

ARTHNOVA

SEPTEMBER
2025

INDIA

THE SIGNATURE
STYLE OF
Katrina
Kaif



H&M BEAUTY
ENTERS INDIA TO
MARK 10 YEARS

KAY BEAUTY HITS
₹240 CRORE

ABFRL LAUNCHES
'OWND': NEW GEN Z
BRAND ARRIVES+

STAR
BRAND
LEGACY





INSIDE THE ISSUE

Welcome to this month's edition of *Arthnova India*, where global and Indian brands converge to shape the new language of business and culture. September 2025 was a defining month of reinvention, from fashion houses reframing heritage to Indian conglomerates rewriting growth stories. Campaigns blurred the line between performance and storytelling, while collaborations proved that culture is no longer borrowed, it's co-created.

Inside, you'll discover how ABFRL's OWND! is redefining Gen Z fashion with affordability and attitude, H&M Beauty celebrates ten years in India by expanding into self-care, and Kay Beauty cements its place as Bollywood's most successful celebrity brand. You'll also find Gully Labs bringing streetwear to life through real-world community spaces, Adani emerging as India's fastest-growing brand, and Carlsberg betting on India's tech ecosystem for its global future.

Across these stories runs a single signal, India is no longer just a market, it's a movement. As global influence meets home-grown ambition, the next era of branding is being built right here.

FOUNDER'S NOTE

SEPTEMBER 2025

Dear Reader,

The signals this month point to reinvention at every level, and India sits at the heart of it. From Aditya Birla Fashion's OWND! capturing Gen Z energy to Kay Beauty's ₹240 crore milestone, we're watching Indian brands mature from trend followers to global tastemakers. Meanwhile, international names like H&M and Carlsberg are deepening their commitment to India, proving the world now builds *with* us, not merely *for* us.

Each of these moves tells the same story: relevance is no longer tied to legacy but to adaptability. Brands that listen, experiment, and evolve without losing their essence will define the decade ahead.

Sincerely,

Aditya Badola
Founder, Arthnova



ABFRL Launches OWND! – A Bold New Gen Z Fashion Brand

In September, Aditya Birla Fashion and Retail Ltd. (ABFRL) unveiled OWND!, a youth-centric fashion brand designed to capture India's Gen Z consumers. The brand made its debut with a 9,696 sq. ft. flagship store in Bangalore's Kalyan Nagar, offering over 10,000 trendy styles with entry prices starting at just ₹399. OWND! positions itself at the intersection of affordability and high fashion, delivering fast-moving trends without the premium price tag.

This launch signals ABFRL's strategic move to tap into India's massive youth demographic, where fashion serves as both self-expression and social currency. By making trend-driven style accessible, OWND! addresses a critical market gap for Gen Z shoppers who want runway-inspired looks on a budget. The brand's constant style rotation speaks directly to a generation that values newness and individuality, making it more than just another label, it's a bet on the consumers who will define India's fashion future.

