

DECODING THE DNA OF PROFITABILITY:

Growth Defined by Value Creation

iff INDIA
FASHION
FORUM
2023

// 28 FEBRUARY – 1 MARCH, 2023 //

Conrad Bengaluru

www.indiafashionforum.in





PURPOSE / What do you stand for?

INNOVATION / How's your fashion different?

EXPERIENCE / How do you entice?

ENGAGEMENT / How do you communicate?





Shailesh Chaturvedi

Industry Thought Leader
Chairman | India Fashion Forum 2023
MD & CEO | Arvind Fashions Ltd.

CHAIRMAN'S MESSAGE

India has a highly fragmented fashion industry with very few 1000 Cr+ brands, indicating a massive opportunity to build brands at scale. However, scale should not come at the expense of profitability.

The focus of IFF 2023, therefore, will be to present some exciting case studies on the buildup of large scale, profitable businesses which have created huge value. IFF is India's largest fashion retail event and it is with great excitement that I have taken on the role of Chairman of IFF's 22nd edition in 2023.

The theme of IFF 2023 (28th Feb and March 1st 2023 in Bengaluru) will be decoding DNA of profitable growth, defined by value creation. The event will cut through topline naivete and focus on real metrics that matter including building operational capabilities for consistent high-quality execution, creating wealth through profitability and focus on return on capital employed. Creation and retention of talent will be key for nurturing this DNA to profitability.

IFF 2023 will deep dive into indepth conversations with leadership teams to uncover management axioms that drive people, processes, and purpose consistently towards value creation. In addition, sharp insights by leading investment and financial analysts will decode organisational practices offering unique actionable takeaways for participants.

Join me at this extraordinary edition of India Fashion Forum on 28 Feb and Mar 1, 2023 at Hotel Conrad, Bengaluru with the country's most powerful fashion business leaders, for mind-bending insights to sharpen the future of fashion in India.

IFF INDIA
FASHION
FORUM
2023

IFF is The Global Identity of India's Fashion Business

What makes IFF India's largest fashion retail intelligence event? It is the only forum that is driven by pure knowledge, looks to the future, prepares companies for consumer & market shifts, and pre-empts the future business models that are yet to take shape.



IMPERATIVES FOR MODERN FASHION BUSINESSES

In Product:

*Accelerate design
innovation,
differentiation*

In Retail:

*Generate brand loyalty,
Achieve perfect channel mix,
Build scale.*

AT IFF 2023, THE FASHION AND LIFESTYLE PROJECT IS DESIGNED TO BE A UNIQUE AND UNPRECEDENTED REDEFINING OF THE BUSINESS OF FASHION FROM THE PERSPECTIVE OF FASHION AS A LIFESTYLE CHOICE. WITH A FRESH, MORE HANDS-ON APPROACH AND AN SUBSTANTIAL MIX OF BRANDS AND EXPERTS, IFF2023 WILL ANSWER SOME OF MOST VITAL QUESTIONS YOU SHOULD BE ASKING.

PURPOSEFUL. PIONEERING. PROFITABLE.

Building Future-proof Fashion Retail Models

1 PURPOSE/ What do you stand for?

Worldwide, young consumers are reacting strongly to how brands respond to relevant social challenges, and how they act upon them. In a market such as India – with 70% of the populace under the age of 40 – fashion purchases will be increasingly influenced by what brands stand for – the commitments they make to the well-being of societies, communities, and the environment. Going forward, fashion brands and companies will be expected to play much more meaningful roles than being just commercial entities.

2 INNOVATION/ How's your fashion different?

Urban consumers across India are increasingly looking to fashion brands to help them express their individuality. With the attention-competition on social media platforms, consumers are looking to stand out in what they wear and how they style and express themselves. Just fresh products are no longer exciting, unless they have a compelling differentiation in design and appeal. In addition to being different, fashion needs to be more authentic, functional – as the athleisure surge shows. Fashion needs to be more experimental, but also serve a distinct utility.

