, bespoke tailoring and prêt couture, Sasya is a one-stop-destination for occasion wear. The multi-designer label store not only offers unique collections but displays exquisitely rare designer collections for men and women*

**Pg No. 92-94**

### EMERGING SEGMENT WOMEN'S FUSION WEAR: AN AMALGAMATION OF STYLE & COMFORT

*The women's fusion wear segment is an emerging market in India, the style evolving into a preferred choice of clothing for various occasions and festivities owing to advantages of abundant style and uncomplicated comfort. Unlike ethnic wear that sells maximum during festive and wedding season, the women's fusion wear segment remains in demand throughout the year, due to being more functional in nature*

**Pg No. 96-99**

### FOCUS SEGMENT THE SAREE AFFAIR: INDIA'S RELATIONSHIP WITH THE WHOLE NINE YARDS

*From fashion runaways, Bollywood, to every gali nakkad; from Millennials to their traditionalist grandmothers, the saree is ubiquitous in India's wardrobes. A look at how the elegant saree still dominates the ethnic wear segment in India*

**Pg No. 100-104**



### COLLECTION LAUNCH

#### KOMPANERO LAUNCHES NEW AUTUMN-WINTER COLLECTION 2019

*Its new and exciting range flaunts clutches, wallets, handbags, messenger bags, sling bags and cross-body bags in the brand's signature chic yet vintage and weathered look*

**Pg No. 106**

#### DUKE LAUNCHES NEW AW-19 COLLECTION

*Exquisitely crafted collection strikes a fine balance between eye-catching style and immense comfort*

**Pg No. 108-109**



#### WINGS4FASHION: CELEBRITY DESIGNERS POONAM BHAGAT & PREMAL BADIANI SHOWCASE COLLECTION AT LONDON

**Pg No. 110**

#### LAKMÉ FASHION WEEK AUTUMN-WINTER 2019:

**Pg No. 114-115**



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# UNI QLO'S

## STRATEGY FOR THE INDIAN MARKET

The brand aims to enhance lifestyles in India by offering more innovative apparel that draws on the nation's distinct culture and traditions, and by contributing to India's economic development in the process...

Charu Lamba

---

**J**apanese lifewear retail brand Uniqlo made its debut in the Indian market with its first store at Ambience Mall, Vasant Kunj in New Delhi. Launched in India for the first time, UNI QLO offers a new shopping experience to Delhi customers that showcases LifeWear, the company's commitment to creating perfect clothing that meets the requirements of everyone's daily lifestyles.

Commenting on the opening of the store, Tadashi Yanai, UNI QLO Founder and Chairman, President

& CEO of the Fast Retailing Group, said, "Fast Retailing has long wished to open stores in India in view of the tremendous potential of such a large nation. We began recruiting here at the end of last year, and have been impressed by the exceptional talent, ambition and diligence of the young people we encountered and welcomed aboard."

He added, "In the years ahead, we aim to enhance lifestyles in India by offering more innovative apparel that draws on the nation's distinct culture and traditions. We wish to contribute



to India's economic development in the process."

"Launching in the Indian market is a step ahead towards globalisation. We aim to enhance lifestyles in India by creating more innovative apparel that draws on the nation's distinct culture and traditions. We wish to contribute to India's economic development in the process," he further stated.

#### **Is This the Right Time to Enter India?**

Being Japanese, it is in the brand's DNA to make sure everything is perfect before any launch. When UNIQLO was confident enough that it had reached the correct level of readiness for a new market, that's when it decided to open stores in India.

Explaining this, Shantanu, Head - Marketing, UNIQLO India said, "Readiness has mainly three components - are consumers ready for us, is micro and macro environment favourable and are we ready to serve consumers. When we thought that all three were met, we knew that it is the right time to enter the Indian market."

The brand opted to open its first store in the Indian capital because of diversity of population and extreme weather conditions.

"Delhi is a big market in terms of population and it is extremely diverse in terms of taste and culture. It is kind of a melting pot for India as people consumers from every state live here. The other component is that our products are very high in quality and one can feel the difference only when they wear it. This difference can only be felt if one is facing extreme situations like extreme summers and extreme winters," Shantanu explained.

>



*“Fast Retailing has long wished to open stores in India in view of the tremendous potential of such a large nation. We began recruiting here at the end of last year, and have been impressed by the exceptional talent, ambition and diligence of the young people we encountered and welcomed aboard.”*

**Tadashi Yanai,**  
UNIQLO Founder and Chairman, President & CEO  
the Fast Retailing Group

*“Readiness has mainly three components - are consumers ready for us, is micro and macro environment favourable and are we ready to serve consumers. When we thought that all three were met, we knew that it is the right time to enter the Indian market.”*

**Shantanu,**  
Head - Marketing, UNIQLO India

### Understanding the Store

Spread over 3 floors and with a total retail space of 35,000 sq. ft., the brand's store in Ambience Mall Vasant Kunj welcomes customers with its stunning three-storey high bay window façade. Interior designs vary by floor, moving from soothing elements with natural materials that integrate the Japanese and Indian aesthetic, to the high-energy LED ticker screen and stainless fixtures that convey a contemporary mood.

In addition, the new store presents a large mural on all three walls facing inside the shopping mall that capture the essence of daily life in the capital created by illustrator Dattaraj M. Naik, while local artist Johnson Kshetrimayum has worked with embroidery craftspeople to create an installation using UNIQLO lambswool. Both artworks are under the creative direction of Hanif Kureshi.

When entering the store from the ground floor, customers are greeted

by a comprehensive introduction to the LifeWear concept with a showcase featuring the latest seasonal styles. Special partnerships are on display throughout the three floors, such as The Kurta Collection, UNIQLO's first India collaboration with Delhi-based designer Rina Singh. Global collaboration lines include Ines de la Fressange and Hana Tajima, as well as the Uniqlo U collection created by the brand's R&D Centre under artistic director Christophe Lemaire.

### What's on Offer

The new store carries a full line up of LifeWear for men, women, kids and babies. This includes iconic products such as the innovative and functional Ultra-Light Down (ULD) and HEATTECH garments, as well as products featuring premium fabrics like denim, cashmere, extra fine merino, and more.

It also houses the UT (UNIQLO t-shirt) line, which transforms t-shirts





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## Special Kurta Collection

UNIQLO has launched a special collection for India, the 'Kurta Collection' with renowned Delhi-based designer, Rina Singh.

The collection is imbued with the sense of daily life, inspired by everyday wear of women from all over India and is a new realisation of UNIQLO's LifeWear concept of simple and high-quality clothing.

This special collection is available in India, Japan, Singapore, Malaysia, Thailand, Indonesia and the Philippines, as part of the brand's Fall-Winter offering.

The collection consists of four categories – tunics, dresses, pants and stoles. Inspired by the Indian spice route, the colour palette is an earthy combination of charcoal, indigo, mustard and red. Keeping the LifeWear concept as the base, the collection replaced customary details like the side slit for pockets and employed larger yokes without button necklines, to give the wearer added comfort and ease in movement. The newly engineered silhouettes are finished with contrast binding, running stitches along the seams as well as tucks and imaginative hem finishes.

The collection also features a distinctive print story of polkas juxtaposed with twill checks, developed indigenously by Rina through hand woven yarn dye and block printing. The designs use premium linen, 100 percent cotton and a specially created rayon fabric jointly developed by UNIQLO and Toray Industries to make daily care even easier. These fabrics create highly functional clothing across the entire line up in the Kurta collection, ideally suited to the climatic conditions and the evolving lifestyles in India. These tunics and tops can be easily layered- worn over trousers or with jackets and can also be worn individually as dresses.

into canvases of art expressing the individuality and tastes of the wearer. With the UTme! service customers can create personalised t-shirts with their own designs or with a range of UNIQLO stamps, including designs featuring tennis legend and the brand's global ambassador, Roger Federer.

### The Future

UNIQLO was established in Japan in 1984 and is present in 23 other countries with 2,200 stores. For now, the brand aims to work with Indian producers and strengthen its sourcing

base in India. The brand soon aims to introduce two new locations in New Delhi NCR at DLF Avenue, Saket and DLF CyberHub.

On being asked about his expectations about the business in India, Shantanu stated: "My curiosity about India goes beyond just business. India is a diverse market with many languages, ethnicities and history. Our focus will be to educate ourselves about Indian consumers."

"However, the store sizes will be different and because of the size, the range offered in those stores will be different. DLF Avenue store will span across 30,000 sq. ft. and DLF Cyberhub will cover the area of 15,000 sq. ft.," he added.

"India is a critical market for us, and we have not restricted ourselves with a budget. Physical expansion in Delhi, outside Delhi and e-commerce are the ways of expanding our reach and we are actively working on those," he concluded.





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## MODAL & OTHER CELLULOSIC (SPECIALTY) FIBRES- OPPORTUNITIES IN END CONSUMER APPLICATIONS WITH TOP GLOBAL BRANDS & RETAILERS

Based on superior properties, viscose along with other cellulosic (specialty) fibres are expected to emerge as the preferred fibre choices for different end consumer applications including apparels and home textiles...

### IMAGES Fashion Bureau

Through the last decade, global cellulosic Fibre market has witnessed continuous growth, especially viscose, which has shown strong growth at 6 to 7 percent (>2X overall fibre growth).

Based on superior properties, viscose along with other cellulosic (specialty) fibres like Modal/MicroModal, Dyed, Excel (Lyocell) are expected to emerge as the preferred fibre choices for different end consumer applications including apparels and home textiles.

According to Ajay Sardana, Joint President, Pulp & Fibre Business, Grasim Industries Limited, over the next decade, global demand for viscose fibre is projected to grow faster at 7 to 8 percent, while specialty fibres like Modal/Micro Modal, Dyed, Excel (Lyocell) are expected to grow even faster.

Some of the key factors which shall drive above growth are rising prosperity, rapid urbanisation, burgeoning middle class and higher disposable income along



with consumer preference for soft, comfortable, fashionable and biodegradable products.

### Discover a Fibre Synonymous with Softness & Comfort

Birla Modal is a premium specialty fibre that offers superior softness. With its sheen, smoothness and breathability, it's one of the most recommended fibres by the top brands and retailers globally. It's a nature based fibre made from wood sourced from Canadian Birchwood trees.

Birla Modal is the second generation in man-made cellulosic fibres which couples great consumer and value chain benefits. Modal, as defined by The International Bureau for the Standardization of Man Made Fibres (BISFA) is a distinct viscose fibre genre, which has a higher wet modulus and satisfies a minimum value of tenacity in the wet stage at 5 percent elongation.

Birla Modal has twin benefits: superior softness + strength akin to cotton. So, even after repeated washes, fabrics made from this fibre retain their softness without losing its perfectly brilliant sheen, colours as well as soft hand feel. It can be the right blending fibre partner

when made with different Fibres. The benefit of Birla Modal can also be appreciated when blended with cotton ensuring property benefit of both Modal and cotton. Both being cellulosic fibres, processing can be done with much ease.

### What makes Birla Modal unique?

- Moisture management – Effective moisture management facilitate efficient transport of sweat from the skin to the outside
- Better Fit & Comfort – Garments with Birla Modal provide better body fit
- Brilliant colours with better sheen – For same colour depth, Birla Modal requires less quantity of dyes compared to other cellulosic Fibres
- Cooling Effect – Fabrics made from Birla Modal are cooler in touch compared to cotton

Birla Modal is also available as a finer fibre. It's called Birla MicroModal. Apparels manufactured from Birla MicroModal are lighter, exhibits superior softness and good dimensional stability. It's like the best friend to the skin and finds excellent applications across different end consumer applications:



Knitted apparels	Premium Intimate wear	Men (briefs/trunks/vests)	Birla MicroModal with Elastane, Cotton Modal Elastane, Cotton Modal
		Women (panties/bra/camisole)	Birla MicroModal with Elastane, Cotton Modal, Cotton Modal Elastane
	Knitted tights/leggings	Women	100 percent Birla Modal, Birla MicroModal and Birla Modal with Cotton (with/without Elastane)
	T-shirts/tops	Men	Birla Modal with Cotton
		Women	100 percent Birla MicroModal, Birla Modal with/without Elastane
Kidswear		100 percent Birla Modal, Cotton Modal, Birla Modal with Elastane	
Woven apparels	Women Tops/Ethnic Kurtis		100 percent Birla Modal, Birla Modal with Cotton
	Formal/causal shirts		Birla Modal with Cotton
	Formal/casual trousers/blazers/suits		<u>Polyester Modal Elastane</u>
Home textiles	Towels		Cotton with Modal in Pile
	Bed linen/duvet covers		Cotton Modal, Polyester Modal
Sarees			Silk Modal, Cupro Modal, VFY Modal blends



# ASICS

(L-R) Rajat Khurana, MD, ASICS India, Footballers - Brandon Fernandes, Jackichand Singh, Manvir Singh posing with ASICS shoes

## REDEFINES RETAIL EXPERIENCE WITH NEW CONCEPT STORE IN GOA

IMAGES Business of Fashion

Japanese sport performance brand, Asics launched its new concept store in Goa thereby expanding and elevating its retail footprint and engagement to strengthen its presence in India.

Located in the largest mall of Goa, Mall De Goa, the launch was inaugurated by FC Goa and Indian Football national team players - Brandon Fernandes, Manvir Singh and Jackichand Singh

who also shared their football tips and tricks with the audience.

With an area of 860 sq.ft., the exclusive store has been developed with a new concept design that creates a balance with the highly technical aspects of the brand's products with natural warm finishes, features and materials to create a powerful brand experience. The store immerses consumers in a world where both the mind and body are stimulated and offers a wide variety of running, training and SportStyle inspired shoes and apparels for men and women.

Speaking on the new launch, Rajat Khurana, Managing Director, ASICS India said, "Retail is growing at a rapid rate especially in the sports and fitness sector in Goa. This is the right time for us to enter the market to reach out to a wider audience. We are excited to see how consumers respond when we bring the essence and heritage of performance and style to a city inspired by sports and fashion."





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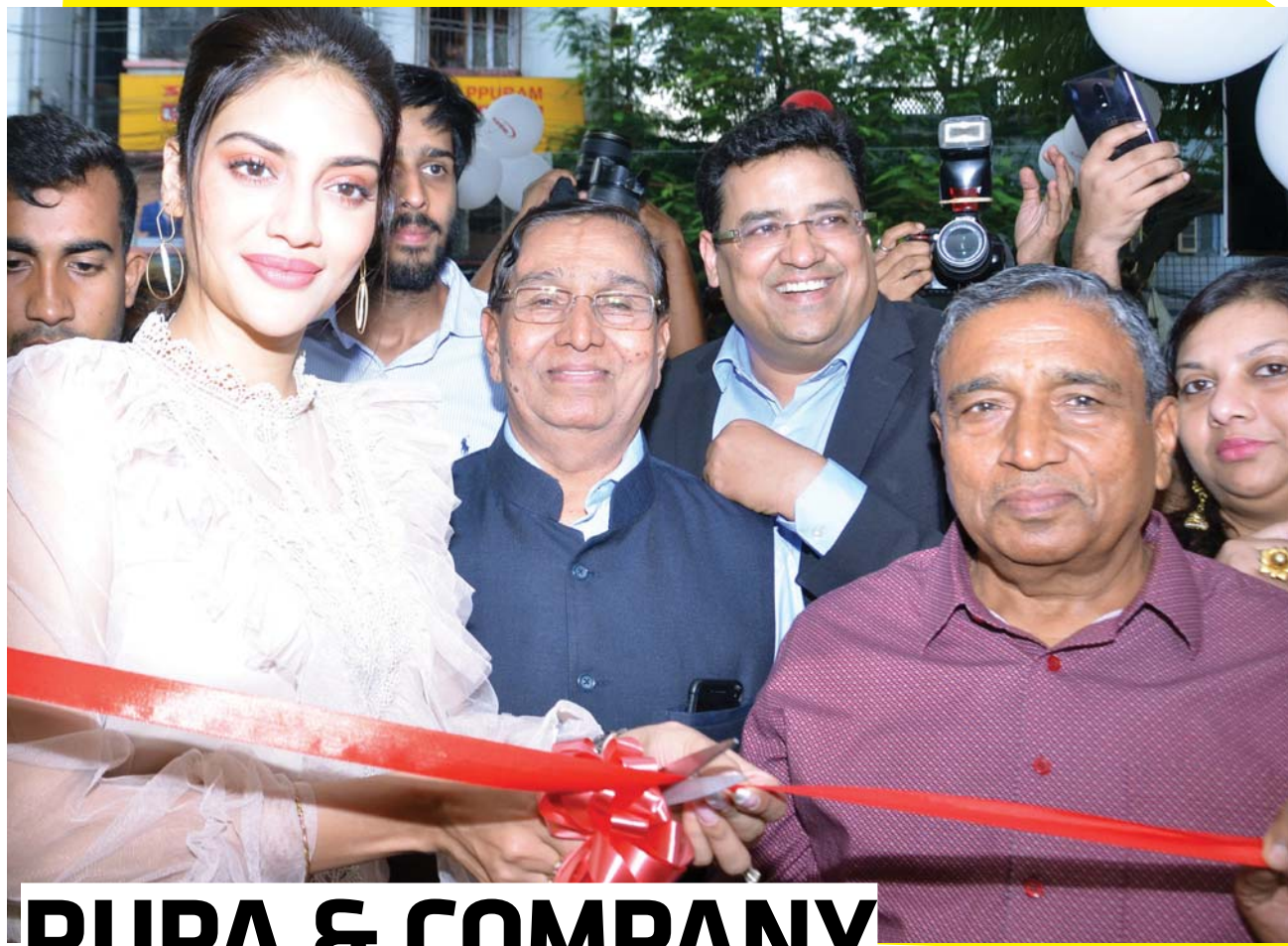
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# RUPA & COMPANY LAUNCHES 3 FLAGSHIP STORES IN WEST BENGAL

IMAGES Business of Fashion

**W**ith an objective to offer customers a personalised experience, Rupa & Company Ltd., opened three flagship stores in West Bengal in Lake Town, Chinsurah and Chandannagar. The stores were inaugurated by Member of Parliament, Nusrat Jahan.

