UDC 33

Fashion Industry Supply Chain Issues: Zara (Azel France)

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Abstract. The main purpose of retail business is to continuously maintain the responsiveness to the changing trends in consumer fashion tastes through quickly creating new designs that are suitable for all customers with an affordable price. Hence, the importance of Supply Chain (Management) has appeared. The objectives of this study are to analyze the impact of purchasing and supply chain management strategies in retail industry and identify the way of success of AZEL FRANCE Retailer Company of ZARA clothing in Bosnia and Herzegovina from supply chain perspective management by conducting a survey study. AZEL FRANCE is found to be successful in that it can control and streamline the highly consumable fashion items in their supply chains so that they can greatly decrease their lead time and thus increase be responsive enough for fast changes in fashion customer needs and desires by minimizing the industry risks. The retailer stores of AZEL FRANCE are also found to be confident about the future profitability. However, some technical inabilities of the company are also identified. It can be suggested that AZEL FRANCE can easily leverage more its successfully implemented supply chain activities by increasing its technical abilities.

Keywords: Fashion industry; Supply Chain; Survey.

Introduction. Supply chains include all direct or indirect occupied elements such as the manufacturers and suppliers, transportation activities, housing and retailing, and customers in order to realize customer requests. They also concern new product development, marketing, operations, distributions, finance, and customer service (Peterson, 2004).

Supply chain management (SCM) is commonly studied in marketing theories and practices. It enhances cost-savings, customer services and targeting purposes in order to gain competitive advantage over competitors (Grean and Shaw, 2004).

According to Porter (1985), competitive advantage can be gained by providing the lowest cost or by differentiating. However, supply chain understanding suggests reducing costs and increasing responsiveness (agility) to customers' needs in order to gain competitive advantage (Martin & Grbac, 2003).

Supply Chain Management (SCM) is the key success factor in responsive fashion business dealing with second and third tier suppliers and second and third tier customers. Fashion business supply chains produce both physical products and also a combination of time, place, and form of function of a product/service (Cai-feng, 2009). Therefore, Hult et.al (2004) describe that supply chain management is not a support function in order to realize a business strategy any longer, it specifically drives the performance of firms. So, supply chain management has become the key element of the overall strategy for the entire chain. Thus, this research aims to focus on a famous retail company's (ZARA clothing company) Supply Chain Management (SCM) and how it deals with various stages of its supply chain in Bosnia and Herzegovina.

Next sections present the related literature review, the data characteristics and the employed methodology. Furthermore, in the results section, the findings are presented. Therefore, the findings are discussed and the research is concluded in the final section by the limitations, the benefits of the study and suggestions for future research.

Literature review

This section will demonstrate the related literature. The aim of this research is to give a clear picture of the theoretical research and the ZARA fashion trends of AZEL FRANCE retail stores operating in Bosnia and Herzegovina (BiH) by considering its supply chain management strategies. The effects of supply chain (management) are particularly fundamental in fashion industries of

marketing research. Through this review, different aspects of supply chain strategies of the fashion industry will be described and therefore the impacts of supply chain management are explained.

Christopher et al (2004) argues that the fashion retail industry has become increasingly more unstable and violate, hardly predictable and because of many influencing factors mostly related to highly changing purchasing behavior, shorter product lifecycles and the consumer expectation about responsiveness.

Easey (2002) reports that the high level of information integration in the supply chain integration of ZARA increases the accuracy and validity of data sources about customer's consuming behavior, preferences and the most updated fashion trends. Therefore, the integrated supply chain systems facilitate ZARA's faster reaction to changes in consumer demand. He moreover concluded that the fast and correct decision making based on the market analysis can enhance meeting customer satisfaction.

Riezebos et al. (2003) suggests exploiting brand name successfully in an international market. Obviously, ZARA is a strong global brand operating in 68 countries. By employing an international branding strategy, ZARA can both increases its financial position and strengthens its strategic global position.

