Brazil’s changing fashion landscape
SAY the words “Brazilian fashion” and flip flops and bikinis probably come to mind. In recent years, however, urbanization, growing affluence and shifting global economics have propelled the country’s fashion industry forward, poising it to compete on an international level.

Brazil has long been a textile and apparel production hub and the growing reputations of São Paulo and Rio de Janeiro Fashion Weeks are a sign of the region’s growing fashion presence. The recent 2014 football World Cup and 2016 Olympics in Rio de Janeiro have put the country in the spotlight, positioning it to capitalize on its vibrant personality, which adds a distinct touch to its products and brands, as well as its operational expertise and relatively stable economic situation.

In this paper, we will look at the current state of Brazil’s fashion and apparel industry, identifying the region’s opportunities, from economic growth in the country’s interior to its growing middle class, and outlining its challenges: geographic and economic diversity; a complex tax system; a fledgling synergy between industry and the market; a unique mall-based retail structure; and competition from lower-cost Asian manufacturing centers.

We will then explore how the right application of technology and best practices, combined with a lean approach to design, product development and production, could be used to help Brazilian companies deal with these challenges, compete with international brands for domestic market share and even expand abroad.
The first three decades of the 20th century were boom years for Brazil’s textile industry, as the one-time Portuguese colony was one of few countries well-positioned to respond to demands for cloth during World War II. By the 1970s, however, a lack of government policy, union conflicts and a difficult global economic context had led to the industry’s decline and its labor force had shrunk by half. In the 1990s, Brazil became vulnerable to competition from low-cost Asian countries, despite United Nations programs to fund technology and CAD/CAM modernization, and educational programs in textile science.

In the early 2000s, the BRIC countries (Brazil, Russia, India and China) emerged and Brazil was on track to economic prosperity. While much of the developed world suffered during the 2008 economic crisis, Brazil seemed immune. Growth continued unabated, with both fashion sales and luxury consumption by Brazilians on the rise. However, following a 7.5% GDP increase in 2010, growth fell to about 3% in 2011. Estimates for 2015 are not much better, with rates ranging from 0.27% according to the market, to 0.7% according to government sources. This slowdown, dubbed the “hangover” following the euphoria of the World Cup, along with the rising cost of labor and a diminishing workforce, are putting pressure on fashion companies. In parallel, a rising standard of living and increasingly sophisticated consumers make Brazil a market with immense potential for local brands who can cater to the country’s evolving middle and affluent classes, especially in the neglected interior regions. A majority of this population has not yet developed clear brand affinities, so the time to reach them is now.

Brazilians are putting pressure on fashion companies. In parallel, a rising standard of living and increasingly sophisticated consumers make Brazil a market with immense potential for local brands who can cater to the country’s evolving middle and affluent classes, especially in the neglected interior regions. A majority of this population has not yet developed clear brand affinities, so the time to reach them is now.

Brazil is one of the few countries to possess knowledge from fiber to finished garment, with many companies already vertically integrated to some degree. However, as Rafael Cervone, President of ABIT (the Brazilian Textile and Apparel Industry Association), emphasizes, many companies have not yet succeeded in linking the different areas of development together into a coherent whole. “The new middle class represents one trillion dollars in revenue for fashion companies,” he says. “The challenge will be to better integrate the links between industry and retail, as well as designers, the industry and academia.” This would enable companies to develop new ways of working that consolidate and modernize their knowledge and process to develop a thriving fashion industry.

Brazil’s Fashion Industry at a Glance

Brazil is ranked fourth among the world’s largest garment producers, boasting one of the most modern and complete textile supply chains in the West. The Brazilian apparel industry employs approximately 1.3 million people, more than 70% of whom are women, and saw close to $53.4bn in turnover in 2013.

In 2013, there were 26,688 apparel businesses spread across Brazil, 80% of which were small and medium-size companies. Nearly 78% of these companies were concentrated in the southeast (13,490) and southern (7,254) regions, followed by the northeast (3,847), midwest (1,846) and northern (251) regions.

