Appendices
QUESTIONNAIRE
(Please tick wherever applicable)

PROFILE

1. Name: ________________________________

A. Age group:
   a. More than 15 yrs but < 25 yrs
   b. More than 25 yrs but < 35 yrs
   c. More than 35 yrs but < 45 yrs
   d. More than 45 yrs

B. Occupation:
   a. Businessman
   b. Professional (C.A., Doctors etc.)
   c. Govt. Job
   d. Private Job
   e. Any other (please specify) ________________________________

C. Education:
   a. Doctoral
   b. Post graduate
   c. Graduate
   d. HSSC
   e. Below HSSC

1. Which type of clothes do you generally use:
   a. Stitched
   b. Readymade

2. The pant & shirt you are wearing now is:
   a. Stitched
   b. Readymade

3. Most of your pants & shirts are:
   a. Stitched
   b. Readymade

4. How often do you buy clothes:
   a. Once in a month
   b. Once in 2 months
   c. Once in 6 months
   d. Once in a year
   e. On festivals
   f. Special occasions like marriages
   g. Not certain
5. When did you last buy clothes?
   a. This month  
   b. Last six months  
   c. Last year  

6. What motivates you to purchase garments?
   a. Need  
   b. Sale / discount  
   c. Occasions  
   d. Any other  
   d. All the above  

7. What factors influence the buying decision of garments?
   a. Brand name  
   b. Ambience in the shop  
   c. Approach of sales person  
   d. Variety available in shop  
   e. Price advantages  
   f. Gift/discount by the shopkeeper  
   g. Garments meeting your special requirements  
   h. Personalised treatment given by shopkeeper  
   i. All the above  

8. How do you compare the ready-mades with the stitched garments (give ratings from 1-9 with 9 as highest)

   a. Readymade garments are more fashionable than tailored garments.  
   b. Ready-mades have perfect fitting as compared to tailored garments.  
   c. Ready-mades offer wider choice of colors and styles as compared to tailored garments  
   d. Ready-mades are quickly available.  
   e. Ready-mades are more affordable than the tailored garments  
   f. Ready-mades are easy to gift whenever one wants  
   g. Readymade garments create one’s better image in the society.  
   h. Wearing renowned branded garments satisfy one’s ego.  
   i. The cloth used in Readymade garments is of better quality which if purchased as fabric will not be affordable.  

9. If you prefer purchasing readymade branded garments state reasons in order of Importance (1-11)
   a. Assured quality  
   b. Status symbol  
   c. Economical  

d. Advantage of fashion in trend

e. Varieties offered

f. Personalised choice

g. Befitting your physique

h. Saves time

i. Adds to your personality

j. Comfort

k. Stitched clothes create a sense of outdated fashion

10. Mention some Readymade garment brands for Suits

11. For what kind of wears do you prefer readymades?
   a. Daily wear
   b. Casuals
   c. Formals
   d. Special partywears
   e. All of the above

12. Do you feel that International brands are superior to national brands?
   i. Yes
   ii. No
   iii. Can't say

   If yes, why?
   a. It is superior in terms of quality
   b. It adds to status due to price tag
   c. Its luxurious texture & feel
   d. It helps to maintain your specialized images

13. Where do you buy the branded Readymade garments from
   a. Exclusive company shop
   b. Departmental store
   c. Specialised garment shop
   d. Any garment shop
   e. From exhibitions
   f. Not fixed

14. Do you insist on buying garments of specific brand
   a. Yes
   b. No

15. Suppose your preferred brand is not available, do you:
   a. Choose any other brand
   b. Postpone your buying
   c. Wait till the shop makes your brand available
16. Are branded Readymades available below the MRP?
   a. Yes [ ] b. No [ ]

17. Do you consider fixed price policy as a hurdle in your buying decision?
   a. Yes [ ] b. No [ ]

18. Do you enjoy bargaining with the shopkeeper?
   a. Yes [ ] b. No [ ]

19. Do you feel that shopkeeper should offer some concession/discount on his own?
   a. Yes [ ] b. No [ ]

20. How often do you visit the shops where discounts are available?
   a. Very often [ ] b. Always [ ]
   c. Sometimes [ ] d. Occasionally [ ]
   e. Rarely [ ] f. Can't say [ ]

