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Foundation, Growth & Evolution of the Fast Fashion Brand, Mango

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ABSTRACT

This paper traces the foundations, growth and expansion, and future scope of the fast fashion brand, Mango. First launched in 1984, Mango today is the second-largest exporter in the Spanish textiles sector behind Inditex. With their Concept, Team and Logistics System the three pillars on which they have built this successful retail brand, their history and evolution is examined. The Mango store and the Franchise system are integral to the Barcelona based retailer, and their metamorphosis into the Megastore, with almost 50 percent own stores has been studied. Mango's global growth and expansion into various emerging and developed economies is examined while its entry into the US market is closely looked at. Mango's various lines and collections, its two new brands H.E. and Violeta, and its alliances with various international designers is also touched upon. The „What should I wear?“ ad campaign in the UK, its first major global branded content initiative, is a novel concept to target 30 something women, promoting Mango clothing as stylish work wear. How Mango survived the 2012 recession and managed to increase its turnover is examined and the Rana Plaza tragedy, considered the industry's worst ever, is also discussed.

Keywords: *Fast Fashion; Mango; Spain; Spanish; Textiles; Inditex; The Mango Store; Franchise System; Barcelona; Megastore; Emerging Markets; Developed Markets; Rana Plaza Tragedy; 2012 Recession; Bangladesh; US Market; HE; Violeta; Adam Lippes; Moises De La Renta; Kate Moss; Stylist Magazine; CSR.*

1.0 The Brand

Mango is a privately owned multinational, which designs, manufactures and markets women's and men's clothing and accessories. First launched in 1984, it is the second-largest exporter in the Spanish textiles sector today, behind Inditex (Zara's parent). Its first website was created in 1995 and, five years later, in the year 2000, it opened its first online store. It generates 75% of its sales outside Spain and considers US to be the most competitive market in the world. It currently owns 2,731 stores in 105 countries, containing a mix of franchised and corporately owned stores. Despite being a Spanish clothing company, and having the most stores in Spain, with a large proportion in Madrid, the city of Istanbul, Turkey, is the one with the largest number of Mango stores (Shopping Centers Today, May 2007). Punto Fa, S.L., trading as Mango, was founded in Barcelona, Catalonia (Spain) by brothers Isak Andic and Nahman Andic. Mango has become the first retail brand after Benetton to capture the mentality of today's global lifestyle in its truest sense, especially with regards to working women who are knowledgeable about both fashion and worldly affairs (Caribbean Business, 10/26/2006).

According to them the keys to their success can be summarised in three points: Concept, Team and Logistics System.

1.1. Concept

Mango can be differentiated for having a highly-defined concept. The Mango concept is based on an alliance between a quality product, with an original design and a coherent and unified brand image. Dressing the modern, urban women for their daily needs is the formula they have analysed, adapted and applied in all the countries in which Mango is present (Behind The Brand, 2015).

1.2. The team

Mango's greatest asset is its people. It can bank upon a motivated and flexible work team, which is able to adapt to and promote change. At present, Mango has over 13,456 employees, 1,800 of whom work at the Hangar Design Centre and at its Headquarters in Palau Solità i Plegamans, Barcelona. It is made up of a young and enthusiastic team, with an average age of 29, and 86% of which is female. Hangar Design Centre, the biggest design centre in Europe, has a total surface area of 10,000 m² and

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houses more than 550 professionals dedicated to creating fashion garments and accessories for women. The Design, Purchasing and Quality departments are located there (Behind The Brand, 2015).

