

## TURKEY: GAINING MARKET SHARE IN THE U.S. READY-TO-WEAR CLOTHING MARKET

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***Abstract.** Although many believe the global textile industry is mature it is still a growing market with predictions the world textile and clothing industries are expected to grow at a three to four percent rate per year for some time to come. Moreover, it is predicted that by 2010 this industry will be a \$500 billion market (Gorvett, December 6, 2006). Although China is a source for many of U.S. products, particularly apparel, the recent product recalls and the need for quality suppliers provides opportunities for Turkish goods. Hence, the overall purpose of this study was to determine the criteria needed by Turkish suppliers to gain market share in the U.S. apparel industry. Five owners of Turkish textile manufacturing firms well established in Europe and recently in the U.S. were surveyed. Results showed that entering the U.S. market as a wholesaler or distributor and gaining experience was the 'safest' way to start. Opening stores may be a next step but must be based on matching brand image with appropriate target markets. Population and culture are so diverse and fragmented in the U.S. most textile products can find a niche in the marketplace, subject to strategic positioning.*

### INTRODUCTION

Jon Gorvett (International Herald Tribune, Dec 6, 2006 ), indicates that, rather than compete with these countries, Turkey, one of the top European textile producers, is refocusing on producing quality fabric and creating niches in this global market. In particular, the focus for Turkey is penetrating the U.S. upscale textile and clothing markets.

Although many think the textile industry is mature it is a growing market with predictions to grow at a three to four percent market per year for some years to come. Moreover, it is forecasted that by 2010 this industry will be a \$500 billion market (Gorvett, December 6, 2006)

Despite down cycles at times, the U.S. is an attractive market with one of the largest and most technologically powerful world economies, the largest GDP of \$43.5 trillion, along with a very large consumer population of 301 million in 2007. These add up to a purchasing power of \$12.98 trillion. Followed by the European Union, the U.S. is also the world's largest importer with a trade import deficit of \$1.855 trillion in 2006 (World Fact Book, 2007). And, probably, the most powerful influence the USA yields is its dominance over world's business transactions and its involvement in foreign affairs.

The apparel industry is the most successfully, globally sourced product (Byonungho 2004). For example, most brands have their headquarters in the United States with manufacturing facilities in other countries, such as Liz Claiborne with 240 factories in 31 countries. Clothing brands may be headquartered, such as Yes St. Laurent in Paris and Gianni Versace in Italy, while their many fabrics come from a wide variety of countries and are manufactured in still other countries for their ready-to-wear lines. Although international designer textile brands may do everything in their home country, U.S. brands, both national and private (i.e., Kenmore and Craftsman for Sears; Arizona and Stafford for J.C. Penney; Victoria Secret and Gap for the Limited), are faced with growing demands, and hence source globally for the best that the dollar can buy as they expand. Although this is a paper regarding textile and manufacturer sectors, recent, scandals in other sectors such as tainted shrimp, toys with lead paint and dog food tainted with contaminated whey, all from China demonstrate that global sourcing is not only prevalent in most industry sectors throughout the world, it also carries risks for brand owners. Given the above, problems of global sourcing is finding and nurturing dependable suppliers that will provide the quality standards, reliable delivery and flexible delivery schedules at a value price for U.S. retailers, manufacturers and textile suppliers. (Su, Gargeya, and Richter, 2005).

Although China is a source for many of U.S. products, particularly apparel, recent scandals and the need for quality suppliers provide opportunities for Turkish goods, especially textiles, one of their world class industries. Hence, the overall purpose of our study was to determine criteria needed by Turkish suppliers to gain additional market share in the U.S. apparel industry. Specifically, the objectives were as follows:

1. Analysis of the US ready-to-wear industry: size, scope and trends.
2. Determine proven success factors for Turkish companies who want to enter and/or increase their share of the U.S. apparel and textile market.
3. Provide an analysis of strengths and weaknesses of the Turkish ready-to-wear industry in comparison to its major competitors.