3 EXPERIENCE/ How do you entice?

Fashion newness in the digital economy is as much about the product as it is about the content and experience. Storytelling is vital. It is how brands are finding ways to speak their consumers' language, and reflect their interests, dreams and goals. The Discovery-to-Desire-to-Possession journey of the modern consumer is defined by the experiences they log on the trip. Be it in a physical store or an online format, experience is the top factor today in not just customer acquisition, but more importantly, retention.

4 ENGAGEMENT/ How do you communicate?

Digital platforms have blurred boundaries between commerce and connection, consumption and production, entertainment and entrepreneurship. Emerging social media platforms are replacing friend-based algorithms with interest-based algorithms. Given the integrated consumption frameworks of today, digital and physical experiences are no longer segregated. Instead, they complement each other in how brands communicate with consumers and push consumption. Fashion retail of the New World embraces an integrated reality – with deeply interlaced digital moments that boost physical experiences, and vice versa.





The Opportunity Metrics

1.38 billion

India's population by end 2020

50%+

India's population under 25 years

29

Average age of an Indian
(compared to 37 for China and 48 for Japan)

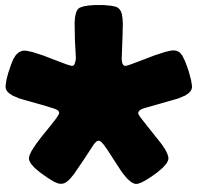
USD 4 trillion

India consumer spending by 2025

1.5 billion

Expected Internet users by 2040, from
current 749 million users





What These Numbers Mean for Your Business

USD 265 billion

India's fashion retail market size by 2026

51%

Order volume growth in fashion eCommerce (FY21)

35%

E-commerce shoppers buying over 50% of their daily fashion wear online

USD 22.53 billion

Indian kidswear market value by FY2026, from USD 16.62 Billion in FY2020

192%

Volume growth in fashion eCommerce in Tier-III and beyond destinations (FY21)

USD 200 billion

Indian luxury market value in 2030



Event Spotlight

Consumer Centric Sustainability (CCS)



We're at an inflection point as an industry, where sustainability is evolving from a 'nice-to-have' to a 'must-have' business imperative; a point at which one's green line is becoming every bit as important as one's bottom line. Consumer concern for sustainability affects shopping behaviour as **63%** of consumers globally – including **77%** of consumers in emerging markets – put time and effort into finding sustainable clothing. They connect ideas of sustainability with naturalness and closely tied to the preservation of earth's resources. However, with this evolution comes the need for knowledge – on how to most effectively manage this sustainable transformation.

Consumer Centric Sustainability (CCS) @ India Fashion Forum, a purpose driven platform, is a showcase of global value chain partners and their innovations that help improve sustainability of the current offering at retail. From sourcing responsibly to sustainable production techniques, be part of a range of multifaceted conversations at the intersection of fashion, ethics, climate change and culture.



Understanding that buying teams are always on the lookout for new ideas, CCS connects top and emerging brands and designers from within the niche market of sustainable fashion to a curated selection of retailers.



The focus of the event is to engage retailers and brands in ways that are unlike conventional trade show methods. Although traditional business-to-business meetings are effective, we are here to take it one step further by incorporating captivating displays and activations that allow retailers to have a deeper understanding of the products they are buying.

Show Highlight

Launching a first-ever global study on sustainable fashion innovation



Exhibition:

EXPERIENTIAL FASHION DESTINATIONS

INDIA
BRAND
SHOW

23

THE SMARTFASHION SHOWCASE

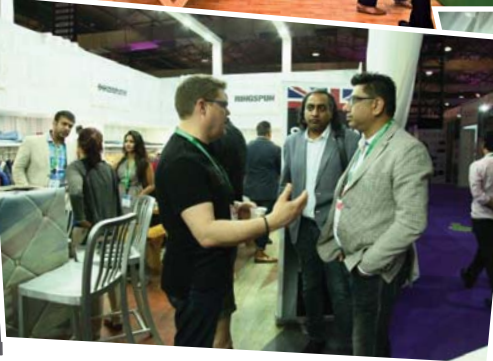
India Brand Show (IBS) provides a stylistic way of conducting business via an unmatched B2B access environment. Fashion designers who want to display their creative output and merchandisers in constant search to add value to their fashion offerings for shoppers cannot afford to miss the buzz here. And, retailers scouting unique, fresh fashion brands and ranges can access a highly creative venue to plan ahead with designers and range planners.

