**IFFTI conference 2012: Fashion Beyond Borders**

**Theme: Educational Responses**

**Merchandise Management the solution to profitable global expansion**

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**Abstract**

It is widely accepted that the key to success in the fashion industry is excellent product that meets or exceeds the customer’s expectations. Much effort and resource is allocated to the design and the marketing of the product and the development of these skills within universities and the industry. This is not the case for merchandising. The author believes that the role of the merchandiser is not suitably supported and that the reason for this is that the role varies across the globe to such an extent that it is hard to identify what skills and knowledge are needed. The author also recognises that the increased global nature of the fashion industry requires a new definition of what merchandise management should cover.

This paper proposes that the role of the merchandiser is the part of the business that is often overlooked by higher education and this role is essential in securing profitable growth. With increased global expansion the knowledge and control provided by this role are becoming even more essential. Within most successful fashion brands and retailers, merchandising is recognised as pivotal to success. Merchandisers command high salaries and progress to senior roles within businesses. However those who go into merchandising are often not from a fashion education background and very few university courses specifically focus on the education of personnel for this profession. Students of fashion are less attracted to this role seeing it a purely a numbers role in the UK, a product development role in the US and a manufacturing role in China or India .Conversely numerate or analytical prospective students are often put off fashion courses as the profession is not seen to be credible or they may feel they need to be fashionable or be able to design.

The paper explores some of the reasons for this situation and looks to offer some solutions for the future.

**Introduction**

This paper is intended to be an introductory and explanatory paper on the subject of merchandising and is expected to identify the need for more, in depth research by raising a series of unanswered questions and contradictions that need resolution.

The paper will discuss concepts around the subject of merchandising from the skills and knowledge needed, the varying roles and responsibilities the job title can cover and its relationship to better known academic subjects or job roles.

The paper’s objective is to start by defining the problem as discussed above and will do this by describing in detail the merchandise function within the fashion industry around the world and then show how this role has changed and continues to change. From understanding the role we can then identify the knowledge, skills and personal attributes required for this function to perform effectively and what can be done by universities to support this.

The paper will look at what is delivered by universities. Universities particularly in the US, Canada and more recently India and Hong Kong run courses on fashion merchandising, this indicates a recognition of the importance of this role however this paper will challenge whether the universities are attracting the right students and whether the students are learning what they need for the role today and in the future.

This paper will question whether universities should be doing “specialist” merchandising courses at all or should this role be recruited from a range of other more general academic subjects.

The fashion industry is becoming truly global in not only its convergence of taste (Levitt, 1983) but also the location of consumption and production within the fashion industry. This is also leading to a change in where the origins of fashion style are originating as the indications are that influences and determiners of fashion trends will increasingly come from places not dominated by US or European culture. This situation has resulted in competition and expansion from developing economies and companies, especially those who have been traditionally in manufacturing or on the periphery or service aspect of the fashion industry. They wish to move along the supply chain to have more control of the outputs of the industry and have access to the greater profits this allows. At the same time those consuming countries are also facing increased pressure on their profits with alternative methods of selling and higher customer demands from ethical assurances to greater choice, better service, increased styling and better value. The pressure is on the fashion industry to deliver more. To make “better” product, quicker, cheaper and have higher profits and this is no longer happening in one country - this is global.

The paper will discuss how the merchandiser’s unique skills and knowledge is core to help the fashion industry in facing this challenge. The paper will start by defining the problem by answering the question. What is merchandising? It will do this by showing how the very different industry structures and economic importance of certain aspects of the fashion industry in UK, US, India and China have determined distinctly different version of the same job title role. The paper will then evaluate the various merchandising roles and consider what the role should encompass to meet the future global needs of the business;

Finally the study will identify the potential for educators of fashion business students to include fashion merchandise management in their curriculum and more importantly what this means.

**Research Methodology**

The methodology applied to this paper is to capture practitioner knowledge, the educator knowledge and triangulate this with what is currently written on the subject through text books, university prospectus and curricula and industry job advertisements. The paper is expected to be part of greater and ongoing research, to discuss Merchandise Management in the broader context of management education within the international fashion industry.