There are numerous factors influencing the fashion industry in Brazil, but there are also numerous ways of building on Brazil’s existing strengths of creativity and supply-chain knowledge to become competitive on a worldwide scale.

A Diverse Country in Constant Evolution
Brazil is an enormous country—the fifth largest in the world, both geographically and in terms of population. It can be likened to a patchwork of many smaller countries, with vast differences in climate and culture from north to south. This diversity is both a source of wealth and a challenge for fashion companies. Regional differences in weather, body shape and fashion preferences make it difficult for brands to deliver the same collection everywhere at once. Local brands can be more agile in their collection planning and delivery than foreign brands that need to grapple with inversed seasons; unfortunately, many content themselves with reinterpreting European fashion from the previous season rather than creating original designs.

Brazil is also heavily urbanized, with 85 percent of its 200 million inhabitants residing in urban areas. While Rio de Janeiro and São Paulo are still the main fashion capitals, smaller cities are joining their ranks, opening up new possibilities for the fashion market.

These smaller cities located in the country’s interior represent half of Brazil’s population and a consumer market of around $633 billion. By 2020, a company will need a footprint in over 400 cities to reach 75% of Brazil’s population, as compared with 229 cities in 2000.

Red Tape and Taxes
One of the biggest criticisms of Brazil is its complex administrative system and high taxes. Many wealthy Brazilians travel to the United States or Europe to buy luxury-brand goods at half the price of what they would pay in Brazil, essentially bypassing their own economy. Domestic brands do a better job of retaining Brazilian loyalty in Brazil when they focus on customer service and delivering a full lifestyle or elite shopping experience that makes the customer feel special. International companies entering the Brazilian market in the last ten years have often opened flagship stores intended primarily to showcase their brands; the added expense of Brazilian import taxes and indecipherable administrative procedures makes it difficult for them to get the maximum out of the domestic market. However, they have caught on to the Brazilian appreciation for customer service and go out of their way to deliver an alluring experience.

Reign of the Mall
The retail scene in Brazil is unique in that it is concentrated in the country’s malls; Brazilians love their malls and flock to them to experience shopping as a lifestyle activity. Brazil still grapples with high crime rates that make malls more attractive for luxury brands than standalone boutiques on city streets.

Red tape and taxes in Brazil make buying luxury goods more attractive abroad.

Historically, malls in Brazil have catered to more affluent consumers and carried primarily foreign luxury and retail brands, but urban development and the emergence of a growing middle class has spurred the development of malls that target a more middle-income demographic. This up-and-coming segment of the population has seen its spending power rise and now represents a new market for lower-end and mid-range retailers. They still prefer a brick-and-mortar experience when buying, which makes the mall very important for this domestic market. Construction rates have been on the rise since 2010, with new malls in the pipeline for the future. Flexibility and agility will be key when it comes to reaching these consumers and establishing a presence while at the same time overcoming unique control challenges that harder-to-reach interior regions present.

Lack of Structure

Brazilians are notorious for their resistance to structure and proud of it. It is the flip side to a culture that prides itself on its flexibility and adaptability. There are certainly several well-known and loved Brazilian fashion brands, but the kind of sustained growth common to other regions where fashion is supported by business strategy and serious investment in technology and an efficient process is generally not present. One of Brazil’s biggest strengths is its vibrant style and creativity, but a lack of proactive management in design and development will kill even the most creative brand; without a product, there is no delivery.

The other risk is that products are delivered with defects, a relatively common complaint in Brazil: the same size in the same store doesn’t always fit the same. This is frustrating for consumers and endangers brand loyalty. Consumers are unlikely to return for repeat purchases if they are frustrated the first few times around.

Brazilian brands recognize that it is not possible to continue building an economically sustainable industry without making some serious changes. Given the market’s potential, it is in their interest to master product quality and deliver consistently, starting now.

Outsourcing Manufacturing and the Question of Cost

Brazil has a strong raw materials and manufacturing history, but a deindustrialization trend is shifting important resources elsewhere. Many large brands now send their goods to be manufactured in China and other Asian countries, while smaller brands that manufacture in Brazil are importing textiles from Asia. Peru and Colombia have also become options for outsourcing production. With the cost of manufacturing in Brazil on the rise, some companies find it more advantageous to import finished goods from China, then label and resell them instead of producing locally.

