

Global apparel markets: business update, 4th 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); corporate strategy; financial results; international trade policy; joint ventures, cooperation, licensing and distribution; markets; new brands; new stores; and online retailing. Companies, organisations, individuals and brands analysed in the report include Abercrombie & Fitch, Arcadia Group, Barneys New York, Benetton Group, BHS, Children Worldwide Fashion (CWF), Christoffel Wiese, Council of Fashion Designers of America (CFDA), Fifth & Pacific Companies, Galeries Lafayette, Gap, Gildan Activewear, Gilly Hicks, Hackett, H&M (Hennes & Mauritz), House of Fraser, Inditex, Intel, Invista, I.T Limited, JC Penney, J.Crew, Joules, Karl Lagerfeld, Kate Spade & Company, Lands' End, Lee, Lenzing, Leonard Green and Partners (LGP), Li & Fung, LF USA, Lucky Brand, Mango, Marks and Spencer (M&S), Opening Ceremony, Perry Ellis International, Quiksilver, Sears, Sycamore Partners, Sustainable Apparel Coalition (SAC), The Jones Group, TJX Companies, TM Lewin and Whistles.

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SUMMARY

ACQUISITIONS, DIVESTMENTS AND MERGERS

A South African businessman has expressed interest in acquiring the BHS chain of department stores

Fifth & Pacific Companies has sold Lucky Brand for US\$225 mn

Sears will spin off its Lands' End Clothing business

Sycamore Partners will acquire the Jones Group

CORPORATE SOCIAL RESPONSIBILITY (CSR)

H&M has committed to paying a living wage to all textile and garment workers at its supplier factories by 2018

The Sustainable Apparel Coalition (SAC) has launched the Higg Index 2.0

CORPORATE STRATEGY

Abercrombie & Fitch will close all of its stand-alone Gilly Hicks stores

Benetton Group will undertake a three-year restructuring programme in order to simplify its business model

Whistles will launch its first men's wear collection in time for the autumn/winter 2014/15 season

FINANCIAL RESULTS

Abercrombie & Fitch: a net loss of US\$15.6 mn was incurred in the third quarter of 2013/14 as net sales fell by 12%

Gap: net sales were up by 3% and net income by 9% in the third quarter of 2013/14

Gildan Activewear: net sales increased by 12.1% and net earnings soared by 115.7% in 2012/13

Fourth quarter 2012/13

Outlook

Inditex: net sales rose by 5% and net income by 1% in the first nine months of 2013/14

JC Penney: a net loss of US\$489 mn was incurred as total net sales fell by 5.1% in the third quarter of 2013/14

Marks and Spencer (M&S): total sales rose by 1.8% in the third quarter of 2013/14

First half of 2013/14

Third quarter of 2013/14

Perry Ellis International: a net loss of US\$3.0 mn was incurred as net sales fell by 6% in the third quarter of 2013/14

Outlook

TJX Companies: net income rose by 35% as net sales increased by 9% in the third quarter of 2013/14

Third quarter 2013/14

First nine months of 2013/14

INTERNATIONAL TRADE POLICY

Pakistan and nine other countries have been granted GSP+ status by the European Parliament

INVESTMENTS

Joules has won investment worth ?22 mn (US\$35 mn) from Lloyds Development Capital (LDC)

JOINT VENTURES, COOPERATION, LICENSING AND

DISTRIBUTION

Barneys New York, Council of Fashion Designers of America (CFDA), Intel and Opening

Ceremony have entered into a collaboration agreement relating to wearable technology
Galleries Lafayette has opened a new store in China under a joint venture partnership with I.T

Limited

House of Fraser has opened its first international flagship store under a franchise agreement with Retail Arabia International

Invista and Lenzing have entered into an agreement relating to the development and marketing of cellulosic denim fabrics

Lee has entered into a licensing agreement with Children Worldwide Fashion (CWF) relating to the development of a Lee branded children's wear collection

Quiksilver has entered into a licensing agreement with LF USA relating to the development of Quiksilver and DC branded children's wear

NEW BRANDS

H&M has launched a new range of sportswear

NEW STORES

H&M has been given final approval by the Indian government to invest in India

Hackett plans to open a number of stores across Asia, North America and South America

J.Crew has opened its first three stores in the UK

Karl Lagerfeld has opened its first store in the UK

Mango has opened new concessions and stores which sell a new range of plus-size women's wear

TM Lewin plans to open new stores and concessions in Africa, Asia, Europe and the Middle

East

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Figure 4: H&M Sport fitness gear for women

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