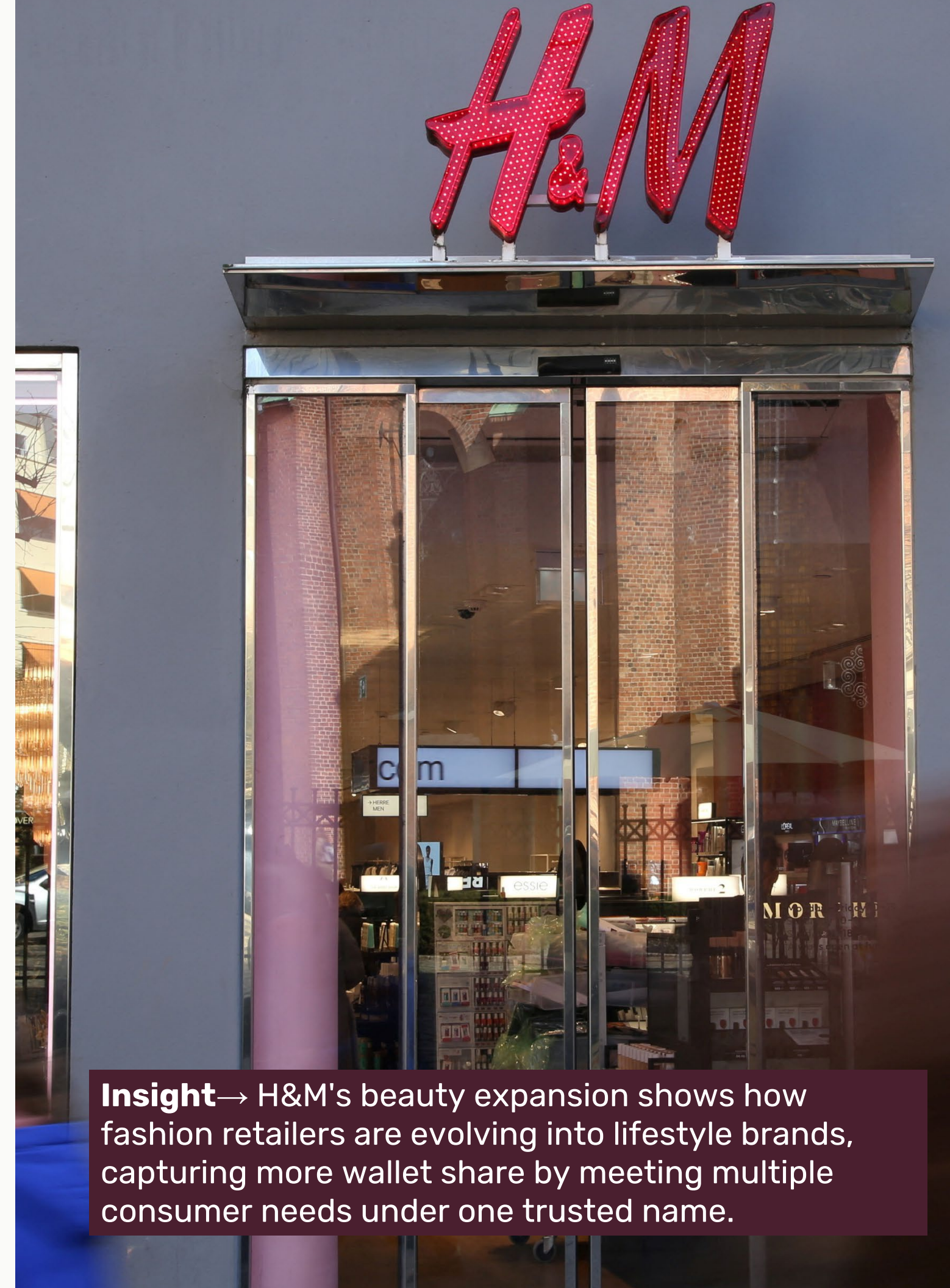


Insight→ Legacy retailers are creating hyper-targeted sub-brands to capture Gen Z, proving that accessible trend-driven fashion builds long-term loyalty with India's youth market.

H&M Beauty Marks India Debut with Dual Celebration

In September, H&M announced the launch of H&M Beauty, set to officially debut across India on October 2, 2025. The announcement coincided with the brand's 10-year milestone in the Indian market, marking a significant expansion beyond apparel. H&M Beauty features a comprehensive collection spanning makeup, beauty tools, nail products, and fragrances, designed to complement the brand's fashion offerings and create a complete lifestyle destination for Indian consumers.

This strategic move positions H&M to capture a larger share of consumer spending by extending into the beauty and self-care category. For a brand that has spent a decade establishing its foothold in India's competitive fashion market, adding beauty products signals deeper customer engagement and an omnichannel lifestyle approach. By pairing festive fashion with beauty essentials, H&M is betting that its existing customer base will embrace a one-stop shopping experience that mirrors their everyday style needs.



Insight→ H&M's beauty expansion shows how fashion retailers are evolving into lifestyle brands, capturing more wallet share by meeting multiple consumer needs under one trusted name.

Loomkins Debuts Premium Kidswear Platform

On September 24, 2025, Loomkins officially launched its website, marking a significant entry into India's evolving premium kidswear market. Founded by parents-turned-entrepreneurs Tanvi Bhardwaj and Piyush Kumar Sharma, the brand focuses on design, innovation, and thoughtfully crafted products that cater to children's comfort and identity. The launch taps into a surging category where parents increasingly view clothing as an extension of their child's personality and development.

