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THE TROUSER SPECIAL 2017

- >> MEET THE QUEENS OF INDIAN FASHION
- >> IFF '17 CURTAIN RAISER

Dear Friends,

Trousers are not what they used to be during my younger years, to say the least. Infact the entire template of a trouser has changed. Back in the day, trouser referred to a simple, utilitarian pair of long legged garment reserved strictly for formal occasions. But today, the word trousers encompasses such a diverse array of bottom wear, that it reduces yesteryear's trouser to just a sexagenarian memory.

The trouser's market in India has seen a recent but significant preference shift. Yet, as claimed by designer Raghavendra Rathore in the report Bespoke Trousers in this issue, this wardrobe staple will still need 2-3 years in India to graduate to a central level of the wardrobe. This, actually, indicates to a healthy buzz in the trouser market which is picking up momentum rapidly. As sized by the experts from Technopak in the lead research, the bottom wear market excluding denims is estimated to be worth ₹39,022 crores in 2016 for men, women and kids. It is estimated that this market segment will grow at a CAGR of 10 percent for the next ten years and is estimated to reach ₹89,392 crores by 2026.

The trousers market in India is dominated by the men's segment which comprises around 72 percent of the entire market. But its the women's section, which only accounts for a meagre ~4 percent, that has outpaced the men's in terms of evolution. From fabrics, styles, fits, stitches, cuts to frills and silhouettes, the options and innovations in this segment is as vast as the

horizon itself. Also, the women's trouser category is expected to grow at a CAGR of 11 percent for the next decade in contrast to the men's segment that, according to industry experts, is poised for an 8 percent CAGR growth.

This issue also gives an insight on the prevailing trouser trends through two special features. In one, industry experts from Celio, ColorPlus, Indigo Nation, etc., talk about the latest domestic market trends and in the other, veteran fashionista Meher Castelino discusses the trouser trends and innovations off the Lakmé Fashion Week Summer/Resort 2017 runway. Also, present is an in-depth feature that traces the size, nature and future of the trousering fabric market as perceived by majors like Siyaram, Raymonds, etc.

Also, in commomoration of the International Women's Day, we talk to and present the journeys of a few eminent women entrepreneurs who have made lasting impressions in the fashion business.

Last but not the least, we present to you the India Fashion Forum 2017 curtain raiser, the mention of which, reminds me to invite you once again to this year's edition of the IFF which will be held at the Renaissance, Mumbai on the 12th and 13th of April 2017. Hope to see you all there!!

Cheers!



Amitabh Taneja

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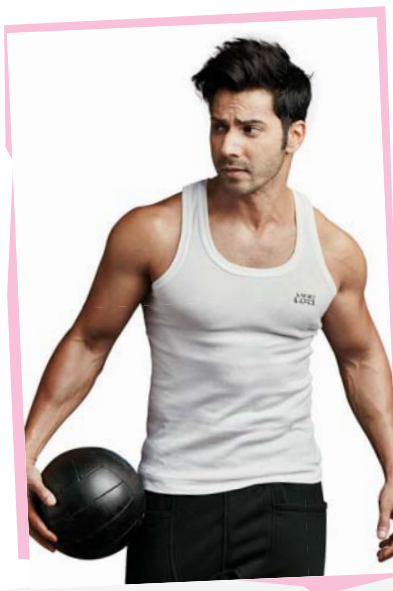
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CAMPAIGN

Lux Cozi's New Brand Campaign

Lux Industries have yet again created a buzz in the innerwear category by roping in Bollywood actor Varun Dhawan as its new brand ambassador.

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IFF CURTAIN RAISER

**India Fashion Forum 2017
Curtain Raiser**

Curtain raiser of India Fashion Forum 2017, April 12-13, Renaissance, Mumbai. IFF'17 will be a confluence of the four biggest determinants of success in the business of fashion in the post-technology age Analyticals, Buy Now, Compliance and Digital - sharply communicating the essential keywords through its customised platforms.

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FASHION QUEENS

The Women That are Defining Fashion in India

On the occasion of International Women's Day, IMAGES BoF showcases some of the most successful women leaders of fashion in India.