21. Do you feel that shop offering discount is not giving right details of price of product?
   a. Yes [ ] b. No [ ]

22. Do you feel that off season discount/festival discount are real reduction in price?
   a. Yes [ ] b. No [ ]

23. If yes, do you buy garments during the period when such discounts are given?
   a. Yes [ ] b. No [ ]

24. How you decide to buy the garments?
   a. You visit any shop and purchase the garments [ ]
   b. You plan to buy the garment and decide the shop in advance [ ]
   c. You set a budget and decide what you have to buy from a specific shop [ ]
   d. You visit your regular choice shop and purchase specific garments without considering budget.

25. Do you purchase readymade garments when certain promotional schemes are offered; for e.g. Buy 2 get 1 free, Buy 2 shirts get 1 pair of pants free, 50% off.
   a. Yes [ ] b. No [ ]
   c. Sometimes [ ]

26. Do you prefer wrinkle free garments?
   a. Yes [ ] b. No [ ]
27. If yes, why?
   a. Their wash & wear property □
   b. To avoid the work of ironing □
   c. Suitable during traveling □
   d. Tension free packing □
   e. All the above □

28. Try to list print/TV ads of Ready-mades which you can remember now?
   a.
   b.
   c.
   d.

29. These celebrities have appeared in the following ads. Match the pairs correctly.

   A                      B
   i) Akshay Kumar  a)  Grasim
   ii) Sunil Gavaskar b)  Ruf & Tuf
   iii) M.A.K. Pataudi c)  Dinesh
   iv) Karan Kapoor  d)  Reid & Taylor
   v) Pierce Brosman  e)  Mayur
   vi) Shahrukh Khan  f)  Bombay Dyeing

30. Of which brands are the following bottom lines or slogans?
   a. Coming home to ___________________ b. ___________________ Since 1925
   c. Ghar aaja re ___________________ d. Ruf & Tuf ho ___________________
   e. The complete man _____________ e. Friday Dressing ___________________
   g. Good Jeans for less _________ h. Upper Crest ___________________

31. Enlist some brands of:
   a. Jeans __________________________
   b. Sports wear _____________________
   c. T. Shirts ________________________
   d. Shirts __________________________
   e. Pants/Trousers ____________________

32. Do you ever feel that you have purchased a pant or shirt of a particular brand because of an ad?
   a. Yes □
   b. No □

33. Exclusive showrooms of which brands of readymade garments are in your city?
   a.
   b.
   c.
   d.
34. Do you always look for banner or hoarding on road of readymade garments?
   a. Yes ✰ b. No ✰

35. Are you tempted by ads in print/TV media of exhibitions of readymade garments?
   a. Yes ✰ b. No ✰

36. Complete the following brand names:
   a. Z_D_A_ ✰ b. W_L_S ✰
   c. I_D_A_Z_N_ ✰

37. When buying a readymade garment generally you go -
   a. Alone ✰ b. With someone ✰

38. If you go with someone whom do you prefer to with ?
   a. Spouse ✰ b. Friend ✰
   c. Colleague ✰ d. Any other ✰

39. Why do you go with that particular person ?
   a. For his / her opinion ✰
   b. For making better choice ✰
   c. Two are always better than one ✰
   d. He / She is more fashion conscious ✰

40. Do you think that you reserve the right to purchase yourself ?
   a. Yes ✰ b. No ✰

41. In your opinion can you take right buying decision for your garments yourself?
   a. Yes ✰ b. No ✰

42. If a Friend/Colleague wears new branded ready-made what do you ask him ?
   a. Price ✰ b. Shop he bought from ✰
   c. Any other thing ✰ d. Nothing at all ✰

43. Do you use perfume while going out ?
   a. Yes ✰ b. No ✰

44. Do you add to your day to day grooming other accessories ?
   a. Yes ✰ b. No ✰

45. Which are the general accessories in your dress ?
   a. Pen ✰ b. Handkerchief ✰
   c. Tie ✰ d. Bracelet ✰
   e. Shoes, socks ✰
46. Kindly give your opinion for following statements:

<table>
<thead>
<tr>
<th>S. N.</th>
<th>STATEMENT</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Readymade garments are becoming more popular as compared to stitched garments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>The fashion of Readymade garments is now a dominating trend from which a common buyer can’t escape.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Readymade garments add to the personality of the individual.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Readymade garments are easily available and save time.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Buying of branded readymade garments is now a common trend in the people.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Companies are establishing exclusive shops of readymade garments making them more popular and customer friendly.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>The business of stitched garment is now vanishing due to easily availability of readymade garments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Reputed multinational brands of readymade garments are available easily.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>One prefers reputed multinational brands because of their quality and cost.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>For a status conscious buyer branded garments are must.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Readymade garments usually are high cost and hence there are limited buyers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>In terms of quality there is no difference between Readymade garments and stitched garments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Personal choice is lost when one buys Readymade garments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>There is a limited/little addition but extra price in Readymade garments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>For a common buyer branded Readymade garments is a product beyond means.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Appendix II**

**News: A peep in Readymade Garment Industry's bygone 5 years**

<table>
<thead>
<tr>
<th>SOME PLAYERS</th>
<th>Gautam Singhania</th>
</tr>
</thead>
</table>
| **Sanjay Lalbhai**  
(Arvind Mills) | **Gautam Singhania**  
(Raymond Apparel) |
| **Top-end** | Designer:  
Be | **Top-end** | Manzoni, Color plus. |
| Arrow Lee Wrangler,  
Ruggers, | **Mid-price** | Park Avenue, Parx. |
| **Mid-price** | Problems:  
Fast changing fashion  
trends leading to high  
stock redundancy. | **Strategy** | Raymond lineage, total  
backward integration,  
strong retail network,  
mORE acquisitions. |
| Excalibur, flying Machine,  
Bay islands | **Strategy** | Raymond lineage, total  
backward integration,  
strong retail network,  
mORE acquisitions. |
| **Low-end** | **Strategy** | Raymond lineage, total  
backward integration,  
strong retail network,  
mORE acquisitions. |
| Newport | **Strategy** | Raymond lineage, total  
backward integration,  
strong retail network,  
mORE acquisitions. |
| **Problem** | Brands took an image  
beating by being constantly  
on discount | **Problem** | Peter England, being  
on discount has been  
losing money |
| **Strategy** | Slash discount sales,  
focus on profits and  
Image-building rather  
than revenues. | **Strategy** | Flexible and customised  
distribution system, brand  
and line extension -intro  
categories like eyewear  
and perfumes. |

| Kumar Mangalam  
(Madura Garments) | Nusli Wadia  
(Bombay Dyeing) |
|-----------------|-----------------|
| **Top-end** | Low-end:  
Vivaldi, Easy Care,  
Proline | **Top-end** |  
Vivaldi, Easy Care,  
Proline |
| Louis Philippe,  
Van Heusen, Allen Solly | **Problems** | Minor player in apparel,  
limited success in ready-  
mades with Vivaldi |
| **Mid-price** | **Strategy** | Build on trusted Bombay  
Dyeing name, major stake  
in Proline, relaunch  
brands. |
| Peter England, San Frisco | **Strategy** | Build on trusted Bombay  
Dyeing name, major stake  
in Proline, relaunch  
brands. |
| **Problems** | Peter England, being  
on discount has been  
losing money | **Strategy** | Build on trusted Bombay  
Dyeing name, major stake  
in Proline, relaunch  
brands. |
| **Strategy** | Flexible and customised  
distribution system, brand  
and line extension -intro  
categories like eyewear  
and perfumes. | **Strategy** | Build on trusted Bombay  
Dyeing name, major stake  
in Proline, relaunch  
brands. |
WHAT WE ARE UP AGAINST

CHINA is already the largest exporter of textiles (16%) and apparel (23%) in the world.

The biggest producer of cotton and man-made fibers (25% of global fiber).

Has the largest spinning and weaving capacity in the world

The largest garment factories and the world’s first supply chain cities

And it is still expanding. In the last three years, it bought around:

- 75% of shuttle less looms sold globally.
- 25% of electronic flatbed knitting machines.
- 30% of circular knitting machines.
- 65% of rotors.
- 65% of texturising machines.

