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ПОДРОБНЕЕ

GLORIA JEANS - RUSSIA

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Impact Evaluation Report for T-Shirt Production  
**Gloria Jeans**  
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# Introduction

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Now that the Russian Federation has joined the World Trade Organization, more companies will be interested in trading and investing with Russia. This signals a new age where Russia is reaching out to the rest of the world to cooperate in the global marketplace. With the rising prices of clothing manufacturing in China and bad reputation of factories in Bangladesh, Cambodia, etc., companies are looking for a new, inexpensive, uncontroversial place to manufacture. Russia may not have all of those qualities in equal amounts but it does have a new frontier position in the global marketplace. The time is now for it to build its global apparel manufacturing reputation.

A new trader or investor interested in Russia will look for its current resources, infrastructure, and production outcomes. The best way to research Russian apparel manufacturing is to investigate companies with the “Made in Russia” tag and study their entire production chain. Gloria Jeans is such a company and is comparable to H&M and Zara. By looking at what is possible in Russia now, investors can identify areas of improvement, how to utilize the current infrastructure, and make an action to build or expand with the intention of creating more sales that result in profits.

## The Company – Gloria Jeans

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Not to be confused with [Gloria Jean's Coffees](#), Gloria Jeans (JSC Corporation Gloria Jeans) is a private vertically integrated retailer with a chain of 600 retail stores in Russia and Ukraine ([live-pr.com](#), 2013). The JSC Gloria Jeans Corporation is most known for its youth apparel that sells under the Gloria Jeans and Gee Jay brands. In addition to apparel, Gloria Jeans sells footwear, outerwear, knits, suits, special occasion, and accessories ([investing.businessweek.com](#), 2013). The target market for Gloria Jeans is girls, boys, teenagers, and young men and women and is divided into four age groups: 0-2, 2-9, 9-14 and 13+ ([www.gloria-jeans.ru](#), 2013). Marketing itself as trendy and affordable, Gloria Jeans is considered fast-fashion and has the sales to prove it. *Drapers Online* considers Gloria Jeans one of the

top five retailers in Russia with the same market share as Benetton and Inditex and in competition with other Russian retailers SELA and Detsky Mir. *Euromonitor* labeled Gloria Jeans as “one of Russia’s fastest growing companies” ([Drapers Online](#), 2013).

When Vladimir Melnikov founded Gloria Jeans 1988 it was the first legal jeans manufacturer in the USSR ([gloria-jeans.ru](#), 2013). The very next year Melnikov undercut Turkish and Chinese knockoffs by 25% and created a loyal following ([businessweek.com](#), 2002). As a vertically integrated company, Gloria Jeans designs, manufactures, merchandises, and sells all of its products in Russia ([gloria-jeans.ru](#), 2013). Celebrating its 25<sup>th</sup> year in business, Gloria Jeans has sales offices, research and design centers

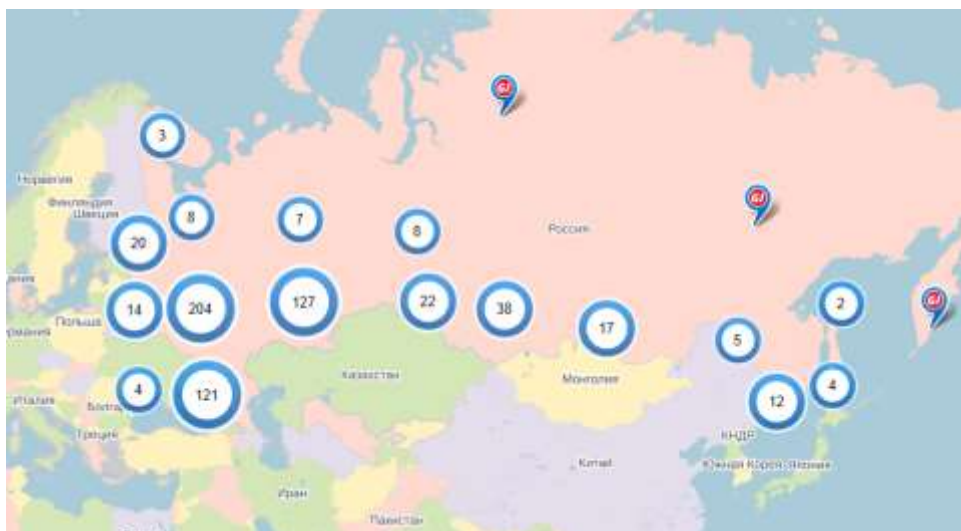


Figure 1 - Gloria Jeans Retail Locations

in the Far Eastern, Volga, Northwestern, Siberian, Urals, Central, and Southern Federal districts of the Russian Federation, as well as in Poland, Italy, Chicago, New York, San Paolo, China, Japan, Turkey, Shanghai, Ukraine, and Kazakhstan