With its wide range of outerwear and innerwear collections, Rupa Comfort stores aim at giving complete dressing solutions to men, women and kids of every age group.

Inaugurating the stores, Nusrat Jahan said, "I am delighted to be associated with the brand which has become a household name today. The Rupa Comfort stores in Lake Town, Chinsurah and Chandannagar showcase a wide range of clothing collections and offer complete dressing solutions to customers. I loved the fashionable collection at the stores." Commenting on the launch, Dinesh Lodha, CEO, Rupa & Company Ltd., said, "Through Rupa Comfort stores, we aim at offering the customers a personalised experience. With our wide range of outerwear and innerwear collections, Rupa Comfort stores aim at becoming a complete dressing destination for men, women and kids of every age group. We are confident that the customers will like the experience and get their desired clothing requirements fulfilled here."







# SUCCESS

## LAUNCHES NEW STORE IN BHUBANESWAR'S UTKAL KANIKA GALLERIA MALL

From the house of Agwani Fashions Pvt. Ltd., Success was started in 1996 as a trouser manufacturing company. It has everything needed to complete a man's wardrobe – suits, blazers, jackets, waist coats, shirts, trousers, denims and accessories...

**IMAGES Fashion Bureau**

Renowned men's wear brand from the East, Success has opened its exclusive brand store in Utkal Kanika Galleria Mall, Bhubaneswar. Spread across approx. 550 sq. ft., area, the new store offers suits, blazers, jackets, shirts, trousers, denim, t-shirts and accessories for men.

From the house of Agwani Fashions Pvt. Ltd., Success was started in 1996 as a trouser manufacturing company. It has come of age today, offering everything possible that could be needed to complete a man's wardrobe – suits, blazers, jackets, waist coats, shirts, trousers, denims and accessories broadly classified into formal, casual and party-wear segments.

“Paradigms dictating changing wardrobe preferences with age have somewhat melted,” says Rajnish Sethia, Director, Success. “We simply offer trendy merchandise for men from age 20 years and above, as well as garments of classic taste keeping in mind our loyal customers and attracting new ones. Our unique selling point lies in our speedy conversion of latest trends into fast-moving materialised goods.” Success has exclusive brand outlets throughout the eastern region and has a pan India presence through big format stores like Central and Brand Factory. The brand also has presence in Pantaloons in the East.

“We have plans to open exclusive brand stores throughout India and also want to get into Tier II and III cities,” says Sethia.

Currently, Success has more than 25 EBOs, presence in over 375 MBOs and 10 shop-in-shops.





# 'FASHION IS AMONG THE TOP THREE CATEGORIES FOR AMAZON'

At present, the e-commerce giant has about 86,000 sellers who list close to 8.7 million different fashion styles across categories. In the past one year, Amazon has added 22,000 new sellers listing 2 million new products...

**Charu Lamba**

The festive season that begins with Onam, peaks at Diwali and culminates with Christmas and New Year celebrations is a period of hectic activities for retailers and e-tailors alike as they aspire to offer the most interesting products to attract the maximum number of consumers.

Consumer sentiments are also high during this season and one category on which customers don't feel shy about splurging is fashion. To make the most of this season of sale, brands like Amazon start preparing for the festive season months before it begins.

Highlighting what Amazon has introduced this year in a run up to the festive season, Mayank Shivam, Director - Category Management, Amazon Fashion India shares, "Fashion is among one of the top three categories

for Amazon. One out of every three new customers to Amazon comes through fashion. To attract more customers this festive season, we have introduced a Plus Size Store, a Designer Store and Premium Watches and along with this, we have entered into a strategic partnership with Max Fashion."

Amazon has also expanded its delivery network with a 2-day guarantee delivery to more than 200 cities in India. To bring alive the touch-and-feel factor alive in fashion, Amazon is offering 30-days return guarantee.

"Apart from this, we have made lots of improvements in our online fashion experience. For example, we have increased the size of the product images, information of the product is shared in a very detailed manner along with a video highlighting the features of the products," Shivam states.

## Amazon Festive Yatra

Amazon has recently concluded its biggest festive celebration 'Great Indian Festival'. Customers experienced never-seen-before deals on the widest selection of smartphones, laptops, cameras, large appliances & TVs, home & kitchen products, fashion, consumables such as grocery & beauty, consumer electronics and more by lakhs of sellers.

Amazon.in's Great Indian Festival was flagged off with the #AmazonFestiveYatra – a unique 'house-on-wheels' bringing the best of India together in one place. The specially curated house-on-wheels also included selection from Amazon.in's Karigar and Saheli programs along with unique products from small & medium businesses, startups and artisans from every state and union territory of India. With 3 special trucks, #AmazonFestiveYatra covered 13 cities covering over 6,000 kms providing a great opportunity for Amazon customers and sellers to engage and share insights and opinions.

Starting from New Delhi, #AmazonFestiveYatra moved to Lucknow, Ahmedabad and Hyderabad before ending its trip in Bengaluru. Enroute this journey, the '#AmazonFestiveYatra' truck engaged with its customers and sellers in Agra, Chennai, Indore, Kolkata, Kochi, Mathura, Mumbai and Visakhapatnam.

Amazon.in has developed an entire ecosystem to offer an incomparable shopping experience to customers. The online marketplace has partnered with hundreds of leading brands, enabled over 500,000 sellers to sell on Amazon.in, and expanded fulfilment footprint with more than 50 fulfilment centres in 13 states offering a storage capacity of over 20 million cubic feet.



***“Fashion is among one of the top three categories for Amazon. One out of every three new customers to Amazon comes through fashion. To attract more customers this festive season, we have introduced a Plus Size Store, a Designer Store and Premium Watches and along with this, we have entered into a strategic partnership with Max Fashion.”***

– Mayank Shivam



“As a result of all these changes, more than 65 percent of consumers on Amazon are coming from Tier II cities and beyond. We have a very deep believe that fashion is for everyone. It is our job to make it accessible,” he adds.

### Exploring Amazon Fashion

At present, the e-commerce giant has about 86,000 sellers who list close to 8.7 million different fashion styles across categories. In the past one year, Amazon has added 22,000 new sellers listing 2 million new products.

“With such a huge seller eco-system, we are able to offer everything from regional sarees in handloom to designer wear. Amazon has tied-up with most of the big, medium and small brands to offer the best fashion to its consumers,” he explains.

Customers can shop from brands like Biba, W, Benetton, Mothercare, adidas, Puma, Samsonite, Fossil; celebrity brands like Rheson by Sonam and Riya, Nush by Anushka Sharma, Prowl by Tiger Shroff and designer brands like Rohit Bal, Ashish Soni, Payal Singhal,

Ashima-Leena, etc. Apart from offering regular collections, these brands keep on introducing their special collections curate especially for Amazon.

“We are also paying attention to get small artisans and sellers on-board. We have grown our platform from 1,000 small artisans and sellers last Diwali to 34,000 this year,” says Shivam. Women’s ethnic wear is the fastest moving category at Amazon Fashion. It comprises of sarees from different regions of the country, ready-to-wear salwar-kameez and dress materials.

>

## Amazon India: Things to Know

### A. Building the widest selection

- > Total selection stands at over 200 million+ products
- > Amazon add over 200,000 products per day
- > Millions of prime eligible products
- > Launchpad - 500 start-ups and over 40,000 unique products across 30 different product categories

### B. Providing convenience

- > **Mobile:** Mobile contributes over 85 percent of the traffic on Amazon.in
- > Reaching the next 100 million customers
  - Language
    - Amazon.in shopping experience in Hindi
    - Customer Service in 5 languages – English, Hindi, Kannada, Telugu and Tamil
    - Seller Support in 5 languages – same as above
    - Prime Video browsing experience in Hindi
    - I Have Space - 23,500 I Have Space

stores in over 350 cities

- Amazon Easy – Thousands of Amazon Easy stores across 21 states

### > Success metrics:

- Over 65 percent orders from Tier II and Tier III cities and towns
- 85 percent new customers from tier II and below geographies
- Amazon deliver to India's 100 percent serviceable pin codes in India through their own logistics network or through third party carriers.

### C. Sellers:

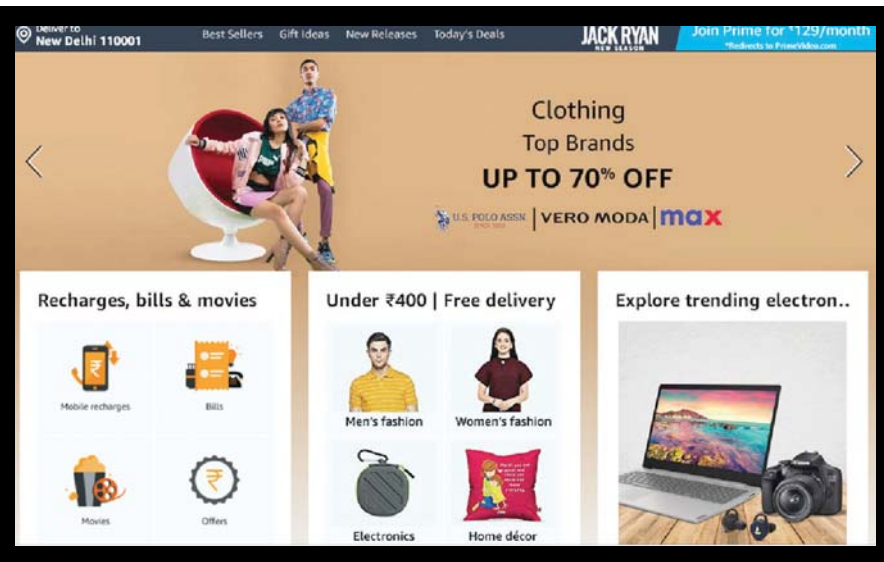
- > 5 lakh+ sellers in India have benefited from various seller services offered by Amazon.in.
- > Over 50 percent of the sellers are from Tier II and below cities. Amazon has sellers in places like Aligarh, Idukki in Kerala, Anugul in Orissa and Rajpipla in Gujarat
- > Number of Indian sellers selling on

Amazon's global marketplaces – 50,000+ with over 140 million listed products to millions of customers across 12 international markets

- > 150,000 weavers and artisans across 15 states and 48 clusters in India are benefitting through Amazon's 'Karigar' (previously Kalahaat) program to reach a diverse set of customers across the country.

### D. Fulfillment Infrastructure:

- > More than 50 fulfillment centres with 24million cubic feet of storage space across 13 states;
- > 15 Prime Now nodes in 4 cities
- > Sort centres across 19 States with more than 1.5 million square feet of processing space
- > More than 200 Amazon owned delivery stations
- > 700 delivery service partner stations with direct presence in every State and Union Territory



### Partnership with Max Fashion

The Max store on Amazon Fashion was launched with the latest selection of seasonal fashion and trends from their Autumn '19 collection on August 01, 2019.

The launch of Max Fashion on Amazon Fashion in India came from the brand's view of improving its consumer reach and base. Their aim is to ensure that highly stylized fashion at affordable prices is made available across 100 percent pin codes, thereby transforming how India shops for fashion. The store was launched with full-feature apparel selections for men and women – across tops, t-shirts, dresses, jeans, trousers, jackets, and also kids' apparel.

“We also have a jewellery store which has collections from large sellers like Mia by Tanishq to regional large players like Malabar, to a lot of small and upcoming jewellery brands. We have almost 30 plus sellers selling different types of gold coins and the category is seeing 150 percent growth year-on-year,” Shivam states.

“We launched Max on Amazon with close to 5,000 styles. The store features apparel selections for men and women – across tops, t-shirts, dresses, jeans, trousers, jackets, and also kid's apparel. Apart from this, customers saw the Max festive range coming on Amazon which is something that they

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the product that customer give to them, it is very exciting to see an emerging designer and a customer in a small town been connected,” he shares.

“We have created a marketplace where emerging designers from any corner of India can come and reach out to millions of customers,” he adds.

**Enhancing Consumer Experience**

To enhance the overall consumer experience, the Amazon is focusing on three things - selection, convenience and value.

had specially curated for the festive season,” says Shivam.

**Amazon Designer Store**

Amazon has tied up 225 well-known and emerging designers. It’s working closely with the designer community in India to get them listed on Amazon. It is also helping them in develop images and create catalogues.

“The new designers have talent on the design side and we are just helping them get access to customers and if you look at the ratings, the feedback on

“We are offering millions of styles to our customers and still we are looking for more options to explore. As far as convenience is concerned, we are trying to improve the data quality, image, detailing in size charts and we are also offering a 30-day no question asked return policy. Lastly, we enable our sellers to provide the best value to our customers and we do that by ensuring that it is easy for sellers to list, lower the cost of distribution for them by giving them a large customer base,” concludes Shivam.



# ETHNIC WEAR STUDY



Pic courtesy: Ethnicity

# BRAND ETHNICITY: A UNIQUE BLEND OF VINTAGE & NEW AGE



**Ameet Panchal,**  
Director, Ethnicity

In a tête-à-tête with Ameet Panchal, Director, Ethnicity, IMAGES Fashion Bureau discovers all about the evolution of the ethnic wear market in India and the unexplored opportunities in the segment...

## IMAGES Fashion Bureau



**Tell us about current standing of the ethnic wear market in India. What is the market size?**

Let's start by identifying ethnic wear as Indian wear to begin with. I personally feel it is a better suited term.

It's a big and growing market actually. India's apparel market is estimated to touch over ₹4 lakh crore in 2022, according to data from McKinsey's FashionScope. Indian wear is the biggest piece of the pie in today's day and time and it isn't showing any signs of slowing down. Women's Indian wear is estimated to contribute to a rough 80 percent, currently at USD\$ 18.6 billion and is expected to grow at a CAGR of 7.60 percent to reach US\$ 38.5 billion by 2027.

Demand for western wear will go up for sure. However, given India is a land of colour and festivals, Indian wear should still account for a sizeable market share.

**How has the ethnic wear market in India grown in the last 10**

**years? What are the major drivers responsible for the change in the ethnic wear market?**

There has been tremendous evolution. The last few years especially have seen rapid growth in the men's wear category. We now see some of the top international and Indian fashion retailers putting a spotlight on men's Indian wear, which has helped in growing the men's Indian wear market. I also feel that there is a large scope for making men's Indian wear more acceptable at workplaces, just like in the women's segment. For now, demand for men's wear comes as a mix of festive and weekend home wear.

The consumer too has evolved greatly. With disposable income in hand and a growing awareness about brands and current trends, people are making more informed decisions and you can see this being reflected in their purchase patterns. Design sensibilities among men and women are evolving rapidly thanks to the many influencing factors.

One of the biggest drivers is the Internet boom, which has opened up a plethora of avenues for the customer.





Television, streaming services, web films, social content and social media are now accessible on handheld devices to customers across all strata of society, and this is where all trends are set in today.

**Tell us about the changes that you have witnessed in the women's segment.**

In the women's section, Indian fashion wear has evolved and is now a part of the customer's lifescape. With more women joining the work force, a need for comfortable and trendy work wear has become a necessity as Indian wear is an acceptable norm for work clothing. It also has become the preferred clothing of choice owing to its comfort and styling versatility. Today, women's

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***"Indian wear is the biggest piece of the pie in today's day and time and it isn't showing any signs of slowing down. Women's Indian wear is estimated to contribute to a rough 80 percent, currently at USD\$ 18.6 billion and is expected to grow at a CAGR of 7.60 percent to reach US\$ 38.5 billion by 2027"***

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– Ameet Panchal, Director, Ethnicity

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Indian wear has a plethora of sub-segments work and fusion wear, festive wear, wedding wear, lounge wear, etc.

**What is the consumption pattern in the women's Indian wear market?**

Awareness has led to age barriers becoming obsolete. Hence, brands like us have to continuously work on the customer mind set across all age groups. And, women across different societal strata have different patterns of selection and it's all an aspirational want, with value being an individual desire or a personal preference.

**What spike in demand do you witness during the festive and wedding season from October to December?**

To be honest, women's Indian wear demands are year-round today. It's just that the styles tend to take a more opulent design approach with vibrant hues and intrinsic patterns during the festive period of October to December.

Also, Indian festivals are as diverse as the country itself; style and preferences are highly subjective to regions. So, we design our collections keeping in mind

the customer preferences regionally. For example, during Pujo season we see a spurt in red and white clothing in the eastern part of the country.

**Tell us about your latest collections.**

Our new festive collection has aptly been named 'Utsav' and has been met with very warm response.

**What are your views on bespoke services in Indian wear?**

Bespoke is a normally a luxury of the luxe and uber-luxe segments. I think, since fit, finish, etc., are far more superior in the bespoke and made-to-order segments, it will continue to enjoy demand at premium and specialised businesses. Nevertheless, we also offer customised fittings, as and when requested by our customers across all our stores.

**Walk us through sales of ethnic wear in Tier II and III markets as compared to metros. How has the market and the consumption pattern changed in Tier II and III markets in the last 10 years?**

When we talk about Tier II and II markets, we are talking about immense untapped potential, of which just the

>



### POPULAR ACCESSORIES IN MEN'S ETHNIC WEAR

- Stoles, dupattas and pocket squares are extremely important accessories in the men's wear categories.
- Buttons also play an important role during selections.
- Men prefer to buy accessories as an impulsive purchase.