## RELEVANT LITERATURE

Shelton and Wachter (2005), noted that, "As a result of the Multi-Fiber Agreement (MFA) 1974, Agreement on Textiles and Clothing (ATC) 1994, NAFTA 1994, and the transitional programs of the WTO of 1995, global sourcing had re-directed the course of U.S. textiles and apparel trade markets to lower cost offshore locations at the expense of U.S. jobs. By January 1, 2005, quota elimination in the textile and apparel trade in the U.S. resulted in job opportunities in low wage countries and jobs lost in developed countries (Shelton, Wachter, (2005). Additionally, Shelton and Wachter (2005) underscored that outsourcing entails more efficient use of capital, technology, labor, and other inputs of business that are considered "none-core". Given the higher cost of labor in the U.S. and other developed nations, Oh and Suh (2003) noted that the textile and apparel industry in these countries experienced plant closings, layoffs, and even bankruptcies, resulting from intense, worldwide lower cost competition. Similarly, competitive pressures from outside the U.S. forced many

companies to outsource to remain competitive (Su, Gargeya, Richter, 2005). U.S. foreign policy makers have been working with countries that border it, Canada and Mexico (NAFTA), also with Central American-Dominican Free Trade Act, and subsequently toward a North and South American Union to be more competitive with the European Union and other trade groups such as those in the Pacific Rim.

Approximately 570,000 jobs have been lost in the textile and apparel industries in the U.S. from 1973-2005 (Department of Labor-BLS 2005), yet the sector continues to employ 547,800 individuals (American Manufacturing Trade Action Coalition Press Release, June 2, 2007). Borneman (2006) noted that U.S. talk of free trade and tariff free trade has made it difficult for implementing the Central American-Dominican Republic Free Trade Agreement and NAFTA due to uncompetitive labor costs and lack of safe distribution channels crossing the borders into the U.S.

In this ever-expanding world of globalization, most companies are trying to identify their strengths and weaknesses relative to other players regarding production, efficiency, cost structure, resources, experience and quality, to thrive. By focusing on their strengths and outsourcing their uncompetitive processes, companies can improve performance and redirect their growth positively. However, U.S. industrial policies have thrived on promoting economies of scale while many other countries implemented policies that protected and improved their national economies and industries that were negatively impacted by low cost labor markets. Though these new country agreements were considered barriers for U.S. businesses, some saw them as opportunities for importing to the U.S. As the world continues to move toward a quota-free trading system in textiles and apparel, companies that can compete are continually to improving the quality of their fabric goods for world markets.

### **The U.S. Ready-to-Wear Clothing Industry**

Because of its modest growth rate, the U.S. market is very competitive and price pressures are always intense. The clothing market in the U.S. was \$127.1 billion in 2003 and grew 3.7 percent from the year before and is forecasted to reach \$147.5 billion in 2008, representing a market growth rate of 3.1 percent per year between 2003 and 2008 (U.S. Clothing Retailing 2004, Snapshots International Inc.). Further, family clothing stores, representing 49.3 percent of the retail textile market, by value, constituted the largest segment in 2003. By value was the GAP was the largest textile retailer, with a 12.5 percent market share, followed by The Limited with a seven percent market share (U.S. Clothing Retailing 2004, Snapshots International Inc.).

The US imported \$80.071 billion in apparel from China followed by Mexico with an eight percent share (WTO, 2006). Although Turkey is the fourth largest exporter in the world and the largest exporter to the European Union in 2005; it ranked 24<sup>th</sup> in apparel exports to the U.S. (World Trade Report 2006, WTO). Since the elimination of quotas U.S. retail buyers increased their sourcing from Pacific Rim nations, particularly from China now up to 43 percent, while decreasing sourcing from developing economies in East Asia and Turkey to 17 percent.

However, according to Davidson (2006) a big thorn in China-US trade relations was that China keeps the yuan artificially low in value making it a prime market for global sourcing and leading to further increases in the US trading deficit, particularly with China. Talks are currently on-going concerning a level playing field in exports for both countries, primarily through a Chinese adjustment of its yuan with its global trading partners.

