

時尚精品敏捷供應鏈之研究-以訂製服為例

Agile Supply Chain of Affordable Luxury: The Case of Custom made Suits

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摘要

有鑒於消費者對產品設計與速度要求漸增，創造出時尚精品、快時尚市場。隨著中產階級人數增加，此類商品需求亦上升，但企業如何兼顧消費者需求並保有利潤？本研究欲透過文獻探討及深度訪談，以紅領作為專案進行研討分析其整條價值鏈與商業模式並輔以 Zara、H&M 所做之策略進行調整，找出企業間的共通性與差異性，藉由繪製商業模式圖比較三間企業採用之敏捷供應鏈，探討企業如何結合平價與快時尚，並給予建議以供後續研究參酌價值。

關鍵字：快時尚、時尚精品、敏捷供應鏈

Abstract

In recent years, consumers in the fashion industry have been craving fashionable goods at a speed that in the past was inconceivable. While the number of middle-class citizens increases worldwide, so does the demand for these highly sought after products. This presents a significant challenge for companies in the fashion industry: how does a company quickly meet this demand while keeping costs low?

By reviewing literature, and conducting an in-depth interview with a custom made suit company, we hoped to better understand how agile supply chain is used in a mass customization model. By mapping out business model canvases for three fashion companies and reviewing their value chains, we discovered that each company adopted their own variation of an agile supply chain. We looked at similarities and differences and observed how their use of an agile supply chain helped them get their products to the customers quickly while maintaining an acceptable level of quality.

Keywords: Fast Fashion, Affordable Luxury, Agile Supply Chain.

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I. Introduction

In recent years, consumers in the fashion industry have been craving stylish goods at a speed that was not conceivable in the past. These quickly-made, yet stylish products are what are referred to as affordable luxuries or fast fashion items. While the number of middle-class citizens increases worldwide, so does the demand for these highly sought after products. This presents a significant challenge for companies in the fashion industry: how does a company quickly meet this demand while keeping costs low?

The fashion industry is evolving, but still maintains its volatility and uncertainty. Adopting an agile supply chain can help companies in this industry to tackle this uncertainty. Therefore, we hoped to understand how Red Collar is using an agile supply chain, and then compared it to two benchmark enterprises in the fast fashion industry. Our goal in doing this is to better understand how an agile supply chain can be used with a mass customization model. In this paper we will take a look at three companies: Red Collar, a custom suit manufacturer; Zara, a fast fashion clothing retailer; and H&M, a global clothing retailer. Each company has come up with their own solutions to dealing with challenges in the fashion industry.

As a result, we reviewed the literature about the status of the fashion industry along with the dimensions of agile supply chain as well as its opportunities and challenges. Then we looked into definitions and success factors in fashion industry and the production methods for customized suits.

II. Literature Review

Having an agile supply chain is not the same as having a lean supply chain. Lean supply chains focus on lean inventory, meaning that waste and efficiency are focused on the manufacturing side (Dizik, 2015). Moreover, different supply chain strategies can work more harmoniously depending on the complexity and certainty of the product. Because the automotive industry sells products with a high complexity and a low uncertainty, it's able to adopt a lean supply model as opposed to an agile one. But because the fashion industry produces products with low complexity and high uncertainty, it is more advantageous to adopt an agile supply chain.

Problems have arisen from sourcing overseas as hidden costs have been found when outsourcing to places with cheaper labor (Daniel, 2013). Some issues which have arisen are problems with child labor. Some retailers are not completely aware of who is manufacturing their clothing. This allows problems to arise which could be damaging to a company's overall image and reputation in the eye of the consumers. In addition to these challenges, often hidden cost can emerge from sourcing overseas. These hidden costs could be caused from longer lead

times, complications in import/export procedures, and issues with a complicated and complex supply chain pipeline. However, there are some solutions to these social and logistical problems.

Advancements in technology have allowed companies to better meet the increased consumer demand. CAD programs and measuring programs allow clothing to be quickly adjusted and cut to meet the fit of a customer in times that were never possible before. Improvements in mass production allow customers to get products that meet their needs quickly. In fast fashion retailing, information technology allows retailers and manufactures to share information quickly in order to interpret demand and make more informed predictions, as well as providing companies like Zara to respond quickly to real demand. Companies which utilize technology effectively are able to respond better to consumer trends and demand.