A BRAND-BUILDING PLATFORM FOR:

While most elements of the IBS are for both retailers and brands, the IBS Exhibition and Brand Shows offer great growth and launch opportunities to new-age consumer brands in:

- * Menswear
- * Womenswear
- * Kids-wear
- * Fashion accessories
- * Eyewear
- * Footwear
- * Jewellery & Watches
- * Home fashion
- * Lifestyle products







trendview

THE DESIGN. TRENDS. SOURCING SHOW

Trend View shapes a picture of what the future of fashion will look like. IFF brings together textile majors, imaginative designers, sourcing experts and forecast agencies to build the future look and feel of fashion through exciting new product lines, collections and an array of fashion ingredients – textiles, trims and embellishments.

SHOW HIGHLIGHTS

- * Future innovations in fabrics, textures, colours, weaves, washes, effects Interactive and real-time sourcing opportunities
- * Display of fashion and consumer trends
- * Inspiration stories from some of the world's finest fashion designers The latest in fashion creation technology and tools

WHO SHOULD ATTEND?

- * Professionals engaged in fashion planning, development, design, buying and sourcing
- * Textile wholesalers, retailers and agents
- * Designers and merchandisers at international and Indian fashion brands, retailers, production and export houses Independent designers and design studios

WHO SHOULD EXHIBIT?

With a robust fashion creation audience, those who will find value in exhibiting at TrendView are:

- * Textile companies
- * Yarn companies
- * Fibre companies
- * Trims and embellishment suppliers
- * Saree & dress material manufacturers
- * A wide range of services and job workers
- * Fashion CAD/CAM professionals
- * Fashion institutes, trade publications
- * Packaging and presentation services



FASHION RETAIL REAL ESTATE

Fashion & lifestyle brands occupy up to 70% doors at any mall. New and innovative players in this category are a major differentiator for any running or upcoming shopping centre.

In addition to understanding the tenets of retail operations, shopping centre professionals need to up the experience factor with fashion tenants. Shopping centres and fashion retailers can create stunning experiential retail environments that merge physical and digital worlds and deliver the elusive 'Wow' for customer experience. As India evolves into a tech-influenced, hybrid consumer landscape, the country's shopping centres are now show-cases of modern consumer aspirations. At IFF 2023, use the **FASHION RETAIL REAL ESTATE** launchpad to create India's most exciting, experiential shopping centres and retail spaces.



WHO SHOULD EXHIBIT?

Businesses and organisations engaged in the development/ marketing/ management of:

- * Shopping Centres & Malls
- * Airports, Metro, Railways & Subways
- * Institutions, other retail space providers
- * Space Managers
- * Urban Planners & Civic Authorities
- * Real Estate Consultants



THE CONFERENCE:

Intelligence for Future-proof Fashion Retail

CONFERENCE HIGHLIGHTS

Class-leading insights from the heads of world's most renowned fashion brands and retailers, & international marquee speakers on:

- * Winning With Fashion Innovation
- * Consumer Insights On Evolving Categories
- * Transformation Through Innovation
- * Bringing Alive The Future of Fashion & Lifestyle
- * India The Promised Land For Foreign Brands
- * The Business - Where The Top Line Is The Waistline

STAR ATTRACTIONS

- * C-Suite Luncheon Meets
- * Roundtables/ Exclusives with CEOs/CIOs/CXOs & Heads of Design/ Innovation/Category Buying & Merchandising/ Sourcing/ Retail Design & VM
- * Presentations - A chosen few by Grand Jury will be recognised IFA 2023 ceremony.
- * Most Valuable Fashion Startups
- * Most Effective Marketing & Promotions Campaigns
- * Most Profitable Design Concepts
- * Most Exciting Innovations in Customer experience

The IFF Conference creates unparalleled opportunities for learning from international and Indian industry experts, academicians, experienced professionals and analysts through a world-class mix of keynote addresses, panel discussions, CEOs Roundtables, presentations, Knowledge Series sessions and workshops.