Loomkins represents a shift in how Indian parents approach children's fashion, moving beyond basic functionality to embrace quality and conscious craftsmanship. By positioning itself in the premium segment, the brand captures a growing demographic willing to invest in products that reflect values of quality and thoughtful design. The digital-first approach provides nationwide access, making premium kidswear more accessible to families across India who prioritize both style and substance for their children.



Insight→ Loomkins reflects the premiumization of India's kidswear market, where parents view children's clothing as an investment in identity and quality rather than just utility.

Katrina Kaif's Kay Beauty Dominates at ₹240 Crore

In September 2025, Katrina Kaif's Kay Beauty emerged as Bollywood's most successful celebrity-founded beauty brand, achieving ₹240 crore in revenue and outpacing her industry peers. Launched with a mission to celebrate beauty in every shade and form, Kay Beauty has evolved from a celebrity endorsement into a performance-driven makeup label that champions diversity and accessibility across India's beauty market.

The success highlights a broader trend of Bollywood actresses building business empires beyond cinema. While Katrina leads with Kay Beauty's impressive numbers, Alia Bhatt's Ed-a-Mamma generated ₹150 crore in sustainable kidswear, Deepika Padukone's 82°E skincare faced a ₹25.1 crore loss, and Priyanka Chopra's Anomaly continues expanding globally. These ventures prove that when stardom meets authentic vision and strategic execution, actresses can create lasting legacies that extend far beyond the silver screen narrative.



Insight→ Bollywood actresses are transforming celebrity influence into entrepreneurial power, with Kay Beauty proving that inclusive brand purpose combined with smart execution drives profitability.

Gully Labs Opens Flagship Store in Delhi

In September 2025, Gully Labs opened its flagship store in Delhi's Panchsheel Enclave, marking a significant expansion for the community-first streetwear brand. The launch represents Gully Labs' commitment to scaling its presence in India's rapidly growing streetwear market, where youth culture and urban fashion are driving unprecedented demand. The flagship store serves as both a retail destination and a community hub, reflecting the brand's ethos of connecting with street culture at its core.

This move comes at a time when India's streetwear segment is experiencing explosive growth, with young consumers seeking brands that represent authentic urban identity rather than mass-market fashion. Gully Labs has positioned itself at this intersection, building a loyal following through designs that resonate with India's hip-hop culture, skateboarding communities, and street art movements. The physical flagship amplifies the brand's digital-first strategy, offering customers an immersive experience that extends beyond e-commerce into tangible community engagement.