### MOST POPULAR WOMEN'S ETHNIC WEAR PRODUCT CATEGORIES

- Presently, the most popular categories for women are fusion wear Indian garments that can be mixed and matched with western pieces such as blouses and skirts, kurtas with A-line silhouette, angrakhas and saree sets, etc.
- During festive times lehengas and skirts with heavy embroideries are more in demand. Traditional Indian prints coupled with western silhouettes are one of the trends seen in recent times.
- For men, the shorter kurtas and Nehru Jackets that can be worn over jeans, are our fast-moving products with longer kurtas and sherwanis being limited to festive and wedding seasons.

tip has been explored, to be honest. Accessible mobile devices and cellular data have brought in a paradigm shift in terms of awareness about brands, trends and fashion, making people from these cities, aspirational as well experimental.

The demand for branded garments has grown manifold from these cities and it only show an upward trajectory going forward. The future belongs to these upcoming cities which will soon be the new metropolises of the future. Ethnicity has already spread its wings

in these cities. We strongly believe retail expansion plans across these cities will help the Indian wear market grow to the next level.

### How do you think will the ethnic wear category shape up in the near future?

With the rise of a back to the roots enthusiasm in the nation, it seems that Indian wear will be the fashion mantra for the years to come. Going ahead, as various channels continue to emerge to converse with the customer, the growth of brands will be dependent on hitting the sweet spot with USPs that make them unique to him/her. Brands that are successful in India understand that all the senses have to be engaged to have the customer asking for more. The customer must feel good to look good.

### How is Ethnicity planning to hit this sweet spot?

We are all about offering the right fit, fabric, feel, colour and look at the right price points, in the right ambience making the customer's decision making simpler. This is the success mantra that Ethnicity follows when it designs all its product and retail stores. We also are working hard on geographical customisation of products.





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MARKET ANALYSIS

# Ethnic Wear IN INDIA

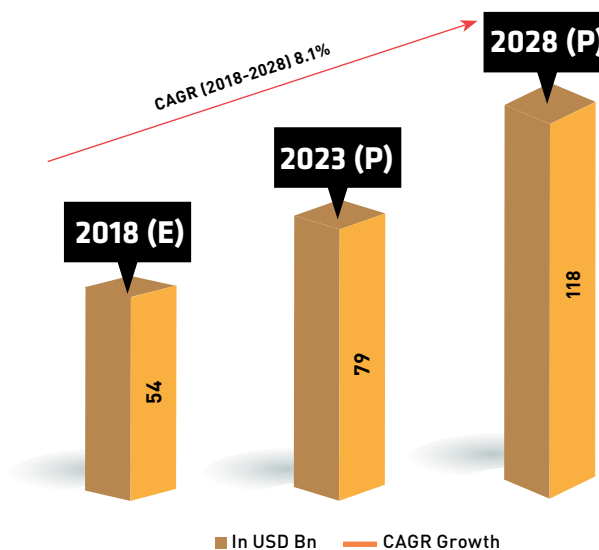
*The Indian ethnic wear segment is metamorphosing at a breakneck. With increased acceptance and immense innovations by brands in this segment, this market in India is growing by the day. Experts from Technopak Advisors, Ashish Dhir, Associate Vice President, Textile and Apparel Strategy and Shivanshi Bhatia, Associate Consultant, Textiles and Apparel, map the market and the key growth drivers.*



The Indian apparel industry is the second largest contributor in the retail industry after food and grocery. The promising growth rate of 8.1 percent makes the Indian fashion industry prominent in the retail sector. 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 by 2028.

India has the world's largest youth population, which is becoming fashion conscious owing to mass media and social media penetration. This has opened unprecedented retail market opportunities. With a GDP growth rate of 7.2 percent, India has an edge over developed markets of the US and EU, which are growing at ~2 percent and ~2.5 percent respectively. The developing nations will drive future apparel consumption globally and India is one of the major consuming nations. Favourable trade policies, increased penetration of organized retail, among other factors, contribute in making the Indian fashion industry attractive for investors.

#### DOMESTIC APPAREL MARKET (IN USD BN)

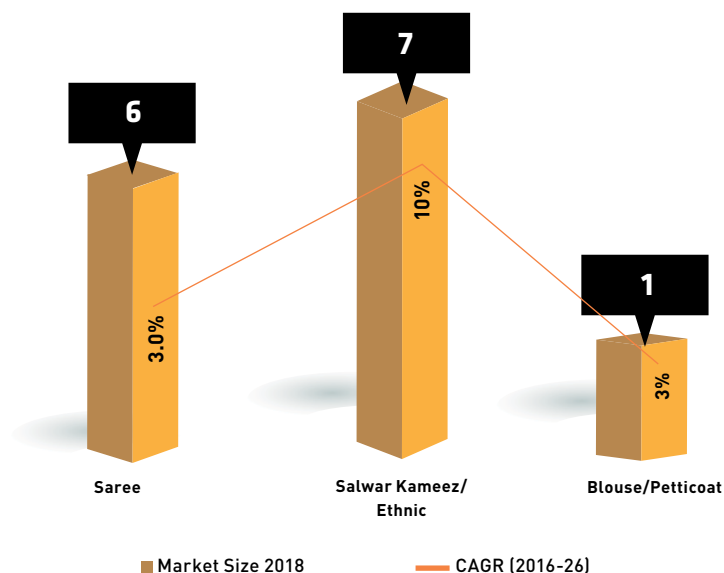


#### INDIAN ETHNIC WEAR MARKET

The total share of the Indian ethnic wear market is approximately US \$17.18 billion (₹112,893 crores) and stands for approximately 32 percent of the total Indian apparel market and is expected to grow in the future. The ethnic wear segment includes men's ethnic wear, women's ethnic wear, boys wear and girls wear.



**ETHNIC WEAR MARKET SIZE IN MENSWEAR (USD BN)**

**CATEGORY GROWTH IN WOMENSWEAR (USD BN)**


The womenswear segment is the single biggest category in Indian ethnic wear with a share of 81 percent in the total category. The increasing consumer demand of Indian wear segment can be estimated with the increasing scale of brands like Manyawar, Biba, W, FabIndia, etc. These brands focus on making the shopping experience easy and are coming up with ideas like fusion wear, which is both Indian and easy to carry. **Online presence of big ethnic wear brands and acceptance of ethnic wear among youth have also given rise to this sector. Men's and women's ethnic wear together contributes around 90 percent to the sector. The increasing acceptability of people towards Indian wear has given rise to the segment.**

The kids' ethnic wear market was approximately US \$1.6 billion in 2018 and is expected to grow at a CAGR of approximately 8 percent by 2028. Brands like BIBA and First Cry offer a huge variety in kids' ethnic wear. For Diwali season 2019, First Cry promoted its ethnic wear merchandise through a video that was uploaded on their YouTube channel and was also

promoted through television. Brands are catering to this segment and see huge growth potential in the sector.

#### GROWTH DRIVERS:

- **INCREASING RENTING BASED MODULE:**

Increasing acceptance of ethnic wear has opened new doors for brands like Flyrobe, Stage 3, Rent A Closet, The Clothing Rental and many more. These brands offer ethnic wear by renowned designers and make them affordable for the normal public. In recent years, there has been an increase in companies offering the rental service especially in ethnic wear. As the Indian ethnic wear market is expected to grow in the coming years the brands offering rental service are also expected to increase their business.

- **RISING E-COMMERCE IS ADDING VALUE TO THE SEGMENT**

E-commerce attracted initial sales because of the highly discounted

# Intelligent apparel



Stain Repellent



Cooling



Wicking

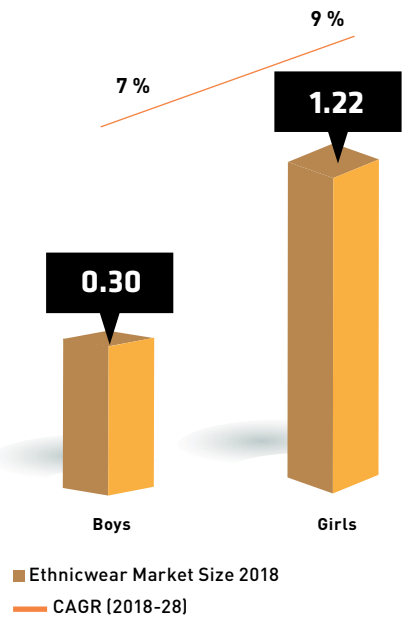


Anti-Odour



Quick Dry

**ETHNIC WEAR MARKET SIZE IN KIDSWEAR (USD BN)**



prices, and now consumers prefer buying online because of a number of factors like ease of shopping, availability of a wide variety of options and ease of return. In the past few years, the e-commerce market has seen a boost in terms of sales and acceptance. With the increasing overall sales, the Indian ethnic wear sector has also seen growth, making e-commerce a valuable sector adding value to ethnic wear segment in terms of sales.

• **ETHNIC WEAR IS BECOMING PART OF EVERYDAY WEAR**

In recent years, ethnic wear is not only occasional wear; it has become part of our everyday wear as well, especially in womenswear. Traditionally, ethnic wear was difficult to carry on a daily basis and with Indians turning towards western wear, the acceptance of ethnic wear declined. Brands came up with the concept of fusion wear and everyday ethnic wear like kurta, pants and leggings, which is also easy to wear.

• **ACCEPTANCE OF ETHNIC WEAR AS FORMAL WEAR:**

With an upcoming concept of comfortable clothing at the workplace, many companies have started to accept ethnic wear like kurta and Indian dresses as part of Formal wear. Also, in recent years there has been an increase in the number of working women which has impacted the acceptance of ethnic wear at workplaces around the country.

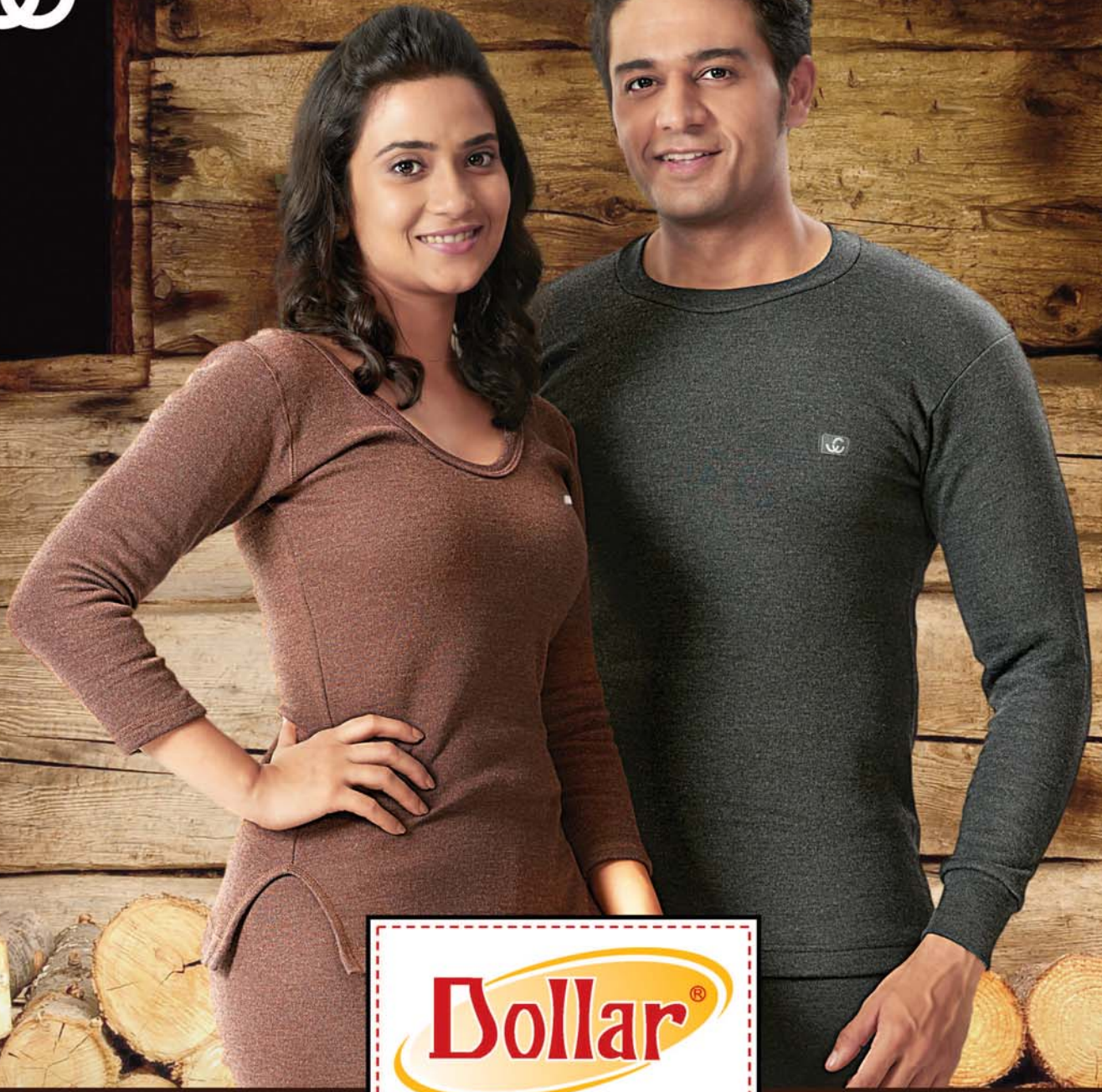
• **THE INCLINATION OF YOUTH TOWARDS ETHNIC WEAR:**

India has the lowest median age across key developed and emerging countries of the world. These younger consumers are indulgent and are well-travelled, brand conscious and well connected. They have higher spending power and are open to experiment and explore. 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 buying capacity of Indians.

Increased buying capacity of youth has led to an overall increase in their spending on apparel, thus increasing their spending on ethnic wear. The inclination of Indian youth has increased towards ethnic wear, as it has become comfortable and more fashionable.








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# MEN'S ETHNIC WEAR MARKET

In contrast to developed markets and other comparable peers, the men's ethnic wear market is an emerging segment. With the early entry of big branded players in this segment like Raymond, the segment is gaining major proportions. IMAGES Fashion Bureau talks to renowned brands to understand the dynamics of men's ethnic wear in India...

Rosy Sharma with inputs from Gurbir Singh Gulati

ETHNIC BY RAYMOND



**Mahendra Rathi,**  
Proprietor, Rajshahi Poshak



Rising fashion enthusiasm among Millennials, increase in the number of emerging fashion designers and the advent of digital and mass marketing strategies by fashion brands have substantially transformed the men's ethnic wear market in India. Various men's wear brands and fashion designers have reintroduced and recreated the concept of traditional men's ethnic wear that exudes an appearance of tradition and charm.

Brand promotions by celebrities and influence of TV serials and Bollywood have impacted the consumption of ethnic wear among Indian audiences. Deepak R. Ajwani, Proprietor, Leebas aptly shares, "The men's ethnic wear market has been growing every year since the time we started out and it is becoming more glamorous. It's major drivers are weddings, festivals, elections (to a certain extent), boost in economy, advertisements and also TV serials."

***"There is huge scope in the men's ethnic wear category. Till the year 2000, there were limited manufacturers in this line but the last 5 to 6 years have witnessed the entry of many organised as well as unorganised manufacturers in this category"***

#### Market Size

According to PwC's retail and consumer quarterly newsletter (third-quarter 2018), the men's ethnic wear segment constitutes nearly 6.6 percent of the total men's wear market, which is largely restricted to occasion wear (i.e. weddings and festivals), as against 74 percent for women.

According to Ajwani, the segment has extremely bright prospects and is growing at a healthy rate every year. "If we compare the overall apparel index the share of the men's ethnic wear segment it will not be less than 35 percent in consideration," he says.

Mahendra Rathi, Proprietor, Rajshahi Poshak also confirms that there is huge scope in this category. "Till the year 2000, there were limited manufacturers in this line but the last 5 to 6 years have

witnessed the entry of many organised as well as unorganised manufacturers in this segment," he shares.

Leebas and Rajshahi Poshak are renowned men's ethnic wear brands from the West and East regions of India. Laden with skill craftsmen, the brands offer captivating clothing collections which include accessories. They generally comprise of simple and designer kurta pajamas, Jodhpuri suits, traditional wedding sherwanis and wedding accessories (including mojaris, safas, stoles, etc.).

#### Consumer Behaviour

In India, traditional wear as a category plays a major role during festivities and wedding. Earlier men lacked options and had limited choices during festivities and when dressing up for weddings. Today, the way men approach fashion and personal style is evolving and hence, the men's ethnic wear segment is brimming



## ETHNIC TRENDS 2019

**Bidyut Bhanjdeo**, Brand Director, Ethnix By Raymond

### **Tell us about current standing of the men's ethnic wear market in India.**

The current men's ethnic wear market is well penetrated and is estimated to be ₹1,000 crore in 2020. However, the market is dominated by the unorganised sector and it is two-thirds of the category by value. The organised sector is touted to grow faster and will almost be 40 percent by 2025.

### **What are the major drivers responsible for the growth in men's ethnic wear?**

The men's ethnic wear market has grown exponentially in the last 10 years and has become a major category as consumers are feeling the need to dress for occasions rather than be classified in formal or casual. The pride in wearing something Indian - led by the explosion in media like television and Bollywood which promotes this category - has helped in driving this category. Celebrity endorsements by leading brands has also helped in popularising this category.

### **Tell us about the consumption pattern when it comes to men's ethnic wear.**

This category is typically consumed when it comes celebrating traditional events in a consumer's life like marriages, puja and occasions like Eid, other traditional events like housewarming, etc. This category has also made in-roads into Indian fusion wear like short kurtas, Nehru jackets that are worn on casual occasions too.

There is a definite spike in the festive season as it is for other categories of apparel too but it's the marriage season which leads the sale figures and it depends on how long the marriage season lasts. Typically, it contributes almost two thirds of the entire sales.

### **Tell us about your most recent and successful men's ethnic wear collections.**

We introduced a new category in casual wear comprising short kurtas, mid-length kurtas and different kinds of bottom wear. The collection was received well by the trade partners and consumers. The collection can be worn for any casual occasion and need not be a celebratory occasion. It can also be worn on a Friday to office.

