

**Images
Business of
Fashion**

IMAGES
BOf
Established 1992

VOLUME XXV
NUMBER 10
OCTOBER 2024

₹100
www.imagesbof.in



WINTERWEAR

*Heating Up the
Indian Fashion Retail Sector*

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Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Modest Print Pack (P.) Ltd. C-52, D.D.A. Shed Okhla Industrial Area Phase-I, New Delhi-110020 and published by S P Taneja from S-61 A, Okhla Industrial Area Phase - II, New Delhi. 110020 Editor : Amitabh Taneja

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Dear Readers,

While climate change may have shortened the winter season in many parts of India, the nation's fascination with winterwear continues to thrive. In fact, the fleeting cold months have only heightened the desire to showcase style through cosy, fashionable layers. From chic wool coats to vibrant knitted sweaters, winterwear has become a statement of both comfort and style. The seasonal shift has also given retailers a brief but intense window to captivate consumers, making winterwear a dynamic and essential segment of the fashion market.

As we herald the winter season, IMAGES Business of Fashion's October 2024 issue studies winterwear retail in India – a fast-growing sector, driven by seasonal demand and changing fashion trends. We study how the country's colder northern regions fuel higher sales during winter, particularly for products like jackets, sweaters, and thermal wear.

As per Technopak estimates, an upward trend was witnessed in FY2024, reaching \$3.91 billion, driven by expanding e-commerce, rising incomes, and the rise of value retail, which further boosted access to winterwear. By FY2025, the market is projected to grow to \$4.57 billion, with continued strong demand across all winterwear categories. In urban areas, rising middle class purchasing power have contributed greatly to this growth, with brands like Monte Carlo, Woodland, and Zara leading the market in premium winter apparel.

According to Maximize Market Research, India's winterwear market is expected to grow at a CAGR of ~10% over the next few years. Demand for sustainable winter clothing, such as jackets made from eco-friendly materials, is also gaining traction, as conscious consumerism becomes more prevalent in India's retail landscape.

Our October issue also explores how leading brands are leveraging cutting-edge innovations and solutions to enhance operational efficiency and elevate customer experiences, setting new benchmarks for the future of winter fashion retail in India.

As always, we hope you find this issue useful and informative. For a more detailed coverage of winterwear retail, log on to our website, www.imagesbof.in.



Amitabh Taneja



Winterwear in India – Chilling Out in Style

The winter season in India is not only a time for cosy evenings and festive celebrations but also a significant business opportunity for the fashion retail industry. The demand for winter clothing spikes in the northern states, with other regions across the country also seeing a steady increase in purchases.

India's Winterwear Market (FY2019 - FY2025, Projected 2032)

The winterwear market grew from \$2.83 billion in FY2019 to \$3.02 billion in FY2020, reflecting a 6.7% increase due to rising urbanisation, disposable incomes, and demand for fashionable and functional winterwear.

However, FY2021 witnessed a sharp decline to \$1.89 billion, primarily due to the COVID-19 pandemic, which severely impacted retail sales and consumer spending on discretionary items. As the pandemic subsided, the market began recovering in FY2022, growing to \$2.47 billion, with increasing demand for winter clothing as people returned to work, offline mode of learning and travel.

WINTERWEAR SPECIAL 2024:

COATING THE RETAIL INDUSTRY WITH CONFIDENCE

The integration of technology in winterwear has made it more functional and comfortable. The adoption of smart fabrics that regulate body temperature or include embedded heating elements is a niche trend gaining traction...

Madhulika Tiwari, Partner, Retail & Consumer Goods;
Parmesh Chopra, Head Content Writer, Technopak Advisors



WHERE FASHION MEETS FUNCTION: The Evolution of Winterwear in the Indian Market

The winterwear market is expected to reach an impressive USD 490 billion by 2033, underscoring the fusion of fashion and function that is redefining winter attire in India...

Kajal Ahuja



India Fashion Forum Innovators Club | Sustainability & Innovation Conclave

The recent Fashion Sustainability Conclave, held on October 3, 2024, at the ITC Maratha in Mumbai, proved to be a pivotal event in the ongoing dialogue about responsible fashion...

IMAGES Business of Fashion

In an era where sustainability is no longer a choice but a necessity, the India Fashion Forum (IFF) Innovators Club is at the forefront of driving responsible fashion creation. This industry-wide collaboration reflects a dedicated platform aimed at fostering sustainable innovation concepts while engaging stakeholders across the entire fashion value chain — from fibre to retail. The recent Fashion Sustainability Conclave, held on October 3, 2024, at the ITC Maratha in Mumbai, proved to be a pivotal event in the ongoing dialogue about responsible fashion.

The evening began with a welcome address by Dr. Naresh Tyagi, Chairman, IFF Innovators Club & Chief Sustainability Officer, ABFRL. This introductory session set the tone for an evening rich with insights and discussions that underscored the imperative of sustainability in fashion.

