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DRESSING GEN NEXT:

The Kidswear Retail Boom

Editor's Note

Dear Readers,

Picture a market buzzing with energy, fueled by a youthful demographic, families with rising disposable incomes, and an ever-growing appetite for stylish, branded children's clothing – this is what the dynamic kidswear retail segment in India looks like. As parents embrace the idea of merging fashion with functionality for their little ones, this sector is blossoming into a remarkable success story. IMAGES Business of Fashion's last edition of 2024 takes you on a journey into the vibrant and fast-evolving world of kidswear in India.

As per a Technopak study, the Indian kidswear market witnessed sustained growth, expanding from USD 5.22 billion in FY2023 to USD 6.3 billion in FY2024. The growth in FY2024 reflects the sector's positive momentum, further supported by the recovery of the retail environment and the shift in consumer behavior toward more fashionable, quality-conscious purchases. The December 2024 issue delves into the rapidly expanding segment driven by a growing inclination towards branded children's apparel in both parents and children.

The issue focuses on the increasing demand for sustainable and ethically produced clothing and how brands are responding to this demand. It also deep dives into the digital revolution and the proliferation of online shopping.

In conversation with market leaders, we decipher how social media marketing further amplifies brand visibility, shaping consumer preferences and driving engagement.

As the market evolves, challenges such as price sensitivity and regional diversity in preferences persist. However, the shift from unorganised to organised retail, along with the entry of international players, is setting new benchmarks in quality, design, and consumer experience.

We invite you to explore this comprehensive analysis and insights presented in this issue, shedding light on the opportunities and innovations shaping the future of kidswear in India. For more detailed information, visit our website at www.imagesbof.in.



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The Growing Kidswear Market in India: Trends, Insights, & Projections

The growing popularity of specialised categories like ethnicwear, winterwear, and gender-specific clothing has contributed to the sector's expansion, particularly in urban and semi-urban markets...

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

India's kidswear market is undergoing a significant transformation, fuelled by a combination of demographic trends, rising disposable incomes, and shifting consumer preferences. With over 30% of India's population under the age of 14, the demand for children's clothing is surging, positioning kidswear as one of the most rapidly growing segments within the broader apparel industry.

According to Technopak analysis, in FY2023, the Indian kidswear market was valued at ₹41,769 crore, approximately 11% of the total apparel market. This sector has demonstrated consistent growth, with a notable 11% year-on-year increase in FY2019. Although the market experienced a setback in FY2021 due to the pandemic, which saw a decline of over 27%, it rebounded swiftly in FY2022, with a remarkable growth rate of 41.4%. By FY2023, the market had shown further positive momentum, growing by 28.9%, signalling a rapid recovery and continued expansion.

A range of factors are driving this growth, including a shift towards premium and branded kidswear, the rise of online shopping, and increased fashion consciousness among parents. E-commerce platforms have emerged as key distribution channels, catering to the needs of tech-savvy millennial and Gen Z parents who seek convenience and variety. Additionally, the growing popularity of specialised categories like ethnicwear, winterwear, and gender-specific clothing has contributed to the sector's expansion, particularly in urban and semi-urban markets.



Small Threads, Big Style:

Exploring the Kidswear Market In India

With a retail value projected to rise by over 16% during the forecast period, the kidswear market in India is set to become a critical component of the broader retail landscape...

Ambuj Gupta, Group Manager, Consumer & Retail
Riya Tyagi, Business Analyst; Jagrit Vohra, Analyst, 1Lattice

India's kidswear market is experiencing a remarkable transformation, driven by demographic shifts, evolving consumer preferences, and a rapidly changing retail environment. With one of the youngest populations globally, India boasts a burgeoning middle class and a growing number of millennial and Gen Z parents who are increasingly willing to spend on high-quality, stylish apparel for their children. As a result, the kidswear segment is not only growing but diversifying, with a clear shift towards premium and sustainable options.

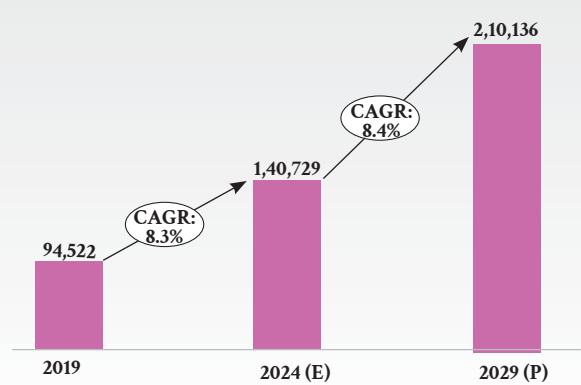
The market, which includes a wide range of categories from babywear to older children's fashion, is benefiting from the increasing influence of social media and celebrity endorsements, which have made trendy kidswear more accessible and desirable than ever before. Along with the growth of e-commerce, offline retail is also expanding to cater to the increasing demand, especially in Tier 1 and Tier 2 cities.