That said, a BCG (Boston Consulting Group) study found that, contrary to widely-held opinion, China is no longer the de facto cheap manufacturing country. But Brazil isn’t inexpensive either. Wage increases, slow productivity growth, a rise in energy prices and currency fluctuations are all squeezing companies, in both China and Brazil.

Heder Vanzin, Purchase Manager at Vantex Industrial LTDA, points out the futility of competing on price: “No matter how qualified or modern we become, we will never get close to Chinese prices.” In order to remain competitive, Brazilian companies will need to consider bolstering added value via design and development, to offer a better, more interesting product. They will also have to streamline costs and time to market. Applying a lean approach to the entire fashion and apparel development and production process represents a huge opportunity in this respect because flexibility can be built in while waste is squeezed out.
While the richness of Brazil's diversity and its lack of structure may pose unique challenges to fashion brands looking to conquer the region, its rapidly evolving social landscape has also created tremendous opportunity for companies that are ready to embrace change and mobilize to jump on this burgeoning market.

The New Middle Class
In recent years, Brazil has experienced profound social change and the growing middle class has turned the economic-class pyramid into a diamond. The middle class now comprises around 108 million people who spent more than R$1.17 trillion or about $600 billion USD in 2013. It is estimated that by 2023, its numbers will rise to 58% of the Brazilian population from 38% in 2013, reaching 125 million people—a significant source of potential revenue for fashion companies.

The Importance of Brazil’s Interior
Brazil’s interior cities are expected to continue seeing above-average growth, playing an increasingly larger part in Brazil’s consumer market. Middle-class and affluent families from these cities will be Brazil’s main growth drivers when it comes to consumption, with the potential buying power to spend more than $600bn over the next five years. By 2020, 47% of apparel spending is predicted to come from interior-city consumers.

As Brazilian brands begin to outsource manufacturing to Asian companies, cheap Chinese brands are entering the Brazilian market, eager to take advantage of the rising middle and affluent classes. The problems associated with outsourcing manufacturing are exacerbated by the fact that many Brazilian brands master neither the product development lifecycle, nor a highly automated, lean manufacturing approach.

A survey of 100 large to medium-sized Brazilian companies found that almost all engage in design, product development, marker making, cutting, sewing and finishing. Basic technology is commonly used for pattern making, grading and marker making but 76% of companies still design by hand and 67% still cut fabric manually. This implies a low level of technology adoption and streamlining across workflows. Basic pattern making, grading and marker making are labor intensive, error prone and repetitious and using a CAD solution (or a computer) is often a first step. However, companies who have automated only the most basic of these tasks have not really adopted modern working methods, while other, more technologically mature regions of the world have long since moved on to more sophisticated approaches.

In Brazil, there is clearly room for improvement across the board, as companies are not fully exploiting the opportunities that lie in linking teams and tasks together: the foundation of a lean operation. Maintaining the status quo without taking advantage of new developments in technology and ways of working can have consequences ranging from ill-fitting clothing and outdated designs to excessive rework, longer time to market, inflated costs and late deliveries, ultimately resulting in a poor-quality product at a high cost.

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3 IEMI (Institute of Industrial Studies and Marketing) for Lectra.
CAD/CAM TECHNOLOGY USE IN BRAZIL

In May 2013, the IEMI (Institute of Industrial Studies and Marketing) conducted a study for Lectra, surveying 100 of the 757 large Brazilian apparel companies to find out how they used technology:

**In design:** 86% of companies surveyed create their own collections. Of these, only 24% use specific fashion design software. The other 76% use sketches and vector graphics editor Corel Draw for collection development.

**In pattern making:** 95% of companies surveyed engage in product development and pattern making. Of these, 84% use specific development/pattern making software but much of this use is quite basic in nature. The remaining 16% produce their patterns manually.

**In cutting and marker making:** 95% of those interviewed have a cutting and marker making process. Of these, 81% use marker making software, 33% have an automated cutting process and 21% have an automated spreading process. In the other companies, cutting and marker making are performed manually.