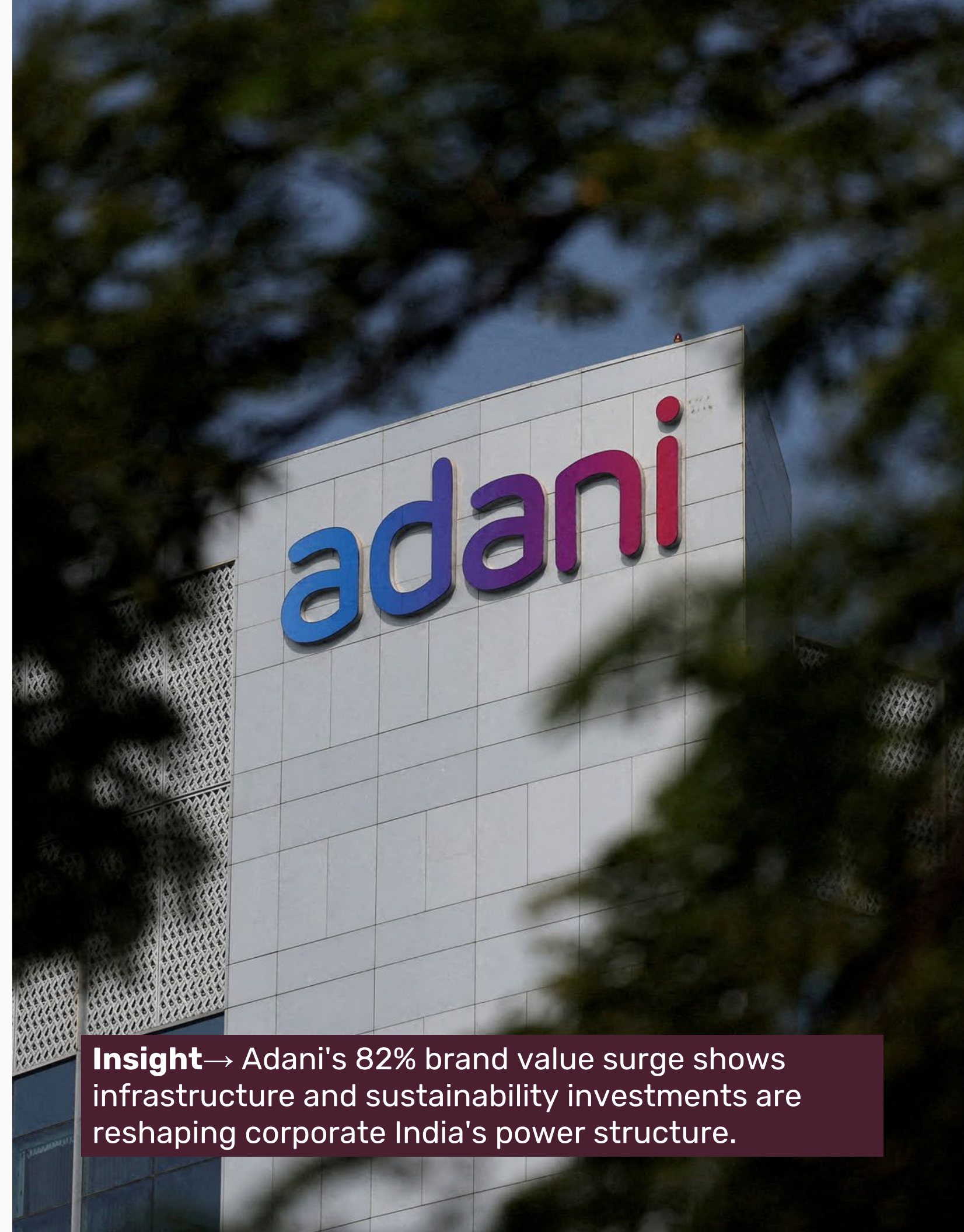


Insight→ Gully Labs' flagship launch demonstrates how streetwear brands are moving beyond online channels to create physical community spaces, proving that authentic culture-driven fashion requires real-world connection points.

Adani Surges 82% to Become India's Fastest-Growing Brand in 2025

According to Brand Finance's 2025 ranking, Adani Group emerged as India's fastest-growing brand, with brand value skyrocketing from \$3.55 billion to \$6.46 billion, an impressive 82% increase. This remarkable surge outpaced iconic names like Reliance, Infosys, Zomato, and Tata's TCS, cementing Adani's position as a powerhouse in India's business landscape. The growth is attributed to aggressive expansion in integrated infrastructure, surging green energy ambitions, and enhanced brand equity among key stakeholders.

The achievement reflects Adani's strategic diversification across ports, airports, renewable energy, and digital infrastructure. With India's GDP projected to grow 6-7% for FY2025-2026, Adani's brand surge demonstrates how infrastructure-led growth creates compounding value. The conglomerate's ascent signals the rising influence of infrastructure and sustainability-focused enterprises in shaping India's corporate landscape, where the top 100 brands now command \$236.5 billion in total brand value.



Insight→ Adani's 82% brand value surge shows infrastructure and sustainability investments are reshaping corporate India's power structure.

LANGUAGE Bets on Suburban Luxury in Navi Mumbai

Known for its emphasis on premium leather craftsmanship, LANGUAGE opened its exclusive store at Nexus Seawoods Mall in Navi Mumbai in September 2025, making its products more accessible to discerning urban customers during the festive shopping period. The brand is offering a limited-time 15% discount on all in-store products until September 30, 2025.

