

Fast Fashion Assessment Tool: A Case Study of a Moroccan Apparel Supply Chain

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Abstract— In order to increase their profit margins and international expansion, many international fashion brands implemented a new supply chain strategy named fast fashion. It aims to rapidly get the trendiest fashion clothes in the stores. Several Moroccan fashion retailers tried to copy the fast fashion business model in order to get a responsive supply chain and a high profit margin. Thus, they need a practical tool to ensure that they have properly implemented fast fashion elements. This paper develops an assessment tool using a maturity evaluation model. This assessment tool has been tested at a Moroccan fast fashion retailer. The pilot test adopted a qualitative research methodology using semi-structured interviews from a single retailer case operating in Moroccan apparel industry. The fast fashion assessment tool enables fashion retailers' managers to have a view of the implementation progression and to eventually locate problems and mobilise other tools and mechanisms to explore them.

Keywords— *Fast Fashion, assessment tool, apparel supply chain, fashion retailers, Morocco*

1. Introduction

The apparel supply chain is facing uncertain customer demand and it is managing a large number of stock keeping units which make accurate demand forecasting a difficult task. In addition, consumers tend to intentionally delay the purchase of garments until the sales period [1]. This decision decreases sales during the season and thus retailers' profit margins decline. To face this situation, some fashion retailers followed a new business model called Fast Fashion. Fast fashion is the ability to quickly pursue fashion trends through a close proximity to the marketplace and to frequently introduce new garments in retail stores [2]-[3].

Zara is the pioneer of fast fashion industry nowadays [4]. It has a super-responsive supply chain and a high profit margin that are the envy of

the industry [5]. Many Moroccan fashion retailers tried to copy the Zara business model. Thus, Zara's business model followers need a practical tool to ensure that they have properly implemented fast fashion elements.

The purpose of this paper is to develop a tool that consists of seven main axes related to the elements necessary to implement fast fashion model. The tool has been designed based on the literature review and the maturity assessment model process developed by [6]. Therefore, this paper seeks to show how a fashion retailer can measure fast fashion elements implementation.

The paper is structured as follows: First, a literature review of the fast fashion strategy is outlined. Second, the methodology followed is described. Third, the fast fashion assessment tool is presented. Finally, the pilot study to test the assessment tool, in the Moroccan apparel supply chain, is described..

2. Literature Review

In the fashion industry, retailing has moved from a system where the designers dictate what to go into production during a season to a system where the customer imposes the trends and generates demand [7]. To precisely respond to customers' needs, fashion retailers have used strategies such as Just in Time and Quick Response in order to provide customers with the right product at the right time [8]. These strategies have opened the way for a new supply chain strategy called: fast fashion [9].

Fast fashion is a set of various strategies to commercially meet the latest fashion trends [1]. It aims to identify new popular designs through daily proximity to the fashion market [3] and to frequently introduce new fashion garments into the stores [10]. Zara has become a worldwide reference in agility and responsiveness in the fashion industry to the point where it has been the only brand able to deliver garments to stores worldwide after only 15

days from their design [11].

Fast fashion strategy is based on four main elements (Figure 1): Quick Response, enhanced design [9], dynamic assortment rotation [12] and agile supply chain [13].

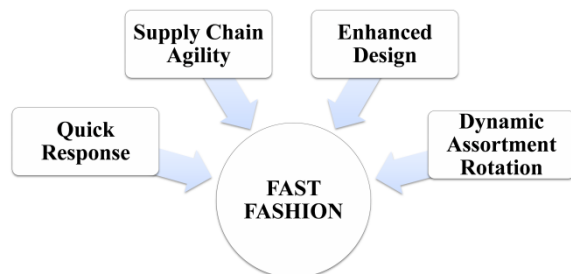


Figure 1. Fast Fashion Elements, [9]-[12]-[13]

2.1 Quick Response

The Quick Response is a strategy that has become synonymous with the apparel supply chain [3]. Its main objective is to delay ordering decisions as much as possible for better demand information and therefore reduce the risk of mismatching supply and demand [14].

This strategy intends to satisfy customer demand by meeting the required deadlines and quantities. It is achieved through integrated relationships along the supply chain and using information technology. In the literature, five key success factors for QR implementation are identified [15]:

- Integration of all parts of the supply chain to respond quickly to customer needs
- Superior product quality at all stages of the supply chain in order to reduce the safety stock level and the number of performed quality tests.
- Open dialogue and a high level of partnership and trust between supply chain partners. This enables fast and complete information transfer between the chain partners.
- Sharing information between the retailer and the manufacturer.
- The adoption of information technologies remains the most important QR element [16]. They reduce the work-in-progress inventory and maximize responsiveness to customers demand.