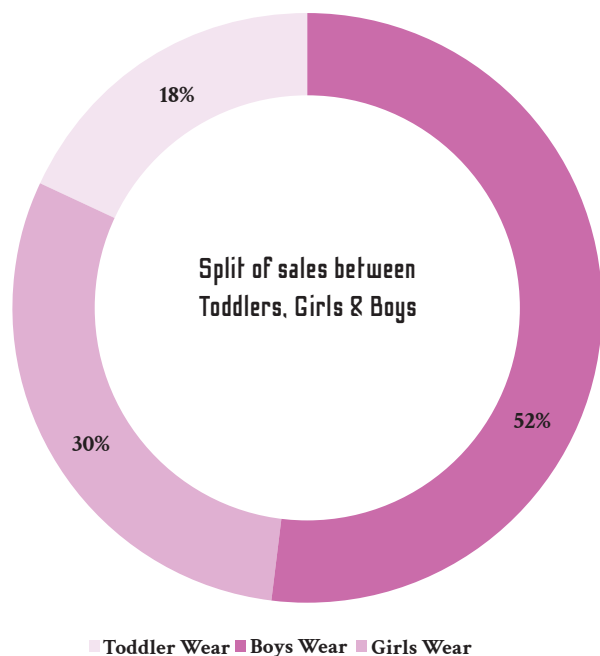
With a retail value projected to rise by over 16% during the forecast period, the kidswear market in India is set to become a critical component of the broader retail landscape. As we move forward, this market's potential is clear, with several opportunities for both established players and new entrants to capitalise on these trends.

Market Size of Kidswear in India
 India's kidswear market has been on a strong growth trajectory, reflecting the segment's expanding significance



India Kidswear Market Size [INR Crore]





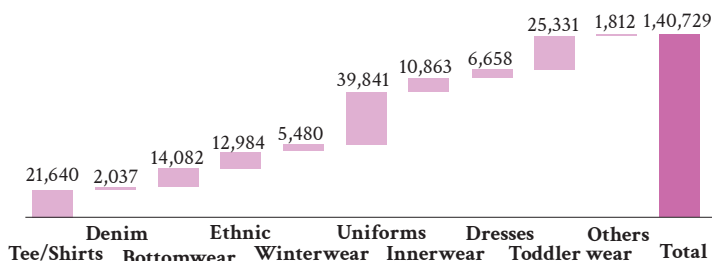
in the overall apparel industry. Valued at ₹94,522 crore in 2019, the market is estimated to grow to ₹1,40,729 crore by 2024, achieving a CAGR of 8.3% over five years. This momentum is expected to continue, with the market projected to reach ₹2,10,136 crore by 2029, maintaining a similar CAGR of 8.3% from 2024 to 2029. The sustained growth is driven by factors such as increasing disposable incomes, a greater focus on quality and branded clothing for children, and evolving consumer preferences toward style and comfort. As a result, the kidswear segment continues to offer significant opportunities for brands and retailers.

Categories of Kidswear

Kidswear comes in a wide variety of styles to suit every child's personality and comfort needs. From casual everyday outfits like t-shirts and denim to more formal wear like dresses and suits, each category offers something special for kids of all ages. It's important to pay special attention to fabric and softness, as children's delicate skin requires gentle materials that ensure comfort throughout the day. Whether it's the freedom of movement provided by shorts and joggers or the cozy warmth of sweatshirts, the options in kidswear are designed to keep children stylish, comfortable, and ready for anything.

- **Tops & T-Shirts:** Tops and t-shirts are popular for their comfort and style. Kids love their lightweight feel, and they are a versatile, unisex option, making shopping easier for parents
- **Denim:** Denim is beloved by kids for its stylish and cool look. However, the fabric can be a little too harsh for children under two years of age.
- **Bottomwear**
 - **Trousers:** Comfortable, unisex, and ideal for outdoor play, trousers provide protection for kids' knees and are a popular choice for casual wear.



