WHERE WE ARE

INDIA has barely 4% of the global textiles market and less than 3% share of apparel.

It is the second-largest product of cotton yarn and silk.

The third-largest producer of cotton and cellulose fiber/yarn.

Over 10,000 small garment units and a fragmented textile industry.

Just to double our market share in five years, we need to invest:

- Rs 50,000 Crore in fabric processing
- Rs 25,000 crore in garment sector
- Rs. 37,000 crore in spinning sector
- Rs. 25,000 crore in weaving units.
- Rs 3,000 crore in knitwear industry.

SECTORWISE ORGANIZED RETAILING IN INDIA

<table>
<thead>
<tr>
<th>SEGMENT</th>
<th>MARKET SIZE (Rs. Crore)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Textiles and clothing</td>
<td>4050</td>
</tr>
<tr>
<td>Jewelry</td>
<td>2000-2500</td>
</tr>
<tr>
<td>Consumer Durables</td>
<td>1500</td>
</tr>
<tr>
<td>Footwear</td>
<td>1300-1500</td>
</tr>
<tr>
<td>Food and personal care</td>
<td>1000</td>
</tr>
<tr>
<td>Non-store retail</td>
<td>900</td>
</tr>
<tr>
<td>Luggage, watches and tyre</td>
<td>500</td>
</tr>
<tr>
<td>Book and music</td>
<td>390</td>
</tr>
</tbody>
</table>
PANTALOON RETAIL

The Company's third quarter profits ending Des. 04 were Rs. 10.14 Crores, a year on year growth of 63%. Sales at Rs. 238 crores chalked an increase of 55%.

WESTSIDE'S ASSOCIATION WITH CELEBRITIES

Westside, the retail store from the house of Tata's has associated with celebrities and urban-based movies for a long time. Ace cricketer Yuvraj Singh has been Westside's brand ambassador for 2 years. Even the shoppers get to interact with the sought after cricketer on all events like store launches unveiling of collections and more.

Film-based merchandising is also becoming increasing popular. Westside has associated itself with youthful films like Hyderabad Blues and My Brother Nikhil by lending hip and trendy outfits for the film.

The new Spring Summer Collection by Westside has been introduced with well know models like Kamaal Sidhu, Rashmi Nigam, Sheetal Menon, Zulfi and Westside's brand ambassador Yuvraj Singh.

Every Westside store is fashionable and individualistic, providing not just value for money but a collection of the finest quality merchandise from the house of Tata's. Its elegant interiors, sprawling space and courteous store staff completes the ultimate shopping experience.
Munjani & Traub Two international personalities, Mohan 'Mike' Munjani and Marvin Traub (former chairman of New York based fashion department store Bloomingdales) have formed a consulting group Munjani Traub India Ltd. for corporates & brands entering the Indian organised retailing industry.

RAYMONDS IN TALKS WITH FY WEISS FOR STRATEGIC TIES

Raymonds is in talks with European worsted fabric producer FY Weiss for a strategic alliance. Weiss, located at Nuremberg in Germany, mainly produces worsted suitings and technical fabrics.

The alliance, if it materialises, may result in Weiss outsourcing their entire worsted fabric requirements from Raymonds. According to industry sources, Raymonds can explore the possibility of marketing its products using Weiss' network.

Weiss, which also has a womenswear brand, can also add value to Raymonds' portfolio, according to industry sources. The Mumbai-based textile major is planning to make an entry into the ready-made womenswear and kidswear segments.

TOMMY HILFIGER COMES TO INDIA

United States 'largest selling' apparel brand, Tommy Hilfiger, is scheduled to be launched in India by a joint venture of the Arvind Lalbhai Group.

Called Arvind Munjani Brands Pvt. Ltd., the company is a joint venture between Munjani and Lalbhai groups for marketing and distribution of this brand in the country.
AMB will introduce Tommy Hilfiger's sportswear, men's Jeanswear and junior jeanswear collections in speciality stores across the country.

BABYWEAR COULD BE THE NEXT BIG BET FOR LOCAL GARMENT FIRMS

The apparel exporters in this cluster have quietly moved into the high-value and low-cost babywear category, which came out of the quota regime four years ago.

