

# **Global Apparel Markets: Business Update, 2nd Quarter 2012**

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## **Abstracts**

This report provides an update of business news in the following categories: acquisitions, divestments and mergers; corporate social responsibility (CSR); financial results; international trade policy; joint ventures, cooperation, licensing and distribution; markets; new stores; and online retailing. Companies, organisations and brands analysed in the reports include Abercrombie & Fitch, Anvil Knitwear, Aquascutum, Asos, Benetton Group, Bosideng International, Brooks Brothers, Delta Galil Industries, DyStar, Fast Retailing, Fawaz Al Hokair, Gap, Gildan Activewear, H&M (Hennes & Mauritz), Inditex, JC Penney, J Crew, Lane Crawford, Lee Cooper, Lenzing, Levi Strauss & Co, LVB, Maison Martin Margiela, Marks & Spencer (M&S), My-wardrobe.com, Naturally Advanced Technologies (NAT), Perry Ellis International, Reliance Brands, Schiesser, Tesco, TJX Companies, Tuscarora Yarns, Uniqlo, US International Trade Commission (USITC) and YGM Trading.

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### SUMMARY

### ACQUISITIONS, DIVESTMENTS AND MERGERS

Delta Galil has acquired Schiesser

Gildan Activewear has acquired Anvil Holdings

YGM Trading has acquired the luxury clothing brand Aquascutum

### CORPORATE SOCIAL RESPONSIBILITY (CSR)

H&M has published its Conscious Actions Sustainability Report for 2011

Marks and Spencer (M&S) has launched a new recycling initiative called “Shwopping”

The European Union (EU) has launched a new programme in Pakistan to support the development of a sustainable cotton supply chain

### FINANCIAL RESULTS

Abercrombie & Fitch: net sales increased by 10% in the first quarter of 2012/13

Asos: Total Group revenues rose by 46% in 2011/12 thanks to continuing strong international sales

Fourth quarter 2011/12

2011/12

Benetton Group: net sales and net income declined in the first quarter of 2012

Gap: net sales increased but net income remained static in the first quarter of 2012/13

Gildan Activewear: net sales increased by 25.9% but net earnings declined by 56.4% in the second quarter of 2011/12

Outlook

H&M: sales were up by 14.1% and gross profit rose by 12.3% in the first half of 2011/12

Second quarter 2011/12

First half of 2011/12

New stores

Inditex: net sales and net income rose in the first quarter of 2012/13

New stores

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

Levi Strauss & Co: net sales and net income increased in the first quarter of 2011/12

Marks and Spencer (M&S): total sales increased by 2.0% in 2011/12

Fourth quarter 2011/12

2011/12

Perry Ellis International: total revenues and net income declined in the first quarter of 2012/13

Outlook

TJX Companies: net income rose by 58% as net sales increased by 11% in the first quarter of 2012/13

## **INTERNATIONAL TRADE POLICY**

The US-Colombia Trade Promotion Agreement (CTPA) has entered into force

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

Brooks Brothers and Reliance Brands have formed a joint venture company in India  
Dystar and Tuscarora Yarns have entered into a partnership agreement to develop new environmentally friendly dyed yarns for coloured denim

Inditex will expand its head office and build a new logistics centre in Spain

J Crew and Lane Crawford have entered into an agreement to bring the J Crew brand to Asia

Naturally Advanced Technologies (NAT) and Lenzing have signed a joint development agreement

Maison Martin Margiela will develop an apparel collection for H&M

## **MARKETS**

EU clothing imports fell in value and volume in the first quarter of 2012

US clothing imports were up in value by 2.7% in the first four months of 2012

## **NEW STORES**

Bosideng International has opened its first flagship store in the UK

Fast Retailing will open a new Uniqlo flagship store in San Francisco, USA

Fast Retailing has set up a subsidiary in China

Lee Cooper plans to open 20 new standalone stores in Russia during 2012-14

Tesco has opened its first F&F store in Saudi Arabia

## **ONLINE RETAILING**

My-wardrobe.com will expand into the Asian retail market

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