Category Market Size/Growth Projections in Kidswear [INR Crore]



- **Shorts:** A favorite among kids for their comfort and freedom of movement, shorts are perfect for summer play or evening outings and are equally loved by boys and girls.
- **Joggers:** Stylish and comfortable, joggers serve as a great alternative to regular trousers. They are perfect for lounging or outdoor activities and pair easily with most outfits.

- **Ethnic:** Ethnic wear combines tradition and style, offering kids comfortable and elegant options for festive or cultural occasions.
- **Winterwear:** Cozy, warm, and stylish, sweatshirts are a staple in kids' winter wardrobes. They come in various colors and designs, adding a fashionable touch to any outfit.
- **Uniforms:** Uniforms remain a core segment in kidswear, focusing on durability, comfort, and practicality for everyday school use.
- **Innerwear:** Innerwear prioritises comfort and breathability, ensuring kids feel secure and unrestricted throughout their active days.
- **Dresses:** Dresses are essential in kidswear, offering stylish options for any occasion, season, or event. Designs are crafted to prioritise comfort and adapt to different temperatures, ensuring the perfect fit for every situation.

Leading Brands in India Kids Wear Market by Retail Channel

Retail Channel	Brands
Distribution-led	   
Omnichannel	<div style="display: flex; justify-content: space-between;"> <div style="border: 1px dashed black; padding: 5px;">           <p style="text-align: right;">Indian Origin</p> </div> <div style="border: 1px dashed black; padding: 5px;">           <p style="text-align: right;">International brands</p> </div> </div>
D2C	   



Growth Drivers

There are many evolving drivers like parental shifts toward fashionable and high-quality clothing, the influence of social media, the rise of celebrity-led brands, and the growth of online D2C businesses, etc., that are shaping the future of India's kidswear market. Together, they present a promising future for the sector, one that is increasingly aligned with global trends and the evolving aspirations of Indian consumers.

The kidswear market is undergoing significant transformation, driven by evolving preferences of Millennial and Gen Z parents. With higher disposable incomes, these parents are prioritising stylish, high-quality

The rise of online and Direct-to-Consumer (D2C) brands is another growth driver, with brands like MiniKlub and Keebee Organics offering convenience, trust, and sustainability

clothing for their children, moving away from the practicality-focused approach of older generations. They are increasingly willing to invest in trendy, premium apparel, fueling the demand for fashionable kidswear. Social media platforms like Instagram and Pinterest are also shaping trends, as parents follow influencers and embrace concepts like twinning outfits with their children. Additionally, celebrity-led brands, such as Alia Bhatt's Ed-a-Mamma, are redefining the market by combining star power with robust distribution networks.

The rise of online and Direct-to-Consumer (D2C) brands is another growth driver, with brands like MiniKlub and Keebee Organics offering convenience, trust, and sustainability. Keebee's GOTS-certified organic cotton resonates with quality-conscious parents seeking safe, eco-friendly options. Sustainability has become a critical focus, as parents increasingly demand clothing made from organic, non-toxic materials. Brands like Keebee Organics and Cuddles for Cubs are addressing these concerns by using organic fabrics and azo-free dyes, providing safe, sustainable choices for children. This growing emphasis on style, convenience, and sustainability highlights a shifting paradigm in the kidswear industry.

ENHANCING FASHION RETAIL WITH AUTHENTIC SOCIAL CONTENT:

A Consumer-Driven Approach

Brands today are tapping into the power of user and creator-generated content, giving a voice to their consumers and creators. This authentic form of content has proven to resonate more with audiences compared to traditional advertising...

Zarina Lam Stanford, Chief Marketing Officer, Bazaarvoice

The fashion retail landscape is rapidly evolving, driven by changes in consumer behaviour and the proliferation of digital and social platforms. Today, online engagement shapes brand perception, and social content has become a powerful tool for influencing purchasing decisions. With

discerning consumers, brands must go beyond curated campaigns and embrace authenticity in their social media strategies. The article explores how consumer-driven content transforms fashion retail and why authentic engagement has become essential for success in the modern marketplace.