As per A Sakthivel, chairman, Apparel Export Promotion Council, and president, Tirupur Exporters Association. "Babywear has the potential to touch Rs. 1,000 crore in the next four to five years,"

Baby wear style and designs will take cent restage for the first time at AEPC's India Knit Fair in Tirupur.

People generally are willing to pay a good price for baby products. The onus is therefore on style and quality and rarely on price.

TEXTILE TESTING DEVELOPMENT CENTRE IN MADURAI

A Rs 4 crore textile testing development centre, a public-private partnership project between the Central Government and the Textile Industry of Madurai Zone, would be inaugurated very soon.

Claimed to be the first of its kind in the country, the centre is expected to meet the requirements of textile and clothing industry in and around Madurai.
Madurai region consisted of 400 readymade garment units, 300 spinning mills and 100 powerloom weaving units and 50 handloom weaving units besides several weaving societies and textile exporters.

CROCODILE BRAND GLIDES INTO SAARC NATIONS

The Singapore $2 billion international lifestyle brand Crocodile is foraying into Saarc countries and the Middle-East through licensee arrangements.

This arrangement, will ramp up Crocodile's presence to 30 countries from 24 Crocodile has tied up with Irfan Textiles in Pakistan, Milton, part of the Bangur group in Bangladesh and is in talks with Groline in Sri Lanka and a few garment companies in Middle East and Cyprus, according to Mr. Venkatesh Sivaraman, managing director, Crocodile Products, who is overseeing the expansion. Crocodile Products is a 60:40 joint venture between Coimbatore-based Shivram Associates and Crocodile International.

TOP IN SOFTWARE, B'LORE NOW SET TO RULE IN MENSWEAR

From being the software capital, Bangalore is looking to morph into the fashionable "suit capital" of India. Some of the big names in the garment industry-Madura Garments, Zodiac Clothing, Raymond and big apparel exporters like Gokaldas Images-are setting up units in the garden city to specifically make suits/blazers & trousers.
Industry sources indicate that besides targeting the global market, players will also be looking at the domestic market. The market is small, but opportunities do exist. International travel has created awareness about sartorial tastes which is bound to benefits.

AEPC STITCHES UP SUCCESS WITH APPAREL SHOWS IN US
The two-day exhibition in New York, featuring 68 Indian exporters, attracted 250 buyers in the knit and woven range. The success was attributed to referrals received by India from buyers like Rodney Birkins, executive vice president of JC Penny, besides representatives from biggies like Gap, Tommy Hilfiger, K-Mart, Sara Lee and Timberland.

THE NEWS
- Raymond, Arvind Mills, Welspun, Zodiac, etc. are doubling the existing capacities. Sri Lankan company MAS Holding is setting up a manufacturing base in Bangalore
- Garment exporters like Gokuldas Images, Orient Craft and Ambattur clothing are building bigger factories in single location than before
- By merging their spinning operations, textile companies Vardhman and Mahavir expect to put up the largest textile company in India
- Arvind Mills proposes to set up a Rs.200-cr power loom park near its Santej factory in Ahmedabad
The domestic garment industry is also booming. Bombay Dyeing is finalising plans for its exclusive retail stores. India Fashion and Cavin Cally are opening exclusive showrooms.

Madura Garments, the undisputed leader in the apparel business in India, has swept the prestigious Lycra Images Fashion Award 2005 at a glittering function in Mumbai.

Madura garment was awarded the title of the most admired Apparel Company of the year for the second consecutive year. Allen Solly won the Most Admired womenswear Brand and the Most Admired Trouser Brand of the year for the second year in succession. The title of The Most Admired Brand Professional of the year was conferred on Hemchandra Javeri, president of the company.

Superbrand Allen Solly has achieved many awards such as the 2002 Images Award for the most admired shirts and trousers brand, 2003 Images award for the best launch of the year for women's wear, 2004 Images Award for the most admired trousers brand of the year, 2004 Images Fashion Award and the CMAI Award for the womenswear Brand of the year. This recognition reinforces the fact that Allen Solly as a fashion brand has grown from strength to strength and delivered a consistent performance, which has been recognised by both the consumer and the industry alike.
RETAILING SECTOR WAITING TO TAKE-OFF

Management Consulting firm, KSA Technopak is of the opinion that the organised retailing sector in India is today at the take-off stage. But the real boom is expected to take place in the next five years.