### **How do you think the men's ethnic wear category will shape up in the near future?**

I believe this category will grow at a pace higher than the men's apparel category and the growth will be led by faster conversions from unorganised to organised sectors. This will be fueled by the fact that more and more organised players are jumping into the fray which will only expand the category.





with exhaustive fashion and accessory choices. This in turn has created an exciting space for men's wear brands to branch out into. There are garments available at all price points in various categories for men. Moreover, with the entry of many fashion designers into the men's wear segment, innovation and creativity in outfits are also fueling this segment's growth.

"The ethnic wear market is more or less a defined seasonal approach and the per capita consumption increases during festivities," says Ajwani, "For us, the major business during the year starts with Eid, Navratri and continues till the wedding season. Besides, there are our regular customers who come to us for quality and reasonable rates for their regular wear suits too."

Pertaining to wedding outfits – which is the most important part of

any Indian wedding – and with the discerning male consumer getting more demanding. Wedding outfits are designed using high-quality fabric and efficient design methodologies. In the case of a destination wedding, where everything is planned according to the set theme, the wedding outfits need to do come together with the theme. This encourages designers towards detailed awareness of suitable fabrics, design and styling methods. This is anticipated to enhance the demand for more exploration and product innovation in designing, which will stimulate the overall market growth. With this the rise in the adoption of innovative and customised designs offered by prominent fashion designers and stylists are anticipated to drive the market growth.

With a firm belief in quality and understanding the demands of its consumers, Rathi states that Rajshahi Poshak offers bespoke and customising facilities to customers at outlets located at Mullick Fatak in Howrah (West Bengal). "There is a very good scope in this field. We also do dress codes for many clubs, societies and company on various occasions," he shares. On offer at Rajshahi Poshak outlets are

RAJSHAHI POSHAK



*Today, the way men approach fashion and personal style is evolving and hence, the men's ethnic wear segment is brimming with exhaustive fashion and accessory choices. This in turn has created an exciting space for men's wear brands to branch out into.*





**Deepak R. Ajwani,**  
Proprietor, Leebas

***“The men’s ethnic wear segment has extremely bright prospects and is growing at a healthy rate every year. If we compare the overall apparel index the share of the men’s ethnic wear segment it will not be less than 35 percent in consideration”***

kurta pajamas, dhotis, jackets, Indo-western clothes for men, along with the popular sherwani. The prices range between ₹2,500 and ₹3,500. Last fiscal year the brand achieved sales turnover worth ₹5 crore and this year it plans to reach ₹7 crore despite the volatile market. Furthermore, the brand plans to supply its products to global markets like Canada, the UK, and Bangladesh.

“The category works on the demand pattern where the most popular trends are kurtas and Pathani suits along with a dupatta/safa around the neck as a novelty,” explains Ajwani.

“Mojaris and dupattas to match suits are very popular combination and a regular choice for pairing with the outfit. Accessories like buttons are playing a major demand role. Nevertheless, pagri too has been in demand now to define the complete



RAJSHAHI POSHAK

ethnic look. The Indo-western, churidar-kurta with jackets are the most in demand.”

### **The Road Ahead**

Ajwani feels that the ethnic wear market is here to stay, with the men’s segment moving towards an organised setup with bigger and better brands addressing the need of new-age consumers. “The brands which understand the consumer in this category have a bright future,” he says.

Growth in demand for varying styles of kurtas, sherwanis, Indo-western and Indian men’s wedding outfits is the primary factor driving the men’s ethnic wear market growth. Further, improvements in the quality of fabric and design techniques and stitching-related modifications are expected to drive the ethnic wear market in India.



ETHNIC BY RAYMOND



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A woman with long dark hair is standing in a hallway, wearing a bright yellow long-sleeved top with gold embroidery and a white skirt. She has her arms crossed and is looking directly at the camera. The hallway has white walls, arched doorways, and wall sconces.

# THE CHANGING PARADIGM OF **WOMEN'S ETHNIC WEAR IN INDIA**

A look at how the market dynamics as well as the new consumer's consumption pattern are transforming the potential of the burgeoning ethnic wear market in India...

IMAGES Fashion Bureau





India boasts of a rich and ancient textile and clothing heritage that has continued to evolve through time. While the nation is taking big strides towards modernization, its citizens are still traditionalists at heart, especially when it comes to expressing their culture and heritage through fashion.

Traditionally, ethnic wear in India was largely de rigueur for occasions, festivals and weddings. But in the course of time, as functionality and comfort started taking a centerstage in fashion, the entire template of ethnic wear was subjected to a thorough overhaul. Especially in the women's section, the category today covers a wide spectrum of sartorial elegance – from inherently classic to more contemporary avatars; from everyday wear, festive wear to ensembles that befit even corporate boardrooms.

“Customers love pure ethnics as occasion wear, but with the emergence of fusion wear, they have found something that they can flaunt on a daily basis. The fusion wear category includes myriad ensembles right from kurtis, kameez and tunics, etc., which can be paired with fitted pants, tides, palazzos and even long skirts. Then there are gowns and anarkalis, maxis and nighties converted into stylized and comfortable maxi dresses,” explains Chaitali Giri, Fashion Designer, Chic by Chaitalibiplab.

### India's Flourishing Ethnic Wear Market

The ethnic wear market in India makes up a significant share of the total fashion retail industry in India. In the women's fashion segment, it is the single biggest category, with a share of about 71 percent and is growing steadily. “The ethnic wear market in India is growing steadily and healthily. The category has found acceptance with the growing younger audiences and has also developed new

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## ETHNIC WEAR: WHAT'S IN VOGUE

*“Customers loves pure ethnics occasionally, but with the emergence of fusion wear, they have found something that they can flaunt on a daily basis. The latest trends of this season include saris, maxi dresses, Indi-gowns, palazzos with kurtis, jackets, shirts, anarkalis and fitted tops paired with long skirts or lehenga”*

~ **Chaitali Giri**, Fashion Designer, Chic by Chaitalibiplab.



*“Gowns, lehengas, palazzos and ghararas are currently the most popular product categories in ethnic wear. A lot of layered designs with different sleeve detailing and patterning are also doing well this season. Also, people prefer Indo-Western fusion, something that is not too heavy, yet elegant and sophisticated”*

~ **Nikhil Furia**, Partner, ERA the in-thing!

*“Fusion-wear and modernizing of typical Indian wear is gaining popularity by the day. For example, salwars are now transformed to pants, skirts, and palazzos. Kurtis have now transformed into asymmetric flare kurtis, floor length anarkalis, etc. Contemporary clothing is the most popular trend and category in this sector. Light weighted cotton kurtas paired with palazzos, high low hem kurtas, Dhoti style pants, A-line jackets paired with palazzo pants are current trends”*

~ **Manjula Tiwari** CEO, Future Style Lab & Founder of its brand Ancestry.



niches with the advent of sustainable fashion and contemporary trends,” says Manjula Tiwari CEO, Future Style Lab & Founder of its brand Ancestry.

“While there are varied estimates available about the market size of ethnic wear market in India in public domain, all point to a steady growth and a remarkable shift towards the organised sector,” she adds.

Over the years, the growth in the women’s ethnic wear market has been subtle, yet steady in India. Changing lifestyles, rapid urbanisation and increasing fashion awareness have manifested in an incremental growth

of the ethnic wear segment over the past few years, with experts reporting a significant rise in demand for ethnic clothing especially for women.

“Rising middle class with growing disposable income is a prominent factor driving the growth of this segment. Moreover, the increasing number of women opting to work nowadays has been a boon for this sector as you know that more and more women are wearing ethnic to offices,” says Nikhil Furia, Partner, ERA the in-thing!, an exclusive girl’s ethnic wear brand known for its unique styling, versatility and fashion binding.

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*Along with the rise in demand, the ethnic wear market has witnessed the arrival of a slew of brands, both domestic and international, trying to entice consumers with their respective USPs. As a result, the competition to offer consumers with more and unique options is increasing.*

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The penetration of mass media and m-commerce has helped the brands of this segment thrive in the hinterlands of the country as well. Frequent promotions and lucrative discounts have resulted in increased purchases by the Indian buyers in the entire apparel sector, including women's ethnic wear.

"Ethnic wear is rapidly taking over the work-wear segment and has also found continuous growth in the core festive and occasion wear segment. Tier II and III cities have now easier access to key brands which too has helped the organised segment," says Tiwari.

"Women in Tier II & III cities are open to experimenting with new trends. With the help of online portals and social media, these women are aware of the ongoing trends and styles resulting in increasing demand in good quality and branded ethnic wear," she adds.

In fact, if experts are to be believed, Tier II & III towns and cities are showing better results than the metros. "With overheads being relatively low, and with internet, consumers being more informed, there is much better scope to grow in Tier II and Tier III," says Furia.

Along with the rise in demand, the ethnic wear market has witnessed the arrival of a slew of brands, both domestic and international, trying to entice consumers with their respective USPs. As a result, the competition to offer consumers with more and unique options is increasing. Moreover, as in other fashion segments, the women's ethnic wear segment in India is also registering a significant growth of private labels offering low priced

>



## ETHNIC TRENDS 2019

**Siddharth Bindra**, Managing Director, BIBA



### **Tell us about your latest collection, BIBA by Anju Modi.**

'BIBA by Anju Modi' is a premium collection designed to tap the niche ethnic wear segment in the country. Based on the theme of 'Enchanted Forests', the collection is fun and has a romantic feel which is ideal to fulfil the festive wardrobe needs of the customers. The collection draws special attention to motifs of leaves, special weaves, delicate flora, minarets, flowers, candles, chandeliers, peacocks and parrots in anarkalis and shararas, which are all the rage. It introduces knee-length straight cut kurtis with beautiful layering added to it. In terms of detailing the range has fine gota work and floral embroideries foiled in sunshine gold, cirrus ivory and gleaming zari to make the silhouettes more interesting. The range comprises metallic prints, floral prints and intricate hand embroidery work on pure fine fabrics like silk, chanderi, velvet and modal.

### **How is the collaboration with designer Anju Modi unique from alliances with other designers like Rohit Bal and Manish Arora?**

BIBA has always led creativity and innovation. Tying up with various designers is part of our strategy to be able to provide our customers with a unique designer wear range at great prices. Each designer has a different language and the way they blend with the BIBA aesthetic is crucial. Anju Modi has a distinct design signature that she's been able to maintain over the last 20 years. She is someone who created fashion trends in the industry over the last two decades, and her collaboration with BIBA will provide exciting products to consumers.

Our customers have loved our collaborations, that's what makes us continue to do it over and over again.

Furthermore, it's an opportunity for the brand to commercialise a designer's work and it is for consumers who have always aspired for designer wear at afford range.

### **Tell us how the ethnic wear market is evolving in India?**

Well, I prefer to address the ethnic wear market as the Indian wear market. For me, it is a high fashion category. The products [collection] are evolving all the time during the course it has been imbibing its own trends.

According to a study by Technopak, India's ethnic wear industry is currently pegged at over ₹82,200 crore and is expected to grow to ₹1,26,210 crore by 2019. Considering this, we are less than 1 percent despite being market leaders. Top brands globally control anything between 4 to 8 percent of the market share and that is what we should target. As the Indian economy is growing there is a large population that is moving from unbranded to branded garments hence the category is also expanding. Still, nearly 70 to 75 percent of the Indian wear category sits in the unbranded segment.

### **What are your expansion plans?**

We plan to add another 125 to 150 stores, taking the total store count to 500 in the next two years. In the current year, we are looking to add 100 outlets, of which 60 will be under Rangriti. BIBA currently has 278 stores across the country, where 90 percent of them are company-owned. We also plan to tap the franchise route to expand further into small cities and towns. A majority of these would be for our brand Rangriti, which currently has 85 stores across India.

In product offerings, we plan to add footwear, bags and accessories. Our reasons to add/include products/range come from what our customers tell us. Customers love the brand aesthetics and want it from clothes to shoes to bags to jewellery for it is also about a complete look these days. I think we are fulfilling the demands of our consumers with this.



products compared to their branded counterparts. While this might not be welcome news to most brands and retailers, it nevertheless is a clear testimony that the ethnic wear market is gaining traction in India in recent times.

### Target Audience & Consumption Behavior

Women's ethnic wear is among the very few apparel segments that enjoy equal popularity amongst all age groups and social and economic segments. "The affluent segment is more conscious about the craft-inspiration and material used in creating what they wear, when compared to the middle class, which still does consider pricing to be a major decisive factor. But, the fact is that the ethnic wear category fits perfectly into every woman's wardrobe, some time or the other, be it for work, a casual day or night out, or for festivals and occasions," reveals Tiwari.

Even in the kids section, ethnic is a hot selling category. "Our target audience is right from a 6 month old infant to a 15 year old teenager. Most parents want their children – especially their girls to wear ethnic for festivals and weddings. The affluent class prefers to purchase exclusive and latest in trend designs normally from a single wear (for specific functions), perspective," states Furia.

The festive season in India, which starts in September and goes on till December, needs a special mention when it comes to ethnic wear consumption in India. Thanks to the custom-and-tradition-abiding nature of the country, the women's ethnic wear market in India witness a boost during this period.

"Yes, there is a significant increase in sales during the festive season. However, in the recent years, we have seen a boost in sales for ethnic/contemporary clothing almost



CHIC BY CHAITALI BIPLAB

### LATEST COLLECTION: PAYAL PRATAP X ANCESTRY COLLECTION

- The collection features designs that exude timeless style and serenity in the designer's signature style, a fine expression of glo-cal bohemian trends while retaining the ethos of Ancestry with its strong Indian accents.
- This collection has a hint of Indian royalty, embracing traditional values with modern day fashion codes.
- As Ancestry X Payal Pratap truly encapsulates the new India with its asymmetrical sherwanis, dhoti dresses, bias skirts, shift dresses, kimonos, overlay jackets and salwar pants, it proudly holds a torch to Indian textile traditions with the use of chanderi and cotton silk.



ANCESTRY

throughout the year, since today's fashion conscious woman wants to experiment with her look and not restrict her style to just western wear," says Tiwari.

For Era – the in thing!, the festive season accounts for about half of its annual sales. "For us the season starts from September and goes up till January and we register around 50 percent of our annual sales within this period. We do great sales for Eid also. Besides, in South India, from January to September, there are festivals like Pongal, Ugadi. They also have a good wedding season in that period," says Furia.

### The Future

The women's ethnic wear market has undergone massive transformation. Today, the market is alive with a wide range of colours, style, cuts, silhouettes and detailing in every size and for every occasion. Moreover, the organised retail fraternity has already started to take this category more seriously as more and more branded players are entering into this segment.

If experts are to be believed, the ethnic wear market will continue to grow incessantly for the next few years.





## BRINGING TRENDY ETHNIC FASHION TO EVOLVING CONSUMERS

From being a pure ethnic player in the initial days, Soch has transformed into a stylish brand that retails trendy Indian fashion across categories at delightful prices. Backed by the rise in disposable income among consumers, the influence of social media in making buying decisions as well as easy accessibility through e-commerce, the brand is witnessing an influx of consumers who choose to showcase their individual style with ethnic wear.

**IMAGES Fashion Bureau**

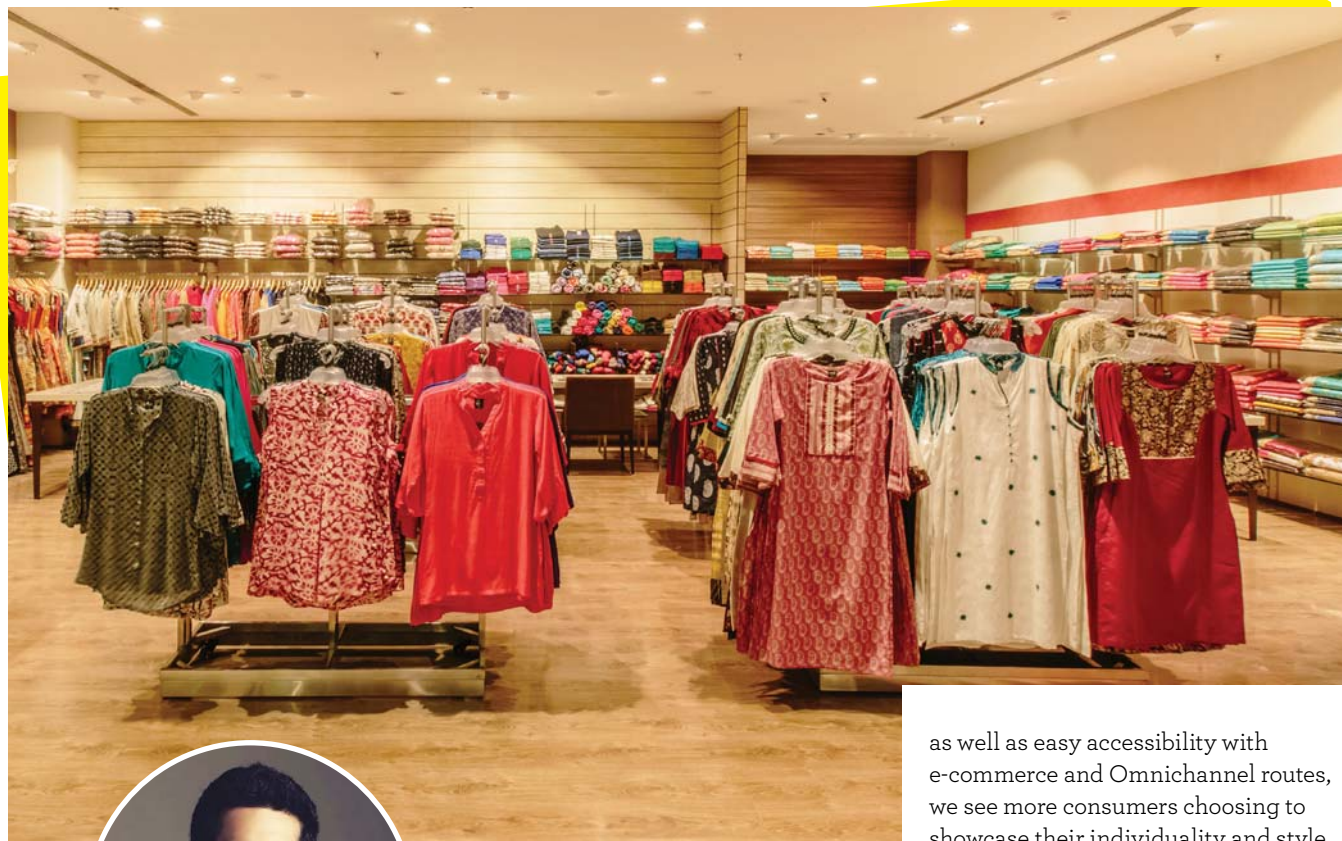
In an age where brick-and-mortar retailers are wrestling with issues of creating lasting value and relevance, there are some homegrown retailers who are aiming for a pan India presence by offering the best to their customers.