The majority of the research used will be from the author’s knowledge, using her practitioner knowledge. The author worked for 20 years within the UK and Europe in roles as a senior merchandiser and merchandise director in a variety of companies and sectors of the industry. Recent roles within the university sector initially running a course specifically aimed at recruiting students to become fashion merchandisers for the UK retail industry, has allowed her to view the role from a secondary and theoretical position. In that role and subsequent roles she has learned more about the varying approaches to merchandise management across the fashion industry, UK and worldwide and its role beyond the retail aspect of the fashion industry. Academic and advisory roles have included working with companies on merchandiser training programmes and work placement schemes and the author has extensive involvement with writing, reviewing and developing curricula aimed at preparing students for the role of a merchandiser in the UK, Hong Kong, India, the US and Canada. This experience and knowledge of curriculum will enable the author to comment upon how courses have been designed to reflect the local industry they serve and the specific skills and knowledge required and the position the merchandising role has within the organisation. The combination of industry and education experience has enabled the writer to have an objective and broader industry view of the role and its various forms within the fashion industry.

**Literature Review**

There are a variety of text books that cover the role of merchandising in its different forms with a larger number that cover Visual Merchandising. There a good number of books on the subject of this paper “product merchandising”. Many are from the US written by practitioners turned academic with titles such as:-

Fashion Merchandising, Fashion Marketing and Merchandising, Merchandising of Fashion Products and Apparel Merchandising.

These books are focused on the role of merchandising from a US / North American perspective reflecting their retail store and supply structures where product design and development are controlled from the company’s home country and progressed through offshore manufacturing. The role of the merchandiser according to these texts differs depending on where they are in the supply chain; whether it is the retailer, the fabric mill, the factory making the garments or the wholesaler liaising with the retailer and factory. The texts, especially the earlier editions, tend to describe the process of product development from a technical perspective including textile properties, sampling, costing, quality and interface with manufacturing.

A popular book in the UK has been Mastering Fashion Buying and Merchandising by Tim Jackson and David Shaw, and is a good summary of the roles and responsibilities skills and knowledge needed for the UK retail head office function of buying and merchandising and reflects the financial and physical stock management processes that governed the merchandising function of the 1990’s. It also highlights a difference between the US and the UK which is that; within the UK, the product development role is the responsibility of the buyer and the planning and control aspect the responsibility of the merchandiser.

There are numerous books, or chapters in books that cover clothing production, textile properties and trend prediction all subjects will be relevant for design and manufacturing aspects of the fashion industry as well as the commercial interface role of the merchandiser. However there does not seem to be much written that discusses how the role varies around the world or of merchandising as an international role.

What does seem to be a consensus is the breadth of the knowledge and skills needed and the requirement to have a well developed logical and analytical ability as well as the intuitive and creative as shown in the diagram below.

Analytical

Creative

Verbal

Intuitive

Merchandiser

Figure 1 Myers, D 1998 as shown in Rosenau and Wilson 2001

**Research Findings**

**What is Fashion Merchandise Management?**

To answer this question, the paper will reference texts on the subject alongside the primary research findings from merchandiser’s descriptions of their roles and job adverts indicating the role’s requirements and university course prospectus definitions.

The role will be described initially by country or region and this will highlight the differences in the role geographically that reflects the structure of the fashion industry in those countries.

The term originates from the term merchant; seller or trader. A simple analogy is the market trader who knows what his customer wants or needs and determines how to get the products or services that the customer will pay for. The trader needs to know about the product its attributes, its quality, the time taken to make and deliver, its suppliers, the price he can buy it and sell it and how long this product will be wanted by the customer.

Another simpler and often quoted description of the responsibility of the Merchandiser is that they oversee the achievement of the 4 Rs; the right product, right place, right price right time (Jackson and Shaw.2001).

This is often confused with the 4 Ps of marketing price. Promotion, place and product however this overlap aptly reflects the cross over of the marketing and merchandising function although each will look at the role from a different perspective but have the same objective- profit.

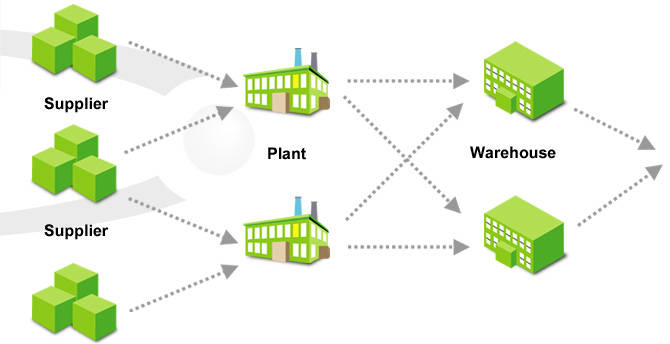
The terms “merchandising”, “merchandiser”, “visual merchandising”, “apparel merchandising”, “merchandise management” all contain the words merchandising but are not always the same role. Equally terms such as buying, trading, product development, category or product manager can include some of roles described in other organisations as merchandiser. Research conducted for this paper has confirmed that the different merchandising terms can mean the same role in some organisations and the same term can mean a different role in other organisations, depending on the industry or region they operate. The terms can mean developing product to meet the customers needs and sourcing the various part of the product to get it made and progressing stock through the manufacturing process on behalf of a wholesale or retail client. This is the predominant case in India, China and Far East, and those economies whose main involvement with the fashion industry is manufacturing.