According to Mr. Arvind singhal, managing director, the turnover of the 20 retailers at Rs. 1000-crore, makes up for just two per cent of the total retail business. It will be 5per cent by the year 2005. By then will be both push from retailers who will have gained some confidence in themselves as well as pull from customers who will begin to have some expectations from the market, which are at present very low.

MADURA GARMENT SET TO SPEND RS. 25 CRORE ON BRAND PROMOTION

Madura Garments, a subsidiary of Madura Coats, is planning to spend Rs.25 crore during the year on the promotion of various brands in its stable. According to George Zacharias, president Madura Garments, the company will spend between Rs. 7-8 crores on the promotion of the newly launched San Frisco range of trousers. The company anticipates good opportunities in the mid priced market. "Our target audience is males above 22 years of age in section A/B. The total market is estimated in this segment of 9.4 million trousers. We believe the company can cash in on the change in preference of the consumer from tailor made garments to readymade ones," he told newpsersons. The new product is priced
between the range Rs. 495 and Rs. 695 and in 12 different sizes. San Frisco will be initially sold through multibrand outlets and plans are afoot to set up San Frisco trouser points, he added. Madura Garments has Louis Philippe, Van Heusen, Allen Solly, Peter England and Byford brands in its stable.

**VIBE DENIM ETHIX INTRODUCES CASUAL WEAR IN TENCEL**

Delhi-based Vibe Denim Ethix readymade garment brand is now available in Tencel too. Presently, Tencel is being used for jeans, hipsters and straight fits. Plans are afoot to add trousers in the same fabric.

**GRASIM IN READYMADE GARMENTS THRUST**

Grasim Industries, the flagship company of the 20,000 crore Aditya Birla group, plans to focus on the readymade garments segment in exploiting its brand and distribution assets.

The foray into readymade garments is part of the company's plan in moving up the value chain that would enable it to utilize its excellent brand equity and strong distribution network built over the years.

**NOW NALLI WILL OFFER READYMADE RANGE FOR MEN**

The Channel based Nalli Chinnasami Chetty group famous for silk saris in the south, is all set to enter the ready-to-wear men's garment sector. Branded Asegai (meaning "spear" in the language of an African tribe), the range was launched across 20 destinations in the south.
BRAND LOYALTY SURVEY

Van Heusen and Peter England lead in brand loyalty in the Indian branded shirts market, according to a Gallup survey, commissioned by Madura Garments.

The decade-old Van Heusen brand commands 32 per cent brand loyalty, while three-year old Peter England follows a close second at 30 per cent. The findings of the survey conducted among the sec-A and B categories are based on an annual sample size of 6,000. The average monthly income of Sec-a is Rs. 10,000 and above and that of Sec-B Rs. 4,000 and above.

The survey showed the reach of premium readymade apparel brands extended only to 50 per cent of the total sec-A and sec-B categories. And, these two segments together account for sales of 20 million shirts annually.

Peter England's strong showing in the brand equity survey has been primarily attributed to the effective ad campaigns.

Madura Garments, established in 1989, enjoys 18 per cent market share of the total branded apparel industry in India. Estimated at Rs. 8,000 crore, the industry annually sells 20 million formal shirts, six million casual shirts, six million trousers and five million T-shirts.

ENGINES OF FUTURE GROWTH

Indian retailers and consumer goods companies are realising that the future lies on the net. Pantaloon Retail is the company aggressively expanding its
brick-and-mortar network to cover the country; it is also constructing a virtual shop to allow for interactive commerce over the net. The company already has a basic information-oriented site at www.pantaloon.com.

Shoppers' Stop already boast of a better designed website but like Pantaloon the supermarket chain still does not have a virtual shop. But there definitely are plan to take Shoppers' Stop fully online.

**DITTO FROM CHARAGH DIN**

Charagh Din, the Mumbai-based shirts store, has launched the 'Ditto' range of unisex shirts, thus targeting women for the first time in its 150 years history.

Priced upwards from Rs. 330, the range uses all kinds of fabrics including cotton and blends, knits, lycra, tencel and wool.