([investing.businessweek.com](#), 2013). Gloria

Jeans owns 48 factories with 35 in Russia and 13 in Ukraine along with 6 logistics facilities ([gloria-jeans.ru](#), 2013). In Prokhladny, new t-shirt equipment was installed consisting of 22 machines created by Juki ([fiber2fashion](#), 2003). Gloria Jeans plans to have 1000 stores by 2018 ([gloria-jeans.ru](#), 2013). They have a strategy of opening stores in cities with 30,000 people or more at 500, 700, 1000 square meters per store ([gloria-jeans.ru](#), 2013).

In expanding the company, Gloria Jeans has a working relationship with several companies such as McKinsey & Company, Cap Gemini, PricewaterhouseCoopers, JDA Software Group, and Gerber Technology ([worldgraphicmachine.com](#), 2004). These partnerships and plans to build more logistic

facilities, Gloria Jeans has more than doubled its sales in two years. In the next five years, Gloria Jeans plans to increase sales from the current 23 billion RUB to 85 billion RUB which is \$695 million US and \$2.5 billion US respectively. In addition to increasing sales, the company plans to open larger flagship stores in Russia and expand its brand awareness internationally ([gloria-jeans.ru](http://gloria-jeans.ru), 2013). The latest news from the company is that it is looking to sell a 25% stake in the company to a private investor ([textilemedia.com](http://textilemedia.com), 2013).

Performance/year end	2012	2011	2010
Sales (bln RUR)	23,3	15,6	9
Operational profit (bln RUR)	3,8	3,1	1,9
Number of stores	545	435	320
Number of stores	20 472	15 621	11 473

Figure 2 - Gloria Jeans Retail Figures

With its sales, Gloria Jeans' workforce has also increased. In 2010, it employed 11,473 people. In 2012, that number almost doubled to 20,472 employees ([gloria-jeans.ru](http://gloria-jeans.ru), 2013).

When searching for labor issues or reports of sweatshop horrors, Gloria

Jeans is never associated with these practices. In fact, Gloria Jeans has won several awards for being an attractive employer to work for ([gloria-jeans.ru](http://gloria-jeans.ru), 2013). While the company is vocal about giving to the charity fund Holy Martyr Anastasia, Gloria Jeans does not have a Code of Conduct, Environmental or Sustainability Statement, or publicly available Labor Practices document ([gloria-jeans.ru](http://gloria-jeans.ru), 2013). It is unclear if the company has runoff or its action plan for the pollutants and waste that is created by clothing manufacturing. There is also no information on disease prevention like brown lung or prevention from exposure to carcinogens present in dyes. In order to fully compete on a global scale, Gloria Jeans needs to make this information transparent.

## The Country – The Russian Federation

Russia is officially called the Russian Federation. There are two leaders: the President is the Head of State and the Prime Minister is the head of the government. It is a multi-party representative democracy with about four major political parties ([russianembassy.org](http://russianembassy.org), 2013).

Industrial production rate is 3.1% which makes it 84<sup>th</sup> in comparison to the world. With a population of 142,500,482, Russia comes in eighth place with a labor force of 75.24 million people. The three major occupations are agriculture, industry, and services which have 7.9%, 27.4%, and 64.7% respectively. The unemployment rate is 6.6%. Russia's inflation rate declined from 8.4% to 5.1% between 2011 and 2012. It is 149<sup>th</sup> in comparison to the rest of the world with the US being at 42<sup>nd</sup> at 2.1%. The GDP is \$2.4 trillion with 4.3% growth at \$16.736 per capita, and a 2.8% 5-year compound annual growth ([CIA World Factbook](#), 2013).