The term can mean the planning and management of stock by the client to their own stores (UK). It can also mean how the product is displayed in windows or in store. It can mean selling product or the product itself.

Each definition is appropriate as a term in describing the act of buying and selling (or facilitating it). That is the outcome of all these roles, however the variety of roles described require vastly different skills and knowledge.

For the purposes of this paper we will focus on the product planning including development and production role within the merchandising definitions as summarised above. These are felt to be the most significant areas within merchandising and where the focus is more strongly aligned to profit generation. The Visual Merchandising role will not be discussed as its prime function is the display of product and although this activity aids selling and retail merchandisers will work with Visual merchandisers to make the product appealing, the knowledge and skills required by visual merchandisers are more closely aligned to promotion and are very different to those required by merchandisers involved in product planning, development or manufacturing.

The areas of merchandising to be discussed take the product through the supply chain from design influence and direction through prototype or sample production, sourcing and costing of raw materials and manufacturing, delivery to the brand, allocation and distribution to stores and final customer. *See figure 2 below*



**Material Sourcing**

**Manufacturing**

**Distribution**

**Retail**

This includes the planning and forecasting of what product is required at the initial stages of the process to the information and direction given to aid the selling and promotion of the product, at the customer facing final stage of the process.

As the paper will show later, the “merchandiser” does not have responsibility for all of these activities. In some countries merchandisers will be only involved with certain parts of the process and probably for a small group of products. In countries where product consumption or purchase of finished goods is the main focus (US, Europe and UK) the merchandiser oversees or delegates the responsibility for certain parts of the process to the producing company and focuses on the initial stages that determine the product order and the final stages of selling. As a result the skills and knowledge needed to fulfil the “differently defined” roles can vary greatly making a global definition and global management and global education of this role difficult.

The next section will discuss in more detail the varying approaches to merchandising across the globe. This will then allow us to consider if there is a need to rationalise or globalise the approach and what opportunities exist to do this if that is the desired outcome?

**Global interpretations of Merchandising**

The paper will now describe the different interpretation of the merchandising role in 3 geographic areas:-

The UK, using the author’s knowledge of the industry and academic experience and university course material;

The US, predominantly using texts on the subject written for the US market, university course material and authors experience of working with US academics and industry contacts;

India and China, using texts, interviews with key personnel at Li and Fung and university course material. The two countries are discussed together however it is understood that there are differences between them however the similarities are greater and where different approaches exist these will be shown.

**United Kingdom (UK)**

Merchandising in the UK is predominantly in the retail sector which is over £40 billion pa and manufacturing and services £8.5bn (ONS, Verdict) The retail industry in the UK is dominated by large retailer brands that have significant own label and in house designed product (termed private label elsewhere), The majority of what is sold in these retailers is produced in the Far East. The UK retail sector is highly competitive and is a declining market in terms of value (Verdict) with high costs for space, stock and staff and increasing competition from substitute products.

The main functions of the role in the UK can be divided into 3 areas:-

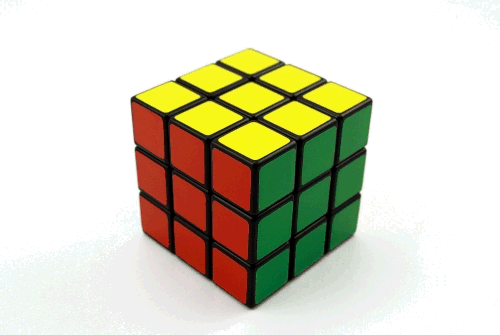
**Range planning** – Analysis of past and future product trends. Considering company or department strategies, plans and budgets, producing a hypothetical range structure and information to allow designers and buyers to start identifying the types of products that need to be designed and sourced.