Supply chains need to be focused on reducing time, meeting consumer demand, and enhancing flexibility in order to respond quickly to changing demand. Long lead times can reduce a company's profits dramatically, so it's important to find ways to cut lead times. According to Peterson (2016) not meeting consumer demand means that items and merchandise need to be put on sale. Moreover, retail store space is limited and costly. Storing unsalable product in a store in a premium location is also costly. It's important to reduce these lead times in order to sell product at retail price. This can be done in several ways. Implementing a vertical supply chain allows a company to have more control over its supply chain, so it can be more flexible to change and demand.

Collaboration within a supply chain can help bring products to the consumer faster in order to reduce products being sold a discount. One method of collaboration could be using intermediaries. Intermediaries are people who help companies source materials overseas. They have a knowledge of which manufactures specialize in which kind of manufacturing process in order to get products finished quickly and more efficiently. Intermediaries are able to allocate responsibility more easily because of their connections with manufacturers and also their logistics capabilities. Companies which are able to effectively utilize intermediaries can reduce lead times and add more agility to their supply chain.

Affordable luxury products are considered quality built, stylish, and add to some degree of exclusivity in their distribution. Some companies that would apply to this label are Michael Kors, Armani Exchange, Kate Spade, Coach, and Tory Burch. They have all managed to promote a style that resonates with middle-income consumers.

The term affordable luxury is more of a perception rather than a firm definable concept; however, certain criteria help make an item or brand seem luxurious. Exclusivity can make

items seem luxurious. This is a specialty for clothing manufacturer Zara, who refreshes their stock with new items every two weeks. Perceived quality can also add to the connection with Luxury. Many of these affordable luxury brands' items look like, or even adopt, the designs of true luxury items. What separates true luxury items and affordable luxury items is exclusive distribution, premium quality or material, and recognizable design. If a company can create a product with the same appearance and feel, and then manage to price it competitively, then it's likely to be considered an affordable luxury item.

Context has a huge impact on what is an affordable luxury. What is considered luxurious in one country or city may not be same as a more developed nation or bustling city. As suggested by Zakkour (2014), "there is still some confusion on the part of brands and retailers about what defines accessible luxury in China." The percentage of the world's middle-class is growing and is projected to rise from 1.8 billion to 3.2 billion in 2020, and 4.9 billion by 2030. The Organisation for Economic Co-operation and Development predicts that a majority of this growth will come from Asia which will account for 66 percent of the world's middle-class population by 2030 compared to 28% in 2009.

i. Definitions and Success Factors in Fashion Industry

The fashion industry is often characterized by its high volatility, short life-cycles, low predictability, and high uncertainty. It's imperative for companies to sell stock quickly and meet the demand of the consumer or they will be left holding unwanted stock. Getting rid of stock is detrimental as retail store rent is high, and costs will add up. Because of the fashion industry's volatility, clothing can go out of style quickly, so it's important to sell stock before it becomes unsalable. On the other hand, too little stock will result in demand not met. As a result, customers may resort to buying from the competition and the company will miss out on potential sales. Companies can combat this by developing a flexible, agile supply chain that is able to restock garments quickly and efficiently. Currently, there are many companies that are finding different logistical solutions to address these issues with meeting consumer demand.

Christopher and Peck (2004) provide three time based dimensions that are necessary to understand. The first dimension is described as time-to-market, or how long it takes a business to recognize a business opportunity and turn it into a salable product. Secondly, a business can further success by focusing on its time-to-serve, or how long it takes for the business to take the customers' order and deliver it and meet the customers' satisfaction. The last dimension of time that is important to meet is the time-to-react. This is defined as the amount of time it takes to respond to volatile demand. In other words, how flexible is the supply chain. If companies can effectively manage these three time dimensions, they have better chances of being successful and meeting consumer demand.

ii. Production Methods for Customized Suits

In the world of custom suits, there are two options to choose from: bespoke and made-to-measure (MTM) suits. Both options provide a better and snugger fit when compared to a suit that is purchased off-the-rack. Another advantage to a customized suit is the variety of fabrics and options available to the consumer. While both offer a similar product, bespoke and MTM are distinctly different in how they are produced which adds the various advantages and disadvantages to both styles. When choosing a methodology, it's important to consider customizability, accuracy, time, and price.