One such retailer is Soch. From a humble start in 2005, when Founder & MD Manohar Chatlani started the brand with a store in Bangalore, the brand is today 180-store strong. From being a pure ethnic player in the initial days, Soch has transformed into a stylish brand that retails trendy Indian fashion across categories such as tunics, palazzos, fusion suits and stoles, apart from traditional staples such as salwar-kameez, kurtis, dress materials and sarees, at delightful prices.

Today, Soch finds a prominent place in the wardrobes of Indian women because of its exclusive designs that keep pace with the rapidly changing trends in ethnic fashion. Adding to its exciting array of styles, the brand has launched a new collection for the festive season for discerning women consumers. The collection offers stunning salwar suits in deep earthy shades of mustards and olives, fresh pastels with intricate gold and silver work and elegant embroidery that are ideal for evening ensembles. “This season, we are betting big on dupattas with elaborate gota work which are great style companions for the festivities,” states Vinay M. Chatlani, Director & CEO, Soch.

“Our key difference from the competition is our range and variety, and how we respond nimbly to market needs across these categories. I believe we are unique in the spread of our offerings—sarees, salwar suits, kurtis,





***“Our key difference from competition is our range and variety, and how we respond nimbly to market needs across these categories. We are unique in the spread of our offerings—sarees, salwar suits, kurtis, dress materials and bottom wear. In that sense, we believe that a consumer can walk into Soch for a wardrobe solution for most needs and occasions”***

**VINAY M. CHATLANI,**  
Director & CEO, Soch

dress materials and bottom wear. In that sense, we believe that a consumer can walk into Soch for a wardrobe solution for most needs and occasions,” states Chatlani.

**The Evolving Ethnic Wear Market**

The Indian ethnic wear market is quite large and accommodates a wide variety of players, where premium designers are a niche part of this market and address very specific needs. While there has been a rise in designers with prêt lines, Soch caters to a much larger and wider audience across the country.

According to Chatlani, despite the growing popularity of western wear, ethnic wear is still the biggest category in women’s wear in India. Nowadays more and more consumers are embracing ethnic wear as their garment of choice during various occasions and festivities. “Backed by the rise in disposable income among consumers, influence of social media and celebrities in buying decision

as well as easy accessibility with e-commerce and Omnichannel routes, we see more consumers choosing to showcase their individuality and style with the new expressions of ethnic wear,” he says.

“We have a wide variety that we offer our consumers and cater to the needs of different segments of consumers with our offerings. We believe that a large chunk of consumption in the ethnic wear market will be driven by the movement from unbranded to branded, and that there’s enough scope for different brands, retailers and designers to thrive,” he adds.

Till now, ethnic wear, as a segment has been traditionally looked upon as catering largely to an older age group. However, the segment is undergoing a massive transition and Soch is witnessing a revival of interest in this category among younger consumers as well. Another factor driving the younger populace to pick ethnic wear is the influence of celebrities and social media.

The influence of Bollywood, especially the new generation of actresses and micro influencers makes a great case for ethnic wear in as far as younger



consumers are concerned. For example, actresses wearing ethnic makes an impact on the younger crop of women consumers, who begin to see ethnic wear as cool and fashionable.

With options from traditional silhouettes for a very rooted look to mix-and-match clothing, the brand is providing outfits for that contemporary ethnic look, luring in younger consumers who wish to use ethnic wear to showcase their creativity and sense of style. For instance, sarees have gained momentum with several young consumers opting for it.

“This category has largely been underserved up till now but is making up for it. You will see a plethora of launches across large retail houses to small independent brands, trying to carve a niche for themselves and garner the consumer’s attention and a share of the growing spends on this category. For big box retailers, I think the choice is not to say I will give this category more space at the expense of others, but to keep their finger on the pulse of the consumers and shift their merchandise mix accordingly to satisfy more consumers,” states Chatlani.

### Changing Consumer Behaviour

Associating ethnic wear with only festive and occasion wear is fast changing. As Chatlani puts it, “It is definitely the outfit of choice for special occasions, but we are seeing it also evolve into a preferred option for daily outings, airport travel and work wear as well. People are in an experimental mode with the category, and the sheer width of the category aids that. Consumers across ages – be it Gen Z, Millennials, middle-aged and older women – have more to choose from, right from fabrics and designs



***“With ethnic wear borrowing some influences from the latest trends in western wear, the style of clothing is gaining more popularity than ever before. Western wear has helped create an altogether new language of ethnic wear, which is today less bound by rules and is worn as per the person’s needs and desires”***

to colours and cuts. The comfort and versatility of ethnic wear has made it an active choice for many young women as well.”

Also, with ethnic wear borrowing some influences from the latest trends in western wear, the style of clothing is gaining more popularity than ever before. Chatlani feels that western wear has helped create an altogether new language of ethnic wear, which is today less bound by rules and is worn as per the person’s needs and desires. For example, salwar kurtis have now evolved – in some instances – into kurtis paired with pants/palazzos and the humble dupatta has moved from a functional part of the outfit to being a key accessory. “We are confident that

the ethnic wear market, across the spectrum of occasion wear, work formals and casual wear will witness a rise in demand in the next decade, aided by the increasing choice in styles across different price points,” he asserts.

### Future Plans

Soch has been strengthening its occasion wear range, to introduce options across price ranges for festive and semi festive usage. In addition, the brand is also looking at enabling a greater expression of creativity for its consumers with a larger curation of mix-and-match styles – separates that will be designed to be versatile and be paired with different garments to create multiple unique looks.

“We see an increasing desire for mix-and-match in their garments among our consumers, so they are not stuck with a single way to wear something, but are able to easily reinvent their looks, and that is our inspiration for this new range,” says Chatlani.

Soch currently has 180+ touch points across 45 cities. “In the next couple of years, we are looking to double the touch points with considerable doors coming via large format stores. A crucial part of demand for us will come from Tier II and III cities as I believe consumers in these cities are just as aspirational in their desires but are constrained by availability. In our next phase of expansion, we are looking to increase our footprint in these towns,” he says.

Currently, Soch largely services Tier II and III cities through e-commerce and Omnichannel routes. At the same time, the brand is also looking to expand its range on the online platforms, which would lead to more contented customers.





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# MANYAVAR'S RAVI MODI ON THE INDIAN WEDDING TROUSSEAU INDUSTRY



Ravi Modi,  
Director, Manyavar

The high growth wedding apparel industry is running on an aspirational engine that shows no signs of revving down or being affected by any market force. With an estimated 10 million weddings taking place each year in India, the industry is pretty much recession-proof...

Shivam Gautam

When it comes to nuptials, nothing quite rivals the opulence of an Indian wedding. Big Fat Indian Weddings, as they are notorious globally, are the epitome of flamboyance.

The wedding industry in India – worth almost \$50 billion as of today – is fuelled by a perceived compulsion to indulge in lavishness in a bid to celebrate, coupled with an inherited belief in immortal relationships. This high growth industry is running on an aspirational engine that shows no signs of revving down or being affected by any market force. With an estimated 10 million weddings taking place each year in India, the industry is pretty much recession-proof.

While the wedding engine in India benevolently bankrolls a plethora of industrial sectors with generosity, it is the apparel segment that takes centerstage – after all, isn't it what the bride and the groom are wearing that is under the scanner throughout the celebration? In spite of a snowballing market and abundant opportunities, the wedding wear market in India has

traditionally been dominated by the unorganised sector; at least it was until 1999 when Manyavar was launched, an event that would go on to change the whole template of segment in India.

Over the years, the brand has become synonymous with Indian wedding trousseau and has inspired a new generation of brands in this domain to follow in its footsteps.

In an exclusive interview, IMAGES Business of Fashion, talks to one of the most prodigious figures of the Indian wedding trousseau industry, Ravi Modi, MD, Vedant Fashions Pvt. Ltd., about the evolution of the market, and latest trends.

Excerpts from the interview...

**How would you describe the wedding trousseau market in India now? How has it changed in the last 10 years?**

Back in the day, men's ethnic wear did not even exist as a category in the organised sector. Slowly, over time, the category has grown and established itself in the psyche of the consumers. Today, the men's ethnic wear category





is witnessing exponential growth and its demand for a casual or daily-wear option is also growing. The huge demand in ethnic wear is not only confined to festivals but also to the rising trend of pairing traditional pieces with western wear, bringing the Indo-Western trend to both casual and formal wear.

Also, consumer outlook towards ethnic wear has changed and evolved considerably over time. They are now open to adopting and experimenting with cuts, colors, and hues. This will go a long way in ensuring that ethnic wear continues to be contemporary and interesting.

Manyavar, on its part has also acted as an catalyst in this evolution. By starting an entire non-existent category of men's ethnic wear in the country, we have done our bit by providing consumers with a wide variety of options in terms of designs, colors, and cuts across various categories.

**The general assumption is that the wedding/festive season (October to**

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***“The traditional wedding/festive season has broadened over time to include many smaller occasions and personal celebrations around the year. Moreover, consumers now view ethnic wear as a comfortable and casual clothing option. Weekends have now become the new occasion for donning ethnic wear too.”***

– Ravi Modi, Director, Manyavar

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**December) is the principal occasion wear season in India. What's your take on this?**

The traditional wedding/festive season has broadened over time to include many smaller occasions and personal celebrations around the year. Moreover, consumers now view ethnic wear as a comfortable and casual clothing option. Weekends have now become the new occasion for donning ethnic wear too.

Also, for us, we enjoy a healthy distribution of sales around the year as our offerings are varied and cater to various consumer requirements. We ensure that we adapt to changing trends, yet, we strive to ensure that we keep our Indian essence intact.

**What do you think are the major influences on the fashion choices while opting for wedding trousseau in India?**

Generally, customers used to consult our store teams to show them the latest trends. However, with social media and the large number of influencers that we see today, most consumers are completely updated with trends. Such increased awareness broadens up spending avenues and occasions too.

Bollywood and social media definitely play a major role in influencing purchase decisions. However, Bollywood too looks to real-life trends and traditions for inspiration. Hence, our current trends in a way help shape Bollywood's choices.



**Could you tell us the prevalent trends in terms of colours, silhouettes and embellishments?**

Honestly, we see a variety of trends and micro trends throughout the country, so it is hard to narrow it down to 1-2 key trends. Still, there's a lot of variations and styles coming up in terms of colors and patterns. New cuts and prints are starting to shape the ethnic wear market with indulgence in new colors and patterns. Contemporary designs with pastel hues and traditional motifs are in trend right now and are also dominating the festive wear range this year.

Our men's collections showcase an exceptional range of exquisite sherwanis, regal Indo-westerns, classic kurta-jackets, and trendy kurtas. We regularly forecast trends enabling us to ensure that we are always quick to introduce fashion trends; be it the introduction of new offbeat refined colors which were originally never seen in a groom's color palette such as pista greens and soft peaches or unique product characteristics such as edgy and unique cuts with asymmetric hemlines and double-breasted styles along with statement modern prints.

In bridal wear, whether it is the lehenga or the accessories, the focus has always been on the detailing. Hues being the main focus of the season, pastel colors like pinks and greens are ruling the fashion trends and are in demand. Like Manyavar, Mohey too has a varied set of themes fitting the various occasions of a typical wedding affair.

As embroidery is enjoying the limelight for the season, we have specially




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***"In bridal wear, whether it is the lehenga or the accessories, the focus has always been on the detailing. Hues being the main focus of the season, pastel colors like pinks and greens are ruling the fashion trends and are in demand."***

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curated embroidered lehengas to cater to the ongoing trends. Adding to this, cape gowns, pastel hues, floral prints have been the head-turning styles throughout the season.

**What is the inspiration behind your collection for the forthcoming wedding season? Also, tell us about the latest styles of your wedding collection.**

Manyavar has introduced an array of cuts, prints colors, and patterns that are generally not seen in a groom's trousseau options.

Off-beat colors like pastels, which are never seen in a groom's palette, have

acquired a large space in men's ethnic wear range. Asymmetrical cuts and hemlines are trending, making the whole range of men's wear all the more exciting and innovative.

Mohey's flagship category is lehengas. In lehengas, we have a very balanced collection in terms of colours and fabrics – there are beige and ivory lehengas on one end of the spectrum which is balanced well by dark deep brooding colours such as burgundy, rust, old rose, and wine. The embroidery is a mix of resham and antiquated zardosi.

**Today, Indians are increasingly opting for western wedding trousseau than ever before. What's your take on it?**

We, at Manyavar Mohey, actually see the trend going the opposite way. We see this market as one of the most fast-growing and vibrant segments. We are betting on ethnic doubling in a few years' time from the current position.



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# THE 'DAPPER MAN' LEADS TO RISE OF THE OCCASION WEAR MARKET IN INDIA

Owing to a highly penetrated and competitive market, men's occasion wear is gaining significant traction in India. Brands and designers are now focusing on customisation and personalisation at competitive prices along with improving their footprints by penetrating newer markets. This is expected to propel overall market growth in the coming years. IMAGES Fashion Bureau talks to renowned brands to understand the market dynamics...

Rosy Sharma with inputs from Gurbir Singh Gulati

The rise in fashionable wear for men, along with increase in awareness related to dressing sense and looks, has propelled the participation of men in the fashion industry. These emerging fashion conscious men are expected to drive the occasion wear market over the next few years, which will propel the demand for suits, tuxedos and bandgalas.

Cashing on this opportunity are indigenous men's wear brands who are providing customised and innovative designs, while many fashion designers are creating special designs for the male segment to increase product offerings and improve participation.

Men's designer wear brand, Studio H-2 offers suits, blazers, tuxedos, sherwanis, bandgalas and innovative men's safaas. "We are into ready-to-wear and customised fashion for men. Studio H-2



offers inquisitive collection for men with a focus on classy silhouette and edgy cuts. Fine texture of the fabric and handcrafted designer pieces remain the USP of our designs and the categories include tradition, western, Indo-western, formal and casual wear. Our fashion philosophy encompasses sophistication and versatility as our designs are the true epitome of creativity,” share Reshma and Bharat Grover, Creative Heads & Designers, Studio H-2.

Another men’s designer brand, SS Homme offer bespoke tailoring for both



STUDIO H-2



*“Any category of consumer products will see increase in off take as more brands enter the segment. Increased competition has only help expand the market and lead to an evolved customer. Discerning customers looking for international quality standards makes Zodiac the ideal brand choice given the Indian price value which remains unmatched in this segment”*

SALMAN NOORANI, MD &amp; President, Zodiac

western and festive Indian styles, and all products are exclusively designed by Sarah and Sandeep Gonsalves, Co-Founders & Directors of SS Homme. “We are a one-stop shop for all formal men’s wear products. In terms of fastest moving products, our bespoke festive tuxedos are performing exceptionally well. We also have several requests for our Indian classic sherwani designs with our signature detailing and silhouettes,” shares Gonsalves.

Acknowledged as one of the largest and leading men’s fashion houses in India, Zodiac caters to the premium and super premium categories in suits and jackets. The brand’s offering in this segment is crafted from ultrafine light weight super 180s, 160s and 140s pure wool – wool silk and wool Mohair blends. It caters to four distinct looks for customers – Classic, Dark Dressing, Ceremonial and Black Tie. “Zodiac is primarily in the business wear category with fine pure wool suits and in the occasion wear segment with bandgalas. Ready-to-wear suits and jackets in pure wool still appeal to a very niche segment in India. However, as we have seen in ready-to-wear shirts

over the past 20 years, the Indian consumers will get more discerning as his exposure to international brands, clothing and trends increase,” says Salman Noorani, MD & President, Zodiac.

“There has been a steady growth in this segment and that comes from demand of quality product from men clientele. Usually they do not want to compromise on the quality or the final product. That’s how the premium and super premium segment is seeing an increase in sale and client base,” expresses Manoj Mehra, Managing Director, Study By Janak. The brand offers ready-to-wear shirts, trousers, blazers, made-to-measure suits, bespoke suits, bandgalas, sherwanis and kurtas. “The fastest moving products are the Indo-western fusion line, as that’s where maximum innovation is seen in terms of drapes, cuts and fabrics.”

### The Market

Men’s occasion wear has gained significant traction in the market due to the rise in celebrity and social media influencers. Male brand ambassadors are setting benchmarks related to





***“We believe that our bespoke consultation process is a major asset and we keep working on the same with our team to ensure the best possible consultation. The challenge is to keep the team updated with the right design and tailoring trends at all times so they can communicate with customer which in turn allows them to take a well-informed decision”***

**SANDEEP GONSALVES,**  
Co-Founder & Director, SS Homme

occasion wear and wedding wear styles and designs in the minds of the millennial generation. As a result, manufacturers are focusing on popular celebrities to be the face of their brands to improve brand awareness and increase demand for their designs. This is expected to propel overall market growth in the coming years.

According to a report the men’s wear market constitutes a big chunk of the total apparel market at 41 percent, where shirt category remains the largest men’s apparel category, followed by trousers accounting for 27 percent and 22 percent respectively. However, the suits/coats/ bandgala market is ~4 percent of the total men’s wear market.