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- Apeksha Patel**, Proprietor, E2O Accessories & CEO, Deal Jeans
- Archana Kochhar**, Fashion Designer
- Farah Malik Bhanji**, Managing Director & CEO, Metro Shoes
- Jagrati Shringi**, Chief Technical Officer, Voylla
- Nidhi Agarwal**, Founder & CEO, Kaaryah
- Nina Lekhi**, MD & Design Curator, Baggit
- Rashi Menda**, CEO & Founder, Zapyle
- Ritu Beri**, Fashion Designer
- Ritu Kumar**, Fashion Designer
- Rosmin Kunnathottathil**, Co-Founder, The Lingerie Store
- Tanvi Malik & Shivani Poddar**, Co-Founders, FabAlley
- Vishakha Singh**, Founder, Red Polka





THE WOMEN THAT ARE DEFINING FASHION IN INDIA

*"When I dare to
be powerful, to use
my strength in the
service of my vision,
then it becomes less
and less important
whether I am afraid."*

- Audre Lorde

This aptly applies to the women who are leading fashion in India today. They are chartering new territories fearlessly. Women are proceeding with ingenuity and enthusiasm to change the world around them and make a difference with their ideas and insights, run successful ventures and generate employment for many. This generation has overcome many prejudices and notions, and has proved themselves in both life and enterprise. They are confident person and full of fire to take up the best of the opportunities and emerge the queens of the game. Their relentless zeal, incessant quench for success and willingness to make that extra effort, have broken all myths about their limitations that were supposed to be major obstacle on their way to success.

On the proud occasion of International Women's Day, which falls on the 8th of March, IMAGES BoF talks to some of the successful women in the fashion and allied industries, and celebrates the empowered ones, their achievements, their zeal, and their efforts. Our humble hope is that this inspires and entuses the next generation of women to look forward to fashion as their chosen field of endeavor.

We put forward a very elementary set of questions to all the fashion queens we feature here. And then we wondered what to do with the responses. Do we put the editors pen and bind their responses into one common story? We decided not to touch a thing and let our readers read every word they spoke. And we will just share one observation which is that the one clarion call that all sang in unison was that "Women Need to Believe in Themselves." Rest we leave it to the readers to enjoy the gems of wisdom and feel their passion for fashion and life.

FARAH MALIK BHANJI

Managing Director and CEO, Metro Shoes

IBoF: Tell us a bit about your background, education and first career steps.

Farah Malik Bhanji (FMB): Metro Shoes has been a family business for over 60 years. I have grown up visiting my grandfather sitting on the cash counter till in our Colaba, Mumbai showroom. Growing up like this has given me an intrinsic passion for footwear and retailing. When I joined the business after receiving a double degree from the US in Finance & Business Administration, I started my career in marketing. This gave me a ground level feedback on what it takes to create and sustain a brand. After a year, I took on leading our buying and merchandising verticals. During this journey, I initiated and implemented sourcing internationally from places like Brazil and China. I had the freedom to innovate and experiment for which I am grateful.

IBoF: Exactly when did you choose fashion as a career and how has your journey been so far?

FMB: As a young child, I remember spending a few weekends with my grandfather at our Metro Shoes store in Colaba. The business has always been exciting dinner table conversation in the family. Having grown up in this atmosphere, I was very excited to join.

IBoF: What are you most proud of achieving during this time?

FMB: The best of the achievements were the launch of MSL brand, launch of our e-commerce portal - www.metroshoes.net and our double digit CAGR for 5 consecutive years.

IBoF: What were/ are your inspirations throughout this voyage?

FMB: My grandfather and father continue to be my biggest inspiration. Their dedication, passion and constant thirst for knowledge are truly awe inspiring. I have spent a large part of my formative years understanding the nuances and drivers of the retail business from them.

IBoF: What helps you keep yourself motivated?

FMB: I feel that my passion for my work and striving for perfection is what keeps me going.

IBoF: What, as per you, are the qualities required to be a successful woman entrepreneur?

FMB: Believing in yourself can make all the difference. To start with, the mental block that differentiates a man from a woman must be debunked; it is a myth. Going forward, the key is to have clarity of mind with regards to where you want to position your brand and how you want to go about it. There is no recipe to success but belief, clarity, a great team and consistent hardwork definitely helps.



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INDUSTRY SPEAK: TAPPING THE TROUSER CATEGORY IN INDIA

The market for trousers in India has, over the years, seen great casualisation and acceptance of different cuts, fabrics and style. We talk to the leaders in the industry about this emerging market.