2.2 Supply Chain Agility

Agility is the ability of an organization to “respond in shorter time-frames [to market demand] both in terms of volume change and variety change” [17: 99]. Agile supply chains have short lead times and are demand driven [13]. In an industrial context,

such as the fashion industry, characterized by volatile and unpredictable demand and a high level of varieties, the agile approach is the most appropriate [17].

According to [18], an agile supply chain has four main characteristics:

- Market sensitivity: in order to satisfy real customer demand, an agile organization uses information technology to capture demand information directly from points of sale. These data are analysed to determine quantities to be supplied to the stores.
- Virtual integration: agile supply chains are connected and integrated through a shared information system (Electronic Data Interchange, Internet...). This enables the supply chain partners to work on the same quantities requested by the market.
- Process alignment: agile supply chains are “borderless” insofar as delays caused by multitude interventions or buffer inventories between supply chains partners are non-existent.
- Network based: in order to achieve greater responsiveness to market needs, supply chain agility relies on strengths and skills of the network’s partners. This enables organisations to compete not as autonomous entities but rather as supply chains [17].

In addition to these four characteristics, postponement is an important element to achieve supply chain agility. It consists of delaying the final product configuration until the actual customer order is received [1]. Consequently, the more generic the product is, the more flexible the supply chain should be to ensure a good product, in the right place and at the right time [17].

2.3 Dynamic Assortment Rotation

Assortment rotation is a ‘retailing practice [that consists of] changing the assortment of products offered to customers throughout a selling season’ [19: 1]. Fast fashion retailers do not launch new products twice a year as traditional retailers do; they rather manage products individually and constantly update their categories [20].

The main objective of the assortment rotation is to keep customers interested in visiting the stores throughout the selling season and consequently increase sales.

2.4 Enhanced Design

A system that focuses more on the ability of the design to motivate consumers to pay more for fashionable garments but it ignores to reduce production cycle time [9]. This element is used to control the consumers' behaviour, in particular that related to delaying the act of buying until the sales period [1].

3. Research Methodology

The assessment tool presented in this paper is a result of an iterative development procedure. An extensive review of existing literature related to fast fashion implementation and best practices was conducted. To the best of our knowledge, there is no model in the literature developed to assess maturity of fast fashion elements implementation addressed to fast fashion retailers.

The methodology for generic model development has been applied in this paper [6]. This maturity assessment model process includes six main phases (Figure 2). The purpose for which a model may be applied depends on whether the resulting maturity assessment is descriptive, prescriptive or comparative in nature [6]. The assessment tool developed in this paper is purely descriptive, since it provides a deeper understanding of the as-is situation of fast fashion elements implementation. It can evolve towards a prescriptive purpose for fashion retailers looking for maturity improvement.

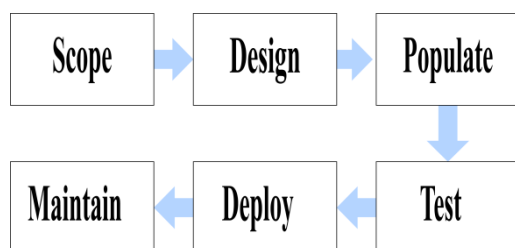


Figure 2. Maturity Assessment Model Process, [6]

3.1 The Assessment Tool Scope

The first step in developing our assessment tool is to set its limits of application. This step is important because it conditions the rest of the decisions related to the assessment tool.

Two main criteria are considered: the focus of the assessment tool and the development stakeholders. In our case, the assessment tool is intended to specially deal with the fast fashion

strategy in the context of supply chain management and not all the processes of the fashion retailer.

Therefore, since the assessment tool is specific, it has been developed with consultation of professors and consultant in the fashion industry.

3.2 Designing the Assessment Tool

The focus here is on identifying the needs of the target audience and how these needs will be met. The main purpose of the assessment tool is to assess fast fashion implementation elements at the retailer's level in order to compare them with ZARA's business model.

The assessment tool is presented in the form of criteria that will measure the maturity level of fast fashion implementation. This will enable fashion retailers to highlight improvements on which they can concentrate their efforts.

3.3 The Assessment Tool Content

The objective of this step is to determine the components and subcomponents of each domain, i.e. constructs and their items which are mutually exclusive and collectively exhaustive. The determination of these constructs and these items is achieved through an extensive literature review.

