

# Global apparel markets: business update, 3rd quarter 2013

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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); financial results; investments; joint ventures, cooperation, licensing and distribution; markets; new stores; and online retailing. Companies, organisations and brands analysed in the report include Abercrombie & Fitch, Advansa, Alliance for Bangladesh Worker Safety, American Apparel, Arcadia Group, Asos, Authentic Brands Group, C&A, C&A Foundation, Calvin Klein, Cond? Nast International, Cortefiel, COS, Demsa Group, DNM Textiles, F&F, Fast Retailing, Fawaz Al Hokair, Fifth & Pacific Companies, Gap, Gazal, Gildan Activewear, Grupo Cortefiel, G.U., H&M (Hennes & Mauritz), Hudson's Bay Company, Inditex, Invista, J Brand, JC Penney, Juicy Couture, JW Anderson, Levi Strauss & Co, Lindex, Mango, Mo?t Hennessy-Louis Vuitton (LVMH), Nordstrom, Oak, Olah, Old Navy, Perry Ellis International, PVH Corp, Saks Fifth Avenue, Suning, Superdry, SuperGroup, Tesco, TJX Companies, Topman, Topshop, Uniqlo, Vestiaire Collective and Water Footprint Network.

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### SUMMARY

#### ACQUISITIONS, DIVESTMENTS AND MERGERS

American Apparel has acquired Oak, a USA-based fashion boutique

Authentic Brands Group has acquired the Juicy Couture brand from Fifth & Pacific Companies

Hudson's Bay Company has acquired Saks Fifth Avenue

Invista has entered into an agreement with Advansa to acquire its speciality polyester sector which makes products for apparel end uses

Moët Hennessy-Louis Vuitton (LVMH) has entered into an agreement to acquire a minority stake in JW Anderson

#### CORPORATE SOCIAL RESPONSIBILITY (CSR)

A group of leading North American apparel retailers and brands has formed the Alliance for

Bangladesh Worker Safety

C&A is working with C&A Foundation and Water Footprint Network to improve its water footprint

#### FINANCIAL RESULTS

Abercrombie & Fitch: net sales were down by 1% and net income plummeted by 33% in the second quarter of 2013/14

Asos: group revenues rose by 39% in 2012/13 thanks to strong international sales  
Fourth quarter of 2012/13 2012/13

Gap: net sales were up by 8% and net income soared by 25% in the second quarter of 2013/14

Gildan Activewear: net sales were up by 2.3% and net earnings soared by 47.3% in the third quarter of 2012/13

Outlook

H&M: sales rose by 4.3% and gross profit by 3.8% in the first nine months of 2012/13  
Third quarter 2013/13

First nine months of 2012/13

Inditex: net sales were up by 6% and net income by 1% in the first half of 2013/14

JC Penney: a net loss was incurred in the second quarter of 2013/14 due to

restructuring charges

Levi Strauss & Co: net income and net revenues were up in the second quarter and third quarter of 2012/13

Second quarter 2012/13

Third quarter 2012/13

Perry Ellis International: total revenues were up by 1.1% in the second quarter of 2013/14

Outlook

TJX companies: net sales were up by 8% and net income by 14% in the second quarter of 2013/14

## **INVESTMENTS**

Vestiaire Collective has secured investment worth US\$20 mn

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

Fast Retailing has established a subsidiary of J Brand in Japan

Olah has entered into a marketing and distribution agreement with DNM Textiles

PVH Corp has restructured a licensing agreement with Gazal relating to the distribution of Calvin Klein products in Australia, New Zealand and other island nations in the South Pacific region

## **MARKETS**

US clothing imports were up in value and in volume in the first seven months of 2013

## **NEW STORES**

Arcadia Group has opened an additional 36 Topshop and Topman concessions inside Nordstrom stores in the USA

Fast Retailing has opened its first G.U. store in China and will open its first Uniqlo stores in

Australia and Germany

Gap will open its first Old Navy stores in the Philippines in 2014

Grupo Cortefiel has opened its first Cortefiel stores in the USA

H&M will open its first COS store in the USA

Lindex will open its first stores in China

Mango will open new Mango megastores around the world

SuperGroup will open its first Superdry stores in Turkey in early 2014  
Tesco has opened an F&F flagship store in London, UK

## **ONLINE RETAILING**

H&M has opened an online store in the USA

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