Russia is 9<sup>th</sup> in comparison to the rest of the world when it comes to exports at \$529.6 billion compared to the US which is 3<sup>rd</sup>. The commodities exported are petroleum and petroleum products, natural gas, metals, wood and wood products, chemicals, and a wide variety of civilian and military manufactures. Russia's major export partners are Netherlands at 14.4%, China at 6.4%, Italy at 5.3%, and Germany at 4.5% ([CIA World Factbook](#), 2013).

At \$334.7 billion, Russia is 16<sup>th</sup> compared to the rest of the world, with the US in second place, importing goods more than \$2.299 trillion. Russia imports machinery, vehicles, pharmaceutical products, plastic, semi-finished metal products, meat, fruits and nuts, optical and medical instruments, iron, and steel. Its major import partners are China at 15.5%, Germany at 9.5%, and Ukraine at 5.5% ([CIA World Factbook](#), 2013).

Russian industries include producing gas, chemicals, metals, coal, and oil, automobiles, aircraft, space craft, radar, electronic components, missile production, ships, communications equipment, railroad equipment, construction equipment, handicrafts, textiles, foodstuffs, scientific and medical instruments ([CIA World Factbook](#), 2013). In 2003, The Russian textile and apparel industry consisted of about 16,000 enterprises which included 2,800 small and medium sized companies ([counsellors.gov.tr](#), 2004).

1 Russian Ruble equals  
0.030 US Dollar



Figure 3 - Russian Exchange Rate

The current exchange rate of Russian rubles (RUB) per US dollar is 33.12. One Russian dollar equals 3 US cents ([Google Currency Converter](#), 2013).



Communications in Russia, telephone, television, news outlets, internet, are sufficiently advanced enough that Russia's online retail businesses sales are outpacing brick and mortar stores ([indrus.in](http://indrus.in), 2013). Per the WTO agreement in 2012, Russia will allow the US unrestricted access for cross-border wholesale and retail distribution via e-commerce sites ([CIA World Factbook](#), 2013).

For a country with the largest total area of all land and water, Russia is fifth in airports with a total of 1,218. This seriously trails the US who has a total of 13,513 airports. Russia is eighth in roadways and second in railways. However, compared to the US, Russia rules the water. It comes in at second with waterways with 102,000 km (63, 380 miles) of water which includes the European Russia links to the Baltic Sea, White Sea, Caspian Sea, Sea of Azov, and Black Sea. Russia is 11<sup>th</sup> for merchant marine with a total of 1,143 vessels composed of 20 bulk carriers, 642 cargo carriers, 3 carriers, 57 chemical tankers, 244 petroleum tankers, 84 refrigerated cargo ships, and a host of other specialty vessels. These ships are registered with 439 other countries with major ports in Kaliningrad, Kavkaz, Nakhodka, Novorossiysk, Primorsk, Saint Petersburg, and Vostochnyy ([CIA World Factbook](#), 2013).

