

Global Apparel Markets: Business Update, 1st Quarter 2013

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Abstracts

This report provides an update of business news in the following categories: acquisitions, divestments and mergers; company rebranding; company restructuring; corporate social responsibility (CSR); financial results; joint ventures, cooperation, licensing and distribution; markets; new brands; and new stores. Companies, other organisations and brands analysed in the report include: Abercrombie & Fitch, American Essentials, Asda, Asos, Comercio Excelente Norte Sur, Concept One Accessories, Cone Denim, COS (Collection of Style), Crailar Technologies, Debenhams, ELL Real Estate, Fast Retailing, Five Star Blue, Gap, George, Gildan Activewear, Greenpeace, H&M (Hennes & Maurtiz), Iconix Brand Group, Inditex, JC Penney, John Lewis, Kering, Kin, Lee Cooper, Levi Strauss & Co, Majid Al Futtaim Fashion, Mango, Marks and Spencer (M&S), MH Alshaya, Ministry of Environmental Protection (MEP), Mitsubishi Corporation, Morrisons, Old Navy, Perry Ellis International, PPR, Primark, PVH Corp, Republic, Sports Direct, Stepping Stones, The International Oeko-Tex Association, TJX Companies, Valentino and World Wildlife Fund (WWF).

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SUMMARY

ACQUISITIONS, DIVESTMENTS AND MERGERS

Iconix Brand Group has acquired the Lee Cooper Brand
Sports Direct has acquired the fashion apparel retailer Republic

COMPANY REBRANDING

PPR has changed its name to Kering

COMPANY RESTRUCTURING

JC Penney has replaced its chief executive officer (CEO) following poor financial results as a result of a failed pricing and promotional strategy

CORPORATE SOCIAL RESPONSIBILITY (CSR)

H&M has published its Conscious Actions Sustainability Report for 2012
The International Oeko-Tex Association has developed a new certification system called

STEP

The Ministry of Environmental Protection (MEP) in China has implemented a plan to manage the country's use of hazardous chemicals
The World Wildlife Fund (WWF) and H&M have signed a partnership agreement relating to the development of a new strategy for reducing H&M'S water consumption
Valentino has made a commitment to eliminate the use of hazardous chemicals from its products and supply chain by 2020

FINANCIAL RESULTS

Abercrombie & Fitch: net sales and net income were up in 2012/13

Fourth quarter 2012/13

Asos: group revenues rose by 37% in the second quarter of 2012/13 thanks to strong international sales

Second quarter 2012/13

First half 2012/13

Gap: net sales and net income were up in 2012/13

Fourth quarter 2012/13 2012/13

Gildan Activewear: net sales increased by 38.5% and net earnings of US\$35.3 mn were recorded in the first quarter of 2012/13

Outlook

H&M: sales increased by 10% in 2011/12 and by 2% in the first quarter of 2012/13

Fourth quarter 2011/12

First quarter 2012/13

New stores

Inditex: net sales increased by 16% and net income by 22% in 2012/13

New stores

JC Penney: a net loss was incurred in 2012/13 due to restructuring charges and a new pricing and promotional strategy

Fourth quarter 2012/13

Levi Strauss & Co: net sales were down by 3% but net income increased by 4% in 2011/12

Fourth quarter 2011/12

2011/12

First quarter 2012/13

Marks and Spencer (M&S): sales rose by 3.1% in the fourth quarter of 2012/13

Perry Ellis International: total revenues were down by 1% and net income plummeted by 42% in 2012/13

Fourth quarter 2012/13

2012/13

Outlook

TJX Companies: net sales and net income were up in 2012/13

Fourth quarter 2012/13

JOINT VENTURES, COOPERATION, LICENSING AND

DISTRIBUTION

Crailar Technologies has entered into an agreement with Cone Denim relating to the development and marketing of its Crailar Flax Fibre

Fast Retailing and Mitsubishi Corporation have established a joint venture company in Indonesia

H&M and Tom?s Berdych have signed a partnership agreement relating to the development of a range of tennis apparel

PVH Corp has entered into five licensing agreements relating to its Izod brand

MARKETS

EU clothing imports were down in value and volume in 2012

US clothing imports were down in value and in volume in 2012

NEW BRANDS

George has launched a new brand of fashion apparel called G21 Talent

John Lewis has launched its first own-label lifestyle range called Kin

Mango will introduce a new children's wear range and a new women's activewear range to its

collection

Morrisons has launched its first own-label range of apparel

NEW STORES

Abercrombie & Fitch will open its first Abercrombie & Fitch store and its first Hollister store in Dubai

H&M has opened its first COS store in Dubai

Debenhams will open new stores in Estonia and Latvia in 2014

GAP will open up to 20 Old Navy stores in Japan during 2013

Primark has announced plans to open its first stores in France during 2013

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Figure 1: PPR's new name and owl logo

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