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LEAD STORY-2

TROUSERS GETTING TRENDY AS EVER

Although not much has changed in the men's trouser category, the women's section has witnessed a sea of change over the years, from plain pants to palazzos, cigar pants, and cigarette pants. We talk to some of the business leaders about the prevailing trends.

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Fashion Retail



LEAD RESEARCH

TROUSERS IN INDIAN APPAREL MARKET

The bottom wear market excluding denims is expected to grow at a CAGR of 10 percent for over the next ten years. Technopak delves deep into the market dynamics of this segment.

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LAUNCHES & EXTENSIONS '16-17

INDIA, THE NEW FASHION STADIUM

The year 2016 witnessed numerous Indian brands launching into the market and several brand extensions to both lock horns with global entrants and riding the opportunities.

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INDUSTRY SPEAK

TAPPING THE TROUSER CATEGORY IN INDIA

Today, sporting trousers for a casual outing is commonplace, unlike the quondam template where formals strictly meant trousers and casual meant denim. The market for trousers in India has, over the years, seen a casual acceptance of different cuts, fabrics and style. We take a look.

By Zainab S. Kazi with inputs from Rosy Sharma

Charting the market for trousers in India, Sanjeev Mukhija, Founder and Managing Director, Breakbounce Streetwear, shares, “The per capita consumption of trousers has grown in recent years because the consumers nowadays prefer to have trousers as one of their daily staple. Also, we have brands that have successfully introduced the casual version of trousers called chino by adding different colours, utilities, quality fabric, comfort, etc., due to which men are inspired to wear chinos instead of denims.” Abhishek Shetty, Head - Marketing, PR and Loyalty, Celio, adds, “This segment has been growing at a CAGR of 8-9 percent. One of the key change in the Indian market is the historical shift from being value seekers to image seekers. The main attributes considered were price and comfort. With a stronger inclination towards fashion and self-image, we are seeing more sliced preferences. Additional attributes such detail orientation, fabric used, fits, etc., have found a place in the minds of this evolved customer. Organized players have an important role in converting consumers from preferring tailor-made to readymade trousers by giving a plethora of options in terms of fits and colours.”



Cambridge Apparels started its business in 1960 with specialization in men's shirts and trousers. Twenty years later it expanded its manufacturing to other garments and accessories of men and also began exporting to countries in the sub-continent and the Middle East. The years 1989 and 1990 were definitive for the brand as it was the first one to launch 'white collar shirts' in India and introduced blazers and suits in the market at an affordable price. The brand has been awarded 'The Best Formal Wear Brand' three times between 2000 and 2010 and simultaneously it has been voted 'The Most Trusted Brand' as well.

CAMBRIDGE APPARELS

Growth Till Date

The brand started with a single store in Colaba (Mumbai, Maharashtra). In the last five decades, it expanded to over 500 stores and close to 25 stores in Mumbai alone. With over 50 years of heritage in dressing people, its journey so far has been fruitful and successful.

Target Consumers

The brand targets consumers from tier -I and -II cities. These people want to feel comfortable and look stylish at an affordable cost for any occasion or event.

Product Categories & Top Selling Range

The product array comprises business and formal wear, party casuals, etc. At present its product range consist of shirts, trousers, t-shirts, blazers, suits, jeans and accessories. Its collection of formal shirts is the best selling the most sought after product by its customers, followed by formal trousers and casual shirts and suits.

New Innovations

The brand introduced formal stretch trousers a year ago at a very reasonable price-point. These trousers have changed the way people look at formal trousers now.

Theme & Core Elements of Latest Spring-Summer'17 Collection

The latest collection will include classic button down shirts in formal wear and business range. The collection will also feature

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FASHION CREATION

Designer Talk

INDIAN TROUSERS GOING BESPOKE

IMAGES BoF talks to a slew of designers who discuss the current trends in designer trousers as well as about the potential for exploring new shapes and styles in the segment as a whole.

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TROUSER TALK: PREVALENT DESIGNER TRENDS

Senior columnist Meher Castelino talks about the many designs, cuts, styles and trends in trousers in India.

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Fashion Creation

New Fabrics

TECHSMART FABRICS LAUNCHED

Launched by Raymond Textiles under its Champion Collection, Technosmart is the smartest fabric in the world with a unique combination of UV protection, moisture management, smooth touch and easy care.

