

# Global apparel markets: business update, 2nd quarter 2014

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## Abstracts

This report provides information, analysis and valuable insight on developments relating to the global apparel industry in the following categories: acquisitions, divestments and mergers; corporate social responsibility (CSR); corporate strategy; financial results; investments; joint ventures, cooperation, licensing and distribution; and new stores. Companies, other organisations, individuals and brands analysed in the report include Abercrombie & Fitch, Archroma, Arden B, Asos, Authentic Brands Group, Blue Inc, Care International, Chalhoub Group, CO2 Nexus, Doris, Folli Follie Group, Freudenberg Far Eastern Spunweb Company, Gap, Gildan Activewear, Hugo Boss, ImagineX, Inditex, IndustriALL Global Union, International Finance Corporation (IFC), JC Penney, Juicy Couture, Karl Lagerfeld, Levi Strauss & Co, Marks and Spencer (M&S), MAS, Parigi Group, Patagonia, Perry Ellis International, Primark, Rainbow Group, Stradivarius, Sustainable Apparel Coalition (SAC), TJX Companies, US Agency for International Development (USAID), Wet Seal and Zero Discharge of Hazardous Chemicals (ZDHC) Group.

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### SUMMARY

### ACQUISITIONS, DIVESTMENTS AND MERGERS

Gildan Activewear has acquired Doris, a manufacturer of branded hosiery, legwear and shapewear

Hugo Boss now has full control of its store network in mainland China and Macau after acquiring the remaining 40% equity stake in its joint venture with Rainbow Group which it did not already own

### CORPORATE SOCIAL RESPONSIBILITY (CSR)

Archroma has increased the prices of its textile dyes in response to the enforcement of environmental regulations

Freudenberg Far Eastern Spunweb Company has joined the Sustainable Apparel Coalition (SAC)

Gap has formed a partnership with USAID to invest in the social and economic growth of

Myanmar

Inditex has renewed its framework Agreement with Industriall Global Union

The UK government has set up an online database which details the results of garment factory inspections in Bangladesh

The Zero Discharge of Hazardous Chemicals (ZDHC) Group has released its Manufacturing

Restricted Substances List (MRSL)

### CORPORATE STRATEGY

Authentic Brands Group will close all of its Juicy Couture stores in the USA

Blue Inc is seeking to raise funds for expansion

Wet Seal has exited from its Arden B Business

### FINANCIAL RESULTS

Abercrombie & Fitch: net sales were down by 2% in the first quarter of 2014/15

Asos: group revenues were up by 26% in the third quarter of 2013/14

Gap: total net sales were up by 1% in the first quarter of 2014/15

Gildan Activewear: net sales were up by 4.9% and net earnings by 9.5% in the second quarter of 2013/14

Outlook

Inditex: net sales were up by 4% but net income was down by 7% in the first quarter of 2014/15

JC Penney: a net loss was incurred in the first quarter of 2014/15

Levi Strauss & Co: net revenues and net income were down in the second quarter of 2013/14

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Marks and Spencer (M&S): total sales increased by 2.8% in 2013/14 and were up by 2.3% in the first quarter of 2014/15

First quarter of 2014/15

Perry Ellis International: net sales and net income were down in the first quarter of 2014/15

Outlook

TJX Companies: net sales were up by 5% and net income was unchanged in the first quarter of 2014/15

## **INVESTMENTS**

International Finance Corporation (IFC) is lending US\$28 mn to the Sri Lankan apparel manufacturer MAS

Patagonia has invested in CO2 Nexus via its \$20 Million & Change fund

The South African government will set up a new sustainable textile and apparel cluster

## **JOINT VENTURES, COOPERATION, LICENSING AND DISTRIBUTION**

Authentic Brands Group and Folli Follie Group will work together to expand the Juicy Couture brand in Europe

Authentic Brands Group and ImagineX will work together to expand the Juicy Couture brand in Asia

Karl Lagerfeld has entered into an agreement with Chalhoub Group

Perry Ellis International has entered into a licensing agreement with Parigi Group

## **NEW STORES**

Inditex will open its first UK Stradivarius store

Marks and Spencer (M&S) has opened its first stand-alone lingerie and beauty store in India

Primark will open its first US store in 2015

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