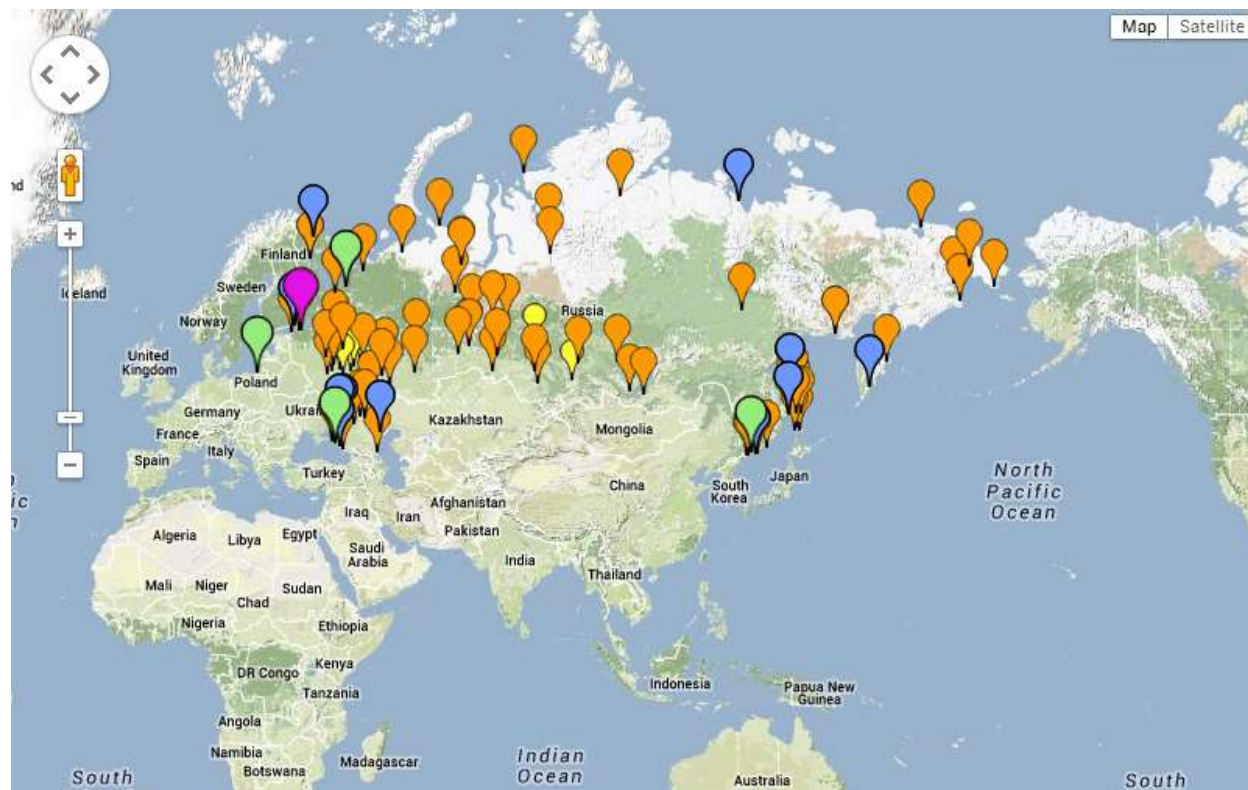


Figure 4 - Russian Ports

Before the collapse of the Soviet Union in 1991, Russia was relatively self-contained. It made profits from oil but because of the volatility of that market, profits were unpredictable and subjected Russia to the whims of oil price fluctuations ([CIA World Factbook](#), 2013). Because Russia had issues attracting foreign investments the state created official programs to raise Russia's international rankings. Russia has also become open to having a more flexible exchange rate ([CIA World Factbook](#), 2013). Another positive development for Russia is that it joined the World Trade Organization in 2012 ([ustr.gov](#), 2013). Trade barriers will be reduced resulting in a freer exchange of goods in and out of Russia.

- Russia's membership in the WTO will provide significant commercial opportunities for U.S. exporters:**
- U.S. manufacturers and exporters will have more certain and predictable market access as a result of Russia's commitment not to raise tariffs on any products above the negotiated rates and to apply non-tariff measures in a uniform and transparent manner.
  - Russia agreed to bind all of its tariffs on textiles, apparel, footwear, and travel goods and, after full implementation of its WTO commitments, Russia's average tariff on textiles, apparel, footwear, and travel goods will be 9.6 percent.
  - To join the WTO, Russia must change its trade regime and implement many trade liberalizing obligations. The United States, by contrast, will merely extend permanently to Russia the same trade treatment it already extends to all other WTO Members, and has extended to Russia every year since 1994.
  - Russia's obligations, including those on tariffs and non-tariff measures, will be enforceable through use of WTO dispute settlement.

Figure 5 - Russian WTO benefits

Currently, the sale of clothing and footwear in Russia is outpacing other European companies ([euromonitor.com](#), 2013). The Russian clothing market has the following structure: women's clothing 50%, men's 27%, and children 23% ([indrus.in](#), 2013). The children's market has increased by 50% and reflects the worldwide growing trend in children's wear ([indrus.in](#), 2013).