WHAT TO DO: STREAMLINE AND STRUCTURE TO STRENGTHEN BUSINESS

While Brazilian fashion companies can’t change the country’s economy overnight, they can better equip themselves by introducing more structure into their way of working and applying lean methodology to their operations. “The most complicated element to overcome is the economy, but technology helps companies stay aligned with the market and cut costs,” says Vanessa Piovesan of Grupo Eixo. Changing demographics and a shifting economic landscape mean domestic companies need to optimize their process and equip themselves with the most up-to-date technology in order to capture the changing market and keep up with demand.

Brazil is overflowing with creativity, but it needs to harness this while maximizing its operational efficiency. Investing in design, development and production is the best way to improve quality and control costs; this will help Brazilian companies make the most of their developing market. How does a company with little to no such experience compete with established brands? By implementing high-performance technology, leveraging technical and creative skills and building cross-functional teams that link the different areas of the development and manufacturing process.
Pairing Best Practices with Technology

Investing in best practices means investing in a sustainable future. “Technology is important, but we also need the right people; there is no innovation without innovators,” says ABIT’s Rafael Cervone. It’s not enough to have cutting-edge technology; the right know-how, implementation and training are essential. Some may hesitate: “But won’t this technology take away my creativity? Won’t it take away jobs?” Quite the opposite; technology, when implemented in the context of a broader optimization strategy, frees creative roles up from the administrative tasks that swamp them on a daily basis. It connects design, development and production in one smooth process that minimizes errors and saves time and money across the board.

Design and Seasonality

Brazilian labels have two important opportunities in the design department: the country’s distinctive flair and the fact that most dominant brands and retailers come from Europe and the United States. As Brazilian summer is the northern hemisphere’s winter, European and American companies operate on an inverse calendar and don’t always offer seasonally appropriate clothing. Brazilian brands are better positioned to deliver garments when local consumers want to buy and wear them. In addition, the Brazilian idea of beauty is not the same as in other parts of the world; in Brazil, womanly curves take center stage, with a special focus on the derriere!

Developing a strong design department requires a solid framework for thoughtful, creative design and the tools to produce consistent, high-quality clothing that stands out in the marketplace. Technology gives designers the freedom to create what is simply not feasible by hand, such as beautiful, complex digital prints. Attention must also be paid to timing, as playing on trend and seasonality depends upon it. Collection management technology, such as PLM, can go a long way in supporting all of these areas.

Developing Consistent Fit

Brazil’s population is incredibly heterogeneous, which makes fit a challenge for Brazilian brands. A good fit and consistency of fit from style to style are very important. With the rise of e-commerce, fit has become a big concern, as 70% of clothing returns are due to poor fit. Retailers and brands want to avoid consumers ordering the same garment in multiple sizes, in hopes of finding the right size. Finding the correct fit for a particular market and keeping fit consistent across different styles are key to minimizing costly shipping and returns from unsure or unsatisfied customers. Shipping fees, inventory management and stock replenishment are all problematic, but they can be measured, managed and quantified. Brand loyalty, on the other hand, is difficult to attain and measure, and even more difficult to retain. Consistency of size is often associated with quality, and determines whether or not a consumer will choose to buy from a company again.

Controlling Manufacturing

Brazilian manufacturers are under price pressure from brands and retailers. By investing in technology and equipment, companies can add value to their offer and increase their competitiveness, especially in relation to emerging, lower-cost manufacturing countries like Vietnam or Bangladesh. Vanessa Piovesan of Grupo Eixo explains, “Outsourcing to Asian countries can seem like a good deal, but the results often do not live up to quality expectations.” She points out that the middle class has access to foreign brands at increasingly competitive prices, which means Brazilian companies would be wise to focus on providing a certain standard of quality that is not always possible when working with China or other Asian countries. Companies that control manufacturing by investing in design technology and automated cutting equipment are better positioned to deliver products that meet customer expectations with less wasted time and fewer wasted resources.
Brazil’s big strength is its strong creative aesthetic and playfulness when it comes to design. Patricia Carvalho Whyte Gailey, Product Manager VP & UP at Ideal Work Uniformes, stresses that creativity and innovation are a strategic advantage for Brazilian companies. However, she says, “the challenge will be to find ways to differentiate without increasing costs.”