Men’s wear market in India has seen a constant surge and Indian men not just want to spend but splurge on apparel, the trend is growing further and buoyed by the trend many international brands and Indian designers have

forayed in the men’s wear market. “Indian brands or even designers are facing fierce and stiff competition, but to beat that one has to offer ensembles that remain the best of quality and creativity, the consumer is always a king in a competitive environment and competition is always healthy if you take it in your stride,” says, Grover.

“The increased competition is mainly in the suits segment and that too at two levels. Firstly, there is ready-to-wear suits available at premium international stores like Zara or H&M and secondly there are luxury brands who are doing the suits, bespoke and traditional bandgalas. But when it comes to a traditional occasion wear pick, the indigenous brands are still way ahead,” opines Mehra.

However, Gonsalves says, “International brands in this segment are currently on the decline. They lack flexibility and are unable to cater to the needs of Indian consumers. As the consumer evolves, they expect the brand to evolve too and that can be an arduous process for international brands since they primarily depend on traditional practices.”





STUDIO H-2

As per Noorani, any category of consumer products will see an increase in off take as more brands enter the segment. “Increased competition has only help expand the market and lead to evolved customers. Discerning customers looking for international quality standards makes Zodiac the ideal brand choice given the Indian price value which remains unmatched in this segment,” he states.

**Product Innovation**

The men’s occasion wear market is highly penetrated and competitive with domestic players and fashion designers engaging in product innovations. They are focusing on improving their footprints by entering into new markets. Many local designers are driving the market by offering customised designs at a low price. In mature markets like metro and Tier I cities, manufacturers are adopting competitive price strategies to increase their sales.

“We are constantly innovating to make the experience better for the end-consumer. We believe that our bespoke consultation process is a major asset and we keep working on the same with our team to ensure the best possible bespoke consultation. In terms of design innovation, we work with the latest hand work techniques such as French knot embroidery and we are also experimenting with fabric manipulation on wool,” says Gonsalves.

“We have recently expanded our production unit to meet the



*“We have been focused on innovating not only the product but the entire experience starting from handling the client and production to the final product. When it comes to our products, the different set of drapes, usage of fabrics or detailing techniques, we work on each collection as a new benchmark for the season launch”*

**MANOJ MEHRA,**  
Managing Director, Study By Janak

exponentially growing demand. In terms of bespoke tailoring, we are frontrunners in our category since we adhere to the standards set by Savile Row tailors over the last two centuries. The bespoke market is growing consistently in India with consumers leaning towards customisation and personalisation for festive and occasion wear.”

Similarly, Study By Janak has also been focusing on innovating not only the product but the entire experience starting at handling the client, production and the final product. Infact, they were the first ones to get 40 Savile Row to India and are still following the guidelines of Savile Row tailoring. They launched it around eight years ago and are seeing a steady growth in the same. They are working on technique and software to give a complete bespoke suit experience on the fingertips. Mehra shares, “I

*The men’s occasion wear market is highly penetrated and competitive. Many local designers are driving the market by offering customised designs at a low price. In mature markets like metro and Tier I cities, manufacturers are adopting competitive price strategies to increase their sales.*



***“Indian brands or even designers are facing fierce and stiff competition, but to beat that one has to offer ensembles that remain the best of quality and creativity. The consumer is always a king in a competitive environment and competition is always healthy if you take it in your stride”***

**RESHMA AND BHARAT GROVER,**  
Creative Heads & Designers, Studio H-2

personally spearhead the design team of the men’s wear, as that is the core of the brand.” When it comes to products—the different set of drapes, usage of fabrics or detailing techniques — Study By Janak work on each collection as a new benchmark for the season launch.

“Zodiac is constantly looking at innovation and quality to bring perfection to its consumer,” says Noorani. All stages of the manufacturing process, across facilities, have recently been upgraded with the latest developments in automation and technology. From automatic spreading-and-cutting to auto sewing and material handling using Artificial Intelligence. This has resulted in eliminating subjectivity from manufacturing and planning, while capturing data in real time. Ensuring that the work in progress

SS HOMME



manages itself at the same pace as it is being manufactured, culminating in auto finishing. Thereby improving efficiency, productivity, and consistency of quality. The plant at Yelahanka, Bengaluru is CTPATT approved and was the first woven clothing facility in the world to be S.A. 8000 certified. Today, the facilities is a fully BSCI and Sedex compliant, with surveillance audits carried out regularly. Zodiac launched a bespoke and made-to-measure offering for the discerning customer of ‘limited edition’ shirts called Regale in ultra-luxurious Italian fabrics, the rare Sea Island Cotton 7 and linen from European Flax.

“Product innovation remains the main criterion for us and that goes through a transition in every season, we keep pace with global fashion trends before presenting new products in the market. Quality control, product innovation remain the core essence of our designs. We have always preferred to offer our clients in the store experience, feeling the texture of fabric, embroidery and seeing colour contrast, trying the fittings are very important factors before making the purchase decision,” concludes Grover.



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With a history that can be traced backed to the Indus Valley Civilization, the saree is one of the world's oldest and perhaps the only surviving unstitched garment from the past. This feature outlines how the changing personality of the Indian woman fueled the metamorphosis of this antediluvian piece of attire turning it from a modest traditional attire to a fashionable ensemble...

Ruby Kashyap Sood, Associate Professor, Textile Design, NIFT, New Delhi & Dr. Suman Pant, Professor, Faculty of Home Science, Banasthali University, Rajasthan

# WOMEN IN SAREES:

CHANGING CONNOTATIONS  
FROM THE 20TH TO THE 21ST CENTURY

The most distinctive dress that marks the identity of the Indian woman across the world is the unstitched draped garment, saree that is accompanied with the underskirt called the petticoat and a short fitted blouse, typically known as the 'choli'. The classic drape worn since the earliest times persists in modern India with evident changes accustomed to the women of today and their lifestyles.

The saree holds a special place for Indian women, gaining importance in different phases of their lives. In cosmopolitan India, the saree is symbolic of tradition and culture, donned on special occasions by young women on attaining adulthood, while graduating from school and later at the time of wedlock, when a young bride carefully selects sarees for her wedding trousseau. Sarees are a prized possession and have an emotional value, as mothers pass them on to their daughters as heirlooms. In the urban society, a saree is considered a formal ensemble, ideal for working professionals employed in the education, hospitality, health, media and allied industries. Women in politics follow the saree as their dress code, upholding Indian values and ethos. The versatile saree conveys a multitude of looks, from glamorous and opulent, mature and professional to ceremonial and culturally intrinsic to India.

Over the years and significantly in the 20th century, the saree attire has evolved and new trends have been set by Indian icons from different walks of life that have trickled down to the masses. The changing persona of women and their status in society and interrelated influences have impacted the saree fashion at a particular time.

### Being Social

It is believed that the saree worn in its present form, with a fitted blouse and petticoat became prevalent in the beginning of the 20th century. It was during the British rule that a large number of Indian women made modifications in their saree drape as well as added an underskirt worn beneath the saree and a blouse that integrated elements from the Victorian dress such as lace edgings and trims like frills, ruffles and pleats. The change in the saree ensemble was an attempt to conform to the new rules of modesty prescribed by the missionaries and in accordance to the European fashion. The western inspired blouse was readily adopted by the educated elite women of Bombay and Calcutta. An important icon of this period was Jnanadanandini Debi, Rabindranath Tagore's sister-in-law and wife of Satyendranath, the first Indian who joined the Indian Civil Service, who took inspiration from the Parsi ladies in Bombay, and introduced the new style of draping the saree, the nivi-style that was a precursor to the modern day saree drape, teamed with a blouse and petticoat.

The changes in the socio-political environment led to increasing participation of women in different fields, including music, dance and theatre. In the early 20th century, the socially active royal Indian women altered their attire, in order to emulate European fashion trends, yet retain the traditional character of the saree. It was the Maharani of Cooch-Behar, Indira Devi, who pioneered the trend for pastel coloured, sheer chiffon sarees, teamed with sleeveless blouses. Subsequently the Maharani's daughter, Gayatri Devi, Maharani of Jaipur popularized the trend among the royals and the crème de la crème.





### **The Nationalist**

In the wake of the Indian freedom movement, Gandhi introduced 'khadi' to the nation, as a symbol of nationalism, thereby discouraging the use of foreign fabrics and goods. The father of the nation motivated Indian women to adopt the plain 'khadi' sarees and become a part of the 'swadeshi' movement. The committed women freedom fighters in 'khadi' sarees worn with simple, loose styled blouses served as a marker of national identity communicating a strong message supporting the freedom movement and endorsing indigenous materials.

### **The Working Woman**

Post-independence, women got an opportunity to work outside their homes, thereby giving a boost to their economic status. The working women and their increasing participation in outdoor activities like social get-togethers implied an array of clothing styles. The alleviation of the economic and social standing of the women impacted the saree and blouse, which became more trendy and contemporary in nature.

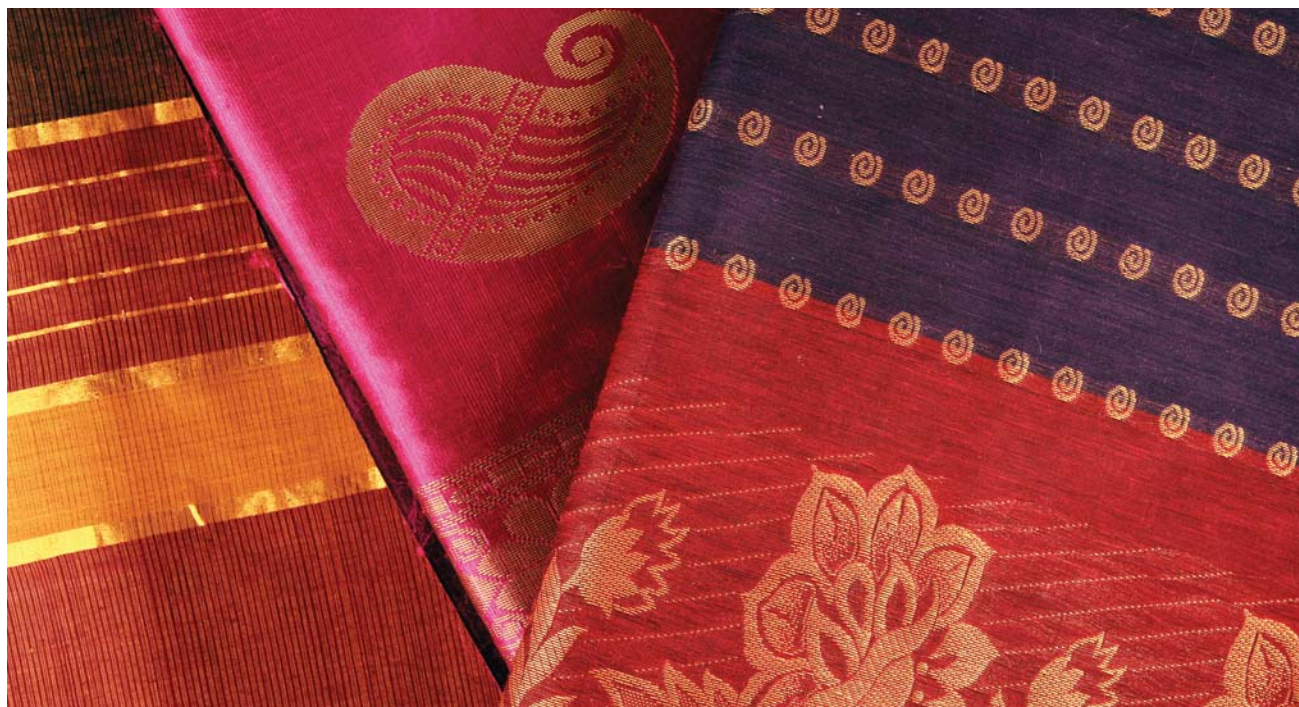
In post-independent India, though industrialisation ushered in mill-made sarees, the Indian Government made concerted efforts to promote the regional handloom sarees and fabrics. Hand woven sarees from different regions of India were also endorsed by eminent women like Puppul Jayakar and Indira Gandhi. In the fifties, political leaders, literati and artists favoured the hand woven sarees, while others wore mill-made sarees with mismatched blouses.

### **The Cinema Buff**

The 1960s witnessed the growing trend of the working class women, who were acquainted to latest fashion through different media, predominantly Hindi cinema as well as English films, and fashion magazines like Femina. During this era, joint fashion shows and beauty contests were conducted, followed by participation of winners in international beauty competitions. Exposure to western culture and fashion images brought about socio-cultural changes, influencing lifestyles and clothing styles of the urban women.

Indian cinema was a dominating factor that became an important means of recreation. The newly styled saree drapes with sleeveless blouses donned by the leading ladies on the big screen were gradually adopted by the masses. Innovative saree styles like stitched saree worn by Asha Parekh in





Hindi film 'Do Badan' and hipster saree sported by Mumtaz in the movie 'Brahmachari' attracted the attention of the ladies and were copied precisely by the tailors.

#### **The Western Appeal**

The saree reigned supreme in the seventies and synthetic sarees became popular with the masses. The 100 percent polyester wash and wear sarees were manufactured and promoted by brands like Garden Silks, Bombay Dyeing, Khatau Group and Vimal by Reliance Industries. In this decade women were influenced by western trends, reflected in the styling of their saree blouse, baring the skin with sleeveless décolleté neckline, sleeveless or with deep cut armholes. The party goers were comfortable in halter neck blouses teamed with sheer georgette and chiffon sarees.

#### **The Ethnic Chic**

In the 1980s, there was a renewed interest in the handloom saree by the intellectuals, artists and politicians who understood the importance and uniqueness of Indian textile heritage. The preference for hand woven sarees over synthetic sarees was credited

to Indira Gandhi, the then Prime Minister, who wore exquisitely woven sarees from different states of India with a modest blouse that covered the midriff well. The former Prime Minister was also instrumental in organising festivals of India world-wide in order to promote the handcrafted textile traditions and the craftsmen. Film personalities like Smita Patil and Shabana Azmi also sported handwoven sarees. The eighties woman embraced ethnic fashion in an attempt to differentiate herself from the west. During this period fashion attained a new height owing to upward social mobility and the growing middle class consumers.

#### **Daring to Bare**

In the early nineties the onset of the satellite television led to the entry of foreign channels and hence exposure to global fashion. Around this time beauty pageants became more popular, following the achievements of beauty queens Sushmita Sen and Aishwarya Rai as Miss Universe and Miss World respectively. There was admiration for the young confident Indian women, who set forth new notions of beauty




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*The preference for hand woven sarees over synthetic sarees was credited to Indira Gandhi, the then Prime Minister, who wore exquisitely woven sarees from different states of India with a modest blouse that covered the midriff well. The former Prime Minister was also instrumental in organising festivals of India world-wide in order to promote the handcrafted textile traditions and the craftsmen.*

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and fashion, enthused by the west. The women of the nineties were comfortable to show their skins and flaunt their bodies.

The 1990s steered large number of Indian designers, who were talented and creative, displaying a wide variety of innovative styles to the Indian women who desired exclusiveness in their attire. Bollywood continued to be a key factor in impacting fashion trends and designers started playing the role of costume designers for Bollywood films, thus integrating Bollywood opulence with fashion. The saree attire gained prominence as a sensuous wrap that reveals as well as conceals.

#### Being Experimental

Fashion in the 21st century has transformed the saree ensemble, making it more glamorous and modern in its appearance. The new-age saree has inculcated interest in the younger generation who is keen to wear sarees with a blouse that is more westernized in styling. Leading Bollywood stars like Priyanka Chopra, Deepika Padukone and Sonam Kapoor dressed in stylish and innovative saree styles have impacted the new age women.

Contemporary designers have enthused unconventional ideas into the saree that are readily being accepted by the modern woman. Also the increasing numbers of working

women with high purchasing power are looking forward to innovation in saree designs.

#### The Transformation

The changing role and perception of women in society have prompted changes in the saree attire. The metamorphosis of the saree from a modest traditional attire to a fashionable ensemble is attributed to the changing personality of the Indian women. The contemporary woman does not mind to bare as she is particular about her fitness. She is well informed, well-travelled and financially independent, and is selective in her choice. The economically independent woman is aware of the latest trends and is able to make her own choice with ease. This is reflected in her clothing style, which is more personalised and innovative.

In the 21st century, an assortment of saree styles co-exist that are aptly selected by the wearer, based on her socio-cultural values, beliefs and customs. The preference for the saree is also related to the type of saree, fabric, style of draping, the occasion for which it is worn as well as the personality of the wearer. Deeply rooted in its cultural ethos, the contemporary young Indian woman prefers the saree on special occasions yet retains modernism by teaming it with a stylish blouse.



#### ABOUT THE AUTHOR:

**Ruby Kashyap Sood** is an Associate Professor in the Textile Design department at National Institute of Fashion Technology, New Delhi. Her areas of specialisation include surface design, textile art, craft studies and research methods. A Master's in Textiles and Clothing from Delhi University, Ruby has done research on traditional Indian textiles and costumes and has co-authored books titled 'Celebrating Dreams - Weddings in India' and 'Traditional Indian Textiles'.

**Dr. Suman Pant** is a Professor in Faculty of Home Science, Banasthali University, Rajasthan. Her specialization is in Clothing and Textiles. She has 30 years' experience of teaching and research. Many of her articles have been published in national and international journals and she is also member of various boards of universities.





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## WEDDING TROUSSEAU BRAND SASYA FOCUSES ON PERSONALISATION OVER EXTRAVAGANZA

Offering services in ethnic wear, wedding clothes, bespoke tailoring and prêt couture, Sasya is a one-stop-destination for occasion wear.

The multi-designer label store not only offers unique collections but displays exquisitely rare designer collections for men and women.