LANGUAGE already operates exclusive outlets in Chennai, Hyderabad, Chandigarh, Indore, Ludhiana, and Dubai, while being available through more than 250 multi-brand premium retailers across India. The Navi Mumbai launch signals a strategic shift: premium brands are no longer concentrating solely on metro city centers but actively pursuing affluent suburban markets where aspirational consumers increasingly live, work, and shop.

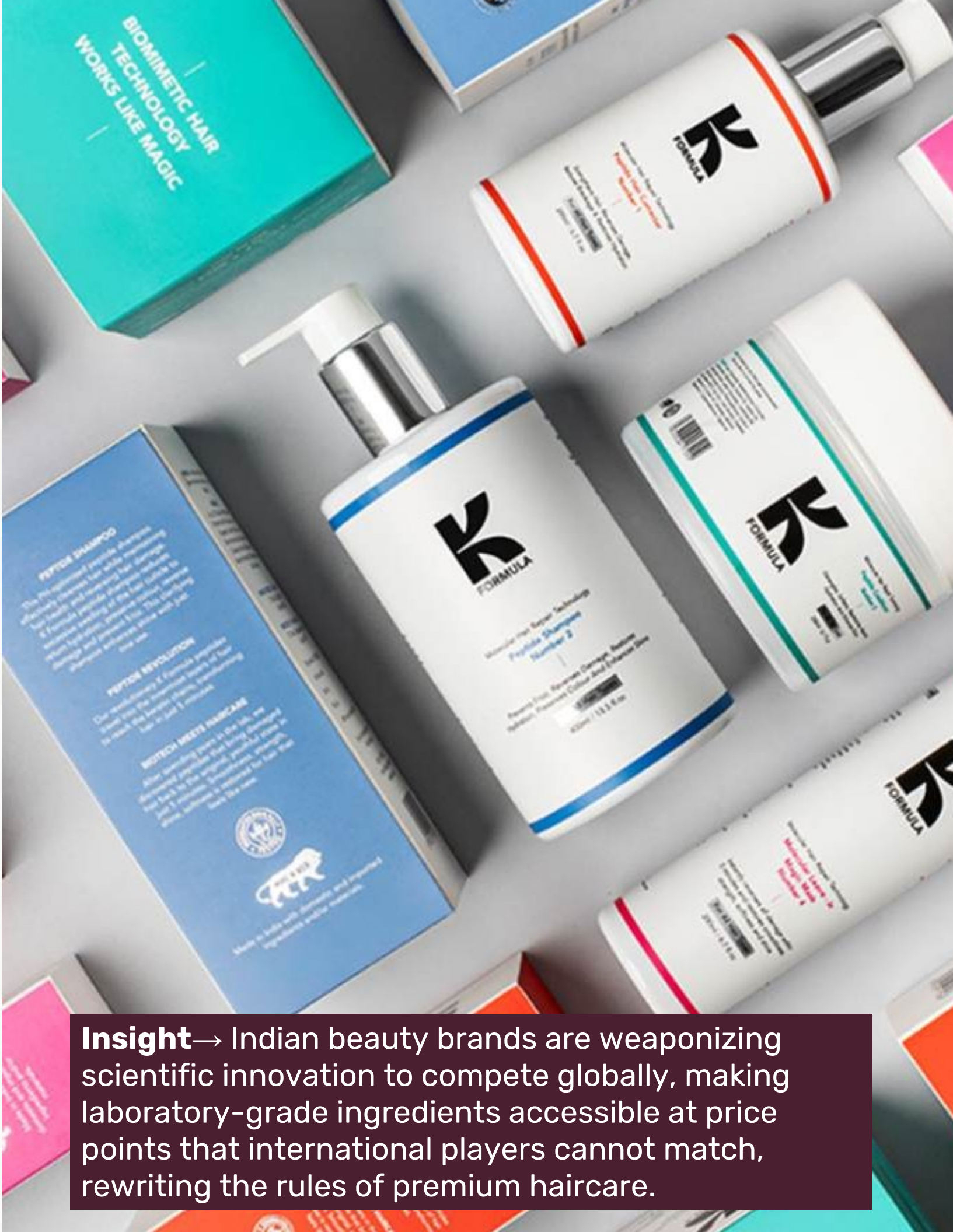


Insight→ India's luxury retail frontier is shifting from downtown flagships to suburban malls, as premium brands follow affluent consumers outside traditional metro centers, making suburbs the new battleground for aspirational spending.