The event began with a panel discussion exploring materials and innovation for fashion. The discussion focused on materials and innovation for fashion. Moderated by Prem Sadhwani, Head - Business Development, Sanitized AG, this session featured industry experts

including Navneet Krishnan, Head -Brand Solutions, South Asia Archroma India Pvt. Ltd., Ritesh Sharma - Head - Brand & Retail R|ElanTM, Sucharu Uppal - Joint President - Brand and Retail Aditya Birla Group, Rishi Suri - Business Development Director (South Asia), The LYCRA Company. Together, they explored preferred sourcing strategies essential for ensuring the future resilience of the fashion industry.

Following this panel, Rishi Suri, Business Development Director (South Asia), The LYCRA Company presented insights on



‘ Innovative combinations such as fur-lined coats with detachable collars, jackets with faux fur sleeves and suede accents demonstrate our commitment to pushing the boundaries of design and providing our customers with truly unique pieces ’

Akhil Jain,
Executive Director, Jain Amar
(Parent Co. of Madame)

‘ We Use Innovative Fabrics & Technologies to Enhance Our Winterwear ’

Says Akhil Jain,
Executive Director, Madame

In a freewheeling chat with IMAGES Business of Fashion, Executive Director Akhil Jain discusses how Madame has seamlessly incorporated winterwear in its offerings – a category that has gained enormous traction over the years to become a bestseller...

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In the vibrant landscape of Indian fashion, where there is a plethora of trends to choose from, womenswear brand Madame encourages using fashion as a means of self-expression by offering looks for every season and styles for every reason. Madame, under the leadership of Executive Director Akhil Jain, has crafted a strategic vision with an aim to empower women through fashion. In an exclusive interview with IMAGES Business of Fashion, Akhil Jain shares how the brand has been instrumental in bringing about a revolution in Indian retail.

Along with revealing how every decision in Madame’s journey has been meticulously planned, contributing to the brand’s success, he also discusses how Madame has seamlessly incorporated winterwear in its offerings – a category that has gained enormous traction over the years to become a bestseller.

Excerpts from the freewheeling chat...

How do you balance functionality (warmth, durability, protection) with style in your product offerings?

At Madame, we have meticulously designed our winterwear collection to integrate functionality with contemporary aesthetics. Our designs are crafted to not only withstand the rigours of winter but also to exude a sense of refined elegance. We meticulously select materials that offer exceptional insulation, durability, and protection, while concurrently ensuring a luxurious feel.

Today’s discerning customer demands both form and function, and our commitment to providing cutting-edge designs and unparalleled quality reflects this understanding.

Our outerwear, in particular, is a testament to this philosophy, featuring clean, minimalist lines that lend a sophisticated edge. By incorporating insulating, sustainable fabrics, water-resistant technologies, and

How Versatility & Innovation Helped **Numero Uno** Metamorphose into a Complete Lifestyle Brand

Over the years, Numero Uno has transformed into a lifestyle brand, covering a wide range of apparel and accessories, an important part of which is the winterwear category – a natural extension for a denim brand...

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Numero Uno was conceived in 1987 with the aim of offering high-quality, stylish, and durable denim wear for the Indian market.

“Our mission is to create fashion that blends comfort, versatility, and sustainability, catering to a diverse audience. Our vision is to lead the industry in offering innovative, classic and fashion forward clothing that balances style with functionality, while maintaining our commitment to ethical practices and long-lasting quality and staying true to our core,” says **Jaiwant Singh Dhingra**, Director of Marketing & Business Development.

The brand’s target audience includes youth, working professionals and a loyal older generation, all of whom value versatile fashion that transitions effortlessly from day to night, while prioritising sustainability and durability even as they look stylish.

Over the years, it has metamorphosed into a complete lifestyle brand, covering a wide range of apparel and accessories, an important part of which is winterwear – a natural extension since denim and corduroy are excellent choices for winter bottom and top wear due to their heavier fabrics, providing warmth, functionality and durability.

Balancing Functionality with Style

By leveraging the right mix of advanced materials, fabric technologies, and purposeful design, Numero Uno ensures that its products are both functional and stylish, catering to the varied lifestyle needs of its customers.

“This balance is at the core of every collection we develop – key to delivering products that appeal to both the practical and aesthetic needs of our diverse customer base,” explains Dhingra.

Its approach focuses on using advanced fabrics, thoughtful design, and innovative technology to ensure warmth, durability and style come together seamlessly.



CANOPY

Pioneering Forest Conservation through Sustainable Fashion Retail Solutions

The organisation is working on an initiative called the CanopyStyle campaign, which collaborates with over 500 global fashion brands to eliminate the use of wood-derived viscose in fabrics, steering them toward more sustainable alternatives...