The Shift Towards Consumer-Centric Content

Consumers in today's hyper-connected world actively participate in brand conversations. Social platforms have facilitated customers to share experiences and opinions about products resulting in User-Generated Content (UGC) such as product reviews, unboxing videos, styling tips et al. This has significantly influenced purchasing decisions. UGC, unlike traditional advertising, provides real, unfiltered perspectives that resonate with consumers seeking authenticity. UGC has a wealth of benefits. It plays a crucial role across the entire consumer buying process, inspiring confident purchasing decisions at every step. This makes UGC a powerful asset for fashion retailers. Brands today are tapping into the power of user and creator-generated content, giving a voice to their consumers and creators. This authentic form of content has proven to resonate more with audiences compared to traditional advertising. Shoppers want to see UGC being shared by brands across their digital, social and physical touch points. This is why 82% of brands and retailers are moving or considering moving paid media budgets to owned and earned content creation.



SMALL SIZES, BIG BUSINESS:

Trends, Growth & Opportunities in the Indian Kidswear Segment

Valued at over ₹1.45 lakh crore (2023 estimates), the segment is projected to grow at a CAGR of 8-10%, outpacing other apparel categories...

Sandeep Kumar



From playful prints to sustainable fabrics, the kidswear market in India has evolved into a dynamic and thriving segment. Once considered a niche category, kidswear has now evolved to reflect the evolving preferences of millennial parents who value functionality, quality, and style for their children. Driven by the rising disposable incomes of young families, the expansion of e-commerce, and a growing emphasis on curated, child-centric lifestyles, kidswear has rapidly become one of the fastest-expanding segments in the Indian apparel market.

Market Watch

According to Technopak analysis, in FY2023, the Indian kidswear market was valued at ₹41,769 crore, accounting for approximately 11% of the total apparel market. The segment has shown a strong and consistent growth trajectory, with an 11% year-on-year increase in FY2019. While the pandemic caused a significant setback in FY2021, resulting in a decline of over 27%, the market demonstrated resilience by bouncing back in FY2022 with an impressive 41.4% growth rate. By FY2023, it recorded a robust 28.9% growth, underscoring the sector's rapid rebound and continued expansion. Valued at over ₹1.45 lakh crore (2023 estimates), the segment is projected to grow at a compound annual growth rate (CAGR) of 8-10%, outpacing other apparel categories.



PURPLE UNITED KIDS:

Redefining Premium Kidswear in India

Purple United Kids is set to scale new heights with its ambitious plans to open 100 new stores in the next two years...

IMAGES Business of Fashion

Launched in 2014, Purple United Kids has swiftly emerged as a leading premium kidswear brand in India. From its humble beginnings, the brand has expanded its presence both online and offline, steadily building a reputation for delivering high-quality, fashionable, and functional clothing for children.

Core Product Offerings

The product lineup includes versatile apparel, footwear, and accessories tailored for various age groups—infants, toddlers, and older children—alongside seasonal collections for summer, winter, and all-season wear. The brand's emphasis on fun, fashion, and functionality has struck a chord with quality-conscious parents who seek stylish yet practical options for their children.

"Embodying fun, fashion and functionality, Purple United Kids brings to life the story of a new-age child who is free-spirited, independent, and self-assured. From everyday wear to special occasions, Purple United Kids offers timeless styles that both inspire and delight," says Bhawna Seth, Whole Time Director, Purple United Kids.

The brand stands out in a competitive market by offering innovative designs and exceptional attention to detail.

Key Milestones in Purple United Kids' Growth Trajectory

- **2015:** Expansion into both offline and online distribution channels.
- **2017:** Strategic licensing agreements with Disney and Mattel for kids' footwear.
- **2019:** Opening of its first Exclusive Brand Outlet (EBO) in Delhi.
- **2020-2023:** Substantial retail expansion across Delhi NCR, Punjab, and Uttarakhand.
- **2024:** Transition to a publicly listed company, signaling its growing influence in the industry.



ZOIYA: A Revolutionary Leap Towards Sustainable Fashion

As India stands on the brink of a transformative wave in the fashion industry, a new brand emerges to lead the charge towards sustainability. Zoiya, an avant-garde label is not just reimagining the way we dress, but how we engage with the environment...

IMAGES Business of Fashion

India's fashion industry is set to undergo a significant transformation with the introduction of Zoiya, an avant-garde brand dedicated to sustainable living. This new clothing and accessories line, launched amidst great anticipation and fanfare, marks a turning point in how fashion is perceived and consumed in the country. Zoiya's core values are rooted in innovation, customer-centricity, and a steadfast commitment to sustainability.