Technology and consumer behaviour have transformed the core of fashion businesses and no single company or brand can keep up with all the insight needed to manage that change on a rolling basis. IFF breaks the knowledge down into 4 power nodes, the essential corner stones for building a sustainable, profitable fashion retail model that can withstand macro disruptions.



IMAGES
SOLO
stories. opinions. learnings. outcomes.

10 *Dynamic Fashion CEOs to narrate*
Untold Stories # Mega Life Lessons # Bold
Opinions # Outstanding Outcomes # Biggest
Business Dreams

Conference Topics

BUILDING FUTURE-PROOF FASHION RETAIL MODELS: PURPOSEFUL, PIONEERING, PROFITABLE.

The transformation sweeping across the consumer universe and technology is throwing up major implications for fashion businesses. How can brands and companies balance the four ingredients of fashion retailing in the New World – Purpose, Experience, Innovation and Engagement?

PANEL DISCUSSION:

IN-STORE TECH – ADDING DRAMA AND DIFFERENTIATION

The physical store has the potential to be the most powerful and effective form of media available to a brand because it offers an experience, which if crafted properly, cannot be replicated online. So what can you do to maximize this effect – learn more at this engaging discussion.

PANEL DISCUSSION:

THE FINAL BASTION – CUSTOMER EXPERIENCE

Technology can change the rules of the game, customers change the game! Retailers and Technology providers discuss and debate the future of retail and customer engagement and retention.

PANEL DISCUSSION:

FUTURE PROOF: HOW DO WE MAKE FASHION SUSTAINABLE?

For the consumer of today, fashion is not only about looking good but also ensuring that what they buy hasn't negatively impacted the environment in any way. A deliberation on long-term trends that can make the fashion industry more sustainable in times to come.

PANEL DISCUSSION:

FASHION INNOVATION USING AI: TURNING FASHION CREATION ON ITS HEAD

Of the list of emerging technologies, artificial intelligence has been the forefront of disruption for the fashion industry. Thus one of the most prominent ways fashion and technology have been integrated is the ability to turn a diverse set of data into engaging, enriching information.

PANEL DISCUSSION:

MAPPING MARTECH TO THE MARKETING LIFECYCLE: THE NEW GAMECHANGER IN CONSUMER UNDERSTANDING

The proliferation of capabilities across omnichannel and multichannel trends and technology can make it hard for marketers to understand what is needed and when. One way to make some sense of this is to look at each step in the marketing lifecycle and map Martech capabilities into it based on what marketers are trying to accomplish with each step.

PANEL DISCUSSION:

CONSUMPTION NEEDS A STRONG BOOST. CAN MALL-RETAILER PARTNERSHIPS LEAD THE WAY?

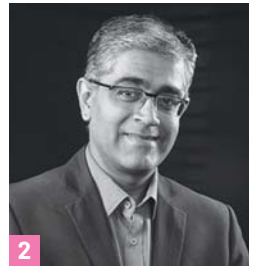
Retailers and retail space developers need to develop re-imagined, agile models of collaboration and consumption triggers – more than ever before to build consumer confidence, co-create digital triggers, and drive demand and re-energize top lines across all key verticals.