*"[T]he clothing market can be divided into three categories: the low-price segment (\$5-\$30 per item) with 85% of the market, the medium-price segment (\$30-\$100) with 10% and the premium segment (\$100+ per item). The low-price segment mostly consists of Turkish- and Chinese-made products. The medium-price segment is formed by Chinese, Indonesian, Polish and some Russian brands (such as Gloria Jeans (Rostov-on-Don) with Gloria Jeans and Gee Jay brands, Mir detstva (Moscow) with Mir detstva, Etti-Detti, Sela, Malenkaya feya, and Gulliver brands)" ([indrus.in](#), 2013).*

While Russia has improved foreign relations in the recent years and the WTO agreement brings accountability, it still has issues of concern to investors that do not instill confidence. Russians appear to not invest in their current infrastructure, has a shrinking workforce but expanding population, and is

notorious for its corruption. Russia also has a high number of about 46,250 internally displaced persons and stateless persons ([CIA World Factbook](#), 2013). Russia also has a problem with human trafficking and currently has a tier rating ([state.gov](#), 2013) of three which means that it does not fully comply with the minimum standards that show a genuine effort in eliminating trafficking ([CIA World Factbook](#), 2013). These people are used for illicit activities such as prostitution, the drug trade, and slave labor. A counterfeit clothing factory was discovered August 2, 2013. Over 200 “illegal migrants” were discovered but the only reason the sweatshop was exposed because authorities were looking a migrant who bashed in an officers skull ([en.ria.ru](#), 2013). This cannot be the only way labor violations are exposed.

## The Rostov Region



Figure 6 - Rostov Region

The Rostov Region is an example of a highly developed apparel manufacturing area due to the efforts of Gloria Jeans. The region is one of Russia’s most successful industrial and business centers and has the potential to benefit many sectors of manufacturing ([ipa-don.ru](#), 2013). Not only is it in a convenient location, the transport infrastructure is already in place and operational ([ipa-don.ru](#), 2013). It is situated on the crossroads of the region’s major transport arteries: Scandinavia, St. Petersburg, Moscow, Rostov, and Novorossisk ([ipa-don.ru](#), 2013). Rostov is located near “6 railway lines, 7 federal motorways, a navigable waterway

from Russia to the Black and Mediterranean Seas” ([ipa-don.ru](#), 2013). There are also 5 ports, three of which have international status ([ipa-don.ru](#), 2013). The location gives immediate access to Western Europe, North Africa, and Asia ([ipa-don.ru](#), 2013). On the far east of Russia, they have access to the same ports and waterways as China.



The region is a Special Economic Zone (SEZ) and new businesses can take advantage of tax and duty benefits ([ipa-don.ru](http://ipa-don.ru), 2013). Capital investment is growing at a steady pace and continues to instill confidence in new investors ([ipa-don.ru](http://ipa-don.ru), 2013). Other industries in the region are food, metallurgy, power, chemical, petrochemical, forestry, paper-pulp, light industry, and construction ([ipa-don.ru](http://ipa-don.ru), 2013). Enterprises in the region “produce 100% of all national mainline electrical locomotives, 94% of sewing machines, and over 60% of grain” ([ipa-don.ru](http://ipa-don.ru), 2013).

The Investment Promotion Agency of Rostov Region, where Gloria Jeans is located, says cheap and qualified human resources in the region are comparable to China. While cotton is imported, raw stock such as pig and cow are plentiful as is the manufacturing of man made goods ([ipa-don.ru](http://ipa-don.ru), 2013). Gloria Jeans is producing over 20 million denim garments in the region and is successfully competing with Chinese and Turkish producers ([ipa-don.ru](http://ipa-don.ru), 2013).

## Travels of a Russian T-Shirt

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Because Russia's climate is not suitable for growing cotton it has to import it ([fiber2fashion.com](http://fiber2fashion.com), 2013). By 2020, the estimated demand for cotton will be approximately 200,000 tons. Russia imported 90,000 tons of cotton in 2012. To import cotton into Russia it has to be declared cotton rope and the import duty rate is 5% with a VAT of 18% ([dutycalculator.com](http://dutycalculator.com), 2013). When classified under Business & industrial → Fabrics, Materials & Fixtures → Cotton thread with HS commodity code 5204.11.0000 ([dutycalculator.com](http://dutycalculator.com), 2013).