1.3. Logistics system

Mango bases its logistics on an in-house system which has developed progressively since the opening of their first store in 1984 until the present day, in which Mango has become Spain's second largest textile exporter. In order to develop a truly integral implantation, Mango supplies its stocks to its franchises under a deposit system. In 2000, Mango completed a logistics system created with its own personality, acquiring and adapting the latest technologies at its facilities, making it possible to classify and distribute 30,000 garments per hour. In 2013, Mango put its new Dynamic Distribution Centre (CDD) into operation in Parets del Vallès, Barcelona. This 24,000 m² warehouse specialises in the distribution of folded garments, goods which until now were managed from the central offices, thus leaving the central offices to specialise in hung garments. At the CDD all processes are automated: loading, storage, invoicing and dispatch. This reduces the workload and increases the work rate of employees, thus making the CDD the most efficient in its sector, with a management system that is 5 to 7 times faster than the competition. The SLM (Mango Logistics System) is based on speed, information and technology, its aim being to ensure that every store has the goods it needs at any moment, according to rotation speed and sales. With a production and distribution of 90 million garments a year, this guarantees the continuous renewal of goods and a production rate in accordance with market demand, both in terms of volume and variety (Behind The Brand, 2015).

2.0 The Mango Store

All Mango stores are in prime locations, either in shopping centres or in city centres. In order to display their collections, stores have dimensions which make it possible to maintain the interior design, image and product display criteria they have designed in order to create a pleasant environment in which customers can enjoy the shopping experience.

Their large team of window-dressers, merchandisers, coordinators and supervisors guarantees that all of their stores enjoy the same atmosphere, offer a high level of customer service and are managed in the same way. The conception and execution of a Mango store project is carried out by a multidisciplinary team of over 100 professionals, including interior designers, architects, project managers, engineers, industrial designers, administrative employees and managers.

The atmosphere in HE boutiques is very different to that of Mango stores. Above all they are characterised for their quality, the result of display furniture with black and gold finishes, together with a decoration which includes antique items, Chesterfield leather sofas and cowhide rugs. The remaining details which help determine the character of the space include bevelled glass, aged-effect parquet flooring and walls covered in dark tones, featuring the unicorn, the logo of the collection, as a pattern. Mango Touch boutiques have a design with a markedly feminine air. Warm spaces predominated in which the flooring features natural oak timbers. The furniture is noteworthy for its combination of styles, such as the Louis XVI chairs, the antique oak furniture in grey or the cleaner lines of the side units used for product displays (The Mango Store, 2015).

3.0 Franchise System

The Mango fashion chain offers its franchise system throughout the European Union and in the major world capitals and cities. The Mango franchise system is a comprehensive system that covers all aspects relating to product marketing and franchise management.

Initially, it aimed for a mix of 70% franchised and 30% company owned stores. However presently, Mango's 2,731 shops are 60 percent franchised and 40 percent owned. This could change to 50/50 in five years, as the retailer wants to increase ownership of its retail space (Women's Wear Daily, 6/3/2013). This is due to the various problems caused by franchising, such as:

- 1) Inconsistency.
- 2) Quality control problems.
- 3) Supervisors sent to every franchise every 3 weeks to analyze operations (micro-management so that customer can't tell the difference between franchise and company owned store) (Shopping Centers Today, May 2007).

Mango takes care of all these aspects:

- Always stays up to date with the latest trends.
- Provides a collection that is complete, extensive and varied.
- Supplies in accordance to needs, avoiding possible inventory cost.
- Carries out store's interior design project.
- Trains sales and management team.
- Changes store's window displays design on a regular basis.
- Assists continuously on item display and sales issues with the help of periodic visits by product and merchandising professionals (Franchise System, 2015).

4.0 Mango's Journey in the US Market

In the US market Mango's target audience on first starting out was women in the 18-35 age bracket. Their price range was 25-250 USD and they claimed to dress women from 8 AM to midnight (Shopping Centers Today, May 2007).

In 2006 MANGO decided to open its first fast fashion retail store at South Coast Plaza in Costa Mesa, California. Though the firm's other stores go by the name Mango, the US stores were being marketed as MNG by Mango (Women's Wear Daily, 5/25/2006). MNG opened its first store in Puerto Rico on the lower level of the Plaza Las Americas (Caribbean Business, 10/26/2006).

In 2007 Mango became the third retailer to enter the US market with cheap-chic fashions and quick-to-market merchandise. According to Jane Hali, vice president and director of retail of Coleman Research Group, fast fashion retailers have changed the mindset of shoppers by instilling the knowledge that the items they want would no longer be in the market for a long time, causing shoppers to buy fresh merchandise opposed to waiting for sales (Shopping Centers Today, May 2007).