IMAGES Fashion Bureau talks to Rachit Agarwal & Mayank Agarwal, both of whom are Directors of Sasya, to understand fashion dynamics in wedding trousseau...

Rosy Sharma



Rachit Agarwal,  
Director, Sasya

Over one crore weddings take place in India every year spanning all sections of society. The wedding industry is estimated to be worth \$50 billion, a large percentage of which comprises of the apparel segment. Half of India's 1.3 billion population is under the age of 30, with high disposable incomes. This assured section of the population, so influenced by social media, want to plan their weddings and the frills that go with it - including clothes. Aiding these fashion conscious men and women in their wedding planning are e-commerce, social media influencers and fashion magazines.

In a freewheeling chat with IMAGES Fashion Bureau, Rachit Agarwal talks about the wedding wear market in India. The chat covers a myriad of topics including how weddings - and by default wedding clothes - are becoming so all-encompassing and how the Indian fashion retail industry is gearing up, revamping itself to cater to the growing demands of the Millennial generation with fashion, accessories and product innovation.

### Excerpts from the interview...

**How would you describe the wedding trousseau market in India today? Has it changed over the years?**

The Indian bridal wear industry is growing at a rapid rate and has the potential to become the largest wedding market in the world. Millennials aspire to look their best on their wedding day, and it is the retailer's

job to ensure they go the that extra mile to realise the shopper's vision of a dream wedding.

The wedding trousseau market has changed and evolved over the years. It has become more structured with people being more focused about buying things they want and need rather than going on an endless shopping spree. The bride and groom

are more aware and informed about their specific requirements and the options available, where comfort is more important than how heavy an outfit it.

Also, with the entry of e-tailing, social media and websites, blogs on vendors and service providers for anything related to a wedding, there are innumerable choices to consumers who are not restricted to their territory but have an entire globe of options at their doorstep.

The general assumption is that the wedding/festive season is principally the occasion wear season in India. What percentage of your annual work does this season constitute?

While the wedding/festive season is principally between October and December, but with destination weddings becoming so popular nowadays, the occasion is getting wider and widely distributed in the calendar cycle. The market has been showing good growth and our work has been increasing year-on-year. We make over 40 percent of our business between these months –from October to December.

**As, a designer and a specialised boutique, can you tell us about the main consumer segments that come to you?**

The consumers that used to come to us were the upper class and upper middle class but now we are also trying to provide smart, light and comfortable affordable fashion range to the middle/



*“The major factors which consumers and wedding trousseau buyers keep in mind are comfort and self-expression, with the adoption of prevailing fashion trends and style in the attire. The usability of the attire after the event on multiple occasions. And finally, the wedding attire falling under an affordable budget.”*

– Rachit Agarwal, Director, Sasya

aspiring class, which we hope would open more opportunities to serve a wider range of consumers.

**What do you think are the major influences while opting for wedding trousseau?**

The major factors which consumers and wedding trousseau buyers keep in mind are comfort and self-expression, with the adoption of prevailing fashion trends and style in the attire. The usability of the attire after the event on multiple occasions. And finally, the wedding attire falling under an affordable budget.

**Tell us about the most popular demands of your consumers. What are the latest trends in wedding wear today?**

The most popular demands we have been getting by both men and women are choosing comfortable and light

wear over heavy attire. The consumers, today, have become smarter and are aware of their moods and wants much more than before.

The latest trend in wedding wear today is that the brides and grooms are not restricted to wearing classics. They are open to trying new and fun ways of sporting clothes, something which is an extension of their personality and which makes them look unique and stand out. So, from adorning themselves with accessories, putting on funky shoes and wearing personalised clothes, the idea is to be in love with detail and personalisation.





**Tell us about the prevalent trends in terms of colours, silhouettes and embellishments.**

While the classic red colour holds its ground for the bride; and colours like light pink, fuschia pink, bottle green, gold and purple are all making way to the wedding outfits, grooms too are experimenting out with gold, beige sherwanis to match their beautiful brides. For other wedding functions, sophisticated pastels or neutrals like powder pink, ivory, lilac, ecru and silver are ruling the year. People are experimenting with silhouettes but at the same time, are keeping in mind their body type. The heavy embellishments have given way to light work and thread work embroidery and heritage embroideries are also making a big comeback.

**Whether for a client or for a collection, ‘the look’ is always critical. How do you go about designing and delivering ‘the look’ that goes for an occasion?**

The look for an occasion is governed by lots of factors such as season, colour trends, design and style trends, body type, theme of the event and most importantly comfort of the client. So, it is not a single factor but an amalgamation of a lot of things which are centered around the comfort of the client.

**What trends do you feel will emerge in the future?**

The trend that is already emerging and shall hold stronger is the revival of heritage craft techniques in a modern way with a mix and blend of fabrics and designs. While, new innovative and original ideas would never go out of trend, there would be more amalgamation of heritage embroidery with modern embroidery techniques

and styles. There would be emergence of more designers and designer labels.

**Can you share the most memorable occasion/wedding wear creations of yours?**

The most memorable wedding creations was the one where we developed same attire for the entire family for a special occasion with little changes as per their personalities in terms of colour or silhouette. It was not just heartwarming to see how a wedding brings the entire family together but was equally motivating and challenging to keep each outfit similar yet distinguished as per the personalities of the family members. So, it was designing for the entire family that became the most memorable creation for us as we also became a part of their wedding and story in a unique way.



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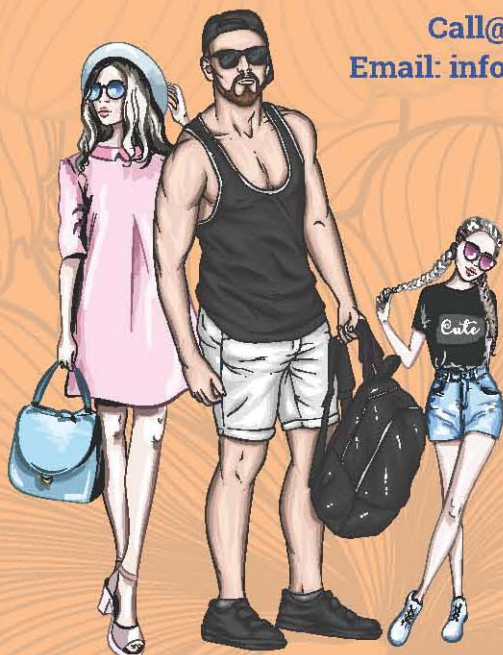
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# WOMEN'S FUSION WEAR

An Amalgamation of Style & Comfort

The women's fusion wear segment is an emerging market in India, the style evolving into a preferred choice of clothing for various occasions and festivities owing to advantages of abundant style and uncomplicated comfort. Unlike ethnic wear that sells maximum during festive and wedding season, the women's fusion wear segment remains in demand throughout the year, due to being more functional in nature...

Rosy Sharma with inputs from Gurbir Singh Gulati





AKS CLOTHING

Fusion wear or Indo-Western wear as it is commonly called, is fast catching up among women in the country. This rapidly emerging fashion category is revolutionising the country's occasion wear market, where it's embracing both the beauty of Indian traditional wear as well as the contemporary cuts of western wear.

According to Nidhi Yadav, Founder & Creative Head, AKS, "In the last few years, the fashion scenario in India has changed dramatically with fusion wear gaining immense popularity among urban women, especially working women. Today, women have more choices in their wardrobe with growing options like a long maxi dresses, skirts, crop tops, tunics, halter tops and sleeveless long spaghetti kurtas."

"The introduction of new concepts like corporate dressing and statement attires are the prime disruptors in the market," she adds.

More and more women are switching over to fusion wear like capes, lehengas, Indo-western tops, spaghetti kurtas, crop-tops, etc., for occasion wear and event specific dressing. Other ranges like A-line kurtas with pants or palazzos, flared fusion gowns and kurtis with saree-drapes, etc., are gaining popularity over traditional and voluminous attire.

Reinforcing the emerging trend Vikas Pacheriwal, Co-Founder, Raisin affirms, "The consumption pattern of fusion wear sees a tremendous demand throughout the year as women are incorporating Indo-Western wear in their everyday wardrobes. The fashion trend blends the sensibilities of Indian and Western styles that offer women a huge variety to choose from. Fusion wear also has the perk of looking good while being supremely comfortable."

"The perception of fusion wear has changed from being drab to being receptive to various trends and styles. This style has spread far and wide to such an extent that it has now become a distinct category in itself owing to its versatility and comfort," Pacheriwal states.

### Market & Major Drivers

Rising presence of women in workplaces, increasing participation in social and outdoor activities, growth of e-commerce and e-tailing, and influence of fashion and entertainment industries have significantly spurred the growth of fusion wear market in India.

According to Pacheriwal, one of the biggest drivers of the fusion wear market is the changing lifestyle of women. "With western elements influencing the fashion market, women are readily accepting these changes



AKS CLOTHING





**Vikas Pachariwal,**  
Co-Founder, Raisin

***“Fusion wear has pretty much revolutionised the Indian fashion industry with women increasingly demanding Indo-western clothing. The market is proposed to grow to twice its size by 2020”***



in the form of Indian fusion wear. There is also an increase in the female workforce which in turn leads to a higher disposable income. The younger population is embracing traditional wear by going for traditional styles wrapped in modern silhouettes which is the essence of modern fusion of wear,” he says, adding, “With all these things, the market is proposed to grow twice its size by 2020.”

#### **Why Fusion Wear?**

The target audience of most fusion wear retailers is the growing Millennial population. As per Yadav, the elegance of traditional Indian wear and the comfort and functionality of western wear have transformed salwars into

palazzos, churidars into leggings, patialas into skirts, kurtis into floor-length dresses and even tunics. “Women who spend a major part of the day in offices and outside prefer attire which ensure them both style and buoyancy. Fusion wear is the best to meet this changing demand in urban women in the age bracket of 25 to 40 – the segment’s major target audience.”

While the segment is proving to be a critical market for fashion-forward and spirited women in big cities, it has caught the fancy of women across all demographics, not liming the trend to metro and urban cities only. Women in Tier II & III cities are receiving quality education today, working in both the

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***“Fusion wear has gained tremendous popularity in India and the introduction of new concepts like corporate dressing and statement attires are the prime disruptors in the market”***

**Nidhi Yadav**, Creative Head and Founder, AKS

public and private sectors with immense exposure to social media. They have a good amount of disposable income and are increasingly experimenting with their outfits, visiting shopping malls in nearby cities specially to get ahold of fusion collections. Thus, a lot of brands – both online and offline – are targeting these potential customers.



RAISIN

“These young and self-dependent women are gradually changing into fashion-forward buyers and are latching onto fusion wear. They are internet-savvy and are buying all the leading fusion wears brands on various e-tailing sites like Flipkart, Myntra, Zivame and Craftsvilla,” says Yadav.

### **Future Prospects**

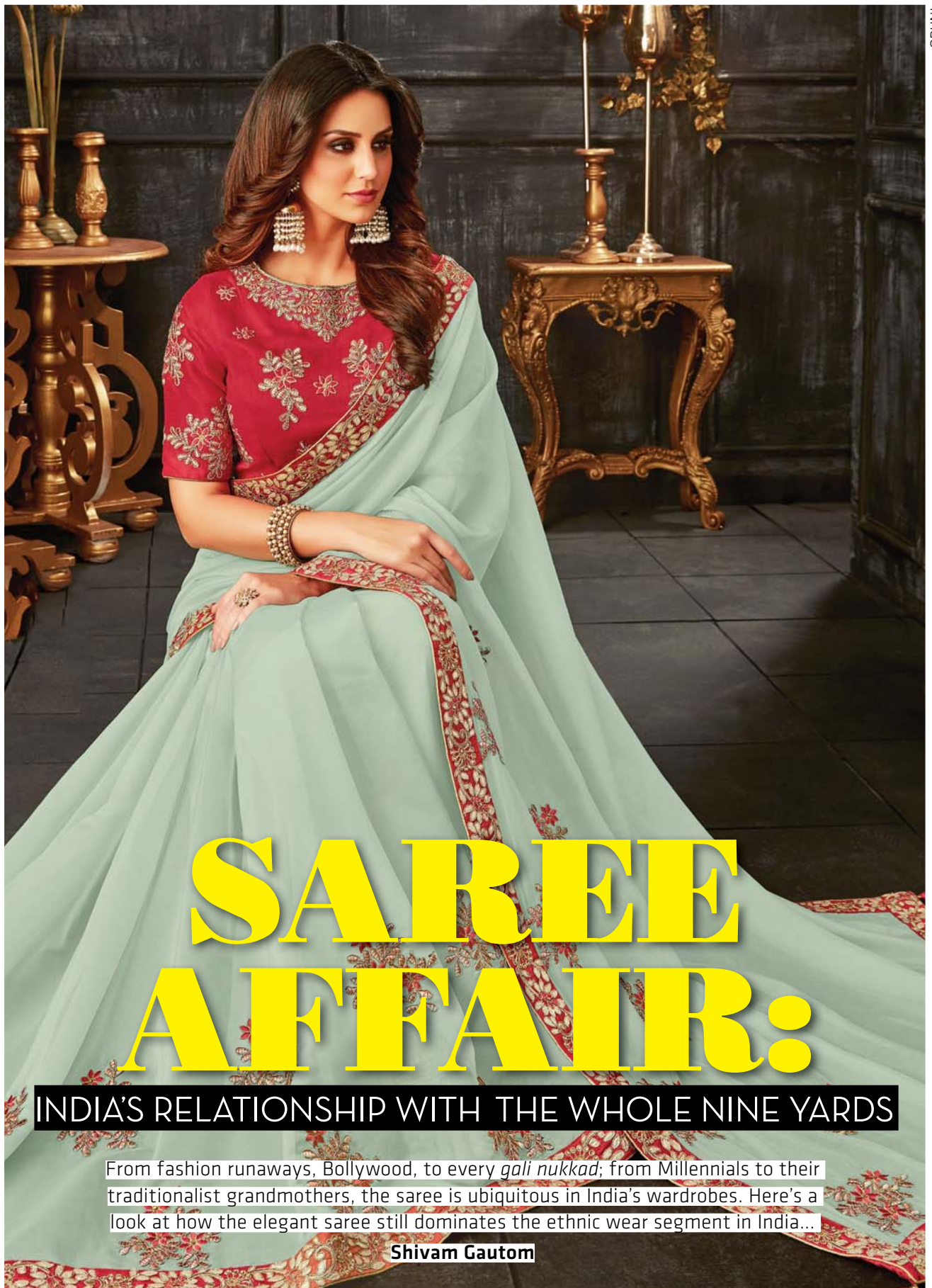
Fusion wear has now become an inseparable part of women’s wardrobe simply because of the variety they are available in as well as due to the fact that the clothes are comfortable, yet stylishly cut, designed for all occasions

“With a hike in women workforce in India, fusion wear has found a new demand for itself in the market that never existed owing to western formal wear being the prominent dress code for professionals. However, fusion wear is sure to continue to grow a lot in near future,” states Yadav.

“Fusion is an ideology that is being adopted across various sectors due to its tremendous potential, which goes for fashion too. Looking at how much it has to offer in terms of experimenting with different styles and statement looks women are looking for, fusion wear holds a great promise of growth in the coming years,” concludes Pacheriwal.



RAISIN STORE



# SAREE AFFAIR:

INDIA'S RELATIONSHIP WITH THE WHOLE NINE YARDS

From fashion runaways, Bollywood, to every *gali nukkad*; from Millennials to their traditionalist grandmothers, the saree is ubiquitous in India's wardrobes. Here's a look at how the elegant saree still dominates the ethnic wear segment in India...

**Shivam Gautam**



The saree is a wonder in itself. It's unarguably one of ancient most form of apparel known to humankind, with references of it dating back to the Vedas as well as records from the Indus Valley Civilisation. Yet, from fashion runaways, Bollywood to every *gali nukkad*; from Millennials to their traditionalist grandmothers, the saree is ubiquitous in India's wardrobes.

India is taking giant strides towards modernisation, yet the saree still holds its place as a key relic of the cultural representation of the Indian women. This versatile piece of fabric conveys a multitude of looks - from glamorous and opulent, mature and professional to ceremonial and culturally intrinsic to India. In cosmopolitan India, the saree is symbolic of tradition and culture, donned on special occasions as well as considered as a formal ensemble, ideal for working professionals.

The saree is also the sartorial testimony of India's overwhelming cultural diversity. The seamless piece of cloth is worn in over a hundred different traditional styles across different regions of the Indian subcontinent. The drape of the saree differs according to region, community, functionality and sometimes occasion. "Walk across the length and breadth of India and you're sure to see a million variations of the traditional Indian saree. From the prominent pallu used to cover the heads of women in the north to the unique drapes of the Kodavas in the south, from the lightweight Mangalgiris and Patolas to the heavy silk Kanjeevarams, India has a saree type for every region and culture," says Puneet Jain, Director, Odhni Sarees.

***"Even today, more than 70 percent Indian women wear sarees - if not daily, then at least on selected days and occasions ever year. Sarees are a significant contributor to the ethnic wear industry, that capture 71 percent market in women's wear segment"***

**Yatin Jain,**  
Director, Odhni Sarees

***"Pre-draped sarees and pre-stitched ethnic wear or readymade sarees, where pleats and pallus are pre-stitched, are more in demand and define modern fashion. Thanks to these hassle-free options, even the younger generation flaunts sarees not only on special occasions but for daily wear as well"***

**Puneet Jain,**  
Director, Odhni Sarees

### **The Saree Market: Gaining Momentum**

Even today, a majority of the women in India wear sarees, and it still is considered as a primary piece of clothing even in modern wardrobes. Sarees are a dominating segment of the Indian fashion industry and account for about 71 percent of the biggest retail segment in women's wear segment, ethnic wear. "Today, more than 70 percent Indian women wear sarees - if not daily, then at least on selected days and occasions ever year. Sarees are a significant contributor to the ethnic wear industry, that capture 71 percent market in women's wear segment," says Yatin Jain, Director, Odhni Sarees.