**Range selection** – Select product that will enable the company to achieve its sales, stock and profit targets. The range selected must meet financial and operational, image and strategic requirements. For example suppliers used must not only provide the right quality of product at the right price, they must be able to deliver on time and do so within the company’s ethical requirements. Produce a financial stock and sales plan to meet targets.

**Range management** – Ensure stock is ordered in quantities, colour and sizing ratios, required to meet stock and sales plans, communicate with supplier needs. Monitor progress of production. Liaise with logistics, stores and marketing to ensure they are aware of stock and sales plans. Allocate stock to stores in line with latest plans and sales predictions, monitor sales against plans and react to sales variances against plan (re-order, postpone, reduce or increase price). Clear stock at end of selling period (promotion or withdrawal)

The authors own view from UK industry and academic experience is that; the role of the merchandiser is a generalist role requiring knowledge about the whole business within which it operates; its customer, supplier and competitors. However the skills needed are specialist and require a merchandiser to analyse the business from a specific perspective “the stock“ as an item that needs to be designed, planned, produced, progressed, delivered, stored, displayed and sold. This management of the product takes place at every stage of this chain of events.

The merchandiser needs to consider the product from a perspective of the financial, physical, aesthetic, function, time and place. This is a “Rubik cube” of a problem (authors own analogy) Where each side is each of these perspectives and each segment represents the individual products of each range need to fit together to present a clear and coherent offer to the customer.



Product functionality

Satisfy customer needs – price, quality, ethics, use, co-ordination

Physical Requirements and Logistics

Financial targets

Profit, Sales. Stock and Cash Flow

Location

Right ranges for each customer geographically

Aesthetic

Product must be appealing and in line with company or brand image

Must “fit” with other ranges

Time

On time delivery, right time for trends and season

Figure 3 Merchandising Role

To do this role, Merchandisers in the UK work closely with buyers, whose role tends to focus on the product and its design or development. The merchandisers focus is on the financial and operational aspects of planning. The buyer by understanding the relevant fashion trends for their customer determines product development and supplier sourcing and negotiates prices.

How the merchandising of product in the UK is organised varies. This is sometimes by fabric type e.g. wovens, jersey, knitwear, lingerie, reflecting a manufacturing/ supplier or specialist knowledge approach. In other retail companies the merchandising is organised by product type or end use e.g. women’s coats, ladies dresses, tops, bottoms, etc and reflects the product type or customers functional preference. The former approach i.e. by fabric type reflects a historical perspective where merchandisers and buyers needed technical knowledge of the product and an understanding of the suppliers processes.

University education in the UK of merchandisers tends to be via generalist courses in fashion management. On the UCAS search, there are 16 courses listed as fashion management and only 3 have merchandising in the title one of which is a foundation course. At least 30 courses listed as fashion marketing also include knowledge that will be of use to merchandisers. Those courses that include the role of merchandising in the curriculum usually combine it with the buying role. Most courses have a generalist approach, teaching students about the fashion industry its structure and processes and influences; management, strategy, marketing, product knowledge, and global sourcing including the manufacturing processes.

The specialist merchandising courses cover in more detail some of the specific knowledge and skills related to merchandising such as range planning, space and stock management and the metrics and management tools used in the industry however this is a small percentage of the whole course content. In the UK students will spend as much time learning about marketing as they do merchandising or product development. This reflects the UK Fashion industry and its market or consumption driven focus.

Despite the number of fashion management courses, university lecturers and recruiters in the UK have reported that the ideal fashion merchandising students - those that are creative, analytical, numerate and communicate well are not interested in the merchandising role. From discussions with recruiters it appears that a greater number of those recruited into merchandising roles in the UK have not done merchandising as part of their degree. Those going in to merchandising have done analytical or business or social science degrees often recruited for their numeracy skills with absence of creative or fashion industry knowledge.

**United States**.

Kincade and Gibson (2010) very effectively sum up the role of merchandising in the US into 3 categories of merchandising. They then divide the roles by the part of the industry they serve, raw materials, product manufacturing and retail. The authors then state that the sector of the industry each merchandising role serves will determine which reporting or operating function the role will work within, marketing, merchandising or operations. The key areas have been described as:-

**Visual Merchandising**: the use of presentation and display techniques to enhance the sales of the company’s product be it raw materials, finished clothing or service

**Product Merchandising**: the activities involved in procuring suitable product for the customer. The 4R’s (or 6R’s) *right* product, r*ight* time, *right* price, *right* place, (right size, colour, silhouette and right quantities have been added but many consider the latter 2 are part of right product). Within this category of merchandiser you will have retail merchandisers, product developers or product merchandisers the latter 2 are predominantly found in the manufacturing of raw materials or finished goods and the role in these 2 sectors is similar to each other and less similar to the role of the retail merchandisers.