Mango followed up its entry into the US market with aggressive expansion at Class A malls and lifestyle centers throughout the country but had trouble clicking with the customers. The first and foremost reason being that the American customers didn't know who Mango was. Secondly, Mango did not do a lot of advertising and put a lot of their stores into malls instead of main street locations. This initial failure was followed up with various mitigation strategies. In 2009 it partnered with J C Penny and MNG by Mango stores opened up within JCP locations.

A store within a store model was adopted, with approximately 1000sq feet assigned to MNG in the center of JCP women's apparel departments. Mango merchandise also started selling on jcp.com. This helped by exposing Mango to average American women while minimizing risk on investment. It also benefitted JCP by drawing in customers younger than their normal bracket of 45-60 age group (Retail Traffic, Jan/Feb2010).

The store within store concept greatly expanded Mango's presence in the US market. In the Victoria Garden's store, the Mango store is hidden behind black plastic curtains. It is set apart from the rest of JCP store by hardwood floors, gray paint, black chandeliers and pop music.

Everything is unique, right down to the clothes racks and the way the merchandise is displayed. The stock is limited and Mango clothes are clubbed into outfits, displaying the belts, handbags, shoes and scarves alongside the apparel rather than in

separate departments. These Mango boutiques are located next to Sephora stores (Press-Enterprise, The (Riverside, CA) 08/18/2010).

5.0 Mango, Growth and Expansion

In 2003, Mango closed down a store in Iceland's largest shopping mall owing to unsatisfactory financial results (Textile Industry of India, Oct 2003). In 2008, Mango reported an 8% increase in sales in 2008 to 1.4 billion euros, or \$1.87 billion, at current exchange rates (Women's Wear Daily, 1/30/2009). Due to the 10.9% sales increase observed in 2010, Mango planned a large scale global expansion in 2011. With the target to add 550 stores to its global portfolio in 2011 along with entries in six new markets, namely, Guadeloupe, Bermuda, Monaco, Cambodia, Angola, Ghana and Yemen, taking its tally to 109 countries (Women's Wear Daily, 4/14/2011). In the year 2014, Mango's net profit rose 9% to EUR120.5m (US\$165.2) during the year, and turnover increased 9% to EUR1.85bn. Turnover for online sales jumped 77% to EUR124m (Aroq, 4/6/2014). The Spanish men's clothing line HE by Mango was re-launched in Germany in 2012. HE had been discontinued after a dispute with a German men's shirt manufacturer Einhorn concerning a unicorn logo. The re-launch was carried out with new stores coming up in Munich, Muhlheim, and Saarbrücken (Textilwirtschaft, 3/25/2010). In 2012, as a part of its endeavor to expand into emerging markets, Mango opened 80 stores in China and 30 in Russia, while opening its first stores in Myanmar and Pakistan. It tripled its sales in China and doubled them in Russia by 2013 (SCT Week, 4/13/2012). In 2013, the Barcelona based retailer officially pulled out its business from Bulgaria due to bankruptcy of the brand's representative in the country (Regional Today, 9/ 5/2013). In 2014, Elbit Fashion Ltd., Israeli franchise for the fashion brand Mango, sold its retail stores in Israel to retailer Fox-Wisel, a designer and manufacturer of fabrics and fashion accessories (Aroq, 10/16/2014).

5.1. The Megastore

"The idea of megastores is a change in our DNA," Daniel Lopez, Vice President.