Bhardwaj and Fairhurst (2010) presented that supply chain integration enables ZARA to decrease production, transportation, and inventory costs and to improve quality control. They suggested that ZARA's centralized distribution facilities lower the lead-time of its products and inventory stock level by improving its supply chain's competitiveness. They explained that ZARA is competitively flexible in the variety, frequency and the amount of the new style products they produce. They continued that ZARA can rapidly attract customers with their new trendy wear and therefore increases sales figures as return. They concluded that information sharing increase ZARA's supply chain operations more than the other fashion industries. Moreover, fast information sharing reduces the costs and maintains the fashion trends and customer satisfaction.

Kumar and Arbi (2008) emphasize that Benetton's operation and supply chain strategy is a significant example of an operation network for competitiveness. It has developed diverging solutions from industry practices and employed the strategies by considering its main competitors. They stressed on the importance of private ownership of assets (brand product design and market knowledge), technology and information sharing among all supply chain elements. They recommended them to increase company's internal rigidity and find the perfect balance among them. Also, they suggested Benetton's model as flexible integration.

Ferdows, Lewis and Machuca (2003) suggest ZARA stores to exert strong influence over almost the entire garment supply chain activities such as the design, purchasing, production, distribution and retailing in order to offer cutting edge fashion at affordable prices.

Dutta (2003) reported that the main factors of ZARA's business structure are: (1) Extensive market research (provides a constant stream of inputs into the product development process), (2) Location of various business functions (enhances the coordination of various functions and making joint-decisions very quickly), (3) Control (early investment in raw material, and direct or indirect "ownership" of processing and production capacities), and (4) Information and Communication Technologies (to manage the constant interface of various functions and the huge variety of production information). He concluded that these elements are important to quickly respond for market research/influenced decisions.

According to Tripa and Cuc (2007), H&M aims to lower costs combined with differentiation (more fashionable limited collections) in its strategy. However, ZARA tries to be more fashionable for reasonable prices. They identified that H&M is very aggressive and tries to beat every competitor, while ZARA has a more specialized market share. Therefore, ZARA has more local competitors. They don't really focus on these businesses but trust only to its own name and quality. Hence they concluded that ZARA is more expensive then H&M, but it's in fact worthy among some quality brands.

ZARA's unique quick response system including both human resources and information technology enhances ZARA's responsiveness to the demand of its consumers in the marketplace. According to Amanda et al (2004), ZARA employs backward vertical integration to be quick fashion follower to achieve manufacturing efficiencies by focusing on ultimate consumers. They also reported that it's extremely important to speed the information flow of consumer desires and

preferences to ZARA's apparel designers. So, ZARA develops teams in the retail and manufacturing environment for this purpose (Amanda et al, 2004).

Birtwistle (2004) argued that retailers and their suppliers should share more information, because there is a growing realization in that shared information can reduce the inventory level. At the same time, transaction cost and inventory carrying cost can be significantly decreased. The cooperated parties are ready to move to co-managed inventory (CMI). CMI is the process through which the suppliers collaborate with the retailers to manage the flow of products into customer's distribution system.

Marion (2004) stated that while the traditional apparel industry has difficulty in sales, large, vertically integrated, multi-national retailers such as ZARA, continue to challenge the global economic downturn. ZARA is successful in that it has solved the problem of highly perishable fashion items by controlling and streamlining its supply chains, ZARA is able to reduce its lead time into two or three weeks even less. Therefore, it can be responsive to the very fast changes in fashion markets almost in real-time by greatly minimizing the fashion industry risks.

According to Zhang (2008), ZARA's designers are not aiming innovation in their production, but recognizing fashion elements of the existed products on their purpose, and transferring them into new kinds of products. Furthermore, they can interpret the fashion instead of creating fashion. He argues that ZARA keeps its production lot as small as possible by leaving the extra capacity for generally manufacturing products.

Bruce and Daly (2006) reported that ZARA stores aim to increase their responsiveness and reduce excess stock and forecasting risk as product specifications until delivery. They also pointed that purchasing activities play a critical role through suppliers' selection and product decision-making in the fast fashion industry.