### **Turkey Ready-to-Wear Clothing Industry**

Turkey's ready-to-wear clothing industry is one of the major industries of its economy and international trade. According to Sevim and Emek (2006) clothing and textiles had annual sales of \$30 billion and a 26 percent share of total export volume in 2005. Turkey is the fourth largest clothing supplier in the world and second largest supplier to the European Union. Under the World Trade Organization Agreement on Textiles and Clothing (WTO, 2006) –

this sector continues to maintain and enhance its competitiveness despite the abolition of quotas (Sevim and Emek, Turkish Clothing Industry Report, Export Promotion Center of Turkey, 2006). Germany, the UK and the U.S. are the most important markets for Turkish exports, with export shares of 27%, 18%, and 8% respectively. However, compared to 2004 data, exports to the U.S. have declined 21 percent. Hence, understanding the causal factors has potential for reversing this decline and growing apparel and textile exports to the U.S.

## METHODOLOGY

### Sample

To determine what strategies would help Turkish firms gain market share in the US, five Turkish companies with brand equity in European markets for approximately ten years were surveyed. These companies have been active players in the U.S. market in recent years and a major reason for their selection. Target companies in this study were contacted via telephone or e-mail, and asked to participate in the study based on their past performance in the U.S. market.

In addition to survey data the companies' product lines, distribution channels, advertising, promotion and public relations strategies were examined. Finally, American and Turkish governmental trade organizations were sought out for their insights on Turkey gaining textile and apparel market share in the U.S.

### Instrument

Upon their acceptance, a questionnaire consisting of thirty questions was distributed via e-mail. Respondents were given the option of corresponding by e-mail or telephone, as well as, to omit any questions considered inappropriate or proprietary. Many of the questions required just a yes/no response or were otherwise open-ended. Some of the questions included the following:

1. How do you evaluate your performance in the US market? What are your future goals?
2. Are the products manufactured in the US?
3. Which distribution channels have you used? (wholesalers, retail stores, e-stores, telemarketing)
4. Why and how did you decide to enter the US? Were there any major factors that enabled your decision to establish business in the US?
5. Were there any governmental factors to help foster your exports to the US?
6. Are your products in their Turkish design, or are they customized according to US market needs (ex: rapper jeans, XXL sizes etc?)
7. If you have an established brand, how is its awareness? Do you have plans to improve your brand equity? What other strategies do you plan to improve it?
8. What are the key success factors and value propositions of your company?
9. How do you segment the US market? Which segments you target?
10. Do you utilize or cooperate with any research company to find out unmet customer needs or expectations?
11. What assets and competencies should a business have to build brand image and maintain sustainable success in the US?
12. Who are your competitors in the US market?
13. What are their major strengths or weaknesses?
14. Are there any US derived import tariffs or regulations that limit your exports and/or sales activities?
15. What do you consider the future threats and opportunities in the US and for your business?
16. Are there any major strategic uncertainties? ( Ex: export policy , dollar's strength etc)
17. How would you plan to respond to a possible demand change or a completely new product line necessity etc?

18. When you compare to Turkish market what are the major differences between US and Turkey (ex: Costs, customer motivation, advertising , promotion and sales activities, etc)
19. What percent of the sales income is used for advertising, promotion and PR activities?
20. Which media channels are used for advertising ( print media, mail postings, e-mail postings, newspapers, magazines, radio, TV , internet, events , sponsorships, promotions etc.)

## RESULTS

All respondents had opened their own chain stores in Europe (approximately 15 to 20 years ago) and were still expanding. All respondents had been doing business in the U.S. a minimum of ten years and began as suppliers for U.S. brand names. All respondents agreed that their main competitive advantages were: (1) reasonable prices; (2) quality products; and (3) the trust they provided in the market after being trained and gaining experience from the major brands (Duan and Neace 2006).