In 2013, Mango decided to gather all of its brands under one roof and launch 200 megastores in 2014. Ending 2012 with a turnover of 1.7 billion euros [\$2.31 billion at current exchange] in sales, it planned to achieve 5 billion euros [\$6.7 billion] turnover in the next four or five years. The Barcelona based retailer planned to achieve this through organic growth and megastores. They supersized their stores to between 8,600 square feet to more than 32,000 square feet. Prior to this, the average size of Mango

units was about 3,200 square feet. In opening larger stores, Mango is following a path also taken by rivals H&M, Zara and Uniqlo, which are opening bigger and bigger stores to contain expanding collections. H&M, for example, opened its largest store in the world, a 63,000-square-foot unit at Herald Center in Manhattan, in fall 2014. In Munich, the brand opened its largest store in Europe— 24,757 square feet. The megastores are concentrated in Spain, France, Germany, Belgium, the Netherlands, Luxembourg, Russia, Italy, Norway and Poland and in cities such as Barcelona; Bilbao, Spain; Paris; Maastricht, Netherlands, and Munich (Women's Wear Daily, 10/8/2013).

5.2. Selling space

Mango women's range requires minimum of 10,760 square feet of selling space. Men's requires 3,200 square feet. A new kids' collection for boys and girls, three to 12 years old, 1,290 to 1,614 square feet, and the new Mango Sport & Intimates, 215 square feet to 430 square feet. The line includes an intimates collection and apparel for technical sports, home wear and yoga wear. Violetta for plus sizes, requires 3,767 square feet of space (Women's Wear Daily, 10/8/2013).

6.0 Mango Fashion Development and Portfolio

Mango employs a group of international fashion designers from all over the world who keep up with the latest technology in textiles, colour trends and designs. They live in different countries, travel

and immerse themselves in the day to day lives of women around the world, understanding their needs, wants and concerns. Their feedback is translated into wearable, beautiful and economically accessible fashion collections (Caribbean Business, 10/26/2006). In 2008 Adam Lippes signed a deal with Mango wherein he designed a new limited edition collection of American sportswear for Mango in Barcelona, Spain. This was done with a view to bring a real American sportswear point of view to Lippes's Adam for Mango collection which arrived in 220 Mango stores worldwide in March, 2008. The collection comprised of 24 new looks, 12 for women and 12 for men, with a small mix of accessories to work with the activewear (Women's Wear Daily, 10/24/2008). On April 1, 2010, Mango in collaboration with fashion designer Moises de la Renta launched the collection MDLR for Mango. De la Renta was also roped in to design dresses for Mango (Women's Wear Daily, 3/29/2010).

In 2014, Mango launched a line called Violeta by Mango that aims to dress younger target customer in sizes up to 22, with the tag line "I love it and it fits".

Its first store opened on 10 February, 2014 in Madrid. Expansion for Violeta involved Mango's seven largest markets, namely, France, Germany, Italy, The Netherlands, Turkey, Russia and Spain, with 50 stores opening by the middle of 2014 and another 50 by the year's end. Prices for Violeta range from about \$19.99 for T-shirts to \$189.99 for coats (Women's Wear Daily, 2/18/2014).

6.1. Apparel products

WOMEN			MEN			
CLOTHING	ACCESSORIES	FEATURED	CLOTHING	ACCESSORIES	FEATURED	LINES
Dresses	Footwear	Basic essential	Coats	Footwear	Special point	CASUAL
Monkeys	Imitation Jewellery	Trends skin	Sweatshirts	Handbag	Anoraks light feathers	SUITS
Topwear	Scarves	Exclusive online	Coats & Jackets	Belts	Barna	BLACKSMITH
And Kafans	Bags		American Clothing	Leather Goods		SPORT
Kimonos	Jewelry	Fashion edit - tricot		Bracelets		
Coats	Leather Goods		Skin	Headscarves		
Jackets	Belts		Cardigans & Sweaters	Ties & Bow Ties		
And Trench Coats	Hats & Caps		Shirts	Handbags & Wallets		
Cardigans & Sweaters	Handbags & Wallets		T	Sunglasses		
Sweatshirts	Gloves		Polos	Hats & Caps		
Blouses & Shirts	Sunglasses		Trousers	Gloves		
Shirts & Tops	Other accessories		Jeans	Other accessories		
Trousers	Fragrances		Bermuda			
Jeans			Denim			
Skirts			Underwear & Nightwear			
Shorts			Swimwear			
Premium Lingerie						
Sport						
Bathroom						
Skin						
Basic						