AZEL FRANCE

AZEL FRANCE Bosnian textile retail stores sale ZARA (famous Spanish clothing brand) products. Therefore, AZEL is the exclusive distributor of ZARA's clothes through Bosnia and Herzegovina. The first boutique of AZEL FRANCE was opened in Mostar Mepas Mall which is the largest shopping center in BiH including many other well-known trademarks as well. AZEL FRANCE's stores basically sell outlet clothing products that are designed and manufactured by ZARA and remained unsold from previous seasons or as surplus production. Hence, they can provide clothes at more affordable prices than those found in the other exclusive stores. They aim to provide a modern, high-quality clothing and footwear, available clothes for everyone and for every budget. Today ZARA is owned by the company Inditex, the largest global textile companies founded by Amancio Ortega Gaona, a fashion designer and one of the leaders in the Forbes millionaires list (AZEL FRANCE, 2013).

The company AZEL was founded in 2003, and become a well known established trademark today. It opened the first retail outlet shop by including clothing and footwear's concepts by providing affordable fashion products to many people. Today, Bosnia and Herzegovina is covered with a selling network of more than 60 shops of AZEL FRANCE in all the major and middle size cities. AZEL moved his head office and built its warehouse facilities in the region of Sarajevo nearby the future crossing of motorways in order to support its Supply Chain activities. The location and settings increase the efficient flow of goods through the region. A well organized, successful logistics together with motivated employees have enhanced the delivery of the products twice a week for all the branches in the country in order to offer a constantly renewed collection for their customers' benefit. Since, it is today a key actor of the fashion retail industry in Bosnia and Herzegovina (AZEL FRANCE, 2013).

Data and Methodology

This research is based on understanding the significance of supply chain strategy and purchasing strategy in the fashion industry. In order to achieve the research purpose as well as to better understand the relationship of developing purchasing and supply chain strategies, this report examines AZEL FRANCE fashion retailer of ZARA clothing in BiH.

The survey, conducted among the employees of AZEL FRANCE branches through BiH, achieved a number of 167 responses. After the responses are collected, the data has been entered into an excel spreadsheet and analyzed descriptively. The survey questionnaire was divided into eight question groups each including seven or eight questions, specific for that kind of group questions, with forty one questions in total.

Results

More than half of the respondents are identified to be female (96/167) and quite young (57.5% of them are less than 30). The respondents are observed to be mostly from marketing and sales (63.5%), administration (13.8%), finance (11.4%) departments and supply chain related staff (10.8%) (Table 1).

Table 1 Departments

Departments	Frequency	Percent
Missing	1	.6
Administration	23	13.8
Finance	19	11.4
Marketing and Sales	106	63.5
Supply Chain	18	10.8
Total	167	100.0

Questionnaire Analysis

The questionnaire consists of seven sections and measures the agreement level of the respondents by using a 7-point Likert scale. The results of descriptive analyses are provided below.

Information and Communication Technology

The respondents agree that they have a basic developed system in order to respond the customer orders. The system is appeared to moderately provide the communication and secure information transaction among supply chain members. They seem to slightly follow the technology in order to be innovative in their operations. However the system is weak in that it cannot provide statistical analyses and generate necessary reports and furthermore cannot improve supply chain activities (Table 2).

Table 2 Information and Communication Technology

Items	Mean	Std. Deviation
My company has information systems in order to improve supply chain activities	3.84	1.357
My company information system provides security for all supply chain activities	4.66	1.306
My company information system enables communication among the chain members	4.58	1.394
My company follows the technological improvements in order to enhance its processes and supply chain activities	4.79	1.501
My company information system improves the company innovativeness in its processes and supply chain activities	4.39	1.579
My company has developed systems and units in order to give response to the needs of customers	5.19	1.571
My company information system has sophisticated components	4.05	1.548
My company information system can provide statistical analyses and generate necessary reports	3.84	1.645

Strategy of Logistics

In this group of questions participants were asked about the consistency of their strategy of logistics with fashion retailer directives in this field. The respondents slightly agreed that the company tries to get best offer and high quality in its Logistics activities (Table 3).