Hence, the constructs and the items have been determined based on Zara's best practices and fast fashion elements developed in section 2.

3.4 Testing the Assessment Tool

Once the assessment tool is populated with items, it is important to test it for considerations of relevance and rigor. The selection of complementary methods to complete the assessment tool helps to ensure face validity.

Thus, we submitted our evaluation tool, prior to the evaluation of a Moroccan fast fashion retailer, to experts in fashion and research fields. The content validity has been ensured by the extent of the literature review and breadth of area covered.

3.5 Deploying and Maintaining the Assessment Tool

This step remains important because it is about checking the extent of the assessment tool generalisability. Besides the pilot test at the Moroccan fast fashion retailer, the identification of other fashion retailers that can benefit from future application of the assessment tool can be done as part of another research project. This will help to

move towards standardisation and general acceptance of this first version of the assessment tool.

Finally, the evolution of the assessment tool will be done when fast fashion business model and the understanding of the assessment tool are broadened and deepened.

4. Fast Fashion Assessment Tool

The developed Fast Fashion Assessment Tool (FFAT) consists of two dimensions: fast fashion practices and maturity levels. At the first place, 166 practices have been identified from Zara case studies and the fast fashion elements previously discussed in the literature review. Duplicated items have been assembled in one item (Example: Sales data sharing throughout the supply chain is at the same time a quick response and an agility best practice). As a result, 114 practices have remained (See Appendices).

These items have been aggregated into seven main axes: planning and design, physical flow management, information flow management, human resource management and organisation, Information system and technology management, performance measure system and supply chain agility attributes. These items were tendered, as discussed above, to academics and consultants in operational management from the fashion field in order to ensure their validity.

For this FFAT version, three maturity levels have been defined: Non-existent, Poor and Good. All fashion retailers are assumed to begin from non-existent level. Table 1 defines maturity levels from lowest to highest.

Fast fashion retailers must have at least 91 points (which represents 80% of all the assessment tool best practices) to be considered having good maturity level. Fashion retailers that have not implemented at least Quick Response elements and long-term partnership with their supply chain partners are not considered fast fashion retailers.

Table 1. FFAT Maturity Levels

Level	Description	Note
Inexistent	Practice is required for fast fashion retailer but currently inexistent.	0
Poor	Practice exists but it is not developed to contribute to the fashion retailer improvement.	0,5
Good	Practice is fully integrated with fashion retailer processes and systematically applied. Contributes to the company excellence.	1

5. Pilot Test

The FFAT has been tested at a Moroccan fast fashion retailer to ensure its face validity [6]. The pilot test organisation, established in 2002, is a 100% Moroccan fashion retailer; it has a logistics distribution center located in Casablanca and more than 80 stores. The core activity of the organisation is the distribution of ready-to-wear garments for women, men and kids. The women product line was launched first and it represents the major part of the organisation's turnover.

The main source of data for this pilot test was face-to-face semi-structured interviews with nine key elements of the retailer's internal supply chain. Each interview lasted an average of twenty minutes and was recorded and transcribed.

In order to analyse the collected data, a content analysis approach was used. This technique helped us to read the transcripts of interviews and allowed us to extract significant elements to complete the assessment tool [21].

The Moroccan fast fashion retailer implemented 50% of the fast fashion strategy best practices (Table 1). These results demonstrate that the Moroccan fast fashion retailer implements some quick response elements such as Electronic Point of Sale (EPoS), barcode readers and Universal Product Code (UPC). However, neither sales data are shared with suppliers via Electronic Data Interchange (EDI) nor the automatic replenishment is set for basic articles.

In addition, the Moroccan retailer focuses more on creating new designs than just following fashion trends. It offers monthly new fashion garments to consumers and occasionally makes some changes to design during the season. These changes are based on information flow originating from store

managers. Besides, the main retailer's supplier is integrated in the design process.

Regarding the supply chain agility attributes, the retailer uses information technology to capture demand data from EPOS and analyses them daily in order to identify what items should be replenished and how much quantity to deliver to stores. In addition, the retailer benefits from facilities of the supply chain partners and concentrates more on its core competencies (design and distribution). However, process alignment and virtual integration with the upstream supply chain are quasi absent.

The results obtained by FFAT axis are shown in details in Table 2 and Figure 3.