All respondents, now seasoned to the U.S. market's peculiarities – subsequently opened retail stores in major cities of the U.S. (New York, Washington, Las Vegas, Los Angeles, San Francisco, Chicago, and Miami) about five years ago. Another common characteristic among respondents was that all produced innovative designs by professional designers using high quality fabrics and were capable of responding to large orders with a quick response time. Further, all respondents owned their manufacturing units that enabled them to respond quickly to changes in demand and to make profitability adjustments. Respondents stated that continued expansion in the U.S. market share, they would open stores in new market locations and increase awareness of their brands by participating in a variety of international fairs and trade shows.

Turkish clothing brands offered by respondents included a broad variety of lifestyle products in clothing fashions and accessories. Their specialty clothing stores offered extensive collections of business and semi-casual menswear and women's wear, extended denim collections, shirts, t-shirts, sweatshirts, and sweaters. Accessories comprised a broad range of products such as footwear, eyewear, jewelry, and leather goods. Jean manufacturers and specialty clothing producers employed well-known designers from Italy, France, Spain and Turkey. Many of these designers incorporated high quality Turkish fabrics in their product lines.

Sample Turkish firms employed middle to high and high-end pricing strategies due to their product quality and variety. Since they owned their manufacturing units, they had considerable leverage in adjusting prices to market supply/demand fluctuations. Throughout their stores they utilized the single price standard retail pricing policy; thus, all consumers paid the same preset price for any given item.

Respondents that also functioned as suppliers to wholesalers and distributors indicated that despite lower per unit profits than those similar items sold in their own stores, they still preferred working with them due to the increased sales volume and the parallel economies of scale. This strategy worked as a hedge against risks when opening their own stores.

Respondents that were jean manufacturers have moiré standardized products, and hence utilized on-line sales through their web sites (e.g., [www.littlebigjeans.com](http://www.littlebigjeans.com), [www.mavi.com/shop](http://www.mavi.com/shop)). Although some sample firms did not provide us consumer on-line sales, they all provided English language websites aimed at the U.S. markets, where virtual fashion shows of their seasonal collections were important strategic merchandising strategies. These web sites offered brand profiles for potential consumers plus wholesaling opportunities for private brand retailers ([www.sarar.com.tr](http://www.sarar.com.tr), [www.damat.com.tr](http://www.damat.com.tr), [www.viraclub.com](http://www.viraclub.com)). Moreover, respondents indicated all had showrooms in key markets for potential buyers.

Retail and intermediary advertising and promotion strategies were used by all respondents. Specifically, their advertising, sales promotions, and publicity budgets were continually adjusted depending on supply demand conditions. However, compared to

competitors their advertising budgets were relatively a small percentage of their overall U.S. sales. They preferred to localize retail advertising for their stores depending on competitive market conditions where the stores were located. Due to their product lines, they preferred to advertise in regional editions where available of fashion, lifestyle, sports and entertainment publications such as *Vogue*, *Women's Wear Daily*, and *People*. Ads usually consisted of celebrities and/or models wearing the companies' brands in settings designed to involve viewers emotionally through enhanced depictions. Billboards, local radio stations and on-line advertising were also used in some unique markets but to a lesser extent.

Sales promotions were another medium that enabled Turkish firms to selectively improve their sales. Promotions were employed on national holidays such as Easter, Thanksgiving, Memorial Day, and Christmas; along with seasonal events such as in-store fashion shows, various types of gatherings, DJ and/or live music, ethnic and community events. Also noted was the use of sales coupons offered through their stores, via mail, and in e-mail and web sites that could be downloaded. Essentially all of our sample firms employed very similar merchandising strategies, varying only with specialty fashion products.