A Grand Launch: Unfolding a Revolution

Zoiya's launch event, held on November 8th and 9th in Delhi, was nothing short of spectacular. Attended by industry leaders, environmental advocates, and fashion enthusiasts from across the globe, the event unveiled a vision that promises to revolutionise the textile and fashion industry. The gathering was a testament to the growing global recognition of sustainable practices and the role of fashion in driving meaningful change.

More Than Just a Brand: A Movement Towards Sustainability

Zoiya is not merely a clothing and accessory brand but a movement toward sustainable living and a healthier planet. The brand under the banner of HempClub aims to produce eco-friendly products crafted from natural fibres such as hemp, bamboo, and other plant-based materials. By doing so, Zoiya seeks to transform the textile industry, significantly reducing pollution, lowering water consumption, and cutting carbon emissions. It also promotes rural employment and boosts local economies.

The Visionary Behind Zoiya

Siba Panda, the driving force behind Zoiya, brings a wealth of experience and a unique blend of technical expertise and strategic vision. With over two decades of professional experience, he has

Mi Arcus

Mi Arcus, an Indian kidswear brand founded by Gian Singh in 2020, specialises in high-quality baby and maternity products. The name 'Mi Arcus', meaning 'My Rainbow', reflects the joy and vibrancy a new baby brings. The brand aims to address a gap in the Indian market by offering baby essentials that are safe, comfortable, and stylish.

Mission & Vision

Mi Arcus focuses on creating products that ensure safety and functionality for both babies and mothers. Gian Singh, Founder & Business Head, Mi Arcus notes, "There is too much choice and information when it comes to children's products. Faced with this pool of choices, parents constantly search for validation leading to additional stress. Taking this into consideration, Mi Arcus started with a vision to make the stressful life of today's parents easier."

"Our thoughtfully curated collection is designed for children between 0-6 years," he adds.

Core Product Offerings

Mi Arcus offers a diverse range of products, including rompers, sleepsuits, swimwear, jackets, thermals, and more. Mi Arcus's Autumn Winter 2024 collection has three subcategories:

- The Adventure Collection merges functionality with a stylish hiking aesthetic, perfect for outdoor activities.
- The Bonjour Collection channels Parisian chic with romantic soft pink hues, blending style with sophistication.
- The Neutral Love Collection incorporates calming palettes, reflecting strength and softness.



Environmental Impact

Sustainability is central to Mi Arcus's operations. The brand uses eco-friendly packaging and ensures ethical sourcing. It follows Indian government laws, including prohibitions against child labour and adherence to minimum wage standards. The company also uses Better Cotton Initiative (BCI) cotton, promoting sustainable farming and responsible resource management.

"We proudly use Better Cotton Initiative (BCI) cotton, a globally recognised standard promoting sustainable farming, better working conditions for farmers, and responsible resource management, reflecting our commitment to positive environmental and social impact," Singh stresses.

Seamless Omnichannel Strategy

Mi Arcus's omnichannel strategy goes beyond social media ads to engage customers across various platforms. A notable initiative is the launch of a real-life mascot, Zuzu the Koala, who travels to stores for meet-and-greets and activities. The brand also invests in print ads, cinema ads, mall branding, and digital marketing through Meta and Google.

"One of the most exciting aspects of customer engagement at Mi Arcus is the launch of our real-life mascot, Zuzu the Koala, who travels across stores to connect with visitors, fun activities, and selfie opportunities," Singh says, adding, "As an omnipresent brand, we are seamlessly integrated across retail and e-commerce platforms. We will soon implement an endless aisle solution, enabling customers to effortlessly place orders in-store and have them fulfilled through our warehouses or retail outlets."

Market Presence & Pricing Strategy

Mi Arcus's pricing strategy caters to middle-class and upper-middle-class families, especially in Tier 2 and Tier 3 cities, offering international-quality products at affordable prices. The brand operates 60 stores across 42 cities and provides a seamless shopping experience through its D2C website and leading online marketplaces like FirstCry, Amazon, Myntra, and more.

ARR & Expansion Plans

The company is on track to achieve an annual revenue run rate (ARR) of ₹65 crore by year-end. Mi Arcus aims for ₹100 crore in the next fiscal year, a 54% growth, and expects to reach ₹135 crore in the following year, a 35% year-on-year growth.

"Mi Arcus plans to open 100 new stores by the end of 2025, further strengthening its presence across India with a focus on existing and new markets, extending its reach to more cities and customers," Singh concludes.



PURPLE UNITED KIDS
PREMIUM FASHION



Fashion
that makes
you feel
Good