While both methods are capable of comparable results, bespoke offers limitless customization. Some suit companies offer both MTM and bespoke and provide more options with their bespoke line. Going the MTM route may limit your fabric choice to the hundreds, while bespoke options range in the thousands. Moreover, bespoke suits are made by hand instead of machine and generally offer more fittings to help improve overall product satisfaction (Dizik, 2015). However, most MTM stores also offer multiple fittings if necessary and a generous return policy.

When it comes to price and efficiency, bespoke has several key drawbacks when compared to MTM. While MTM prices generally range from 500 USD to 1000 USD, bespoke offerings range anywhere from 1000 USD to 45,000 USD according to Hemingway's website. This difference in price point makes bespoke less competitive to a middle-class market. While its exclusivity makes bespoke a desired product, its price point makes it inaccessible to many consumers. Moreover, bespoke tailoring suffers from longer lead times. Bespoke suits are made by hand, whereas MTM is made by a machine. While it takes about a week or longer to make an MTM suit, bespoke suits can take months to make. One company warns of a minimum 12 week wait period for a bespoke quality service. Some services may provide 5 or more fittings. This process creates significantly longer lead times when compared to an MTM service.

III. Methodology

The study aims to map out agile supply chains operating in the fashion industry, especially focusing on mass customization. Therefore, we reviewed literature about agile supply chain and affordable luxury in the fashion market. However, only a small portion of studies which combined these two factors were available. As a result, this study underwent an in-depth interview with its target company. The interview was conducted by questioning business personnel who gather information on the current situation in the fashion industry and sum up the future for developing opportunity and conquering challenges. After the interview, we underwent a procedure of utilizing the business model canvas method to outline the structure of our target

company's supply chain and comparing with the well-known successful fast fashion corporations- Zara and H&M.

i. In-depth Interview

The Case study is a research methodology that focuses on understanding the dynamics present within a single case, multiple cases, or numerous levels of analysis (Gillham, 2000). For example, a single case can be an individual, a group, or it can be an institution, large scaled community and etc. Multiple cases are based on a single case study combining two or more cases. The adoption of a single or multiple cases depends on what information is desired. According to Yin (2004), conducting case study research is most appropriate when researchers are interested in learning "how" or "why" phenomena occur, when the research focuses on contemporary events. Yin (2004) also adds that the case study method is "an all-encompassing method" (p.14) which comprises design, data collection, and data analysis techniques. Case studies, as in the view of Yin, are used to better understand complex social phenomena, as well as real-life events from organizational and managerial processes. Using this method is particularly helpful when explaining phenomena within their context when the relationship between the two, phenomena and context, are not clear. To gain deeper insight into the affordable luxury agile supply chain interface, the multiple-case study approach will be used. Case studies are widely-adopted methodologies and enable the researcher to explore differences and similarities within and between different cases (Yin, 2003). Therefore, the multiple cases study approach is the most appropriate method to use while reviewing the literature and to investigate information about retail fashion supply chains, a subject which will be covered in this study. This study will focus on two companies within this competitive, global fashion industry: Red Collar Clothing Co. and Zara. The goal of this study is to find the companies' guidelines for an agile supply chain concerning affordable luxury items.

ii. Business Model Canvas

The business model canvas is a method for understanding a company's value composition and their operating logic. As well as a strategic management and startup template for developing new or documenting existing businesses. The business model canvas is a visual chart that was initially proposed by Alexander Osterwalder that the canvas is made by nine squares which can be divided in four main field that consists of customers, offer, infrastructure, and financial viability. Moreover, by a visual chart can make it easier to notice the part which can be neglected (Osterwalder & Pigneur, 2010). As a result, this study adopted the business model canvas to firstly map out the case's business model afterward we chose two well-known fast fashion companies that are successful in the fashion industry which one is Spanish

Corporation-Zara and the other one is Swedish Company-H&M. The business model canvas's structure is shown in Figure1.