Table 2. Obtained Score by FFAT axis

Axis		Obtained Score	Rate per axis
Planning & Design		6	50%
Physical flow management	Sourcing & Manufacturing	2,5	23%
	Inventory & Ordering Management	5	45%
	Distribution System	3,5	44%
	Retailing & Merchandising	14	61%
Information flow management		3,5	58%
Human Resource Management & Organisation		6,5	36%
Information system & Technology Management		10	77%
Performance Measure system		2,5	83%
Supply Chain agility attributes		3	43%
Global Rate			50%

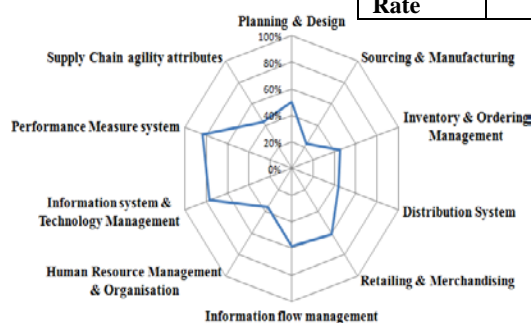


Figure 3. Obtained Rate by FFAT Axis

6. Conclusion

In this paper, a new tool for assessing fast fashion elements implementation is suggested. Based on the results, it can be concluded that the FFAT is a practical tool that can readily used in practice.

The FFAT was initially viewed as a diagnostic tool that would first enable assessment or

description of the 'as-is' domain position of a fast fashion retailer. In fact, the FFAT allows fashion retailers to be aware of their fast fashion practices strengths and weaknesses. This will enable fashion retailers managers to locate problems and mobilise other tools and mechanism to explore them.

The pilot test concerned a single Moroccan fast fashion brand. The results showed its performance on three areas: information flow management, information system and technology management, and the performance measurement system. On the other hand, the retailer supply chain needs to make an effort to improve three axes: physical flow management, human resources management and organization, and supply chain agility attributes.

Future research should accomplish other empirical case studies to further develop and shape the technical functionality, structure and procedures of the FFAT tests.

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Appendices

Axis	Best Practices	Performance Level				
		I*	P**	G***		
		0	0,5	1		
PLANNING AND DESIGN	Design of garments follows the consumer preferences					
	The design team works on modifying existing design, developing best-sellers and making new developments for the current season; and on selecting fabric and product mix for the next season					
	The designer attend to catwalks, draw from luxury brands catalogs, TV, internet, films content and work with store managers					
	New collection selection is conducted in team					
	The proposal of a wide range of products, fast moving, relatively high fashion and with a reasonable quality					
	Stock coverage for risky items is reduced (design error)					
	The presentation of the first designs are made six months before the start of the season by the design team					
	The forecasts are made on the purchase of fabric					
	The designed items have relatively a short life cycle					
	The design team made an initial assumption on sales of an item and does not rely on the sales forecast					
	The new design is tested in the collection for judgements in relation to colours, fabric,etc					
	The selected garments (newly designed) are manufactured in small quantities and sent to stores for test					
	PHYSICAL FLOW MANAGEMENT	Sourcing and production	A part of the purchased fabric is undyed			
			The purchase orders are made in small batches			
Basic garments are manufactured in low cost companies						
Labour intensive garments are made by subcontractors (Sewing)						
Fashion garments are made internally						
Possession of automated plants for prototypes, cutting, finishing and control						
Part of the production of the first designs is engaged with suppliers before the start of the season						
Much of the production of basic garments is committed with suppliers before the start of the season						
An additional capacity is kept when necessary						
The postponement is part of operations						
Suppliers have the ability of a short production cycle						
Order Processing & Inventory Mgt			Orders are sent from stores to headquarters in a planned manner and via PDA			
		Store managers have to meet deadlines for sending orders to the headquarters				
		The store manager receives offers via PDA 24 hours prior to the order sending deadline				