Within this category whether it is for retail, product manufacturing or retail stages of the supply chain there is a requirement for research (market or product) and design input and there is a requirement for the merchandisers not only to know about the market but also how the product is made.

**Merchandising Services**: these are the services needed to support the customer in the purchase of the goods. These merchandisers are sometimes called account managers and are often associated with business to business relationships (B2B) and the focus is on a smooth and profitable business relationship. These services can include financial or customer services, data analysis, technical expertise or other logistical services.

This description of the role of merchandising within the US market is reflected in the university courses delivered in the US and Canada. Apart for the obvious greater population size product merchandising as described above is a significantly recognised profession in the US with a large number of universities delivering merchandising courses and the fact that the majority of the texts on the subject are also from US writers would also indicate its level of development in the US.

The University courses delivered do reflect a dominance of product merchandising particularly focusing on the raw material and manufacturing industry and the product development aspects of the role. The course prospectus of Laboratory Institute of Merchandising(LIM) quotes “

*“Fashion merchandising is defined as a broad understanding of an industry that joins design, product development, textiles, manufacturing and retailing”*

It has been noted from reading texts and in conversation with fashion industry personnel that the role in the US has a high degree of product making and textile technology and this is reflected in the greater level of time devoted to these subjects in the curriculum. However it has been noted that the level of product development, textile knowledge and manufacturing aspects of the curriculum for LIM and Fashion Institute of Technology (FIT) in New York is much lower than it was 4 years ago. There is a greater amount of general and retail industry knowledge and skills now taught than in the past which would imply that the US Education is also moving the role towards a more commercial rather than a technical understanding of product development mirroring the UK of 4 years ago.

**China, Hong Kong and India**

The description of the role within this region is informed by knowledge of the industry in this region from discussions with personnel at Li and Fung, and other trading and manufacturing companies operating in the region and research into the education of this subject in Hong Kong and India.

In China and India the role of merchandising is very much preoccupied with the manufacturing aspect of the product cycle

The role tends to have 2 strands:-

**Product Production** - Where the customers’ requirements are translated from product specifications and samples to production plans for manufacturing, including the sourcing of relevant raw materials.

**Trading** - The link between the retail customer and the factory or producers ensuring that the customer requirements are fully understood and progressed through the specific part of the supply chain they are responsible for.

Merchandising in India and China for the product production role requires skills in; manufacturing systems and processes, garment construction, textiles, pattern cutting, costing and distribution. For the trading role there is an expectation that there is an understanding of the garment production methods but there is a greater emphasis on communication skills and problem solving.

Reviewing the careers website of companies such as Li and Fung the majority of roles on offer in India, China and Korea had merchandiser in the title, looking at a the roles in more detail indicated that there were two types of skills required a generalist with customer market understanding and the other requiring in depth knowledge of a sector of the industry or product area e.g. trimmings.

These 2 strands are echoed in the website information on fashion business and merchandising courses at Pearl Academy of Fashion.

*“The industry indicates specific needs for Fashion Merchandisers who have an in-depth and broad based understanding of markets, products and merchandise sourcing (extract from website Pearl Academy of Fashion (PAF) PG, diploma Merchandising)*

*The students get a deeper understanding of the three main strands of commercial functioning of fashion, i.e., Merchandising, Manufacturing and Marketing (PAF Fashion Business Management BA: Hons)*

In depth analysis of course curriculum in India and Hong Kong uncovered a recent move to a more generalist approach in the education of merchandising with the introduction of more generic business subjects such as strategy and global issues and a move to be more influential in product development with trend forecasting and design understanding being increasingly included in the curriculum. However the predominant focus is still towards serving the manufacturing process and product knowledge and trading.

In Hong Kong where very little manufacturing takes place merchandisers focus on progressing the customers requirements or work very closely and sometimes based in mainland China with manufacturing facilities and the predominant role is a trading role.

In China and India although still dominated by manufacturing, trading companies are expanding along the supply chain rather via acquisition and development in manufacturing. Li and Fung is just one example of a company doing this. To support this development they have been re training employees to be come product developers rather than product progressers and the development in the university courses in this region to include a greater understanding of the consumer markets especially international markets indicates a proactive response to this change.