CHILDREN			VIOLETA	
GIRL	CHILD	LINES	CLOTHING	ACCESSORIES
Dresses	Coats	Back to School	Dresses	Footwear
Coats	Coats and jackets	Mimi Me	Coats	Bags
Coats and jackets	Cardigans and sweaters		Jackets	Jewellery
Cardigans and sweaters	Shirts		Cardigans and sweaters	Leather Goods
Blouses and Shirts	T		Blouses and Shirts	Belts
Shirts and tops	Polos		Shirts and tops	Hats and caps
Pants	Pants		Pants	Handbags & Wallets
Jeans	Jeans		Jeans	Gloves
Skirts	Bermuda		Skirts	
Shorts	Pajamas and Underwear		Monkeys	
Monkeys	Accessories			
Pajamas and underwear	Footwear			
Accessories				
Footwear				

6.2. What should i wear?

In 2011, Mango launched its first major global branded content initiative as a part of its goal to use Facebook in providing content and competition for women. It featured an interactive online video series and a UK partnership with Stylist magazine. 'What Should I Wear?' was an interactive

series seeded on YouTube and Facebook where the public decided each week the storyline of four friends in LA. Specific UK activity centres on a tie up with Stylist targeted 30 something women through Facebook competitions and advertorials. It promoted Mango clothing as a stylish work wear, positioning a woman's workplace as a catwalk. Winners of the 'Work It' competition saw Mango/Stylist makeover parties brought to their offices (New Media Age, 3/17/2011).

6.3. Brand ambassadors

Since fall 2011, Kate Moss had been Mango's muse, and in 2012 signed her to feature in their spring/summer 2012 advertising campaign. She first appeared in a video featuring Terry Richardson who shot the whole campaign and directed the commercial.

He also photographed their Fall/Winter campaign that featured Moss as the Mango brand image. Moss was recently replaced by Australian model Miranda Kerr.

In April 2011, Letizia, Princess of Asturias visited the company headquarters wearing a Mango outfit (Women's Wear Daily, 1/24/2012).

7.0 Fast Fashion

Mango can move items from the design stage to store in 3-6 weeks while the industry average remains 9 months. They call it „speed to market“. Fresh products are moved to store every week. The reasons for them to achieve this contracted supply chain are:

- 1) Tightly controlled production and distribution.
- 2) These functions are often kept in house or outsourced to a lesser extent than many other US retailers.
- 3) Items are produced in small batches, creating scarcity to make customers make snap purchases.
- 4) Limited quantity is cleared out quickly, enabling them to immediately respond to latest fashion trends and stock the next must-have items.
- 5) Clothes are inexpensive.
- 6) Shoppers no more wait for sales, for they know that the merchandise will clear out fast (Shopping Centers Today, May 2007)

In 2009, as competition in more mature American and European markets stiffened and economies went into recession, fast fashion looked to expand in new growth markets around the world, from China to Middle East (Women's Wear Daily, 1/30/2009).

8.0 2012 recession

The 2012 turnover increase was challenging to achieve, as sales in recession-stricken Spain and other developed markets were weak. The Barcelona based company took the following steps to achieve this:

- 1) Mango was forced to further restructure its business.
- 2) Major promotional campaign was launched in Spain, where merchandise was discounted by as much as 50 percent.
- 3) In the other 107 global markets where it's present, the retailer slashed prices by 30 to 40 percent.

The business re-structuring went thus:

- 1) As part of the strategic shift, which began in 2011, Mango changed its merchandise assortment to stock more day-to-day casual and work items and fewer party and event apparel, which have for years accounted for the major share of sales.
- 2) The store interiors were changed to allow customers to do more self-shopping.
- 3) Marketing activities were concentrated on publicizing “big sales” everywhere.
- 4) Their new policy is to open stand-alone stores in key urban centers.
- 5) Mango has undertaken a study of Chinese women's body shapes as a part of their “researching future growth strategies to more strongly establish their brand after opening a lot of stores”.
- 6) With an eye to 2019, Cusi said future shops will be opened in markets where Mango is doing well, like- Russia, France, Germany, Italy and the U.K, Singapore and Saudi Arabia.
- 7) Regarding new store formats, Mango hopes to open more megastores of 8,500 to 31,860 square feet around the world. Such stores, the largest of which is scheduled to open in Ankara, Turkey, in the next 12 months, house all of Mango's lines including Mango, H.E., accessories franchise Mango Touch and newer lines, Mango Kids and Mango Sport & Intimates.
- 8) Of all of Mango's lines, H.E. will see the biggest expansion, with 80 openings a year. The division should have 400 doors by 2018 and 500 by 2020.

- 9) H.E. differentiates itself from large competitors such as Cortefiel's Springfield by targeting an older 25 to 30 year-old market segment and Inditex's Massimo Dutti by selling "edgier and more fashionable clothes that more closely follow global trends."
- 10) Mango introduced a new label for plus-size women in 2014 called Violeta and another for those aged 14 to 20 years old.
- 11) Mango Touch intends to open 35 stores a year, while Mango will begin introducing Mango Kids through corners (the label targets boys and girls three to 12 years old) in a selection of 100 Mango shops, mostly in Europe (Women's Wear Daily, 6/ 3/2013).

9.0 Manufacturing

Mango doesn't manufacture anything at home. The chain makes 40 percent of its clothing in China, 20 percent in Morocco, and the rest in Turkey, Eastern Europe and India (Women's Wear Daily, 6/ 3/2013).

10.0 Rana Plaza Tragedy, 2013

More than 3,000 workers were on shift at the Rana Plaza complex, an eight-story commercial building in the suburb of Savar in the Greater Dhaka area, the capital city of Bangladesh, when it collapsed on April 24, 2013.

They were making clothing for Western retailers including the Benetton Group, Bonmarché, Cato, DressBarn, Joe Fresh, Matalan, Monsoon, Primark, The Children's Place, Britain's Primark and Spain's Mango.

The collapse of the building housing five garment factories and employing 5000 people killed 1,129 people. The building,

Rana Plaza, was owned by Sohel Rana, leader of the local Jubo League, the youth wing of the ruling Awami League (ABC Premium News, 08/13/2013).

This tragedy, considered industry's worst ever, has led to renewed scrutiny of "made-in-Bangladesh" clothes which are commonly sold in the West (New Zealand Herald, The, 06/06/2013).

11.0 Corporate Social Responsibility

11.1. The environment

Mango aims to control all aspects within its sphere of influence concerning the environment in order to foresee and manage contamination as effectively as possible (The Environment, 2015).

11.2. Carbon footprint

Since 2011, Mango's CSR Department has been working on the study and calculation of the carbon footprint and the greenhouse gases associated with its activity. The study includes all the emission categories according to international protocols:

1. Scope 1 (direct emissions)
2. Scope 2 (indirect emissions related to electricity)
3. Scope 3 (other indirect emissions).

This study, started by the Environmental Management Research Group (in Spanish GIGA), part of the Pompeu Fabra University, is the UNESCO Chair in Lifecycle and Climate Change.

It has two goals: firstly, to show the impact and possible actions and improvements that could be adopted, and secondly the reductions achieved from such improvements.

The Ecology and Development Foundation (Ecodes) verifies these studies annually and has awarded Mango the ZeroCO2 label for production and logistics. Since 2009 Mango has offset the emissions of its production sites, offices and the staff transport. The most recent offset emissions correspond to 2011 and totalled 12.922 Tn CO2 eq (Carbon Footprint, 2015).

12.0 Future scope

Mango hopes to more than double its sales 4.5 billion euros, or \$5.85 billion, and roll out 5,200 stores to operate 7,800 units by 2019. It has launched a plus-size clothing line, Violeta, and plans to launch a new label for teenage girls in the near to medium term. Mango has ambitious plans to expand its men's label H.E. by Mango, sales of which have risen 30 percent annually since its 2008 debut, with plans to open 400 stores in five years (Women's Wear Daily, 6/ 3/2013).

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