Adopting technology in fashion supports innovation, so it’s a natural move for any company with an eye to the future. Proven best practices, coupled with intelligent, fashion-specific technology and processes, can help Brazilian brands deliver well-fitting, stylish clothes at the right price point and to the right customer, both at home and abroad.

While technology in fashion is not foreign to Brazilian companies, its implementation is often not optimized because companies are either using outdated hardware or software, or because these technologies are applied as one-off solutions rather than built as an overall process. A lean, change-management based approach that takes the big picture into account is just as essential for Brazilian companies looking to adopt technology and improve their way of doing business.

Facilitating Collaboration
Fashion-specific technology can streamline a company’s process and introduce the much-needed structure that is holding many Brazilian companies back from taking their business to the next level. By improving communication across the global supply chain and optimizing efficiency to save time and resources, Brazilian fashion and apparel companies can better manage the complexity involved in creating a collection and deliver a better-quality product to market faster.

When enhanced by guidance from fashion industry experts who understand the business, a collaborative solution such as a fashion-specific PLM can facilitate communication between departments and reduce costly misunderstandings, saving time, keeping development on track and giving Brazilian companies the freedom to play up their forte—creativity—by simplifying workflow and eliminating unnecessary tasks and time wasters. Instead of working in silos, creative departments can synchronize, share data in real time, make better decisions sooner in the process and collaborate to turn great creative concepts into solid quality products.

PLM technology allows product development departments to easily store and share information in one central place, a big time saver. Standard color libraries and color metadata, as well as shared custom palettes, improve color management. Elements and styles from previous collections can be saved and reused in new designs; existing patterns and material layouts can be used to save on fabric; and grade rules from previous collections can be applied to ensure consistent sizing and fit. The development cycle is shortened, which means product gets onto store shelves faster and in plenty of time to capitalize on season trends.

Switching to a more collaborative way of working can be a daunting task for many companies and a project management approach can help make this transition easier. Using PLM as the catalyst for change, industry experts experienced in change management can help companies transform their way of doing business and implement industry best practices. Then, over time, companies can adjust and develop their own best practices for an optimized process all around.

Across all departments, a proper technology platform puts an end to the constant search for information and blind decision making. It can provide information at both the global and operational level, so that teams can coordinate and synchronize, from retail planning to production delivery. The effects of staff turnover can also be mitigated, helping companies keep pace as they recruit new talent.

Enhancing Creativity and Ensuring Quality
A brand is driven by its ideas but technology can help transform these ideas into reality—a reality that not only reflects the designer’s vision, but also fits properly, meets quality standards and gets delivered to stores on time. 3D virtual prototyping and pattern making technology lets designers play around with fabric design, scale and placement until they get the combination just right. Dedicated design solutions give designers access to an unlimited palette of colors, styles and patterns to create with, allowing them to transform imagined styles into technical sketches. The creative possibilities are endless.

A picture is worth a thousand words and a thousand words less of explanation saves time and means fewer headaches when it comes to development. 3D virtual prototyping solutions convert ideas into something visually tangible that
merchandising, design, product-development and production teams can all refer to. Designers can work closely with pattern makers and see immediately if they have understood an imagined concept. Design approvals become simpler and faster because everyone is looking at the same idea and fewer details are left to the imagination. Fit, drape and fabric choice are easy to visualize and approve. The development cycle is shortened.

3D virtual prototyping technology also means modifications can be made without having to adjust a physical sample. Early prototypes can be fit virtually, so fewer physical samples and fit sessions are needed, saving time and cutting down on development costs. Quality is also improved because incremental adjustments can be made at very little cost until the perfect fit is achieved.

Technology can also be used to protect and extend the fruits of creative labor. 3D virtual prototyping and pattern making technology provides brands with a way to develop and store patterns season after season, establishing a knowledge base and protecting brand equity. Fashion companies can work from the same base set of patterns, varying style details to continuously generate new designs that retain the fit of previous styles. They can also use this base pattern to automatically generate the sizes they need to produce and sell.