Table 3 Logistics Strategy

Items	Mean	Std. Deviation
My company considers the best price offer for Logistics Activities	4.91	1.357
My company seeks to catch high quality in its Logistics Activities	4.91	1.320
My company Logistics strategy has been determined according to locations of company warehouses	4.41	1.477
My company determines its logistics strategy by considering its inventory levels	4.40	1.610

Supply Chain Strategy

According to the results obtained from the third group of questions about supply chain strategy in the questionnaire, it is observed that the company considers first its customers in order to determine its supply chain strategy. While planning the determined strategy, it evaluates the relationships between buyers and sellers. Furthermore, it is identified that using technology is effectively considered in their supply chain strategies. Finally, the company is observed to be willing to in-source (not to out-source) its activities as a part of its strategy (Table 4).

Table 4 Supply Chain Strategy

Items	Mean	Std. Deviation
My company has a customer centric Supply chain strategy	4.98	1.307
My company considers using technology very much in its Supply chain strategy	5.05	1.422
While configuring Supply chain strategy buyers and sellers relationships are considered	5.67	1.261
My company prefers outsourcing its non-fundamental works	3.33	1.252

Organizational Strategy

According to the results obtained from the fourth group of questions about organizational strategy, the respondents are sure that the company has achieved its customers' satisfaction. They are observed to offer unique and comfortable stylish clothes with low price and quality. Furthermore, their services are spread through Bosnia and Herzegovina (Table 5).

Table 5 Organisational Strategy

Items	Mean	Std. Deviation
The mission of my company is restricted with dressing the Bosnia and Herzegovina	4.96	1.832
The vision of my company is satisfying its customers' needs	6.11	1.035
My company offers to its customer unique and comfortable stylish clothes	6.08	1.114
My company provides lower price with brand	5.51	1.460

quality.

Supply Chain Activities

The fifth group of questions about supply chain activities revealed that the company can easily be responsive for its customers because of its distribution channels. At the same time, they can provide affordable prices for their customers. However, they are seemed to be not comfortable with their warehousing and production capacities (Table 6).

Table 6 Supply Chain Activities

Items	Mean	Std. Deviation
The production capacity of my company is high	4.24	1.789
My company distributes its products in a responsible, fast, and quick manner	6.07	1.232
My company has enough storing environment	4.29	1.486
My company selling prices is affordable, not too high and not even too low	5.78	1.440

Supply Chain Network Design

The responses for the sixth group of questions about supply chain network design identified that the company is not comfortable with designing its supply chain network. It has appeared to have slightly clear defined goals and can hardly reach the necessary information required to design its supply chain network. Furthermore, they are almost neutral in supporting, analyzing and if necessary refining the current network (Table 7).

Table 7 Supply Chain Network Design

Items	Mean	Std. Deviation
My company has a set of clear defined goals to design its supply chain network	4.73	1.257
My company can collect necessary information in order to design its supply chain network	4.89	1.390
My company has the ability to support and analyze its designed network	4.52	1.438
My company can afford implementing and refining its supply chain design	4.42	1.619

Marketing Strategy

The group of questions about marketing strategy showed that the company highly wishes to be responsive for its customers. However, it can weakly identify its current market situation in Bosnia and Herzegovina. The realization of its brand seems to be weak. Furthermore, the respondents slightly believe that they have competitive power in the market (Table 8).

Table 8 Marketing Strategy

Items	Mean	Std. Deviation
My company has a measurement system in order to identify the market situation	4.78	1.358
My company has the power to compete through the market	4.36	1.839
My company wants to be responsive for customer orders	6.08	1.272

My company brand realization is high in the country   4.39   1.715

Sales. From the last group of questions about sales, the company seems to prefer directly selling to the customers in their branches without the intermediaries. Therefore, customers are coming to the stores, buying the items and then leaving the store. Furthermore, they accept sales as the most important determinant of their company strategy (Table 9).