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Textiles Overview

FABRIC FUNDAS: THE TROUSERING FABRIC MARKET IN INDIA

With readymades gaining momentum, the USP for each brand rests with the fabric that is being put to use and at the price at which the finished product is sold. We talk to the top fabric players about the trouser fabric industry.

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INDIAN TROUSERS

GOING BESPOKE

IMAGES BoF talks to a slew of designers who discuss the current trends in designer trousers as well as about the potential for exploring new shapes and styles in the segment as a whole.

By Manisha Bapna with inputs from Tanya Krishna



"A designer always design and focus on a holistic look and not just on any specific category. Trousers as a category is a very important part of the Indian men's wardrobe. It is presently sold as a part of the suit and only sold in junior markets and pret brands.

-Raghavendra Rathore,
Designer



"I work a lot with shapes keeping in mind the Indian body type and thus have silhouettes like pleated palazzos, ankle length straight pants and drapes."

-Nachiket Barve,
Designer

Trousers, as a category, is a very important part of the Indian men's wardrobe. However, the evolution of it being a centre part of the wardrobe is still 2 to 3 years away. It is presently sold as a part of the suit and only sold in junior markets and pret brands. According to fashion designer, Archana Kochhar, "The focus on trousers, as a category in the Indian market is very minimal as compared to the west. But recently, the trouser trend has had its light in the Indian fusion sector."

But the market for bespoke trousers is blossoming in India. Big brands like The Raymond Shop (TRS), Raymond's Made To Measure (MTM), Arvind Limited's Studio Arvind & Creyate, Van Heusen's new venture MyFit, Siyaram's Fashion Avenue, Reid & Taylor, Louis Philippe are offering custom made or bespoke tailoring services to strengthen their brand's value in India, along with many international players.

Raghavendra Rathore, Fashion Designer, admits that the substantial and growing trousers contribution is anyways between 2:1 (1 being a jacket). "We hope this ratio will increase marginally each year and other categories of lowers such as denims, chino's, breeches, etc., will add to the overall growth," he explains.

Innovations in Trouser Category
Jodhpuri pants, an ethnic innovation of

the traditional Indian riding breeches and churidar pants combined, are one of the most contemporary forms of bottom wear for both men and women. "I have tried and tested several innovations in this category from palazzos and corset trousers for women and Jodhpuri pants and a line of chino trousers with a brand which I had a tie up with, for men," says Kochhar. She further says, "The main factors that I focus on while designing trousers are its comfort and right fit."

"We have always focused on adding unique detailing to both bespoke trousers and Jodhpur breeches, whether it has been an adjuster buckle, trouser hem turn up, hand stitching, waist closure, hidden pocket detailing or any such customised additions that add value and functionality to design. In the classic space, the cuts of these pants are the primary focus," shares Rathore.

Nachiket Barve, Fashion Designer, feels people are experimenting more and more with trousers and thus we see dhoti pants, palazzos, fisherman pants and salwar variation pants. He explains, "I work a lot with shapes keeping in mind the Indian body type and thus have silhouettes like pleated palazzos, ankle length straight pants and drapes."

Fabric & Blends

A designer always design and focus on a holistic look and not just on any





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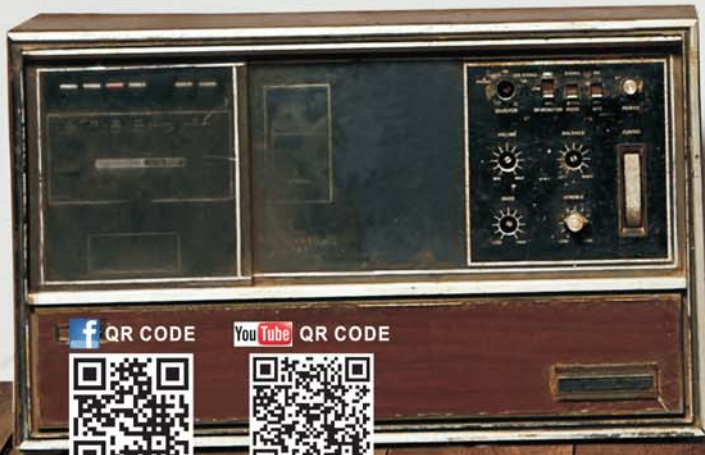
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