Speakers over the years



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1. **Abhishek Ganguly**, MD, PUMA India
2. **Ajoy Chawla**, CEO, Tanishq
3. **Akhilesh Prasad**, President & CEO, Fashion & Lifestyle Business, Reliance Retail
4. **Alok Dubey**, ex-CEO, Lifestyle Brands, Arvind Brands
5. **Amisha Jain**, CEO, Zivame
6. **Amit Chaudhary**, Cofounder, Lenskart
7. **Apeksha Patel**, CEO, Deal Jeans
8. **Ashish Dixit**, MD, ABFRL
9. **Ayushi Gudwani**, CEO & Founder, FableStreet
10. **B.S. Nagesh**, Founder, TRRAIN
11. **Bijou Kurien**, Strategy Board Member, L Catterton Asia Holdings
12. **Bonnie Brooks**, ex-VC, Hudson's Bay Company
13. **C K Venkataraman**, MD, Titan Co.
14. **Darpan Kapoor**, Vice Chairman, Kapsons Group
15. **Darshan Mehta**, President & CEO, Reliance Brands
16. **Deepak Aggarwal**, MD, Kazo
17. **Dhruv Bogra**, Country Manager-India, South Asia, Forever New Clothing
18. **Dilip Kapur**, President, Hidesign
19. **Gurukeerthi Gurunathan**, Co-Founder, Caratlane
20. **Jacqueline Kapur**, CEO, Ayesha Accessories
21. **Jitendra Chauhan**, CMD, Jade Blue
22. **Kamal Khushlani**, Founding Director, Mufti
23. **Kumar Saurabh**, Chief Business Officer, Vedant Fashions (Manyavar)
24. **Lalit Agarwal**, CMD, V-Mart Retail
25. **Lavanya Nalli**, Vice-Chairperson, Nalli
26. **Manish Kapoor**, CEO, Pepe Jeans London



27. Nihal Rajan, VP & Head of Design-MFB, Myntra Designs

28. Nikhil T Rajan, Founder & MD, William Penn

29. Nina Lekhi, MD & Chief Design Curator, Bagged

30. Praveen Bafna, MD, Cool Colors

31. Rajesh Jain, Managing Director & CEO, Lacoste India

32. Rajesh Narkar, Brand Director and VP, Myntra

33. Rohiet Singh, COO, Tommy Hilfiger

34. Samrat Zaveri, MD, Shaze

35. Sandeep Kataria, Global CEO, BATA

36. Sandeep Mukim, MD, Proline

37. Sanjay Vakharia, Co-founder & CEO, Spykar

38. Sanjeev Mohanty, MD & SVP: South Asia- Middle East & Africa, Levi Strauss & Co

39. Sanjeev Rao, CEO, Being Human

40. Shailesh Chaturvedi, MD & CEO, Arvind Fashions Ltd.

41. Shital Mehta, CEO & Executive Director, Lifestyle International Pvt Ltd

42. Siddharth Bindra, MD, Biba Apparels

43. Sooraj Bhatt, CEO- Fast Fashion Business, Aditya Birla Fashion & Retail

44. Suparna Mitra, CEO, Titan Co. Ltd.

45. Tina Tahiliani Parikh, Executive Director, Ensemble

46. Tushar Ved, President at Major Brands India Private Limited

47. Vasanth Kumar, ex-MD, Lifestyle International

48. Vinay Chatlani, CEO, Soch

49. Vineet Gautam, CEO, Bestseller India

50. Vipin Tyagi, Sr. Vice President at Reliance retail

51. Vishak Kumar, CEO, Madura Fashion & Lifestyle, ABFRL

52. Vivek Mehta, CEO, Mass Brands (Amante)

and many more...

Concurrent Event

CX INNOVATION REDEFINING THE FUTURE OF FASHION RETAIL



CUSTOMER
EXPERIENCE
FORUM

in association with



GreenHonchos

Let's face it: Data is king in the modern consumer universe. User-generated fashion, hyper-personalisation, digital logistics, targeted social marketing are at the top of investment priorities for the majority of global fashion retailers.





in association with



GreenHonchos

CX Forum, India's global show on tech-propelled fashion innovation, will offer an extraordinary environment dedicated to only outstanding, mind-warping innovation in the business of fashion, from agile design tools to exceptional in-store tech influencers, from the dynamic science of fashion retail analytics to hyper-targeted Social Marketing. Carefully selected fashion tech innovators, partners, speakers and attendees will ensure that only the finest in the business collaborate for this remarkable, exclusive convention.