Distribution system	The confrontation, by item level, between the supplies received from the factory and stores requests			
	The store manager is responsible for the determination of items to order and those to stop ordering			
	Backrooms contain inventory quantities less than the sales area			
	Frequent assortment changes during the season			
	Replenishment of sales area shelves from backroom each hour (particularly during the peak period)			
	Items with a major size (S, M and L) out of stock, are removed from shelves and held in the backroom			
	The initiation of inter-store transfers for items which sales are low to another stores			
	Introduction of the automatic replenishment for basic items			
	Holding three global physical inventories during the season			
	A mobile tracking system at the distribution center (Carousels)			
	All items pass through the distribution center			
	Small deliveries are made twice a week from the distribution center to the stores			
	The items stay up to three days in the distribution center			
	The delivery program is done by time zone			
Retailing and Merchandising	The third part logistics unload the store delivery (saving stores time)			
	Part of deliveries is carried by air; In particular for far destinations			
	The delivery time to stores vary between 24H and 72H			
	The garments are shipped ready for sale from distribution center to stores			
	The sale prices are low compared to competitors			
	Avoid increased cost price			
	Selling an item does not exceed one month			
	Each weekly shipment contains a new design			
	Customers know the days for new deliveries to stores			
	Investments are made in prime locations			
	High items rotation			
	Limited stocks are displayed on shelves			
	Unsold items are quickly identified, discarded and their production is stopped			
	Returns to the distribution center are dispatched to other stores (reduce inventory markdown)			
Returns to the distribution center (unsold items within 2 to 3 weeks) are cleared through small chains liquidators				
The preference for long-term lease (10-20 years) for stores				
The stores are totally owned and not franchised				
Frequent renovation of the store base (every 3 to 4 years)				
Use the "test store" in headquarter for prototypes of windows and interior display in terms of: theme, colours, presentations, articles				

		Taking pictures of the "Test Store" and sharing photos with store managers			
		The store manager can communicate a different display to headquarters for validation			
		Make sure the brand is presented to customers in the same way everywhere			
		The attractive interior design transmits to the store visitors freedom and comfort			
		Change the windows display of the store each three to four weeks			
		The location of the new designs in the store is discussed between the merchandising responsible and store manager			
		Vendors team have instructions not to disturb customers and give help only when needed			
		Reducing advertising needs: use word of mouth and attractive shops inside (shelves) and outside (windows display)			
		Use of advertising exclusively for the bi-annual sales and the opening of new store			
		Price retrieval System (Full and promotional)			
INFORMATION FLOW MANAGEMENT		The store manager is responsible for transmitting his own ideas and customers opinions to designers			
		Feedback are received from store vendors (on the model, fabric, colours, ...)			
		The sales information of each store (collected via POS) are shared with the headquarter at the end of the day			
		A customer who has a complaint, question or remarks may call the headquarter			
		Constant communication and information exchange are encouraged throughout the supply chain			
		The store manager / vendors scan every evening, items that customers have tried but they did not buy			
	HUMAN RESOURCE MANAGEMENT AND ORGANISATION		A team at the headquarter is dedicated to each product line (Woman, Man and Child) (Designer, Specialist purchasing and product development)		
		Obligation to wear the brand's work uniform during working hours			
		Big stores with three sections (Woman, Man and Child) have a manager by section			
		store vendors are organized by section: Women, Men and Children			
		A training course is provided to new recruits			
		The store manager is responsible for the assessment and monitoring of store staff			
		The promoted store manager makes training in other stores and spent two weeks in the headquarter with a specialized team			
		Constant visits to stores to explain to the team the company culture			
		Manuals that includes information about the brand, its management, HR practices, the IS and the environment are shared with the store staff			
		The company's culture encourages rapid decision making			

INFORMATION SYSTEMS AND TECHNOLOGY MANAGEMENT		The company's culture encourages continuous improvement			
		The company's culture encourages the conservation of the best elements			
		Meetings are held to discuss store performance and best practices			
		The work planning is communicated to employees a week in advance			
		Store employees are experienced and committed to the company			
		All store employees receive sales commissions			
		The store manager is rewarded according to the reliability of his forecasts			
		The distribution center has bar code readers used for sorting and order picking			
		The retail store has PDA			
		The retail store has POS terminals			
		The retail store has bar code readers			
		The headquarter, distribution center and the stores have computer applications			
		Computer applications are developed internally			
		IT support for the opening of a new store is not necessary			
PERFORMANCE MEASURE SYSTEM		Use of the universal product codes (UPC)			
		Use of barcode labels for items			
		Use of barcode labels for containers			
		Sales data capture by SKU			
		Use of EDI / Internet to exchange data with suppliers			
		Use of the online electronic communication between headquarter, the CD and stores			
		Cost, profits and growth objectives are defined by store			
SUPPLY CHAIN AGILITY ATTRIBUTES		Each store volume indicators are monitored by the top management			
		Constant visits to stores to oversee the performance of the store			
		Vertically integrated to production			
		Maintain long-term relationships with subcontractors			
		Provide subcontractors with technology, logistics and financial support			
		Perform on-site inspections of suppliers to monitor compliance with legislation			
	Product development, forecasting and planning are made jointly with the supplier				
	Benefit from the chain partners' capacity and focus on core competencies				