Finally, 3D virtual prototyping solutions can help Brazilian brands achieve the quality and consistency of fit that has eluded many of them. Typically, fit is checked in a single sample size, but with 3D technology, all sizes can be checked very quickly. Given that certain styles do not render well in the smallest or largest sizes, even though they might look fine in the sample size, checking the entire size range is important, especially with childrenswear and plus-size garments, as proportions change drastically from one end of the scale to the other. In mastering quality and fit, Brazilian fashion brands will be better placed to compete with international brands on a domestic and international level.

Optimizing Production Efficiency
Technology plays an important role in manufacturing and can help Brazilian companies bridge the gap between the creative departments and production. If crucial design and development information is available early on in the process, fabric usage can be accurately estimated on the production end so that over or under ordering is avoided. Smart technology in the cutting room can play the role of a centralized “brain” that links orders and inventory from an ERP system with marker-making, spreading and automated cutting activities. This brain can help determine the optimum mix of sizes per marker, fabric widths and quantities and fabric-lay orientation, saving time and reducing expensive fabric waste. Companies can run different production scenario simulations for informed early decision making, while powerful order-planning algorithms can identify efficient and cost-effective ways to reduce fabric consumption. The end result is less waste, bigger profit margins and faster time to market.

A thorough analysis of the manufacturing environment, conducted by an industry expert who can then make recommendations based on lean methodology principles, can help streamline workflow and optimize operations. A lean approach to production, combined with technology that saves time and minimizes waste, contributes to sustained success and produces significant, measurable benefits.

CONCLUSION

Brazil’s culture vibrates with creativity and the rise of the new middle class means the country is rife with opportunity for brands looking to capture a new market. Fashion-specific technology can help Brazilian companies lay a solid foundation for future growth and compete with international brands and low-cost imports by minimizing costs, reducing time to market, mastering quality and fit, and leaving them free to focus on their strong suit: innovation.
For over 40 years, Lectra has supported the world’s most respected fashion brands.

Lectra has the technology and expertise to help Brazilian brands overcome their unique challenges. Our experts understand the fashion industry and take a global, human approach to streamlining processes across the supply chain, working together with companies to help them stay competitive and achieve their business goals.

The transformation to a lean design, development and manufacturing process is one that Lectra can help build. Delivering collections for one of the world’s largest economies and beyond also requires innovative technology and a streamlined process from design to production. Lectra can assess current working methods and future goals, then identify the right steps to take a brand or manufacturer where it wants to go. Our design, development, pre-production and production solutions, coupled with consulting and training, were developed with input from our customers to solve real-world challenges. We can help bridge the gap between design and production.

Lectra also understands the importance of ensuring the future of fashion knowledge and expertise. That’s why we have partnered with almost 900 schools worldwide, including the University Center of Fine Arts, Senai Nacional, Senai CETIQT, and the Senac Santo Amaro University Center in Brazil, among others. Each year, approximately 70,000 students worldwide are trained on Lectra solutions, which represent the cutting edge of fashion technology with innovations like all-size pattern development and 3D prototyping technology.

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ARTICLES

WHITE PAPERS

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Every Lectra Fashion Project benefits from Lectra’s 40 years of fashion expertise in the form of consulting, training, and ongoing support. Lectra’s consultants evaluate customer needs and process to propose appropriate solutions to support their unique business goals. Contact one of our global offices today to find out if a Lectra Project is right for your business.

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LECTRA in Fashion
With over 40 years of expertise in fashion and apparel, Lectra’s mission is to provide a complete spectrum of design, development, and production solutions to confront 21st-century challenges. From first creative spark to final product, our professional services address an end-to-end process. We support the day-to-day operations of our customers in over 100 countries for around-the-clock process optimization. From fast fashion to luxury to ready-to-wear, Lectra’s 23,000 customers in markets as diverse as casual, sports, outdoor, denim, and lingerie represent every development and sourcing model imaginable. Beyond suppliers and manufacturers, they are the brands you love and the stores where you shop.