Table 9 Sales

Items	Mean	Std. Deviation
My company is associated with personal selling, customers often come to store buy items and then leave the store.	6.31	.984
My company directly sells to the customers	5.78	1.511
Sales are important in order to define my company strategy	5.93	1.461

Conclusion. The aim of this research is to give a clear picture of Bosnian Fashion Industry related to ZARA fashion trends of AZEL FRANCE retail stores in terms of supply chain management strategies. The effects of supply chains are particularly important in fashion industries of marketing research.

AZEL FRANCE retailer of ZARA's brand has accomplished the benefits of flexible supply chains for its innovative fashion items. Although, AZEL FRANCE seems to beat its competitors today in terms of profit margins, without any stock out rates and keeping the industry leadership in the market. According to the results, the purchasing and supply chain strategies seem to have a major role in fashion industry. The success of ZARA trends is that it can control and streamline highly consumed fashion items in their supply chains so that they are capable to greatly decrease their lead time and thus to respond faster enough on the very fast changes in its customers' needs and wants by minimizing the fashion risks.

This study has limitations in that it only evaluates the branches of one specific company. Even, it is one of the main players of Bosnian fashion industry; the results may differ for other companies. Future studies may employ industry wide researches. However, this research is important in that it is one of the few studies in Bosnian market related to supply chains.

The questionnaire survey descriptively identifies the picture of fashion stores of AZEL FRANCE fashion retailer of ZARA clothing in BiH. While implementing this survey study, it became clear that the current situation of AZEL FRANCE clothing is not ideal. However, there is a strong wish towards the implementation of new ZARA stores, techniques and the development of the existing ones. This research identifies the technological weakness of the company. Therefore, the company should invest more especially on information systems in order to enhance its supply chain activities. The company is appeared to have a reasonably good logistics infrastructure. However, it can handle successfully its supply chain activities. Furthermore, the company in BiH can incorporate different marketing strategies although the current system has proven to be successful. Considering the risks involved in opening such a business, fashion retailer stores of AZEL FRANCE are seemed to be confident about the future profitability. ZARA, through franchising, has maintained its success, opened its own ZARA fashion stores in among BiH, and utilized the products of the research and development in business operations. These actions will gain great potential for profitability because many of the practices have already been successful. They are moreover moderately well in their organisational, marketing, and supply chain strategies. On the other hand, they are observed to be happy with their amount of sales. It may be estimated that the reason for their success is behind the brand name ZARA and their successful implementation of ZARA strategies despite having poor infrastructure compared to global companies.

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APPENDIX

Supply Chain Management Survey Questionnaires in Fashion retail Industry AZEL FRANCE of ZARA brand in BiH.

Please answer all questions

For each numeric question, circle the number that best reflects your opinion of the factor judged 1=strongly disagree, 2=disagree, 3=slightly disagree, 4=neither, 5=slightly agree, 6=agree, 7=strongly agree

Demographics	
a	Your department/unit:
b	Your current position/role in dept/unit:
c	How long have you been in current position/role ?:
d	Your highest education level: Doctorate Master Undergraduate Other_____
e	Gender: Male Female
f	Age: ≤30 31-40 41-50 51-60 ≥61

Information and communication technology		Disagree Agree
a	My company has information systems in order to improve supply chain activities	1 2 3 4 5 6 7

b	My company information system provides security for all supply chain activities	1 2 3 4 5 6 7
c	My company information system enables communication among the chain members	1 2 3 4 5 6 7
d	My company follows the technological improvements in order to enhance its processes and supply chain activities	1 2 3 4 5 6 7
e	My company information system improves the company innovativeness in its processes and supply chain activities	1 2 3 4 5 6 7
f	My company has developed systems and units in order to give response to the needs of customers	1 2 3 4 5 6 7
g	My company information system has sophisticated components	1 2 3 4 5 6 7
h	My company information system can provide statistical analyses and generate necessary reports	1 2 3 4 5 6 7