## CONCLUSIONS AND IMPLICATIONS

According to clothing industry analyses, macroeconomic conditions such as interest rates, currency parities, and stability of market indicators all play important roles in global marketing. On the other hand, knowledge of local socio-economic factors such as fashion trends, consumer preferences, social trends and cultural habits are most important to new start-up retailers and can often allow for success in selected market niches. Also product and service quality, quick and timely response to consumer needs, as well as fluctuating demands of large macro economies are all necessary issues for surviving in a highly competitive markets, such as the U.S. retail industry. Since all of our Turkish manufacturing firms have overseas locations, it is very important for them to forecast potential problem scenarios and be prepared for them. Efficient inventory management is essential by responding to changing situations in a timely manner to the point of moving excessive inventory in some to locations to other stores where demand remains strong. There are several software programs available for managing this crucial area of merchandising management (e.g., Cisco, IBM, SAP). This includes timed strategies for price reductions of seasonal merchandise and/or contracts with discount merchandisers such as Marshalls and T.J. Max to clear 'old' inventory.

Key factors affecting revenue growth and profitability of clothing companies doing business in the U.S. included controlled growth, knowledge of market segments and their dynamics - continually matching products and revising product selection to satisfy dynamic (and often fickle) consumers. Moreover, store location, atmosphere, visual merchandising, product selection and consumer service quality, pricing, carefully selected and designed advertising/promotional campaigns, and appropriate distribution channels are essential to communicate brand image. Poor choices of alternate distribution channels harm brand image. High-end, high priced brands should be matched with 'high-end' distribution outlets.

Findings showed that entering the U.S. market as a wholesaler or distributor first and gaining experience was the safest way to start. Opening stores may be the next desired step but must be based on matching the brand image with the appropriate target market. Because the make-up of U.S. population and culture are so diverse and fragmented most textile products can find niches in the marketplace, subject to strategic positioning. As Turkish textile producers and clothing manufacturers, with their European successes should consider maintaining those strategies with aspirations of becoming a global brands in the U.S. marketplace. Turkish manufacturers should utilize a differentiation strategy when moving to the next step with their own stores to enhance continued success. Continually tailoring product lines to accommodate current fashion trends is crucial, but not at the expense of established brand images.

Many consumers with discretionary income purchase online or in catalogs. Given this, a well-designed, user friendly, secure on-line store, as well as catalogs have a proven history of building sales volume and should selectively be employed by our Turkish firms. Regarding product availability, same, or next day delivery services are indispensable to consumers who are time poor and in their peak earning years. To reach these consumers advertising/promotion budgets should include not only media advertising but also publicity via sponsored events held at their stores/showrooms. On-line stores are inevitable in today's ever-increasing electronic environment.

Additionally, census data show that median incomes of 'married' and cohabitating couples - were 60 percent of the population with median household incomes of almost twice that of single households. This suggests carrying family-oriented product lines, creating regional member clubs and supporting family events - cocktails, dinners, concerts - that would attract this segment and encourage customer loyalty. Moreover, the U.S. demographic picture suggests the proportional rise of the Hispanic market segment warrants catering to their needs via hiring Spanish speaking salespeople; developing a product line that meets the unique fashion desires of this market subset and targeting communications to Latino media.

Another interesting demographic trend in the U.S. (and Western Europe) is the overweight/obesity issue. Turkish manufacturers should address this opportunity by adjusting their lines of clothing that addresses the needs of this 'large' market segment. Two-thirds of Americans are overweight and it is a multimillion dollar market. In fact, a study of plus-size clothing retail sales for women and girls, and big and tall clothing for men and boys, totaled \$76 billion in retail sales in 2006 and is anticipated to be a \$100 billion market by 2012 (Mindbranch Inc.'s Research, June 2007). Turkish manufacturers that want to enter the U.S. market need to carry a variety of big (XXL) sizes in their product line, to include this segment if it meets with the desired image of the brand. Or possibly create brands that target this market segment.

The U.S. is a dynamic, diverse growing market for textiles and clothing as the above reports. It is also very competitive. Turkish textile and clothing manufacturers can be successful in expanding their U.S. market share but only if they maintain and nurture strong supply chain relationships, stay abreast and incorporate when appropriate new technologies, and, of course, be ever diligent in their monitoring of consumer trends in clothing and fashion.

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