K Formula Brings Peptide Science to Indian Haircare

K Formula unveiled India's first peptide-based haircare line in September 2025, introducing a six-step repair ritual priced between ₹700 and ₹1,500. Consumer trials revealed that over 90% of users experienced noticeably softer, smoother hair after just one wash, positioning the brand at the intersection of clinical efficacy and mass-market accessibility.

This launch represents more than a product introduction, it signals a fundamental shift in Indian beauty retail. While international brands have long leveraged peptide technology in premium segments, K Formula is democratizing advanced haircare for India's aspirational middle class. By combining scientific formulation with competitive pricing, the brand challenges the dominance of both traditional ingredient-led products and expensive imported alternatives, proving that Indian consumers increasingly demand efficacy-backed beauty solutions.



Insight→ Indian beauty brands are weaponizing scientific innovation to compete globally, making laboratory-grade ingredients accessible at price points that international players cannot match, rewriting the rules of premium haircare.

Carlsberg Bets Big on India with Tech Hub

Brewery giant Carlsberg Group announced the launch of its first-ever IT Global Capability Centre (GCC) in Gurugram in September 2025, marking a strategic pivot in the company's digital transformation journey. The facility will serve as a technology nerve center supporting Carlsberg's global operations, leveraging India's deep bench of talent in software development, data analytics, and artificial intelligence.

This isn't just about cost arbitrage. By establishing a GCC in India, Carlsberg joins a growing roster of multinational corporations, from Nike to HSBC, that view India not merely as a consumer market but as a critical innovation engine. The move underscores a broader trend: India is becoming the world's technology back office, with GCCs projected to employ over 2 million professionals by 2030. For Carlsberg, the Gurugram hub represents a bet that India's tech ecosystem can drive competitive advantage in an industry facing disruption from changing consumer preferences and digital-first competitors.



Insight→ India's evolution from consumer market to innovation powerhouse is accelerating, with global brands establishing GCCs to tap into technical talent that rivals Silicon Valley—at a fraction of the cost.

VinFast Makes Bold Indian Entry with VF 6 and VF 7 Electric SUVs

Vietnamese electric vehicle manufacturer VinFast officially entered the Indian automotive market in September 2025 with two electric SUVs, the VF 6 and VF 7. The VF 6, a compact urban EV, offers 480 km range with a 59.6 kWh battery, priced between ₹20-25 lakh. The VF 7 targets premium buyers with 450 km range at around ₹50 lakh. Both models feature connected technology and ADAS, positioning VinFast as a serious contender in India's evolving EV landscape.

What sets this launch apart is VinFast's commitment to local manufacturing at its new Tamil Nadu facility. By establishing production in India, the company is leveraging cost-effective manufacturing while tapping into massive domestic demand. With bookings open and an aggressive expansion plan, VinFast joins a growing wave of Southeast Asian automakers viewing India as both a manufacturing hub and a critical consumer market.



Insight→ Southeast Asian automakers are challenging legacy players by using India as a manufacturing base while targeting EV-hungry consumers with aggressive pricing.

Beyond the Headlines

- Flipkart Receives Singapore Court Approval to Redomicile to India, Setting Stage for \$35 Billion IPO in 2026.
- boAt Partners with Netflix India to Launch PartyPal 700 Speaker Integrated into Hit Series Storytelling.
- Mumbai's Presolv360 Secures \$4.7 Million from Elevation Capital for AI-Powered Legal Dispute Resolution Platform Serving 100+ Enterprises.
- Maruti Suzuki Begins e Vitara Production at New Hansalpur Plant in Gujarat for Export to 100+ Countries.