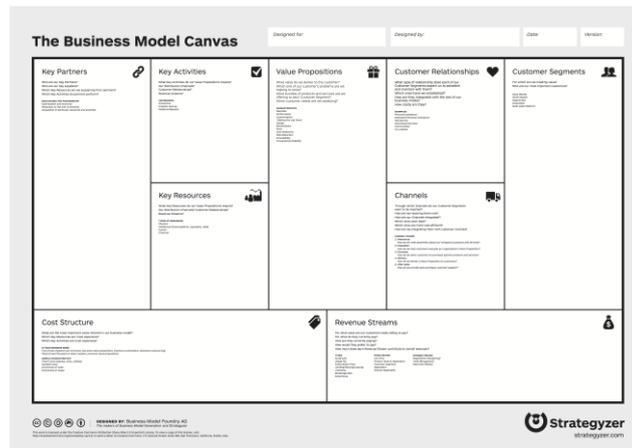


Figure 1 Business Model Canvas

Source: Osterwalder Business Model Canvas

IV. Case Study

Red Collar is a custom suit manufacture/trading company based out of Shandong, China. Their top three markets include North America, Europe, and Oceania. It offers OEM service and design service. Red Collar focuses their output on made-to-measure, or MTM, suits. Their products range from whole suits, pants, shirts, tuxedos, blazers, vests, etc.

Supply chain flexibility is one key feature of Red Collar's supply chain. While many companies like Zara and companies in the fashion industry need to work around seasons, Red Collar is exempt from this model. Red Collar is able to make customized suits at mass production speed, but also keep its prices affordable. Their product's affordable price keeps it accessible, while their speed and efficiency get the product in the customers' hands quickly. Red Collar boasts that its process can take as quickly as 7 days from order to delivery.

Part of Red Collar's success is in its Red Collar Made to Measure Platform (RCMTM). This model aims to turn custom suit manufacturing into a mass customization model. A lot of time is saved by their ability to make suit patterns quickly.

V. Result

We conducted an in-depth interview with the following employees from Red Collar. All participants are positioned at varying levels in Red Collar's hierarchy. The interviews were conducted on December 5, 2015 in Qingdao, China. Each member has had previous experience in the fashion industry, and provide a wealth of knowledge on this subject. Information about

each participant can be seen in Table 1.

Table 1 The Information of Interviewees

Personnel at Red Collar	Position Title	Background	Interview Method
Miss Sun	Vice President	Came from JD.COM Started from 2015	Recording
Mr. Ma	Industrial Engineering Manager	Senior staff at Red Collar	Recording
MR. Mi	Director of Information Department	Senior staff at Red Collar	Recording
Sherry	Principal of Magic Manufactory	Came from Wal-Mart Started form 2015	Recording

i. Red Collar

Red Collar is a custom suit manufacturer that works on a made-to-measure model. Red Collar’s defining characteristic is its ability to produce custom products and mass production speed. They are able to do this by using their tightly controlled supply chain and also by effectively using information technology to their advantage. Red Collar is able to make customer to manufacturer transactions, which reduces complexity in their chain. Customers are able to make orders directly from the manufacturer. In addition to this, Red Collar utilizes 3D measuring technology to takes accurate measurements of clients in order to reduce fittings and returns.

The company indeed has a place to measure its clients; however, Red Collar doesn’t have any brick and mortar stores (except in China). Instead, Red Collar has the measuring bus. The measuring bus is equipped with 3D measuring machines to take accurate measurements of clientele. Customers simply need to make an appointment, and the bus will come to them. Aside from making custom suits, Red Collar also licenses what they call SDE Engineering. This is a package which helps solve problems plaguing a company’s supply chain. Below is a business model canvas explaining Red Collar’s business model.



Figure 2 The Business Model of Red Collar

ii. Zara

Zara's defining characteristic is its speed. Zara is able to respond quickly to changes in demand based on its control over its supply chain. For its more fashionable and exclusive pieces, Zara uses its Europe-based manufacturing team to respond quickly to changes in demand. This helps to set it apart from its competition. Trucks arrive at Zara retail stores delivering new stock every two weeks. Zara's process is possible due to its use of information technology. This technology allows manufacturers to coordinate with retail stores and share information. Managers are able to order new stock based on demand, or make predictions on what products could be salable in their region.