The launch of Ditto comes in the wake of a survey conducted by the store to understand the perception of the youth about the CD brand. Results showed that CD shirts were considered flashy, old-fashioned a 'not for me' kind of brand. So, CD has worked on bringing a youthful image to the Ditto range by bringing in the hoods, loose fits, the body suit fit and short lengths in the styles and cuts that it is available in.

**JACQUARD FRANCAISE COLLECTION FROM ZODIAC**

Zodiac, tie makers since 1954, launches a new collection for the
contemporary Indian male. The Jacquard Francaise collection is targeted at men who dress elegantly and stylishly.

The Jacquard Francaise collection is available in polyester and silk. The polyester ties are priced between Rs. 295 to 435 and the silk ties are priced between Rs. 555 to 1650.

**RUGGERS FROM ARVIND**

Arvind Garment, a division of Arvind Mills, has entered the market with an international range of khaki wear titled Ruggers. This range includes flat fronts, cargo, military, miner and gaberdines.

To complement this range of khaki wear, Ruggers has also introduced shirts and T-shirts. Ruggers has introduced a separate range of khaki wear for girls too. The other offerings include T-shirts in rugby, pique polo and waffle knits apart from casual shirts in peach poplin and checks shirts in two ply.

**TIBRE FROM GANGOTRI**

Gangotri Apparels, a division of Gangotri Textiles (GTL), recently entered the garments markets with the launched of cotton trouser under the 'Tibre' brand name.

As part of the company's plan to make Tibre a national brand, a range of new products targeting kids in the age group 4 to 14 years has been developed. The company is also looking at introducing shirts and T-shirts
besides launching variants of cotton trousers. GTL also plans to enter the
wrinkle-free garment segment once it clears health hazards tests.

ARVIND DEAL ON TRADEMARK WITH ARROW EXTENDED
The US based Clue Peabody & Company; the owners of Arrow brand have
extended the Arrow trademark agreement for another five years with Arvind
Clothing Ltd., part of the Arvind Mills Ltd. (AML).

In another move, Arvind Mills Ltd. has also decided to provide garment
packages for some leading names in brand retail market worldwide. This is
being done to move up the value chain and ensure better returns.

ASHIMA FORAYS INTO RMG SEGMENT
Many textile mills are facing challenges due to the opening up of markets
and liberalization of economy. In order to face competition these mills are
upgrading their technology or are shifting to other business. Ahmedabad
based Ashima Ltd. too is not far behind, apart from introducing value added
products and product innovations to meet challenges it has also chalked out
a comprehensive marketing and distribution strategy for its readymade
segment in order to emerge as a nationwide player.

Ashima launched 'Logo' the 100 percent cotton brand in Ahmedabad and
some parts of Gujarat last year. Logo consists of a complete range of formal
shirts, casual shirts, trousers, shorts, jeans and T-shirts.
OSTERMANN'S PLANS FOR THE MILLENIUM

Ostermann, the premium brand in men's cotton trousers is fast emerging the top runner in Delhi and Northern India. Available in the market in regular and easy fits, the product is priced from Rs. 795 upwards. Its recent introduction - the wrinkle free trousers has also had a tremendous running in the market. This product is available in two styles- Nicholson and Patterson, priced at Rs. 1145 and Rs. 1195 respectively.

Reebok has established a chain of 10 stores across India exclusively for women's sportswear. It is going range for aerobics, running, yoga, tennis and swimwear. Specially to mention The Delhi DLF City Center outlet has fitness experts who give advice and inspiration free of cost.

A survey done by Rashmi Bansal. It was revealed that male buyers falling in age group of 13 years to 30 years had major consumption areas of clothing accessories, food, entertainment & if married to some extent consumer durables. The role of influencers were played by (if near to the lower limit then) parents, peer group, workmates and if married then spouse.

All were brand conscious and 10 percent were brand loyal regarding clothing to be specific the readymades. (Businessworld, 28th June, 2004).

The Ebony department store change is expanding by itself by adding a book store - "Wordsworth" at Ludhiyana outlet. This is step to taken attract that
class people who have a healthy appetite for books. In addition to the books the store will also stock educational musical toys and greeting cards.

(Business India, April 2-15, 2001).