According to the Aditya Birla Group, the retail value of the women's wear market in India is estimated be around ₹122,600 crore (US\$ 19.2 billion) in 2017, of which saree alone contributed nearly 33 percent amounting to



IITAN





***“The fabric that enjoys most demand for us is silk. With the varieties in design and composition, silk is no longer restricted to a particular community. It is being worn by people all across the country and globally as well”***

**Rachit Agarwal,**  
Director, Simaaya

nearly ₹38,000 crore, this segment is expected to grow at a CAGR of 5 to 6 percent between 2018 to 2023 owing to increasing demand for the saree from various segments across the nation.

Increasing disposable income and increasing penetration of e-tail are touted to be the most influential game changers of the saree market in recent times. “With increasing disposable income of middle class, increasing penetration of e-tail and acceptance of designer wear, the Indian saree market has expanded its consumer base. The consumer is smarter with the increase in the availability of options in style and price points to them. The exposure to social media through smartphones ensures everything is at the consumer’s fingertips. The end result –fashion trends reach people at lightning speed,

penetration of the internet is increasing day by day in the hinterlands of the country, it is opening new revenue pockets for stockholders in Indian saree industry. Brand awareness is also increasing among this consumer base and hence they are exploring options based not only on the value but also on the brand.

“Our online category has been doubling in revenue since inception; and last year we tripled in revenue from the year before,” reveals Lavanya Nalli, Vice-Chairperson, Nalli in a clear testimony on how e-commerce has been successful in breathing life in the Indian saree market.

### **Changing Preferences**

Over the years, both the saree market as well as the sartorial preferences have been subjected to massive metamorphosis. Indian consumers are today, embracing the idea of fashion as a self-expression and are welcoming fusion and comfort even to their sarees. Talking about the shift in consumer preferences, Jain from Odhni Sarees states, “Customers have become very



becoming fads faster than ever before,” points out Mayank Agarwal, Director, Simaaya.

The Indian saree market is dominated by rural market accounting for nearly 60 percent of the overall saree consumption. This is why, the online market is one of the major reasons in the growth of sarees in India. As the



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**According to the Aditya Birla Group, man made/blended materials now account for nearly 72 percent of other overall market with cotton accounting for 26 percent whereas silk contributed nearly 2 percent of the overall consumption of fibres. MMF and blended fibre gained popularity due to it better appearance and lower cost as compared to cotton and silk.**

choosy about designs and variety today. The saree market, as a whole, has improved incredibly, and these days, women have more options than ever. Pre-draped sarees and pre-stitched ethnic wear or readymade sarees, where pleats and pallus are pre-stitched, are more in demand and define modern fashion. Thanks to these hassle-free options, even the younger generation flaunts sarees not only on special occasions but for daily wear as well.”

When it comes to fabric, cotton used to be the most popular material for the saree traditionally. But over the period preference has changed. According to the Aditya Birla Group, manmade/blended materials now account for nearly 72 percent of other overall market with cotton accounting for 26 percent whereas silk contributed nearly 2 percent of the overall consumption of fibres. MMF and blended fibre gained popularity due to it better appearance and lower cost as compared to cotton and silk, however with changing climatic condition lead to demand for skin friendly apparels and increasing disposable income women’s are preferring sarees made of silk or other similar fibre such as viscose.

“The fabric that enjoys most demand for us is silk. With the varieties in design and composition, silk is no

longer restricted to a particular community. It is being worn by people all across the country and globally as well,” says Rachit Agarwal, Director, Simaaya.

Echoing similar sentiments, Yatin Jain states, “Silk-based fabrics, brocade, and weaving fabrics are the most demanding fabrics in sarees. Customers look for fabrics which ensure elegance as well as comfort.”

Cotton sarees is expected to witness a growth of ~6 percent while demand for viscose fibres in sarees is expected to grow by nearly 8 percent between 2018 to 2023.

### Evergreen Trends

Although both the market and the consumer have evolved tremendously over the years, the simple nine-yard saree still rules the roost, experts point out. “Personally, I believe wedding related sarees are always in demand. In addition, newer innovations, be they fabric innovation (e.g., modal silk) or weaver-innovation (e.g., banarasi designs appearing on Kanchipuram sarees, linen bodies with Kanchipuram silk borders and pallu) also enjoy strong sales,” reveals Lavanya Nalli.

Talking about the recent trend in Sarees, she adds, “We see two distinct phenomena -- there’s a lot of work by saree historians and revivalists, trying to bring back some of the traditional motifs and designs of yesterday. At the same time, we see a lot of innovation and cross-inspiration between the





*“Wedding related sarees are always in demand. In addition, newer innovations, be they fabric innovation (e.g., modal silk) or weaver-innovation (e.g., banarasi designs appearing on Kanchipuram sarees, linen bodies with Kanchipuram silk borders and pallu) also enjoy strong sales”*

Lavanya Nalli, Vice-Chairperson, Nalli

## THE SAREE STORY

- According to a household survey by NSSO in 2017, more than 90 percent of the households in Karnataka, Andhra Pradesh, Chhattisgarh, Tripura, Odisha, West Bengal, Bihar and Meghalaya purchased one or more sarees in the previous year, showing more popularity of saree in these states.
- The same survey also found less than 60 percent of the households in Rajasthan, Punjab, Haryana, J&K, Himachal Pradesh, and North Eastern states reporting purchase of one or more sarees in the previous year.
- In the women's wear market saree is by large the most popular outfit in the nation. Retail value of women's wear market in India is estimated be around ₹122,600 Crore (US\$ 19.2 billion) in 2017, of which saree alone contributed nearly 33 percent amounting to nearly ₹38,000 Crore, this segment is expected to grow at a CAGR of 5-6 percent between 2018 to 2023 owing to increasing demand for the saree from various segments across the nation.



different designs and techniques from various regions. Plus, we see more contemporary designs turning up on saree borders or pallus too.”

Keeping with the trends in ethnic wear, the younger generation are even spicing up the saree with a western twist to it. “The most recent trends are fusion of the saree with western formal silhouettes like pants, skirts, palazzos, denims and even crop tops to having pockets and belts in sarees. But the best thing is that the classic saree still remains in demand and trend forever,” reveal Rachit and Mayank Agarwal.

### The Future

According to experts, the overall demand for sarees is expected to

remain significant. Despite the expected shift from saree to salwar kameez or western wear in urban and semi-urban markets, saree is expected to still remain as the predominant category among elderly and middle-aged women across urban and rural India.

“The women's ethnic wear market including the saree market shall continue to see growth in the next 5-10 years. The demand will be for good-quality, affordable fashionable wear. The market trends are moving back to the roots with growth to be seen in heritage fabrics and motifs and embroidery. The future looks competitive yet bright and growing,” conclude Rachit and Mayank Agarwal.





# FASHION *CREATION*





# KOMPANERO

## Launches New Autumn-Winter Collection 2019

Its new and exciting range flaunts clutches, wallets, handbags, messenger bags, sling bags and cross-body bags in the brand's signature chic yet vintage and weathered look...

IMAGES Fashion Bureau

Premium leather bags and accessories brand, Kompanero has launched its Autumn-Winter Collection 2019. Its new and exciting range flaunts clutches, wallets, handbags, messenger bags, sling bags and cross-body bags in the brand's signature chic yet vintage and weathered look.

Contemporary, modern and classy, the premium brand's new Mandala line is inspired by Mandala art, an ancient art form based on complex, abstract circular designs. The bags in this range are hand-painted, premium Italian leather (₹6,000 to ₹13,000). The Macrame range boasts an elaborate woven pattern of lace-like webbing and is entirely handcrafted (₹6,000 to ₹10,000).

Kompanero's Tessere bags are also woven, with a two-tone effect and embroidered shoulder straps (₹12,999). Amalfi mirrors the fun vibe of the

colourful, pretty and petite coast in Italy. The bags here have a minimal design with a pop of colours, all studded around the corners and are perfect for casual occasions (₹4,500 to ₹10,000). Finally, the brand's Coachella range embodies the spirit of the Coachella music festival and celebrates youth. These bags have special eyelet weaving and are a perfect accessory for concerts and outdoors events (₹4,500 to ₹6,000).

Inspired by the Spanish word that means 'companion', Kompanero reflects the closeness of the arm-in-arm representation. The premium brand's bags are made from naturally tanned leather and are a modern version of traditional leather designs. The brand's special appeal also comes from its penchant for natural, sustainable materials and preference for handcrafting.

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## IMAGES BUSINESS OF FASHION



**WINTER WEAR SPECIAL** Winter is hands down the most fashionable season. It is so much easier to be fashionable during this time of the year – mix and match, layer it up or improvise! Winters make colors more fun than summers – the brighter they are, the warmer they look.

In keeping with this trend, the winter wear market in India, the once necessity-based market, has now morphed into a very lucrative segment.

### HIGHLIGHTS OF THE ISSUE

- >> Market Size and Growth rate
- >> Key Categories - Jackets, Sweaters, Sweatshirts, Thermal Wear, Socks, etc.
- >> Key Factors Driving the Market
- >> Key Trends
- >> Opportunities and Bottlenecks
- >> Competitive Landscape and Key Vendors

*The December issue of IMAGES Business of Fashion maps the exponential rate that the market is evolving presently and chalk out the opportunities that it has to offer to brands, retailers and all stakeholders of this segment.*



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## DUKE LAUNCHES NEW AW-19 COLLECTION

Exquisitely crafted collection strikes a fine balance between eye-catching style and immense comfort...

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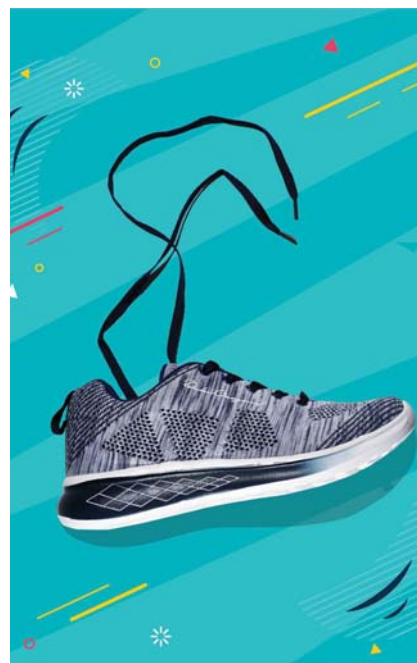
**D**uke enters Fall 2019-20 season with its unique soft wear clothing – a curated collection of super soft garments for men, women and kids; engineered to fit to perfection. Offering an opulent yet edgy touch, this season, it's all about good fits that let you live, work, play and move in total comfort.

The brand's latest Autumn-Winter 2019 collection emulates the ideology of the youth whilst injecting a hip exuberance in its latest collection. Inspired by vast and vibrant heritage of colours, textures and prints juxtaposed with western cuts, the collection is fun, fashionable, quirky and riding high on international appeal. Crafted for every young fashionistas, the collection promises to bring alive their individual style statements.

The collection presents iconic garments with classic silhouettes, as well as innovative pieces with advanced technical features. The collections for men, women, and kids have been developed in sync with global trends and is priced attractively between ₹849 to ₹4,999. Heat retention sweaters, performance polos and bomber jackets are just a few of the items that make this collection unique and purposeful.

“With a strong focus on fashion and style, Duke caters to the young cosmopolitan Indian offering them the season’s latest trends and catering to their ever-changing fashion needs. We

are always looking towards products that can deliver a high degree of style and quality. Our target audience is today’s youth who is looking for trendy and stylish range that is sync with international designs, fashions and quality. Duke is a value for money brand and our mission is to make available the international designs and styles at highly reasonable prices. We see it as our duty to provide our customers the inspiration they need to look and feel confident. Our Autumn Winter’19-20 Collection is also based on the same philosophy,” said Kuntal Raj Jain, Director, Duke Fashions (I) Ltd.



***“We are always looking towards products that can deliver a high degree of style and quality. Our target audience is today’s youth who is looking for trendy and stylish range that is sync with international designs, fashions and quality. Our Autumn Winter’19-20 Collection is also based on the same philosophy”***

- Kuntal Raj Jain, Director DUKE

### **ELEGANT RANGE OF FOOTWEAR BY DUKE FASHIONS**

Duke launched its premium footwear collection 2019 which is inspired by the defining trends of international fashion which guarantees you fashionable, latest and elegant styles with international designs. Offerig the collection under Life Style Shoes, Sports & Running Shoes, Loafers, Joggers, Smart Casuals, Driving Shoes, Sock Shoes, Tesla Shoes, Chelsea, Derby, Monks, Sneakers, Moccasin, Mid Top Ankle, Sandals and Flip Flops, they are priced attractively between ₹399 to ₹3,999.

Full of trendy tones and pops of colours, the range reflects modern sensibilities, new innovations and the best of youth fashion. Every detail is carefully produced with the care of Italian craftsmanship and also the collection has a loving, detailed branding. With their casual look, high wearing comfort and classic sole, these shoes can be combined easily with any outfit.



# WINGS4FASHION:

## CELEBRITY DESIGNERS POONAM BHAGAT & PREMAL BADIANI SHOWCASE COLLECTION AT LONDON

IMAGES Business of Fashion



The world's fashion centre, London witnessed another International Fashion Event, Wings4Fashion in September on 14 and 15, 2019. Organised as a trade event and fashion show, the two-day long event observed various stakeholders including fashion incubators, mentors, trade buyers, bloggers and media during the event. The platform also allowed budding designers and brands to network and pitch for funding and mentoring support from the panel of successful fashion industry veterans and venture capital funds specialising in fashion industry. Curated by independent designer platform FatakaFashions.com, it exhibited collections of emerging Indian and global fashion designers and brands on an international level. The event is strategically organised during London Fashion Week, to get attention from the fashion fraternity present in London.

"The event proved to be the launchpad for the many UK-based as well as Indian fashion designers," said D Kadikar, Founder and CEO, Fataka Fashions. "Often the astronomical costs associated with the participation at fashion events discourage young designers. However, at Wings4Fashion we are providing them with the perfect

platform to showcase their collection in a fashion event at an international level. This is an attempt to bring forward the skillful designers of India and showcase their talent to the world."

One of the mentors and core members at Wings4Fashion, Premal Badiani, who is also an Indian-American haute couture and celebrity fashion designer stated, "We are aware of the problems and obstacles faced by fashion designers and fashion entrepreneurs in their first few years and this event will provide everything a fashion designer or fashion brand may need to succeed and grow in the fiercely competitive fashion industry."

Celebrity fashion designer and past member of Board of Governors for FDCI Poonam Bhagat, who showcased at the event and was also on the panel of experts said, "I am extremely excited at being part of this event which is a wonderful platform to showcase one's designs at an international event and also benefit from expertise of others."

×



*"Often the astronomical costs associated with the participation at fashion events discourage young designers. However, at Wings4Fashion we are providing them with the perfect platform to showcase their collection in a fashion event at an international level. I see a lot of potential in our Indian designers and have always desired to provide them with the right platform to grow and present their art. This is an attempt to bring forward the skillful designers of India and showcase their talent to the world."*

D Kadikar, Founder and CEO, Fataka Fashions.

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# Lakmé Fashion Week Autumn-Winter 2019

## SAROJ JALAN PRESENTS 'BANJI' COLLECTION

The collection exudes warmth and elegance along with capturing the romance of silhouette to exuberate the free flowing spirit of the modern Indian bride. The power to experiment, to have fun, be free-spirited yet remain stylish...

IMAGES Fashion Bureau

With 'Banji' at Lakmé Fashion Week, Saroj Jalan introduced a new dimension to her Autumn-Winter 2019 collection by recreating the bridal couture collection for today's modern Indian free-spirited yet rooted bride.

The collection exudes warmth and elegance along with capturing the romance of silhouette to exuberate the

free flowing spirit of the modern Indian bride. The power to experiment, to have fun, be free-spirited yet remain stylish. The garments combine simplicity with quality; the timeless volumes are updated with contemporary high-quality materials and finishes. The tailored silhouettes play on fitted v/s flavoured volumes and fabrics giving a sharp and sculpted look. The collection is constructed with an array of rich



fabrics brought to life using crafts and embroideries from various parts of India. It includes innovative pieces of textile like bandhej coupled with the Rajasthani dori work encapsulated in the beauty of Kashmiri Shikarga beholding the bold tenacity of appliqué and the serenity of the gulmarg tree patterns. The designer has used stones, beads in our work to form layouts that challenge the idea of textiles

being curated. The line incorporates fluid paneled skirts, as an ode to our traditional lehengas. The statement embroidered coats, with multi-materials and paneled belts. The ensembles thus comprise of corseted blouses, anarkalis, sarees, making it a go to couture wear for our bride.

Speaking about the collection Saroj Jalan said, **"This is a very special**

**collection as it's designed for the women of today who feel and believe that life is a fashion show and the world is our runway and so it's time to put the best foot forward. The collection is very detailed and it is a celebration of couture heritage, colours and the glamour of India in our style."**



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## HIGHLIGHTS OF THE NEXT MEGA ISSUE

**DECEMBER 2019: WINTER WEAR:** Winter is hands down the most fashionable season. It is so much easier to be fashionable during this time of the year – mix and match, layer it up or improvise! In keeping with this trend, the December issue of IMAGES Business of Fashion map the exponential rate that the winter wear market is evolving presently and chalk out the opportunities that it has to offer to brands, retailers and all stakeholders of this segment.

### KEY HIGHLIGHTS OF THE ISSUE

- >> Market Size and Growth Rate
- >> Ethnic wear market by consumer Men/Women/Children
- >> Trends in Key Categories - Jackets, Sweaters, Sweatshirts, Thermal Wear, Socks, etc.
- >> Key Factors Driving the Market
- >> Opportunities and Bottlenecks
- >> Competitive Landscape and Key Vendors

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