Another key element to Zara's success lies in its designs. Clothing off the rack is fresh and in style because of their team of designers and trend spotters. Zara's designs are not based from creative directors and predictions, but are rather inspired from trending fashion. Designers either mimic designs from other popular designers or they take information from trend spotters. Trend spotters will gather information about current trends relating to their target customers. A business model canvas for Zara is included below.

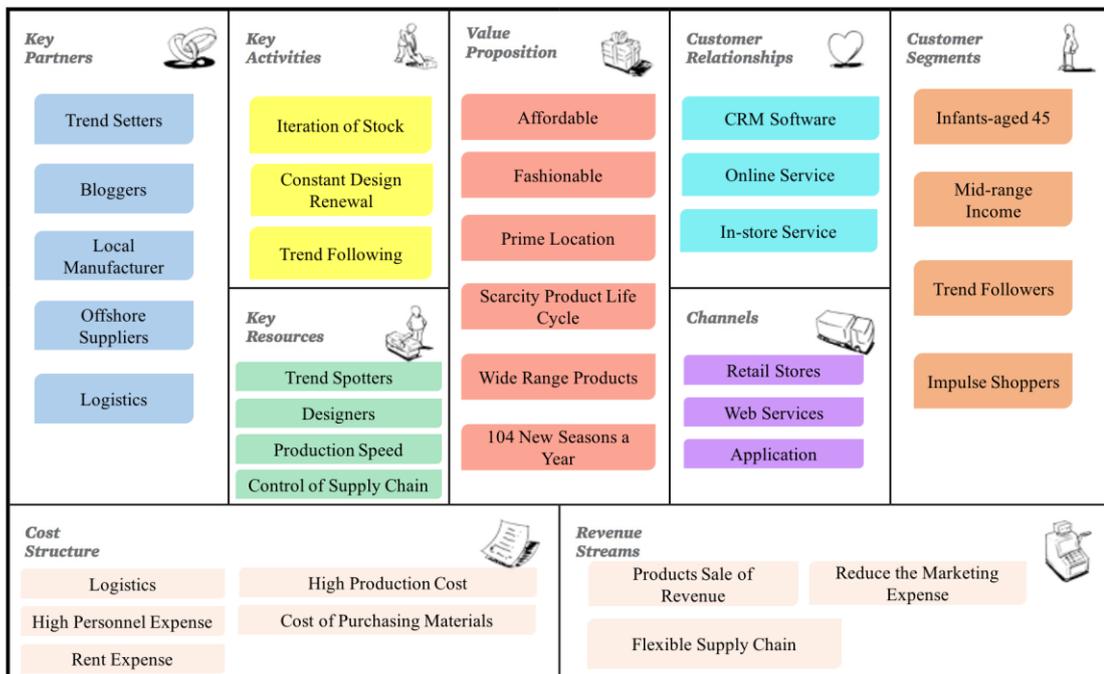


Figure 3 The Business Model of Zara

iii. H&M

H&M's model focuses on keeping the end cost down. H&M outsources all of its manufacturing and works through a minimal amount of intermediaries in order to keep prices on its merchandise low. While it does not have direct control over its suppliers, H&M does employ a network or production offices close to its manufacturers, so it can make changes in its supply chain when needed; however, even with this implementation, H&M is still at risk of potential overstock or under stock.

H&M also has many ways to connect with its customer base. H&M boasts 4,000 retail stores internationally. Moreover, shoppers can connect with H&M via their website and mobile app. They also have a physical catalog which customers can order from if they prefer a tangible medium. In the design department, H&M hopes to set itself apart by collaborating with famous designers and icons. The idea is to give customers a chance to own items with fashion affiliations that would otherwise be unattainable due to their price and exclusivity. A business model canvas for H&M is included below.

