

Global Apparel Markets: Business Update, 4th 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: corporate social responsibility (CSR); financial results; joint ventures, cooperation, licensing and distribution; manufacturing facilities; new stores; online retailing; and store closures. Companies, other organisations, individuals and brands featured in this report include Abercrombie & Fitch, Asos, Beyonc? Knowles-Carter, Calvin Klein, Community, Fruit of the Loom, Gap, Gildan Activewear, HanesBrands, H&M (Hennes & Mauritz), Inditex, JC Penney, Marks and Spencer (M&S), Perry Ellis International, Primark, Puma, PVH Brands Australia, TAU Investment Management, Tesco, TMall, TJX Companies, Topshop, Wet Seal, Zalando and Zara.

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SUMMARY

CORPORATE SOCIAL RESPONSIBILITY (CSR)

Gap has entered into a partnership with TAU Investment Management to improve sustainability and working conditions in garment manufacturing facilities in South-East Asia

Tesco has entered into a partnership with Community to improve working conditions in the UK clothing supply chain

FINANCIAL RESULTS

Abercrombie & Fitch: net sales down by 12% in the third quarter of 2014/15

Asos: group revenues up in the fourth quarter of 2013/14, the whole of 2013/14 and the first quarter of 2014/15

Fourth quarter 2013/14

2013/2014

First quarter 2014/15

Gap: total net sales down by 0.1% in the third quarter of 2014/15

Gildan Activewear: net sales up in the fourth quarter and whole of 2013/14

Fourth quarter 2013/14

2013/2014

Outlook

Inditex: net sales up by 7% in the first nine months of 2014/15

New stores and investments

JC Penney: total sales down by 0.5% in the third quarter of 2014/15

Marks and Spencer (M&S): sales up in the first half of 2014/15 but down in the third quarter

Second quarter 2014/15

First half 2014/15

Third quarter 2014/15

Perry Ellis International: total revenues down by 4.8% in the third quarter of 2014/15

TJX Companies: net sales up by 6% in the third quarter of 2014/15

JOINT VENTURES, COOPERATION, LICENSING AND DISTRIBUTION

Fruit of the Loom has entered into a yarn supply agreement with Parkdale Mills
Puma and United Legwear & Underwear Co have entered into a joint venture to develop a range of children's apparel

Puma has entered into a multi-year partnership with Rihanna

PVH Brands Australia has entered into new licensing and distribution agreements and made a number of acquisitions as part of its plans for expansion

Topshop has entered into a joint venture with Beyonc? Knowles-Carter to create a new company called Parkwood Topshop Athletic

MANUFACTURING FACILITIES

HanesBrands has opened a new manufacturing facility in Kim Dong District, Vietnam

NEW STORES

Abercrombie & Fitch will open its first stores in Mexico during 2015

Gap will open its first Old Navy brand stores in the Middle East

H&M has opened its first store in the Philippines

Inditex will open several new Zara stores in the USA during 2015

Primark will open seven new stores in the USA

ONLINE RETAILING

Calvin Klein will expand its online retailing operations

Gap will sell its products online in Europe through Zalando

H&M will launch several new online stores during 2015

Inditex has launched an online Zara store on the Tmall online retail site in China

STORE CLOSURES

Wet Seal has closed 338 of its 532 retail stores

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