TEXTILE & CLOTHING: CONTRIBUTION OF KSA TECHNOPAK

KSA Technopak is a leader in Fashion & Textile Consulting in India, covering the entire value chain - from fibre to fabric.

KSA Technopak has had the privilege of working with the leaders of the textile and clothing industry in India. A select few of these market leader companies are listed below:

- Arvind Mills: Market leader in Denim, Yarn Dyed Shirting and Bottomweights.
- Bombay Dyeing: Market Leader in Home Textiles.
- Himatsingka Seide: Largest Exporter of premium silk fabrics.
- Madura Garments: India's Largest Clothing company.
- Morarjee Mills: Market leader in premium 100% cotton shirting.
- Raymond: Market leader in Worsted and blended Fabrics.
- Shopper's Stop: Largest Department store chain.
- Ambattur Clothing Limited: Leading Garment Exporter.

- Reliance: Market Leader in Polyester Fibre (and Intermediates)
- Welspun: India's largest Manufacturer & Exporter of Terry Towels.
- Wills Sports: Fastest growing Fashion clothing retail chain.
KSA has led the transformation of the entire industry sector by founding original solutions such as Quick Response for soft good manufacturing and AAMT R for developing manufacturing resources. KSA has proven these solutions during numerous implementations.

Internationally, KSA has assisted in starting over 200 factories across 6 continents and improving the operations of many more, in this industry sector. Kurt Salmon Associates has 50+ consultants working in Apparel Operations and more than 300+ men hours of experience. This varied experience aids in innovative and successful implementations for the clients across the globe.

KSA Technopak has closely worked with the Indian Government through the Ministry of Textiles, Ministry of Industry and its agencies such as Export Promotion Councils and Industry Associations on various assignments.

KSA Technopak understands the functions of all potential target companies and has deep professional relationships with key executives at senior most levels. This provides KSA with a head-start to execute the assignment.

Today KSA-Technopak is positioned as a full service provider for the following sectors of the textile and apparel industry:

- Fibre Manufacturers.
- Spinning Mills.
- Fabric Manufacturers.
- Independent Process Houses.
- Integrated Textile Mills.
- Branded Apparel Companies.
- Garment Manufacturers.
- Garment Exporters.
- International Buying Houses and Sourcing organizations.
- International textile companies.
- Industry Associations.
- Trade Promotion Councils.
- Financial Institutions.
### ADDRESS OF RETAILERS AND MANUFACTURERS OF AMRAVATI CITY

#### RETAILERS

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Puroshottam Harwani</td>
<td>‘Samrat Men’s Wear’ Jawahar Road, Amravati.</td>
</tr>
<tr>
<td>2.</td>
<td>Rasiklal Gaglani</td>
<td>‘Rajrasik’ Jaistambh Chowk, Amravati.</td>
</tr>
<tr>
<td>3.</td>
<td>Vinodkumar Samra</td>
<td>‘The Raymond Shop/Park Avenue’ Samra Complex, Jaistambh Chowk, Amravati.</td>
</tr>
<tr>
<td>8.</td>
<td>P. A. Hablani</td>
<td>‘Mayur Garments’ Jawahar Road, Amravati.</td>
</tr>
<tr>
<td>10.</td>
<td>‘Rasik Stores’</td>
<td>Jaistambh Chowk, Amravati.</td>
</tr>
<tr>
<td>11.</td>
<td>‘Keswani Men’s Wear’</td>
<td>Rajkamal Chowk, Amravati.</td>
</tr>
<tr>
<td>12.</td>
<td>‘Peter England’</td>
<td>Chandralok, Jaistambh Chowk, Amravati.</td>
</tr>
<tr>
<td>13.</td>
<td>A. P. Harwani</td>
<td>‘Poshakh Showroom’ Jawahar Road, Amravati.</td>
</tr>
<tr>
<td>15.</td>
<td>‘Akenzo Fashions’</td>
<td>Tank Plaza, Namuna Galli No. 1, Amravati.</td>
</tr>
</tbody>
</table>

#### MANUFACTURERS

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Modtex Fashions</td>
<td>Virendra Ganediwal, A/68, 7th Cross Road, M.I.D.C., Amravati.</td>
</tr>
</tbody>
</table>