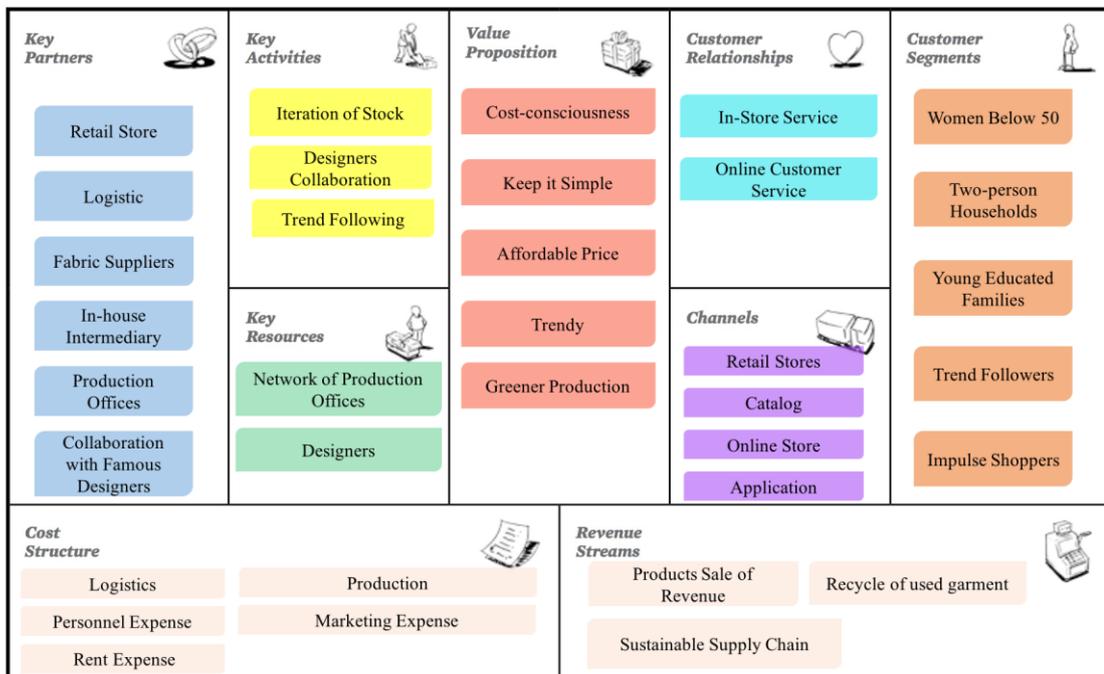


Figure 4 The Business Model of H&M

VI. Conclusion

When comparing these companies, you can see where each of their strengths lie. Red Collar excels at meeting customer demand directly and quickly while maintaining leanness in its supply chain. Because it's dealing directly with the consumer, it's not having to deal with any overstock or overproduction. Zara on the other, excels with its flexibility and speed while targeting a wide market range. H&M, on the other hand, prefers to get its stock into the market cheaply and focuses on simple designs in order to reach a broad market. However, of the three, it runs the most risk of developing issues with overstock.

As for reaching their target markets, each company chose a variety of ways to connect with their target markets. While Red Collar, along with Zara and H&M, has online presence and a mobile app, they do not have the same international retail store presence that H&M and Zara do. Instead, they rely on their measuring bus system. While this could be seen as a shortcoming, it also means that money does not need to be spent on costly rent prices. Zara, on the other hand, does have their retail stores placed strategically in heavy fashion centric areas, which means they have to pay a premium for retail space. However, Zara counters this expense by saving money on advertising. H&M is the only one of the three companies which advertises heavily. H&M also has a catalog which customers can order from as well.

Each company fits comfortably under the labels of fast fashion and affordable luxury. While all companies achieve speed in their own way, they also manage to stay cheap and

desirable. Red Collar's model focuses on undercutting prices in the bespoke men's custom suit model. They are able to get a custom suit from the production stage to delivery in 7 days, while a bespoke men's suit can take anywhere from several weeks to months. Zara adopts designs from the top design firms and current trends and translates these concepts into products. They do this quickly and change their designs frequently to maintain exclusivity associated with a luxury brand. H&M's model is similar, however, their stock isn't changed quite as frequently as Zara's. However, H&M do collaborate with big designers and icons to push exclusive lines.

In conclusion, by analyzing each of the companies and their use of agile supply chain, it becomes apparent that mass customization can work in tandem with an agile supply chain. Looking at all three companies' business models helped put this concept into context.

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