After the cotton has been purchased, it is processed most likely by Gloria Jean's Prokhladnyy factory ([fiber2fashion.com](http://fiber2fashion.com), 2003) New t-shirt equipment was installed in this facility and it consists of 22 machines specialty t-shirt machines created by Juki ([fiber2fashion.com](http://fiber2fashion.com), 2003). To make the cotton yarn they will use a circular knitting machine with 2 sets of latch needles and 10 feeds, and rib gating to make a rib knit ([Textile Fundamentals.com](http://Textile Fundamentals.com), 2013). Before they take it to the knitting machine, the cotton will be scoured, to remove impurities like dirt and grease ([Textile Fundamentals.com](http://Textile Fundamentals.com), 2013). The cotton would then be bleached with chlorine or hydrogen peroxide to whiten the fibers ([Textile Fundamentals.com](http://Textile Fundamentals.com), 2013). After the fibers are spun and knitted, it will be finished with a softener to improve the fabric's hand and give it



abrasion resistance ([Textile Fundamentals](#), 2013). Depending on the quality of Gloria Jean's fast-fashion t-shirts, they may or may not mercerize and/or use relaxation drying to prevent shrinkage in the fabric before cutting, sewing (making), and trimming ([Textile Fundamentals](#), 2013). Dying will happen before C,M,T and the fabric will be dyed at the fabric stage with a vat or reactive dye ([Textile Fundamentals](#), 2013).

Because this facility has printing equipment on site such as the Heidelberg SM 74-2P, Polar 115 E, and Heidelberg SBB ([worldgraphicmachine.com](#), 2004), any graphics on the shirt will be printed in house. Russia manufactures plastics so it is reasonable to assume they produce packaging and tags in house. If the shirts are going directly to the stores, they may not need packaging and can be put on a truck and delivered to one of the many Gloria Jeans retail stores for sale to the public.

## Benefits vs. risks

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From the perspective of a United States trades and investment specialist, Russia and the US have a long and sensitive history. Because of the tumultuous history and delicate present relationship it is easy to not do business with Russia. The language barrier, distance, history, and cultural differences can be a major barrier to entry for companies.

The US has its own drug problems as does Russia. Both countries' "illegal immigrant" situation is overwhelming and cannot be solved overnight. While the US is not innocent in human-trafficking there is more being done to stop the practice. If Russia refuses to make a serious effort at preventing the exploitation of the people in its country, investors may as well remain with trouble regions like Bangladesh and Cambodia because it will not be worth the risk to change the current sourcing model.

Russia joining the WTO last year is a major step for the country. It is a comfort to investors to have recourse and accountability. With information about infrastructure, business practices, ports, Russian law and retail practices, Russia can now be viewed as a viable place to have clothing manufactured. Unlike third-world countries where everything needs to be built from scratch including educating the locals, Russia presents a situation where there is a new resource that already has



experience and may only need improvements. Because most of the vertically integrated Russian retail companies are doing as good as or better than Inditex, producing in Russia presents an exciting prospect. A less than honest investor may even see Russia's loose oversight on immigration and trafficking as a lucrative opportunity. Cotton has to be imported now but there is a state effort to revive cotton production in the Astrakhan, Stavropol, and other southern regions of Russia ([fiber2fashion](#), 2013). Russia is also at the top of the list as the fastest growing exporting country marking a 45% increase in exports from 2010 to 2013 ([otexa.ita.doc.gov](#), 2013). Because most apparel goods are shipped, Russia has the shipping power and central location to serve the world.

## Conclusion

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Gloria Jeans is an example of how a company based in Russia can use its surrounding resources and thrive. Russia should take this company's example and apply its success to build Russia's global apparel enterprise. As Russia becomes more comfortable as a global marketplace, foreign partners can aid in reshaping their marketplace to make it easier to navigate. It is apparent that Russia has learned that in order to survive as a country that it has to leave behind some of its former social and political paradigms to compete globally. Russia has a wealth of land, water, and infrastructure that makes it more attractive than a developing nation. As terrible as climate change is, it may benefit the region by making it more hospitable to growing crops used in textiles such as cotton. The amount of undeveloped land means there is almost a limitless opportunity for expansion. Russians are not only great producers but consumers whose purchasing power is on the rise.

It is recommended that The Russian Federation begin a global campaign letting the world know it is a business friendly environment. It can do so by making a concerted effort to raise their human trafficking tier level. There needs to be documented proof showing how the reputation of a corrupt government is inaccurate and actionable aid for foreign business owners and investors. There needs to be a countrywide stance on fair labor practices and a sincere statement on how Russia is protecting the environment. More importantly, Russia needs to show the world how it is an exciting place to build and



sell goods. With more development and investors who are willing to take a chance, Russia can be a rewarding country to inexpensively manufacture and profitably retail apparel.



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