**Summary of Findings.**

The main differences between the US and UK roles are that in the US, the role described as merchandising is all encompassing from concept to consumer. In the UK the function is split into two; the product development part and liaison with supplier regarding costs and delivery is done by the buyer and merchandiser’s focus on the planning of the range and progress of the range to delivery to store and sale.

The management of inventory, sales analysis and financial planning appears to be less in the US than in the UK, with this aspect possibly carried out by store managers, sales support or finance in the US.

The difference between merchandising roles in the UK and US and those of China India is that their focus is on the production of finished goods and of the raw materials required in that process or the liaison between the customer and the factory. The majority of the products produced are for export and the relationship and understanding of the overseas consumer is less. There is less product design and development in these countries. These functions are still largely determined by the client in their home market using either in house design and product developers or outsourcing to design or wholesalers who are also based in the consumer’s home market. The concept of retail merchandising as per the UK and US is not really evident in China and India although is likely to take place as it is at the heart of trading i.e. buying and selling. Developments in recent years within China and Indian markets and within the supplying companies of these countries would indicate a change towards a greater emphasis on the Chinese and Indian consumers needs. In addition because of costs and developments by supply companies in China and India they are now delivering some of the services such as product design and development previously only provided within the clients country.

The premise for this paper was that this key role within the fashion industry is poorly supported and structured within the industry and education and that the skills of the merchandiser are essential for profitable global expansion. It was also felt that the lack of clarity of what the role is causes problems of attracting the right calibre of person to these roles.

The paper has shown that the role is indeed very different around the world and the term merchandising means different things across the globe and within the fashion industry. The specific knowledge skills and attributes required can also appear to vary significantly. However it can be seen from the discussion within the paper that there are some common themes in all the merchandising roles described.

The role can be any and all of the activities involved in managing a product along the supply chain - from garment design to delivery to ultimate consumer (**Fig 2)**

However it is felt that there is some commonality of knowledge, activities and skills:-

- Knowledge required of product capabilities and attributes and suppliers of raw materials or component parts

- Consumer or market understanding

- Communication skills

- Analytical approach and problem solving

- Knowledge of principles and concepts associated with industry sector of the process to generate profitable solutions

The major difference is the required specialist knowledge for each sector and the metrics and concepts used, that are unique to the industry or that part of the supply chain. What is not needed is knowledge of fashion designers or their influences other than how this impacts the consumer’s choices. There is no need to be able to design or even pattern cut. However these subjects are covered and it has been argued that to understand the context in which a merchandiser operates they need to understand something about all roles they interface with. Merchandisers can then understand what information the designers or pattern cutters need to help them to create a range for the specific customer market.

So what does this all mean for the role of merchandising and the titles claim that merchandise management is the key to profitable global expansion?

**Conclusion**

What the paper has shown is that the industry, university education system and the text books supporting merchandising roles, are doing so from a local industry perspective. Profitable global growth can only come from thinking globally and trading globally. The skills and attributes of the merchandiser allow a level of detailed understanding and control that helps manage risk and maximise sales in whatever sector of the industry they are in. It is clear that the fashion industry needs people who have specialist design, product development, manufacturing or retail knowledge but the international merchandiser or trader does not need to know how a product is made or designed, they need to know that it has been well designed and made effectively for their customers needs.

My conclusion is that there needs to be more distinction in the role of the merchandiser they should not be product developers or manufacturers (although they may have started in these areas). They should be the people that work with these specialists. They are traders, buying and selling product to suit the market. Their specialist skill is the knowledge of the fashion industry and of the specialists that exist within it and the factors affecting it.

More clarity in what the role of merchandising is, will allow the skills to become more professionalised and this will lead to clearer global university courses which will be able to attract the right person with the combination of analytical and creative abilities.

The paper has raised some questions that require further research and evaluation such as:

Is the merchandising role a specialist or a generalist role?

What should a merchandiser be taught, specialist or generalist knowledge?

What are the skills and knowledge needed in the future?

How can the Universities become more global in their perspective, while still serving the local employment needs?

How can the universities work with industry to promote the professionalisation of the role?

However fundamentally this paper and the question it raises are about the fashion industry becoming more effective in what it does to meet the needs of the global consumer who wants more style, more quickly, more profitably and less wastefully. The paper has focused on merchandising as it is an apt example of how a job role has evolved haphazardly alongside the rapidly expanding fashion industry and its fragmented nature is not sustainable and will not sustain profitable global expansion.

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