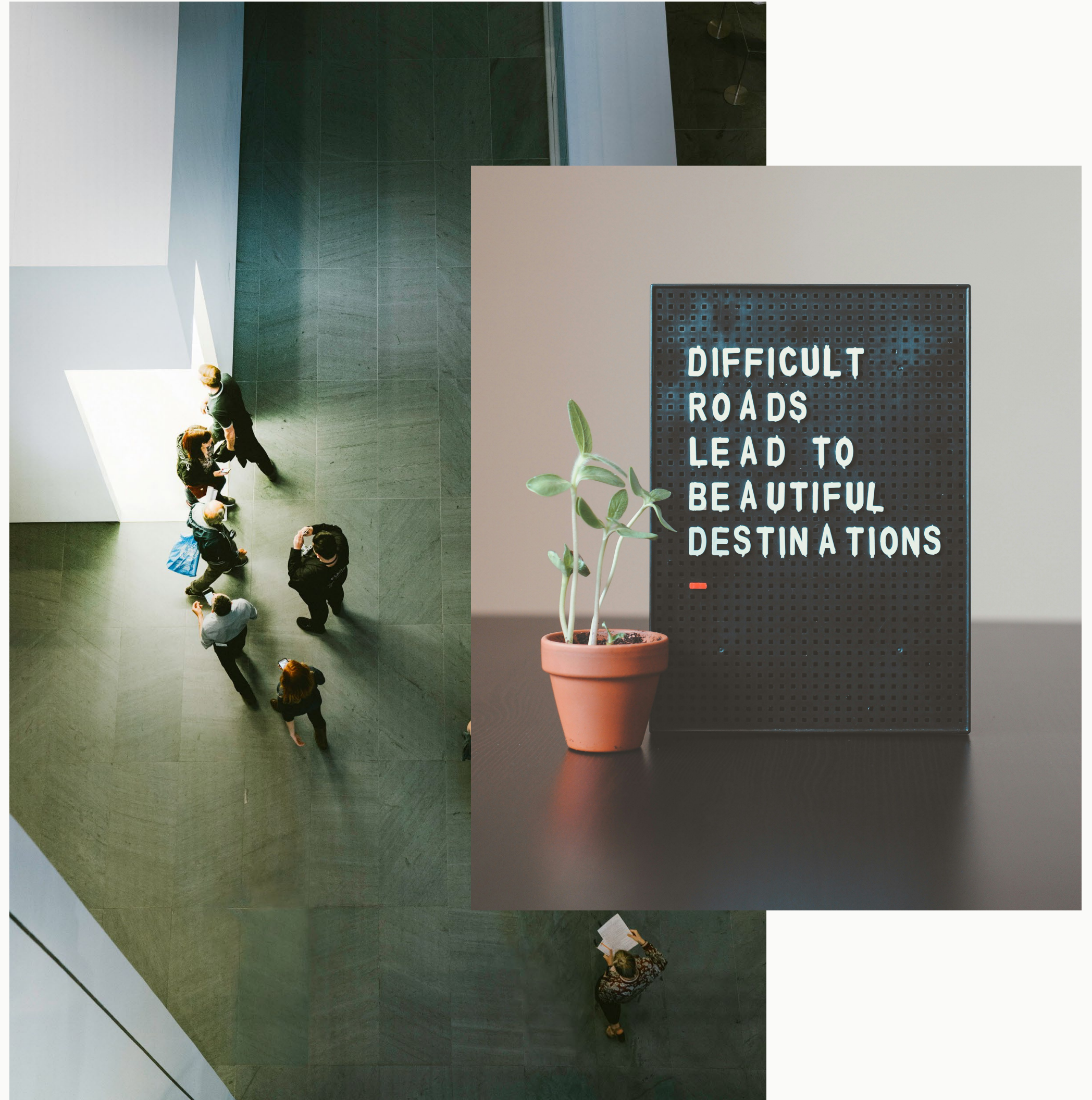
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Final Thoughts

This month proved one thing: reinvention keeps brands alive. From Nike rethinking its slogan to Kay Beauty turning purpose into profit, every story showed evolution. India led the way with OWND redefining youth fashion, Gully Labs shaping street culture, and Adani building identity through scale.

More Indian names will go global, more creativity will blend with commerce, and audiences will keep rewarding authenticity over noise.

Until next month, keep watching the signals.





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