Kajal Ahuja

Non-profit environmental organisation Canopy, which works to protect forests, species, and climate by collaborating with the forestry industry, businesses, and communities was founded in 1999 by Nicole Rycroft. Canopy focuses on ensuring the sustainability of the world's ancient and most endangered forests. Its efforts include encouraging the fashion, packaging, and publishing industries to adopt eco-friendly alternatives to wood-based products, such as using recycled materials or innovative textiles made from agricultural residues. More notably, the organisation is working on an initiative called the CanopyStyle campaign, which collaborates with over 500 global fashion brands to eliminate the use of wood-derived viscose in fabrics, steering them toward more sustainable alternatives. Alongside protecting forests, Canopy hopes to protect biodiversity, reduce carbon emissions, and promote sustainable business practices.

In an exclusive conversation with IMAGES Business of Fashion's Kajal Ahuja, Canopy Founder, Nicole Rycroft talks about the organisation's unique approach, which combines environmental advocacy with business collaboration, and in doing so has gained recognition and widespread support from global brands.

Tell us about Canopy's mission to transform supply chains and what are the key milestones in this mission?

Canopy is a solutions-driven, not for profit organisation working to protect forests and reduce carbon footprint through transforming supply chains that currently drive deforestation and forest degradation. We work with 980 large corporate customers of the forest products industry which include companies like Walmart, H&M and LVMH – companies which use a lot of forest based textiles or paper based packaging for their production.

Our focus, as we work with brands is paper packaging, wood based textile viscose and Lyocell supply chains. The first thing we do is to ensure that the companies we work with no longer source from the world's most sensitive, high carbon, high biodiversity value forests. But that's a fairly low bar to set that we're just not destroying these most critical planetary life support systems. A large part of our work now, especially within the fashion space, is to really try and accelerate the transition to commercial scale production of these game changing, low carbonous, more circular, next generation solutions.

DUKE FASHIONS

Sets Its Sights on Sustainable Winterwear Expansion, Introducing Eco-Friendly Lines by 2025



Duke Fashions offers a diverse winterwear collection that includes sweaters and knitwear, featuring a mix of classic and contemporary designs...

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Leading Indian apparel brand Duke Fashions was established in 1966 and is known for its commitment to quality, affordability, and innovation. Starting as a humble journey in the hosiery industry, the brand has evolved to cater to the diverse fashion needs of men, women, and kids across India. The brand prioritises sustainability by sourcing eco-friendly materials and implementing responsible manufacturing practices. With a focus on inclusive sizing and customer feedback, Duke ensures a flattering fit for all.

“Our mission is to continue shaping India’s hosiery and apparel industry by delivering exceptional products setting new trends and inspiring our customers to express their unique sense of style,” says **Kuntal Raj Jain, Director, Duke Fashions.**

“At the heart of Duke’s vision is the goal to make high-quality fashion accessible to everyone, ensuring our products reach every corner of

PERGARN

Redefining Swimwear with Style, Inclusivity, and Innovation

Over the next two years, Pergarn plans to introduce active swimwear tailored for water sports enthusiasts, featuring performance-driven designs that provide greater support and durability...

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Founded in 2023, Pergarn is a home-grown swimwear brand that strives to revolutionise the swimwear industry by seamlessly combining style, comfort, and functionality. The brand is committed to creating designs that cater to a diverse array of body types and lifestyles, ensuring that its products meet the evolving needs of customers.

Mission and Vision

Discussing the brand's mission and vision, **Vickram KJ, Managing Director of Pergarn**, states, "Our mission is to empower individuals to feel confident and comfortable in their swimwear, whether lounging by the pool or engaging in water sports. Our target audience includes fashion-conscious individuals ranging from young adults to mature customers who value quality, comfort, and style."

Emerging Categories

Pergarn's key categories encompass swimwear for men, women, and children, and swim accessories such as cover-ups, swim caps, and bags. In the next two years, the brand plans to introduce active swimwear tailored for water sports enthusiasts, featuring performance-driven designs that provide greater support and durability. Additionally, Pergarn is looking to expand into shapewear and compression garments.

Product Innovation

To ensure product innovation, Pergarn utilises high-quality, stretchable fabrics that offer an optimal fit and support. Its trendy yet practical designs allow customers to enjoy their swimwear both in and out of the water.



From Mountains to Markets:

Columbia Sportswear's Rise in India's Outdoor Apparel Sector

Columbia Sportswear is popular among the Indian consumer for its innovative and technologically advanced products. Jackets, advanced thermal jackets, hiking boots, and outdoor pants are among its most popular categories...

Kajal Ahuja





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A legacy brand with 40 years of experience in retail furniture & fixtures manufacturing and installation. With a track record of successful furniture projects, our reach spans the length and breadth of India.