WHO CAN EXHIBIT?

Companies engaged in development/ marketing of:

- * Wearable tech
- * Alternative Material Tech
- * Customer segmentation and analytics
- * Identification of customer – IoT, mobile, presence, WIFI, Apps
- * Digital signage and endless aisle
- * Recommendations – associations, lift, market basket, persona
- * User Interface and User Experience – web, app, mobile and in-store Visual Merchandising
- * Store Layout – Planogramming, Electronic Shelf Edge Labels
- * Store Associate enablement – mobile, tab, CRM, endless aisle
- * Augmented and Virtual Reality across channels
- * Check-out – self checkout, queue busters, POS
- * Payment solutions – mobile wallets, digital payments, gift cards, alternative payment options
- * Loyalty – coupons, loyalty cards/apps, points accrual and redemption, cashback
- * NPS and surveys to assess customer experience
- * Integrated Mobility
- * AR/VR powered in-store engagement
- * AI-powered personalisation
- * Next-generation VR in retail ops
- * Social Marketing





— 2023 —
22ND ANNUAL
 ★ **IMAGES** ★
 FASHION AWARDS

The annual IMAGES Fashion Awards are adjudged on the basis of performance in operational benchmarks along with qualitative factors such as product and marketing innovation, social responsibility initiatives, HR practices and industry goodwill, among others. The IFA trophies for 2023 will go to India's most forward-looking, innovative and exciting fashion brands, retailers and professionals for achievements in the year 2021. The awardees and finalists will be announced at a glittering ceremony on March 1, 2023.



IMAGES FASHION AWARDS (IFA) 2023

(Assessment Period Calendar Year 2022)

AWARDS FOR SINGLE BRAND RETAIL CHAIN – FASHION & LIFESTYLE RETAILERS WITH NATIONAL/REGIONAL PRESENCE

- ★ IMAGES Most Admired Fashion Brand of the year: **Men's Westernwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Women's Westernwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Kidswear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Jeans & Casualwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Active Sportswear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Men's Indianwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Women's Indianwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Lingerie**
- ★ IMAGES Most Admired Fashion Brand of the year: **Men's Innerwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Footwear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Jewellery**
- ★ IMAGES Most Admired Fashion Brand of the year: **Watches**
- ★ IMAGES Most Admired Fashion Brand of the year: **Eyewear**
- ★ IMAGES Most Admired Fashion Brand of the year: **Fashion Accessories**
- ★ IMAGES Most Admired Fashion Brand of the year: **Home Décor & Gifts**

AWARDS FOR LARGE FORMAT MULTIBRAND RETAILERS WITH 15000+ SQ FT AV. STORE SIZE & WITH NATIONAL/REGIONAL PRESENCE

- ★ IMAGES Most Admired Fashion Retailer of the year: **Large Format National MBO Chain**
- ★ IMAGES Most Admired Fashion Retailer of the year: **Large Format Regional MBO Chain**
- ★ IMAGES Most Admired Fashion Retailer of the year: **Stand Alone MBO**
- ★ IMAGES Most Admired **Affordable Fashion Retailer** of the year
- ★ IMAGES Most Admired **Home Fashion Retailer** of the year

AWARD FOR RETAIL MAJORS WITH MULTIPLE FASHION & LIFESTYLE BRANDS & FORMATS IN RETAIL

- ★ IMAGES Most Admired **Fashion Company** of the year
- ★ IMAGES Most Admired **Fashion Design Concept** of the year
- ★ IMAGES Most Admired Fashion Retailer of The year: **Marketing & Promotions**
- ★ IMAGES Most Admired **Fashion Innovation** of the Year
- ★ IMAGES Most Admired **Launch** of the Year
- ★ IMAGES Most Admired **Tech Implementation** of the Year
- ★ **IMAGES Retail Re-Imagined**

PARTNERS OVER THE YEARS



and many more...



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