Strategy of Logistics		**Disagree Agree**
a	My company considers the best price offer for Logistics Activities	1 2 3 4 5 6 7
b	My company seeks to catch high quality in its Logistics Activities	1 2 3 4 5 6 7
c	My company Logistics strategy has been determined according to locations of company warehouses	1 2 3 4 5 6 7
d	My company determines its logistics strategy by considering its inventory levels	1 2 3 4 5 6 7

Supply Chain Strategy		**Disagree Agree**
a	My company has a customer centric Supply chain strategy	1 2 3 4 5 6 7
b	My company considers using technology very much in its Supply chain strategy	1 2 3 4 5 6 7
c	While configuring Supply chain strategy buyers and sellers relationships are considered	1 2 3 4 5 6 7
d	My company prefers outsourcing its non-fundamental works	1 2 3 4 5 6 7
Organizational Strategy		**Disagree Agree**
a	The mission of my company is restricted with dressing the Bosnia and Herzegovina	1 2 3 4 5 6 7
b	The vision of my company is satisfying its customers need	1 2 3 4 5 6 7
c	My company offers to its customer unique and comfortable stylish clothes	1 2 3 4 5 6 7
d	My company provides lower price with brand quality.	1 2 3 4 5 6 7

Supply Chain Activities		**Disagree Agree**
a	Purchasing department in my company is a part of supply chain	1 2 3 4 5 6 7
b	The production capacity of my company is high	1 2 3 4 5 6 7
c	My company distributes its products responsible, fast, quick and fresh	1 2 3 4 5 6 7
d	My company has enough storing environment	1 2 3 4 5 6 7
e	My company selling prices is affordable, not too high and not even to low?	1 2 3 4 5 6 7

Supply Chain Network Design		Disagree Agree
a	My company has a set of clear defined goals to design its supply chain network	1 2 3 4 5 6 7
b	My company can collect necessary information in order to design its supply chain network	1 2 3 4 5 6 7
c	My company has the ability to support and analyze its designed network	1 2 3 4 5 6 7
d	My company can afford implementing and refining its supply chain design	1 2 3 4 5 6 7

Marketing Strategy		Disagree Agree
a	My company has a measurement system in order to identify the market situation	1 2 3 4 5 6 7
b	My company has the power to compete through the market	1 2 3 4 5 6 7
c	My company wants to be responsive for customer orders	1 2 3 4 5 6 7
d	My company brand realization is high in the country	1 2 3 4 5 6 7

Sales		Disagree Agree
a	My company is not associated with personal selling, customers often come to store buy items and then leave the store.	1 2 3 4 5 6 7
b	My company directly sells to the customers	1 2 3 4 5 6 7
c	Sales are important in order to define my company strategy	1 2 3 4 5 6 7

Индустрия моды Supply Chain: Zara (Азел Франция)

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Аннотация. Основной целью розничного бизнеса постоянно поддерживать реагирование на меняющиеся тенденции в моде, потребительские вкусы через быстрое создания новых конструкций, которые подходят для всех клиентов с доступной ценой. Целью данного исследования является анализ влияния закупок и поставок стратегии управления цепочкой в отрасли розничной торговли и определить пути успеха Азеля ФРАНЦИЯ Розничный компания ZARA одежды в Боснии и Герцеговине от управления цепью в перспективе посредством проведения исследования. AZEL Франции признан успешным, он может контролировать и оптимизировать высоко расходные модные вещи в своей цепочки поставок, в результате фирма может значительно уменьшить их время выполнения и таким образом увеличить долю дохода от клиентов. Управление магазинами AZEL Франции позволяет предполагать, что в будущем фирма будет рентабельна. Тем не менее, некоторые технические неспособности компании также определены.

Ключевые слова: Мода промышленности; цепи поставок; обследования.